

User guide — Enterprise plan

Complex groups and networks. This guide describes the 62 modules included in the Enterprise plan.

Contents

- Getting started
- Dashboards : Dashboard, My dashboard, Executive dashboard, COMEX governance
- Point of sale : POS
- Steering : Alerts, Notifications, Smart notifications, Forecasting, Reporting, Consolidated reporting, Analytics, Advanced analytics
- Master data : Sites, Multi-site comparison, Business sectors, Multi-sector, Catalogue
- Stock : Stock, Transfers, Stocktakes, Production capacity, Maintenance (CMMS)
- Purchasing : Purchase orders, Suppliers, Advanced suppliers, Procurement, Strategic sourcing, Indirect spend, Supplier contracts, Supplier performance, Tenders
- Sales & customers : Invoicing, Quotes, Sales targets, Objectives per rep, Customer CRM, Customer contracts, Recurring customer revenue, Promotions, Sales geolocation, Field dashboard
- Finance : Financial statement, Department budgets
- HR & talent : Human resources, HR planning, Training, Employee portal
- Quality, CSR & risk : CSR, ESG reporting, Non-conformities, Product quality, Internal audits, Regulatory watch, ERM (risk), Business continuity, Incidents
- Transformation & projects : Digital transformation, Innovation hub, Cross-functional projects, Competitive watch
- Administration : Settings

Getting started

Accessing MasterStock-PRO

MasterStock-PRO runs in your web browser (a recent version of Chrome, Edge, Firefox or Safari). There is nothing to install. Open the sign-in address you were given, then the **Sign in** tab.

Creating your account and starting your trial

1. On the sign-in screen, choose the **Sign up** tab.
2. Enter your **Full name**, your **Email address**, your **Company** (optional) and your **Business sector**.
3. Enter the **Number of sites to include**, then choose **Your plan** and the billing period (**Monthly** or **Annual**). The total after the trial is shown below the plans.
4. Choose a password (at least 6 characters), confirm it, then tick the box to accept the trial terms.
5. Click **Create my account**. You are taken to Stripe's secure payment page. Your bank card is requested, but **you are not charged during the 14-day trial**.
6. Once you confirm, the message **Your trial is active** appears. Your workspace is ready.

If you leave the payment page before the end, sign in again and click **Continue with Stripe**.

Your plan: Enterprise

Capacity	Unlimited sites and users
Price per site, excl. VAT	on quote monthly · on quote annually
Modules included	62
Home page	Dashboard

Signing in and signing out

- **Sign in**: enter your email address and password, then click **Sign in**.
- **Sign out**: click your name at the top right, then **Sign out**.

Forgotten password

1. On the sign-in screen, click **Forgot password?**.
2. Enter your email address and click **Send the link**.

3. Open the email you receive (check your spam folder too) and click **Choose a new password**.
4. Enter and confirm your new password, then click **Save password**. You are signed in.

The link is valid for a limited time and works only once. Open it in the browser where you made the request.

Finding your way around

- **The side menu** (on the left) groups modules by theme. It shows your **Plan** and the number of modules included. The arrow at the top of the menu collapses it to save space.
- **The top bar** offers:
 - global search (**Search...**, shortcut **Ctrl + K** or ⌘ **K**) to open a module or find an item;
 - the site selector (**All sites** or a specific site), which filters the screens that support it;
 - the notifications and alerts bell;
 - the language selector (French, English, Arabic);
 - your personal menu: **My profile**, **Settings**, **Sign out**.

Modules not included in your plan

A module that is not part of your plan shows the **Locked module** screen, with the plan that unlocks it. The **Débloquer** (Unlock) button opens the plan grid. To change plans, contact us. The change is applied to your subscription and your billing.

Your subscription

- Your plan and number of sites are the ones you chose at sign-up. You can see them in **Settings**.
- Stripe issues an invoice at each due date (monthly or annual).
- For any question about billing, changing plans or cancelling, contact support at the address shown in the application.

Dashboards

Dashboard

Menu : Dashboards > Dashboard · Included from the Essential plan

What this module is for

The **General Dashboard** gives you, on a single page, an overall view of your stock management: stock value, alerts, pending orders, transfers between sites and recent movements. It is for anyone who wants to see the state of stock at a glance before going into the details of other modules.

What you see on screen

- **En-tête** (Header): the title, the active sector and site if selected, the period selector (**7 j** (7 d), **30 j** (30 d), **3 mois** (3 months)), a **Filtré** (Filtered) badge when a sector or site is chosen, and the label **Données réelles** (Real data).
- **Première rangée d'indicateurs** (First row of indicators):
 - **Active sites**, with the number of references;
 - **Stock value**, with the label **Across all sites** or **Périmètre filtré** (Filtered scope);
 - **Stock alerts** (products with low stock or out of stock), with the number of stockouts;
 - **Alertes péremption** (Expiry alerts), with the number of critical alerts.
- **Deuxième rangée d'indicateurs** (Second row of indicators):
 - **Pending orders**, with the amount still to be received;
 - **Monthly movements**, calculated over the chosen period;
 - **Valeur en transit** (Value in transit), with the number of transfers in progress;
 - **Transferts en retard** (Late transfers), compared with the number of transfers in progress.
- **Graphique des mouvements** (Movements chart): **Inbound**, **Outbound**, **Transfers** and **Ajustements** (Adjustments) bars over the chosen period, with a **Voir le stock** (View stock) link.
- **Stock by sector**: a ring chart of stock value by sector. When a sector is active, it becomes **Stock by site**.
- **Recent movements**: the last six movements (product, site, date, quantity, type), with a **View all** link.
- **Stock alerts**: the first five alerts with their level (**Critique** (Critical), **Élevé** (High), **Moyen** (Medium), **Faible** (Low)). The counter to the right of the title opens the alert centre.
- **Top moving products**: the seven products with the most stock, with a **Détail** (Details) link.

Common tasks

View activity over a period

1. Click **7 j** (7 d), **30 j** (30 d) or **3 mois** (3 months) at the top right.
2. Read the **Monthly movements** indicator and the movements chart, which update.
3. Hover over a bar in the chart to see the exact quantities.

Narrow the view to a sector or site

1. Choose a sector or site in the application's top bar.
2. The dashboard recalculates for that scope and shows the **Filtré** (Filtered) badge.
3. Click the site name in the subtitle to open its record.

Handle an alert

1. Find the alert in the **Stock alerts** block.
2. Click it to open the alert centre.

Good to know

- Figures are calculated live from your stock, purchases and transfers.
- Alerts cover four situations: **Rupture de stock** (Stockout), **Critical threshold**, **Overstock** and **Péréemption proche** (Expiry approaching).
- Orders counted as "pending" are those ordered, confirmed or partly received. Cancelled transfers are not counted.
- The **Top moving products** ranking is based on current stock quantity.
- If loading fails, a message appears with a **Réessayer** (Retry) button.

My dashboard

Menu : *Dashboards* › *My dashboard* · Included from the *Essential plan*

What this module is for

My KPIs is your personal dashboard. You pin only the indicators you care about (stock, purchasing, transfers, alerts, suppliers) and arrange them in the order you want. Each indicator is also a shortcut to the matching module.

What you see on screen

- **Header**: the label **Tableau de bord personnel** (Personal dashboard), the **My KPIs** title and the number of **Indicateurs épinglés** (Pinned indicators) displayed.

- **Buttons:** **Catalogue** and **Personnaliser** (Customise) in normal mode; **Réinitialiser** (Reset), **Ajouter indicateurs** (Add indicators) and **Save** in customisation mode.
- **Context banner:** when a sector or site is selected, the **Données pour :** (Data for:) line reminds you of the scope.
- **Indicator grid:** one card per indicator with its value, title, subtitle and, depending on the case, a progress bar, a badge (**Urgent**, **Critique** (Critical), **Action requise** (Action required), **OK**, **Prioritaire** (Priority)...) and a 7-day trend line (**-7j** (-7d) to **Auj.** (Today)).
- **Help at the bottom of the page:** a reminder that you can click an indicator, with the **Personnaliser la disposition** (Customise layout) link.

The available indicators are:

- **Stock:** **Stock value**, **Références actives** (Active items), **Ruptures de stock** (Stockouts), **Stocks critiques** (Critical stock), **Surstocks** (Overstock);
- **Purchasing:** **Pending orders**, **Valeur commandée** (Ordered value), **Commandes totales** (Total orders), **Commandes reçues** (Orders received);
- **Transfers:** **Transferts actifs** (Active transfers), **Transferts urgents** (Urgent transfers), **Valeur en transit** (Value in transit);
- **Alerts:** **Alertes actives** (Active alerts), **Alertes critiques** (Critical alerts);
- **Suppliers:** **Fournisseurs actifs** (Active suppliers), **Note fournisseurs** (Supplier rating);
- **Performance:** **Taux de stock normal** (Normal stock rate), **Inventaires planifiés** (Scheduled stocktakes).

Common tasks

Choose the indicators to display

1. Click **Catalogue** (or **Ajouter indicateurs** (Add indicators) in customisation mode).
2. In the **Catalogue des indicateurs** (Indicator catalogue) window, filter by category (**All**, **Stock**, **Purchasing**, **Transfers**, **Alerts**, **Suppliers**, **Performance**) or use **Rechercher un indicateur...** (Search an indicator...).
3. Click a card to select or deselect it. You can also use **Tout sélectionner** (Select all) or **Tout désélectionner** (Deselect all).
4. Confirm with **Appliquer** (Apply).

Rearrange or remove indicators

1. Click **Personnaliser** (Customise).
2. On each card, use the left and right arrows to move it.
3. Click the red pin to remove the indicator.
4. Click **Save**. A message confirms that your preferences are saved.

Go back to the default selection

1. Click **Personnaliser** (Customise).
2. Click **Réinitialiser** (Reset).

Open the module linked to an indicator

1. Outside customisation mode, click the indicator card.
2. The matching module opens (stock, purchasing, transfers, alerts, suppliers or stocktakes).

Good to know

- By default, eight indicators are pinned: stock value, stockouts, critical stock, pending orders, ordered value, active transfers, active alerts and critical alerts.
- Your layout is saved on the computer and browser you are using.
- The **Taux de stock normal** (Normal stock rate) turns green above 80%, orange between 60 and 80%, and red below.
- The stock and alert indicators follow the selected sector and site.
- If no indicator is pinned, the **Ouvrir le catalogue** (Open the catalogue) button lets you add some.

Executive dashboard

Menu : Dashboards > Executive dashboard · Included from the Enterprise plan

What this module is for

The **Executive Dashboard** gives a consolidated view of all the company's key indicators: finance, sales, stock, operations, purchasing and human resources. It is designed for management, who want to track revenue against targets and quickly spot issues that need attention.

What you see on screen

- **En-tête** (Header): the title, the active sector if there is one, the period selector (**Mois** (Month), **Trimestre** (Quarter), **Année** (Year)) and the **Export PDF** button.
- **Bandeau rouge d'alertes critiques** (Red critical alert banner): it appears when there are critical alerts and repeats their messages.
- **Filtres par catégorie** (Category filters): **All**, **Finance**, **Ventes** (Sales), **Stock**, **Opérations** (Operations), **Purchases**, **RH** (HR).
- **Grille d'indicateurs** (Indicator grid): for example **Chiffre d'affaires** (Revenue), **Marge brute** (Gross margin), **Orders**, **Average basket**, **Stock value**, **Rotation stock** (Stock turnover), **Service rate**, **Fournisseurs actifs** (Active suppliers), **Employés** (Employees), **Masse salariale** (Payroll), **Tickets SAV** (After-sales tickets), **Taux conversion CRM** (CRM

conversion rate). Each card shows the value, the change (green or red arrow) and a comment.

- **Évolution du CA — Réalisé vs Objectif** (Revenue trend — Actual vs Target): a monthly bar chart (**Réalisé** (Actual) and **Objectif** (Target)), followed by three totals: **CA cumulé** (Cumulative revenue), **Objectif cumulé** (Cumulative target) and **Taux d'atteinte** (Achievement rate).
- **Alertes & Points d'attention** (Alerts & Points of attention): the list of alerts classed as **Critique** (Critical), **Attention** (Warning) or **Info**, with the area concerned.
- **Performance par secteur** (Performance by sector): a table with the columns **Sector**, **CA Réalisé** (Actual revenue), **Objectif** (Target), **Progression** (Progress), **Marge** (Margin), **Orders**, **Croissance** (Growth) and **Alerts**.
- **Top produits — CA** (Top products — Revenue): products ranked by revenue, with their growth.
- **Tendances mensuelles** (Monthly trends): the last six months with revenue, margin, number of orders and new customers.

Common tasks

Show one group of indicators

1. Click a category, for example **Finance** or **Stock**.
2. The grid now shows only the indicators in that category.
3. Click **All** to see everything again.

Track progress against revenue targets

1. Look at the **Évolution du CA — Réalisé vs Objectif** (Revenue trend — Actual vs Target) chart.
2. Read the **Taux d'atteinte** (Achievement rate) below the chart.
3. In **Performance par secteur** (Performance by sector), look for sectors whose **Progression** (Progress) bar is not green.

Focus on one sector

1. Choose a business sector in the application.
2. The **Performance par secteur** (Performance by sector) table now shows only that sector.

Good to know

- In the revenue chart, a month is green when the target is met, and orange otherwise.
- The **Progression** (Progress) bar for each sector is green at 100% of target, orange from 80%, and red below that.
- Amounts are shown in euros.

- The figures on this page are demo examples. They do not come from your data yet.
- In the current version, the period selector and the **Export PDF** button do not change the display and do not produce a file.

COMEX governance

Menu : Dashboards › COMEX governance · Included from the Enterprise plan

What this module is for

The **Tableau de Bord Gouvernance — COMEX** (Governance Dashboard — Executive Committee) brings together the five pillars of governance on one page: risk management, internal audits, compliance, CSR and contracts. It is designed for the executive committee, which uses it to track an overall score, alerts that need a decision and progress on the action plan.

What you see on screen

- **En-tête** (Header): the title, the date of the last update and the **Export COMEX** (Export for executive committee) button.
- **Bandeau des alertes critiques** (Critical alert banner): the list of alerts that need an executive committee decision, with their owner and **Échéance** (Deadline).
- **Score de Gouvernance Global** (Overall governance score): a **Score Global** (Overall score) gauge out of 100, with one gauge per pillar: **Gestion des Risques** (Risk management), **Internal Audits, Compliance, RSE / ESG** (CSR / ESG), **Contrats** (Contracts).
- **Évolution des scores sur 6 mois** (Score trend over 6 months): one curve per pillar (risks, audits, compliance, CSR), with its legend.
- **Indicateurs clés par pilier** (Key indicators by pillar): cards you can filter with the tabs **All, ERM, Audits, Compliance, CSR, Contrats** (Contracts). Each card shows the value, the trend and, where relevant, the **Cible** (Target).
- **Alertes gouvernance** (Governance alerts): all alerts, with their level (**Critique** (Critical), **Attention** (Warning), **Info**), the pillar, the owner and the deadline.
- **Plan d'actions COMEX** (Executive committee action plan): the actions decided, with their owner, pillar, status (**À faire** (To do), **En cours** (In progress), **Terminé** (Completed), **Overdue**) and deadline. A badge shows the number of overdue actions.
- **Accès rapide aux modules** (Quick access to modules): one tile per pillar, with its score.

Common tasks

View a pillar's indicators

1. In **Indicateurs clés par pilier** (Key indicators by pillar), click a tab, for example **Compliance**.

2. Read the cards: the colour shows the situation (green: good, orange: to watch, red: critical).
3. Compare the value with the **Cible** (Target) shown under the card.

Open a pillar's detailed module

1. Click a pillar's gauge, or its tile in **Accès rapide aux modules** (Quick access to modules).
2. The matching module opens: risk management, internal audits, ESG reporting, CSR dashboard or supplier contracts.

Prepare an executive committee meeting

1. Start with the critical alert banner.
2. Review the **Plan d'actions COMEX** (Executive committee action plan), especially the **Overdue** actions.
3. Check the **Évolution des scores sur 6 mois** (Score trend over 6 months) to measure progress.

Good to know

- The overall score is a weighted average of the five pillars.
- The indicators tracked include, for example, **Risques critiques** (Critical risks), **Score audit moyen** (Average audit score), **Conformité CSRD** (CSRD compliance), **Score RSE global** (Overall CSR score), **Réduction CO₂** (CO₂ reduction) or **Contrats expirés** (Expired contracts).
- The figures on this page are demo examples. They do not come from your data yet.
- In the current version, the **Export COMEX** (Export for executive committee) button does not produce a file.

Point of sale

POS

Menu : Point of sale > POS · Included from the Business plan

What this module is for

The **Point of sale** is a checkout area kept separate from stock management. Sales staff scan or select products, take payment from customers, put tickets on hold, then close the till at the end of the day. The catalogue comes from the site's stock.

What you see on screen

- **Écran de verrouillage** (Lock screen): when it opens, the **Déverrouiller la caisse** (Unlock the till) page asks for the **Mot de passe du compte** (Account password) of the signed-in user. The links **Retour à la gestion** (Back to management), **Sign out** and **Gestion du stock** (Stock management) let you leave.
- **En-tête** (Header): the date, the active sector and site, the tabs **Ticket**, **Pending**, **Historique** (History), **Clôture** (Closing), the **Verrouiller la caisse** (Lock the till) padlock, the exit button back to management, and the **Plus** (More) menu.
- **Catalogue (à gauche)** (Catalogue, on the left): the field **Scanner un code-barres ou rechercher...** (Scan a barcode or search...), the product families and one tile per product (reference, name, price, remaining stock; **Out of stock** if stock is zero).
- **Ticket en cours (à droite)** (Current ticket, on the right): the lines, **Total HT** (Total excl. tax), **TVA** (VAT), **Remise** (Discount, 0 to 20%), **Amount due**, the **Quantity** keypad, the payment methods **Cash**, **Carte** (Card), **Chèque** (Cheque), **Mixte** (Mixed) and the **Take payment** button.
- **Menu Plus** (More menu): **Session de caisse** (Till session), **Statistics**, **Caissiers** (Cashiers), **Sites**, **Fidélité** (Loyalty), **Promotions**, **Alerts**, **Préférences** (Preferences).

Common tasks

Serve a customer

1. Scan the barcode (or type a reference and press Enter), or tap the product tile.
2. Adjust quantities with + / –, or select a line, type the quantity on the keypad and click **Valider** (Confirm).
3. Choose a **Remise** (Discount) if needed.

4. Choose the payment method. For **Cash**, enter the **Montant reçu...** (Amount received...) or tap a quick amount: the **À rendre** (Change due) amount appears.
5. Click **Take payment**. The **Dernier ticket** (Last ticket) block appears with **Imprimer le ticket** (Print ticket).

Put a ticket on hold and resume it

1. In the current ticket, click **Pending**.
2. Later, open the **Pending** tab and click **Reprendre** (Resume). The current ticket must be empty.
3. The **Imprimer la liste** (Print list) button prints the list of baskets to resume.

View the history

1. Open the **Historique** (History) tab.
2. Choose the period (**Jour** (Day), **7 jours** (7 days), **30 jours** (30 days), **Tout** (All)) and the site.
3. Read **Encaissé TTC** (Collected, incl. tax), **Average basket** and the **Cash** share.
4. Expand a ticket to see its details and click **Réimprimer** (Reprint). The **CSV** button exports the list.

Close the till

1. Open the **Clôture** (Closing) tab. The **Résumé** (Summary) step shows the day's sales, the **Paniers restés en attente** (Baskets still on hold), the **Modes de paiement** (Payment methods), the **CA par heure** (Revenue per hour) and the **Top produits** (Top products).
2. Click **Passer au comptage** (Go to counting), then enter the number of notes and coins in **Comptage par coupure** (Count by denomination). The **Écart** (Difference) is calculated.
3. Click **Générer le rapport** (Generate report), and add **Notes de clôture** (Closing notes) if needed.
4. Print the **rapport détaillé** (detailed report) or the **Ticket de synthèse fin de journée** (End-of-day summary ticket), export the tickets as CSV, or enter the manager's address and click **Envoyer** (Send).
5. Finish with **Clôturer & télécharger le rapport** (Close & download report).

Good to know

- The till stays unlocked only in the current browser tab.
- An out-of-stock product cannot be added. The quantity is limited to the available stock.
- Till difference: green if it is below €0.50 (**Caisse parfaitement équilibrée** (Till perfectly balanced)), orange for a **Excédent de caisse** (Till surplus), red for a **Déficit de caisse** (Till shortfall).
- In **Préférences** (Preferences), you set automatic printing, ticket width, number of copies, the **Seuil d'alerte d'écart de caisse** (Till difference alert threshold) and the manager's

address. Above the threshold, you are asked to confirm before the end-of-day ticket is printed.

- The **Session de caisse** (Till session), **Statistics**, **Caissiers** (Cashiers), **Sites**, **Fidélité** (Loyalty), **Promotions** and **Alerts** panels currently show sample data.

Steering

Alerts

Menu : *Steering* > *Alerts* · Included from the Starter plan

What this module is for

The **Centre d'alertes** (Alert centre) brings together everything that needs action in one place: products below threshold or out of stock, overstock, upcoming expiry dates, late transfers and licences nearing expiry. It is designed for stock managers and site managers, who handle the alerts one by one.

What you see on screen

- **En-tête** (Header): the title, the active site if there is one, and the **Tout traiter** (Resolve all), **Générer bons de commande** (Generate purchase orders) and **Configurer alertes** (Configure alerts) buttons.
- **Indicateurs** (Indicators): **Alertes critiques** (Critical alerts), **Non traitées** (Unresolved), **Traitées** (Resolved) and **Alertes totales** (Total alerts).
- **Onglets** (Tabs): **All**, **Stock**, **Licenses**, **Transfers**, **Système** (System), each with its number of unresolved alerts.
- **Options d'affichage** (Display options): the **Afficher tout** (Show all) / **Masquer traitées** (Hide resolved) button and the sort options **Sévérité** (Severity), **Récentes** (Recent), **Non traitées** (Unresolved). When sorted by severity, a line sums up the number of alerts per level.
- **Liste des alertes** (Alert list): for each alert, the title, the level (**Critique** (Critical), **Élevé** (High), **Moyen** (Medium), **Faible** (Low)), the category, the label **Alerte auto** (Automatic alert) for threshold alerts, the site, the reference and the figures (current stock, minimum threshold, maximum, expiry date, expected arrival date, etc.).
- **Boutons par alerte** (Alert buttons): **Commander** (Order), **Suivre** (Track) or **Renew** depending on the case, then **Marquer traité** (Mark as resolved).

Common tasks

Handle an alert

1. Read the alert details.
2. Click the action button: **Commander** (Order) opens stock, **Suivre** (Track) opens transfers, **Renew** opens clients and licences.

3. Once the problem is fixed, click **Marquer traité** (Mark as resolved). The alert shows **Traité** (Resolved). The reopen button lets you undo this.
4. To clear everything at once, click **Tout traiter** (Resolve all).

Prepare purchase orders for missing products

1. Click **Générer bons de commande** (Generate purchase orders).
2. **Sélection** (Selection) step: tick the products to order and adjust the quantities with – and + (in steps of 10). The **Total estimé (HT)** (Estimated total, excl. tax) updates.
3. Click **Réviser** (Review).
4. **Révision** (Review) step: lines are grouped by supplier. Choose **Urgent** or **Normal**, enter the **Date de livraison souhaitée** (Requested delivery date) and the **Notes / Instructions**.
5. Click **Générer ... bon(s) de commande** (Generate ... purchase order(s)). The **Confirmation** step shows the reference, the number of suppliers, the lines and the **Total TTC** (Total incl. tax).

Set up notifications

1. Click **Configurer alertes** (Configure alerts).
2. For each group (stock, licences, transfers, orders, system), turn **Email** and **In-app** on or off.
3. Confirm with **Save**.

Good to know

- Alerts are calculated from your real data and follow the selected sector and site.
- A late transfer is **Critique** (Critical) from 5 days, **Élevé** (High) from 2 days, and **Moyen** (Medium) below that.
- The **Licenses** tab flags licences that expire within 45 days.
- The quantities suggested for purchase orders are at least the minimum threshold, with a target of three times that threshold. A product with zero stock is marked **URGENT**.
- In the current version, generated orders are not saved in the Purchasing module, the **Traité** (Resolved) status is not kept after the page reloads, and notification settings are not kept.

Notifications

Menu : Steering > Notifications · Included from the Starter plan

What this module is for

The **Centre de notifications** (Notification centre) shows the full history of the application's notifications: stock, purchasing, transfers, licenses and system. This is the page that opens when

you click **View history** from the bell in the top bar. It lets you find a past notification, mark it as read and open the related screen.

What you see on screen

- **Header:** the **Notifications** title, the number of unread notifications and the total, and the **Tout marquer lu** (Mark all as read) button (if any are still unread) and the **Réinitialiser** (Reset) button.
- **Counters:** **Non lues** (Unread), **Critiques** (Critical), **Avertissements** (Warnings) and **Informations** (Information).
- **Filter column:**
 - **Filtres** (Filters): **All**, **Non lues** (Unread), **Critiques** (Critical), **Lues** (Read), each with its count;
 - **Category:** **All**, **Stock**, **Purchasing**, **Transfers**, **Licenses**, **Système** (System).
- **Notification list:** grouped by date (**Aujourd'hui** (Today), **Hier** (Yesterday), **Il y a ... jours** (... days ago), then the full date). Each notification shows its text, its level (**Critique** (Critical), **Warning**, **Info**), the time, the category and, if it is unread, a coloured dot and the **Marquer lu** (Mark as read) button.

Common tasks

View a notification and open the related screen

1. Find the notification in the list.
2. Click it: it is marked as read and the matching screen opens (stock, purchasing, transfers, licenses...).

See only what matters

1. In **Filtres** (Filters), click **Non lues** (Unread) or **Critiques** (Critical).
2. If needed, also choose a **Category**, for example **Transfers**.
3. Go back to **All** to see the full list again.

Mark notifications as read

1. Click **Marquer lu** (Mark as read) on a notification to mark it without opening it.
2. Or click **Tout marquer lu** (Mark all as read) at the top of the page.

Start over

1. Click **Réinitialiser** (Reset).
2. All notifications become unread again.

Good to know

- Notifications are generated from your data: stock levels, supplier orders, transfers, licenses and license requests.
- A read notification stays visible, greyed out; use the **Non lues** (Unread) filter to hide it.
- The "read" status is saved on the computer and browser you are using.
- If nothing matches the filters, the page shows **Aucune notification** (No notifications).

Smart notifications

Menu : Steering > Smart notifications · Included from the Enterprise plan

What this module is for

Smart notifications let you set alert rules for each module (stock, invoicing, sales, HR, purchasing, CRM, cash flow) and receive the notifications they trigger. The module is for managers who want to be warned automatically, at the right pace and on the right channel.

What you see on screen

- **Header:** the title, the **Tout marquer lu** (Mark all as read) button (if unread items remain) and the **Nouvelle règle** (New rule) button.
- **Indicators:** **Non lues** (Unread), **Règles actives** (Active rules), **Déclenchements** (Triggers) and **Modules couverts** (Modules covered).
- **Tabs:** **Boîte de réception** (Inbox), **Règles** (Rules) and **Historique** (History).
- **Inbox:** filters by module (**Tous les modules** (All modules), **Stock**, **Invoicing**, **Ventes** (Sales), **RH** (HR), **Purchasing**, **CRM**, **Trésorerie** (Cash flow)) and by priority (**Toutes priorités** (All priorities), **Critique** (Critical), **Élevé** (High), **Moyen** (Medium), **Faible** (Low)), then the list of notifications with title, priority, module, message, date and an action button.
- **Rules:** one card per rule with its name, status (**Active**, **En pause** (Paused), **Draft**), priority, description, trigger, frequency, channels (**In-app**, **Email**, **SMS**) and number of triggers. Each card has an edit button and a switch.
- **History:** the **Historique des déclenchements** (Trigger history) list, with the rule name, priority, date and number of triggers.

Common tasks

Read and sort notifications

1. Open the **Boîte de réception** (Inbox) tab.
2. Choose a module and a priority to filter the list.

3. Click a notification to mark it as read, or click **Tout marquer lu** (Mark all as read).

Create a notification rule

1. Click **Nouvelle règle** (New rule).
2. In the **Nouvelle règle de notification** (New notification rule) window, enter the **Nom de la règle** (Rule name).
3. Choose the **Module**, the **Priorité** (Priority) and the **Déclencheur** (Trigger), for example **Stock critique / rupture** (Critical stock / stockout), **Fournisseur en retard de livraison** (Supplier late on delivery) or **Facture en retard de paiement** (Invoice overdue for payment).
4. Choose the **Fréquence** (Frequency): **Real time**, **Toutes les heures** (Hourly), **Quotidien** (Daily) or **Hebdomadaire** (Weekly).
5. Choose the **Canaux de notification** (Notification channels) and enter the **Destinataires (emails)** (Recipients (emails)).
6. Click **Créer la règle** (Create rule).

Edit, pause or reactivate a rule

1. Open the **Règles** (Rules) tab.
2. Click the edit button to open **Modifier la règle** (Edit rule), then click **Mettre à jour** (Update).
3. Use the switch on the card to set the rule to **En pause** (Paused) or to reactivate it. A message confirms the action.

Good to know

- The available triggers also cover expiring quotes, missed sales targets, pending leave requests, forecast negative cash flow, CRM follow-ups, VAT deadlines and overdue after-sales service times.
- The notifications, rules and history shown are demonstration examples: they do not come from your data yet.
- In the current version, rules you create or edit are not saved, notification action buttons do not open any screen, and changes are lost when you reload the page.

Forecasting

Menu : Steering > Forecasting · Included from the Business plan

What this module is for

Prévisions & Réapprovisionnement (Forecasts & Replenishment) calculates, for each product, how many days of stock you have left and how much to order. The calculation uses your actual

outbound movements over the last 30 days, your thresholds and your suppliers' delivery lead times. It is designed for buyers and stock managers who prepare orders.

What you see on screen

- **En-tête** (Header): the recalculate button, **Exporter en PDF** (Export to PDF) and **Créer commandes groupées** (Create grouped orders).
- **Contexte actif** (Active context): when a sector or site is selected, it is shown with the number of references analysed.
- **Indicateurs** (Indicators): **Critiques** (Critical: stockout or lead time exceeded), **À surveiller** (To watch: under twice the supplier lead time), **À commander** (To order) and **Valeur totale estimée** (Estimated total value).
- **Filtres et tri** (Filters and sorting): the **Toutes urgences** (All urgency levels) list (**Critique** (Critical), **Élevé** (High), **Moyen** (Medium), **OK**), the **All sites** list, and the sort options **Urgence** (Urgency), **Jours restants** (Days remaining), **Qté à commander** (Qty to order).
- **Tableau** (Table): **Product**, **Site**, **Current stock**, **Sorties 30j** (Outbound 30 d), **Consommation/j** (Usage/day), **Jours restants** (Days remaining), **Délai fournisseur** (Supplier lead time), **Point de commande** (Reorder point), **Qté recommandée** (Recommended qty, with an **Commander** (Order) button or the label **Stock suffisant** (Sufficient stock)), **Valeur estimée** (Estimated value), **Supplier** and **Urgence** (Urgency).
- **Légende** (Legend): a reminder of the colour rules below the table.

Common tasks

Find the products to order first

1. Leave the sort on **Urgence** (Urgency), or choose **Jours restants** (Days remaining).
2. If needed, filter on **Critique** (Critical) or on a site.
3. Read the **Qté recommandée** (Recommended qty) and **Valeur estimée** (Estimated value) columns.

View a product's details

1. Click the product row.
2. The window shows **Current stock**, **Stock minimum** (Minimum stock), **Stock maximum** (Maximum stock), **Sorties 30 jours** (Outbound 30 days), **Jours de stock restants** (Days of stock remaining) and **Délai fournisseur** (Supplier lead time), plus a **Niveau de stock** (Stock level) bar with the minimum threshold.
3. Read the recommendation (quantity, estimated value, suggested supplier).
4. Click **Ouvrir Achats** (Open Purchasing) to place an order, or **Close**.

Print the list of requirements

1. Set the filters for the selection you want.
2. Click **Exporter en PDF** (Export to PDF). Only references that need ordering are included.
3. If nothing opens, allow pop-up windows in your browser and try again.

Good to know

- **Consommation/j** (Usage/day) = outbound movements over the last 30 days divided by 30.
- **Point de commande** (Reorder point) = usage per day × supplier lead time + minimum threshold.
- **Qté recommandée** (Recommended qty) = twice the reorder point, minus current stock.
- **Critique** (Critical) urgency: zero stock, or days remaining below the supplier lead time.
Élevé (High): less than twice that lead time. **Moyen** (Medium): stock below the minimum threshold.
- If no lead time is set for the supplier, a lead time of 3 days is used.
- The **Commander** (Order) and **Créer commandes groupées** (Create grouped orders) buttons open the Purchasing module, where you enter the order.

Reporting

Menu : Steering > Reporting · Included from the Essential plan

What this module is for

Reporting & Dashboards brings together the indicators for your stock, movements, sites and suppliers, calculated from your data. Use it to analyse performance, value your stock and produce PDF, Excel or CSV reports for management or accounting.

What you see on screen

- **Header:** the recalculation button, **Export global** (Global export) and **Export** (menu **Export PDF / Export Excel**).
- **Indicators:** **Valeur stock FIFO** (FIFO stock value), **Turnover rate**, **Coverage days** and **Service level**, followed by the calculation date, the number of movements and, where relevant, late transfers.
- **Tabs:**
 - **Rapport mensuel** (Monthly report): expandable sections (**Indicateurs clés du mois** (Key indicators of the month), **Évolution des métriques clés mois par mois** (Month-by-month trend of key metrics), **Mouvements de stock — 6 mois glissants** (Stock movements — rolling 6 months), **Répartition par secteur**

- (Breakdown by sector), **Supplier performance**, **Recommandations** (Recommendations)) and the **Exporter PDF** (Export PDF) button;
- **Vue d'ensemble** (Overview): **Mouvements mensuels (entrées/sorties)** (Monthly movements, in/out), **Valeur du stock par site** (Stock value by site), **Répartition par secteur** (Breakdown by sector), **Statistiques clés par secteur** (Key statistics by sector);
 - **Tendances 30j** (30-day trends): **Évolution valeur 30j** (30-day value change), **Total entrées 30j** (Total inbound, 30 days), **Total sorties 30j** (Total outbound, 30 days), **Flux net 30j** (Net flow, 30 days), the stock value curve, **Top produits mouvementés** (Top moving products) (ranked by **Mouvements** (Movements), **Orders** or **Valeur €** (Value €)), **Scorecard fournisseurs** (Supplier scorecard), **Commandes par fournisseur** (Orders by supplier) and **Radar de performance** (Performance radar);
 - **KPIs by site**: one card per site (**Turnover rate**, **Jours couverture** (Coverage days), **Références au seuil** (References at threshold), **Précision stock** (Stock accuracy)) and the **Comparaison multi-sites** (Multi-site comparison) table;
 - **Rentabilité stock** (Stock profitability): **Valeur immobilisée** (Tied-up value), **Sorties 30 jours** (Outbound, 30 days), **Rendement mensuel** (Monthly yield), **Sites à rotation lente** (Slow-moving sites), one chart per site, the **Détail par site** (Details by site) table and the **Exporter le comparatif PDF** (Export comparison PDF) button;
 - **Stock valuation**: one card per valuation method, with its value and its change over 30 days, and a comparison chart;
 - **Forecasts**: the **Réel** (Actual) / **Prévision** (Forecast) curve of stock value and the next three projected months.

Common tasks

Export the report on screen

1. Open the tab you want.
2. Click **Export**, then **Export PDF** (paginated report) or **Export Excel** (5 data tabs).

Build a custom export

1. Click **Export global** (Global export).
2. **Modules** step: tick the blocks to include (**KPIs globaux** (Global KPIs), **Mouvements mensuels** (Monthly movements), **Performance par site** (Performance by site), **Rentabilité du stock par site** (Stock profitability by site), **Stock by sector**, **Valorisation stock** (Stock valuation), **Supplier performance**, **Alertes stock** (Stock alerts), **KPIs détaillés / site** (Detailed KPIs / site)), or use **Tout sélectionner** (Select all) / **Tout effacer** (Clear all).
3. Click **Suivant** (Next).
4. **Format & Export** step: choose **PDF**, **Excel** or **CSV**, and check the summary.
5. Click **Générer l'export** (Generate export).

Compare site profitability

1. Open **Rentabilité stock** (Stock profitability).
2. Read the **Status** column of the **Détail par site** (Details by site) table.
3. Click **Exporter le comparatif PDF** (Export comparison PDF) to share it.

Good to know

- **Rendement** (Yield) = value taken out of stock over 30 days ÷ tied-up value. Above 20%: **Rentable** (Profitable); between 8 and 20%: **À surveiller** (To watch); below 8%: **Immobilisé** (Tied up).
- **Références au seuil** (References at threshold): **Bon** (Good) from 95%, **Moyen** (Average) from 88%, **Faible** (Low) below.
- The forecast extends the trend of the last 3 months. Without enough history, no month is projected.
- Reports cover all your sites.

Consolidated reporting

Menu : Steering > Consolidated reporting · Included from the Enterprise plan

What this module is for

Reporting consolidé multi-sites (Consolidated multi-site reporting) compares the activity of all your sites over a period and against the previous year (N-1): revenue, margin, orders, purchases, stock and headcount. It is designed for management and financial controllers who monitor the overall performance of the network.

What you see on screen

- **En-tête** (Header): the period selector (**Mois en cours** (Current month), **Trimestre** (Quarter), **Semestre** (Half-year), **Année** (Year)) and the **Excel** and **PDF** buttons.
- **Bandeau de comparaison** (Comparison banner): the period analysed, the N-1 period and the label **Comparaison N-1 activée** (N-1 comparison enabled).
- **Indicateurs** (Indicators): **CA Total** (Total revenue), **Marge brute** (Gross margin), **Taux de marge** (Margin rate), **Orders** and **Purchases**, each with the change **vs N-1** and last year's value.
- **Onglets** (Tabs):
 - **Vue globale** (Overview): **CA par site** (Revenue by site, current period and N-1), **Taux de marge par site** (Margin rate by site) and **Rotation de stock par site** (Stock turnover by site);

- **Par site** (By site): the **Détail par site** (Breakdown by site) table with the columns **Site**, **Sector**, **CA** (Revenue), **vs N-1**, **Marge** (Margin), **Tx marge** (Margin rate), **Orders**, **Panier moy.** (Avg. basket), **Stock**, **Turnover**, **Effectif** (Headcount), **CA/ETP** (Revenue/FTE), a **Total consolidé** (Consolidated total) row and an **Export** button;
- **Tendances** (Trends): the chart **Évolution mensuelle — 6 derniers mois** (Monthly trend — last 6 months) (revenue, margin, purchases) and the **Tableau mensuel détaillé** (Detailed monthly table) (**Mois** (Month), **CA** (Revenue), **Marge** (Margin), **Tx marge** (Margin rate), **Achats** (Purchases), **Orders**, **Ratio achats/CA** (Purchases/revenue ratio));
- **Modèles** (Templates): the **Modèles de rapports** (Report templates) with their last export date, their format and the label **Auto J+...** (Auto D+...) if they are scheduled, then the **Historique des exports** (Export history).

Common tasks

Compare sites with each other

1. Open the **Vue globale** (Overview) tab for a visual reading.
2. Open the **Par site** (By site) tab for detailed figures.
3. Look for sites with a negative **vs N-1** column.

Track month-by-month trends

1. Open the **Tendances** (Trends) tab.
2. Hover over the chart bars to read each month's revenue, margin and purchases.
3. In the table, keep an eye on the **Ratio achats/CA** (Purchases/revenue ratio) and the change shown next to each month.

Export a report

1. Click **Excel** or **PDF** at the top of the page for the consolidated report.
2. Or, in **Modèles** (Templates), click **Générer PDF** (Generate PDF) / **Générer EXCEL** (Generate Excel) on the template you want.
3. A message confirms the export.

Good to know

- **Taux de marge** (Margin rate) = gross margin ÷ revenue. **CA/ETP** (Revenue/FTE) = revenue per full-time equivalent.
- The figures on this page are demo examples. They do not come from your data yet.
- In the current version, choosing the period does not change the figures, the export buttons show a confirmation message without producing a file, and the **Nouveau modèle** (New template) button does not create a template.

Analytics

Menu : *Steering* > *Analytics* · Included from the Business plan

What this module is for

The **Tableau de bord analytique** (Analytics dashboard) compares two periods (one month or quarter against another) and ranks your business sectors by performance. It is designed for managers who want to measure change: stock value, movements, orders, service level, suppliers.

What you see on screen

- **Bandeau de contexte** (Context banner): when a sector or site is selected, it is shown with the note **KPIs, mouvements et comparaisons filtrés pour ce contexte**. (KPIs, movements and comparisons filtered for this context.)
- **Onglets** (Tabs): **Comparaison périodes** (Period comparison) and **Performance par secteur** (Performance by sector), which becomes **Secteur : ...** (Sector: ...) when a sector is active.
- **Comparaison périodes** (Period comparison):
 - two lists, **Période A (référence)** (Period A, reference) and **Période B (comparaison)** (Period B, comparison): months from October 2025 to March 2026, and quarters Q4 2025 and Q1 2026;
 - six comparison cards: **Stock value**, **Entrées totales** (Total inbound), **Sorties totales** (Total outbound), **Valeur commandes** (Order value), **Service rate**, **Alertes critiques** (Critical alerts), with the difference as a percentage or **Stable**;
 - the curve **Évolution de la valeur du stock — comparaison** (Stock value trend — comparison), with 15 points per period;
 - the chart **Mouvements par secteur** (Movements by sector), with the **Total**, **Inbound** and **Outbound** buttons;
 - **Top produits — mouvements comparés** (Top products — compared movements);
 - the table **Performance fournisseurs — comparaison périodes** (Supplier performance — period comparison), showing on-time delivery and orders for each period, with their differences;
 - a **Synthèse comparative** (Comparison summary) box (stock value, movements, service level).
- **Performance par secteur** (Performance by sector): overall indicators, one card per sector with its **Score santé** (Health score), **Stock value**, **Taux service** (Service rate) and **Couverture** (Coverage), the charts **Valeur du stock par secteur** (Stock value by sector) and **Taux de service par secteur** (Service rate by sector, target 95%), then the **Classement détaillé des secteurs** (Detailed sector ranking), sorted by health score.

Common tasks

Compare two periods

1. Open the **Comparaison périodes** (Period comparison) tab.
2. Choose **Période A (référence)** (Period A, reference), then **Période B (comparaison)** (Period B, comparison).
3. Read the cards: the difference is green when the change is favourable, red otherwise.
4. Check the summary box at the bottom of the page.

Analyse movements by sector

1. In the **Mouvements par secteur** (Movements by sector) chart, click **Total**, **Inbound** or **Outbound**.
2. Compare the two bars for each sector (period A and period B).

Identify sectors to watch

1. Open the **Performance par secteur** (Performance by sector) tab.
2. Look for sectors whose service level is below the 95% target.
3. Check the detailed ranking for turnover, coverage, alerts and the top product.

Good to know

- For **Alertes critiques** (Critical alerts), a decrease is considered favourable.
- When a sector is selected, only its figures are shown in both tabs.
- The figures on this page are demo examples. They do not come from your data yet.
- Choosing a site has no effect on the figures shown.

Advanced analytics

Menu : Steering > Advanced analytics · Included from the Enterprise plan

What this module is for

Advanced Analytics analyses your revenue over the year: comparison with the previous year (N-1), breakdown by sector and by site, forecasts to the end of the year and best-selling products. It is designed for management and sales managers who drive growth.

What you see on screen

- **En-tête** (Header): the title and, when a sector is selected, its name as a reminder.

- **Onglets (Tabs):** **Vue globale** (Overview), **Par secteur** (By sector), **Par site** (By site), **Prévisions CA** (Revenue forecasts), **Top produits** (Top products).
- **Vue globale** (Overview):
 - four indicators compared with N-1: **CA cumulé 2026** (Cumulative revenue 2026), **Marge brute moy.** (Avg. gross margin), **Average basket**, **Nb commandes** (No. of orders);
 - the chart **CA mensuel — Comparaison N / N-1** (Monthly revenue — N / N-1 comparison), with bars for 2025, 2026 and **Objectif** (Target), plus cumulative revenue and overall growth;
 - the chart **Taux de croissance mensuel vs N-1** (Monthly growth rate vs N-1), green if positive, red if negative.
- **Par secteur** (By sector): one card per sector (**CA 2026** (Revenue 2026), **CA 2025** (Revenue 2025), **Prévision 2026** (Forecast 2026), **Marge brute** (Gross margin), percentage of the annual target) and the chart **Comparaison CA par secteur — 2025 vs 2026** (Revenue comparison by sector — 2025 vs 2026).
- **Par site** (By site): the table **Performance par site — Comparaison N/N-1** (Performance by site — N/N-1 comparison) with **Site**, **CA 2026** (Revenue 2026), **CA 2025** (Revenue 2025), **Croissance** (Growth), **Orders**, **Average basket**, **Marge** (Margin), and the chart **CA par site — 2025 vs 2026** (Revenue by site — 2025 vs 2026).
- **Prévisions CA** (Revenue forecasts): three amounts (**CA prévisionnel 2026** (Forecast revenue 2026), **Scénario optimiste** (Optimistic scenario), **Scénario pessimiste** (Pessimistic scenario)), the curve **Prévisions de CA — 2026 (12 mois)** (Revenue forecasts — 2026, 12 months) showing actuals, forecast and range, then **Prévisions par secteur — Atteinte objectif annuel** (Forecasts by sector — Annual target achievement).
- **Top produits** (Top products): the ranking **Top produits — CA et croissance** (Top products — Revenue and growth), with the sector, units sold, 2026 revenue and growth.

Common tasks

Measure growth against last year

1. Open the **Vue globale** (Overview) tab.
2. Read the growth badges under each indicator (**vs N-1**).
3. In **Taux de croissance mensuel vs N-1** (Monthly growth rate vs N-1), look for the months shown in red.

Compare sectors or sites

1. Open **Par secteur** (By sector) to see each sector's revenue, margin and progress towards its target.
2. Open **Par site** (By site) to compare each site's revenue, orders, average basket and margin.

Plan for the end of the year

1. Open the **Prévisions CA** (Revenue forecasts) tab.
2. Compare the central scenario with the optimistic (+8%) and pessimistic (–7%) scenarios.
3. Hover over the curve to read each month's value. The **Aujourd'hui** (Today) line separates actuals from forecasts.

Good to know

- When a sector is selected, the **Par secteur** (By sector) and **Prévisions CA** (Revenue forecasts) tabs show only that sector. The other tabs stay global.
- The annual target percentage compares the current year's revenue with the sector's annual forecast.
- The figures on this page are demo examples. They do not come from your data yet.

Master data

Sites

Menu : Master data > Sites · Included from the Starter plan

What this module is for

This module brings together all your operating locations: warehouses, stores, depots, virtual sites and logistics zones. You create your sites here and track their stock, capacity, licence and sync status. You also choose the site you work on in the rest of the application.

What you see on screen

- **Top indicators:** **Active sites** (out of the total number of sites), **Total products** (all sites combined), **Total value** (stock value) and **Sync errors**.
- **Active site banner:** when a site is selected, it appears at the top with its region and number of products, and a **Deselect** button.
- **Filter bar:** the **Search a site...** search box (by name or region), the **All**, **Active** and **Inactive** buttons, and two icons to switch between card view and table view.
- **Table view** (default): columns **Site**, **Type**, **Manager**, **Products**, **Stock value**, **Capacity**, **Licence**, **Sync**, **Status** and **Context**. The table footer shows the number of sites displayed and the current sort.
- **Card view:** one card per site with its products, stock value, a **Capacity** gauge, its sync status and its number of users.
- The **Comparison table** and **New site** buttons at the top right.

Common tasks

Create a site

1. Click **New site**.
2. Enter the **Site name** (required).
3. Fill in **Manager**, **Address**, **Region** and **Capacité (unités)** (Capacity (units)).
4. Choose the **Site type** (**Warehouse**, **Store**, **Depot**, **Virtual**, **Logistics zone**) and the **Sector**.
5. Confirm with **Save**. The site appears straight away in the site selector.

Choose the site you work on

1. In the table or on a card, click **Select** next to the site.
2. The site becomes the **Active site in global context** and appears in the top banner.

3. To go back to all sites, click **Deselect**.

View a site's details

1. Click a row or a card: a summary opens (sector, region, users, address, **Last sync**, **Storage capacity**).
2. Click **Ouvrir le détail du site** (Open site details) to see the full record.
3. The record shows the **Capacity used** and four indicators: **References**, **Unités en stock** (Units in stock), **Stock value** and **Transfers in progress** (with the number that are late).
4. Browse the **Stock du site** (Site stock), **Transferts entrants** (Incoming transfers), **Transferts sortants** (Outgoing transfers) and **Mouvements** (Movements) tabs.

Create a transfer from a site

1. In the site record, click **Créer un transfert** (Create a transfer).
2. The form opens with this site as the origin; only products available at this site are offered.
3. Once the transfer is created, the **Transferts sortants** (Outgoing transfers) tab appears.

Good to know

- Click a column header (**Site**, **Manager**, **Products**, **Stock value**, **Capacity**) to sort; click again to reverse the order.
- In a site record, the capacity gauge turns orange above 70% and red above 90%.
- The **Stock du site** (Site stock) tab offers the **All**, **À réapprovisionner** (To reorder: low stock or stockout) and **Saines** (Healthy) filters, with the min and max thresholds and the expiry date of each item.
- The **Mouvements** (Movements) tab shows the site's last 40 movements.
- The **Alerts** button in the record shows the site's number of alerts and opens the alert centre; the **Gérer les transferts** (Manage transfers) link opens the transfers module.
- Licence: **Active**, **Expiring soon** or **Inactive**. Sync: **Synced**, **Sync error** or **Offline**.

Multi-site comparison

Menu : Master data > Multi-site comparison · Included from the Business plan

What this module is for

The multi-site comparison puts your active sites side by side. It helps managers spot the busiest site, the one that serves its customers best, and those that pile up stock alerts. Only sites with an active status are compared.

What you see on screen

- **Header:** the title **Tableau comparatif multi-sites** (Multi-site comparison table), the number of active sites and a back arrow to the site list.
- **Indicator strip:** **Meilleure valeur stock** (Best stock value), **Meilleur taux de service** (Best service level), **Alertes stock totales** (Total stock alerts, all sites combined) and **Précision moyenne** (Average accuracy).
- **Comparaison par métrique** (Comparison by metric): a bar chart, one colour per site, with a metric selector.
- **Radar multi-dimensionnel** (Multi-dimensional radar): each site's performance on five axes (**Stock value**, **Remplissage** (Fill rate), **Taux service** (Service level), **Précision** (Accuracy), **Turnover**), brought to the same scale.
- **Utilisation de la capacité** (Capacity usage): one gauge per site, showing the units stored against total capacity.
- **Alertes & Statuts par site** (Alerts & statuses by site): for each site, the number of critical and high alerts, or **OK** if there are none, plus a **score**.
- **Matrice de comparaison complète** (Full comparison matrix): a table with the columns **Site**, **Region**, **Products**, **Stock value**, **Capacity**, **Alerts**, **Taux service** (Service level), **Précision** (Accuracy), **Turnover** and **Performance**.

Common tasks

Compare your sites on one indicator

1. In **Comparaison par métrique** (Comparison by metric), click the indicator you want: **Stock value**, **Products**, **Capacité %** (Capacity %), **Taux service %** (Service level %), **Précision stock %** (Stock accuracy %) or **Rotation stock** (Stock turnover).
2. The chart updates.
3. Hover over a bar to see the full site name and its value; the other sites fade out.

Spot the sites to watch

1. Look at **Alertes & Statuts par site** (Alerts & statuses by site).
2. The labels **Licence bientôt** (Licence soon) and **Sync erreur** (Sync error) flag a site whose licence is about to expire or that no longer syncs.
3. For details, go back to the site list with the back arrow.

Read the full matrix

1. Scroll down to the **Matrice de comparaison complète** (Full comparison matrix).
2. Go through the indicators row by row.
3. Look at the **Taux service** (Service level) column: it comes with the label **Bon** (Good), **Moyen** (Average) or **Faible** (Low).

Good to know

- Capacity gauges turn orange above 75% and red above 90%.
- **Taux service** (Service level): **Bon** (Good) from 95%, **Moyen** (Average) from 88%, **Faible** (Low) below that.
- The **score** in the alerts block is the average of the service level and the accuracy. The **Performance** in the matrix also takes turnover into account.
- Alerts come from the stock thresholds of each item (see the Stock module).
- If no site is active, the page invites you to create one with the **Voir les sites** (View sites) button.

Business sectors

Menu : Master data > Business sectors · Included from the Business plan

What this module is for

A business sector (retail, pharmacy, industry, food service...) groups together common management rules. This module lets you set, for each sector, the management units, the default product family, the rules to follow and the alert thresholds. It also gives you a view of performance by sector.

What you see on screen

- **Header:** the **Sector management** title, the application's current sector (marked **active**) and the **Change sector** button.
- **Three tabs:** **Configuration**, **Thresholds & alerts** and **Performance**.
- **Configuration tab:** one card per sector with the **Capacity used**, the number of **Sites** and **Products**, the **Management rules**, the **Units** and the **Famille par défaut** (Default family). Each card offers **View details**, **Edit** and **Thresholds**. Below, the **Custom fields by sector** table (columns **Sector**, **Valuation**, **Custom fields**, **Sites / Products**).
- **Thresholds & alerts tab:** one block per sector with six number fields and a **Save** button.
- **Performance tab:** one card per sector with **Stock value**, **Service level**, **Turnover**, **Sites**, **Stockouts** and **Low stock**, a **Taux de service vs objectif** (Service level vs target) bar and the capacity used.

Common tasks

Edit a sector's units, family and rules

1. In the **Configuration** tab, click **Edit** on the sector card. From **View details**, the **Modifier unités et règles** (Edit units and rules) button opens the same window.

2. Enter the **Famille de produits par défaut** (Default product family): it pre-fills the family of new references.
3. In **Management units**, type a unit and click **Add**, or click one of the **Suggestions**.
Remove a unit with its cross.
4. To reuse the units of another sector, choose it under **Dupliquer les unités d'un autre secteur** (Duplicate units from another sector), then click **Copier les unités** (Copy units).
Units already present are not duplicated.
5. In **Management rules**, enter a rule and click **Add**, or choose one of the **Courantes** (Common) rules (lot traceability, FIFO, monthly stocktake...).
6. Confirm with **Save**.

Set a sector's thresholds

1. Open the **Thresholds & alerts** tab, or click **Thresholds** on the sector card.
2. Fill in **Min stock**, **Alert threshold**, **Critical threshold**, **Reorder point**, **Max stock** and **Service target %**.
3. Click **Save** in the sector's block. The note **Saved** appears.

Track a sector's performance

1. Open the **Performance** tab.
2. Compare the **Service level** with the target: the bar shows **Target reached** or the number of points below it.

Good to know

- The application's current sector is not chosen here: the **Change sector** button and the **Settings > Configuration** link open the settings.
- A sector must keep at least one management unit: otherwise, the **Save** button stays greyed out.
- A sector's units are immediately available in the stock and catalogue forms.
- In the **Performance** tab, the service level is shown in green when the target is reached, in orange up to 5 points below, and in red beyond that.
- A sector's capacity used is the sum of the capacity of the sites linked to it.

Multi-sector

Menu : Master data > Multi-sector · Included from the Business plan

What this module is for

The multi-sector view compares two business sectors side by side: stock value, service level, alerts, orders and movements. It is designed for managers who run several activities and want to

know which one is performing best.

What you see on screen

- **Header:** the **Vue multi-secteurs** (Multi-sector view) title and the **Gérer les secteurs** (Manage sectors) button.
- **Two selectors, Secteur A** (Sector A) and **Secteur B** (Sector B). Each one shows the number of products, the number of sites and a **Score** out of 100.
- **Four tabs:** **KPIs clés** (Key KPIs), **État des stocks** (Stock status), **Mouvements** (Movements) and **Radar**.
- **Key KPIs tab:** four head-to-head cards (**Stock value**, **Service level**, **Alertes critiques** (Critical alerts), **Commandes en cours** (Orders in progress)), then a detailed table, line by line, with the percentage gap between the two sectors (**Δ** column).
- **Stock status tab:** the **Répartition des statuts de stock** (Stock status breakdown) chart (**Normal**, **Low stock**, **Stockout**, **Overstock**), the **Détail par secteur** (Breakdown by sector) as percentage bars, and the top five products of each sector.
- **Movements tab:** the **Comparaison des mouvements** (Movement comparison) chart (products, alerts, movements, orders) and, for each sector, the share of **Inbound**, **Outbound** and **Transfers**, with the **Total mouvements** (Total movements).
- **Radar tab:** the **Profil de performance global** (Overall performance profile) on five axes scored from 0 to 10, the **Synthèse comparative** (Comparative summary) and the overall score of each sector.

Common tasks

Compare two sectors

1. Choose a sector in the **Secteur A** (Sector A) list.
2. Choose another sector in the **Secteur B** (Sector B) list.
3. Read the cards in the **KPIs clés** (Key KPIs) tab: the better value is shown in the colour of the winning sector.

Analyse stock status

1. Open the **État des stocks** (Stock status) tab.
2. Compare the number of items in **Low stock** and **Stockout** for each sector.
3. Check the product list under each sector: a dot flags products with an alert.

Read the summary

1. Open the **Radar** tab.
2. In the **Synthèse comparative** (Comparative summary), each criterion (**Valeur de stock** (Stock value), **Service level**, **Santé des stocks** (Stock health), **Activité** (Activity)) shows the

leading sector.

3. The sector that scores at least 50 out of 100 is marked **En tête** (Leading).

Good to know

- The score splits 100 points between the two sectors: 25 points for each criterion won (service level, critical alerts, stock value, movement volume).
- For alerts, stockouts, low stock and pending orders, the lowest value is considered the best.
- The **Service level** is the share of available products (normal stock or overstock) out of the total.
- On the radar, the **Alertes (inv)** (Alerts (inv.)) axis is 10 when the sector has no alerts.
- If you choose the same sector on both sides, a message asks you to select two different ones.

Catalogue

Menu : Master data > Catalogue · Included from the Starter plan

What this module is for

The catalogue holds all your product references: name, category, supplier, price, storage site and alert thresholds. You create and edit your references here, organise them with tags, and see their stock level at a glance.

What you see on screen

- **En-tête** (Header): the title **Product Catalog**, the number of products listed and displayed, the **Nouvelle référence** (New reference) and **Gérer les tags** (Manage tags) buttons, the sort options (**Name**, **Stock**, **Value**, **Status**) and two icons to switch between card view and list view.
- **Recherche** (Search): **Rechercher par nom, référence...** (Search by name, reference...)
- **Filtres par statut** (Status filters), each with a counter: **All**, **Out of stock**, **Low stock**, **Normal**, **Overstock**.
- **Filtres par catégorie** (Category filters): one button per category in the catalogue.
- **Filtres par tag** (Tag filters) (**Tags :**), with the number of products per tag.
- **Vue en cartes** (Card view): unit price, stock value, stock and minimum threshold for each product.
- **Vue en liste** (List view): columns **Reference**, **Product**, **Category**, **Site**, **Current stock**, **Min**, **Prix U.** (Unit price), **Value** and **Status**.

Common tasks

Create a reference

1. Click **Nouvelle référence** (New reference).
2. Fill in **Reference**, **Nom du produit** (Product name) and **Category** (required). You can choose an existing category or type a new one.
3. If needed, complete **Supplier**, **Référence fournisseur** (Supplier reference), **Site de stockage** (Storage site), **Unit**, **Prix unitaire** (Unit price), **Lot number**, **Date de péremption** (Expiry date), **Description** and **Photo du produit (URL)** (Product photo, URL).
4. In **Stock et seuils d'alerte** (Stock and alert thresholds), enter **Current stock**, **Seuil minimum** (Minimum threshold) and **Stock maximum** (Maximum stock).
5. Confirm with **Créer la référence** (Create reference).

View or edit a reference

1. Click a card or a row: the product details open (stock level, stock value, supplier, thresholds, turnover rate, last movement, lot, expiry date).
2. Click **Modifier la référence** (Edit reference).
3. Correct the fields, then click **Mettre à jour** (Update).

Organise your products with tags

1. Click **Gérer les tags** (Manage tags), then the **Tags** tab.
2. Type a name in **Nom du tag...** (Tag name...), and choose a colour and an icon.
3. Click **Créer le tag** (Create tag). The icons next to each tag let you edit or delete it.
4. To assign a tag, open a product's details and click the tags you want in **Tags du produit** (Product tags).
5. Click **Enregistrer les tags** (Save tags). The label **Saved** confirms the change.

Good to know

- The status is calculated automatically: **Out of stock** when stock is zero, **Low stock** below the minimum threshold, **Overstock** above the maximum stock, and **Normal** otherwise.
- A reference below its minimum threshold triggers a low-stock alert in the notification bell.
- Sorting by **Status** puts out-of-stock items first. Sorting by **Stock** and **Value** goes from largest to smallest.
- The **Catégories** (Categories) tab in **Gérer les tags** (Manage tags) lists the categories and their number of references. A category updates as soon as a product changes category.
- The photo you enter appears on the product's button at the point of sale.
- If no product matches, click **Reset filters**.

Stock

Stock

Menu : Stock > Stock · Included from the Starter plan

What this module is for

Stock management is the heart of the application. Here you record inbound and outbound movements and transfers, follow the history of every movement, handle threshold and expiry alerts, and carry out your stocktakes with automatic stock adjustment.

What you see on screen

- **Header:** the **Stock entry**, **Stock exit** and **Transfer** buttons.
- **Active context:** if a sector or a site is selected, a banner reminds you of it. The whole page then shows only its items and movements.
- **Indicators:** **Valeur totale stock** (Total stock value: purchase price × quantity), **References**, **Ruptures de stock** (Stockouts, with the number of low stocks) and **Alertes actives** (Active alerts: thresholds and expiry dates).
- **Four tabs:** **Products**, **Historique** (History), **Alerts** and **Inventory**.
- **Products tab:** the **Référence, désignation, site...** (Reference, product name, site...) search box and the table (**Reference**, **Product name**, **Category**, **Site**, **Current stock**, **Min threshold**, **Value**, **N° lot** (Lot no.), **Péremption** (Expiry), **Status**).

Common tasks

Record an inbound or outbound movement

1. Click **Stock entry** or **Stock exit**.
2. Choose the **Product**: its site and current stock appear.
3. Enter the **Quantity**. The **Stock après opération** (Stock after operation) is calculated straight away.
4. Check the **Lot number** (taken from the product record) and enter a **Motif** (Reason).
5. Confirm with **Enregistrer l'entrée** (Save entry) or **Enregistrer la sortie** (Save exit).

Transfer stock to another site

1. Click **Transfer**.
2. Choose the **Product**, then the **Origin site** and the **Destination site**.
3. Enter the **Quantity** and a **Motif** (Reason).

4. Confirm with **Enregistrer le transfert** (Save transfer).

Handle an alert

1. Open the **Alerts** tab. Alerts are sorted from most to least serious.
2. Read the level (**Critique** (Critical), **Élevé** (High), **Moyen** (Medium), **Faible** (Low)) and the details (stock, threshold, expiry date).
3. Click **Reorder**, **Déstocker** (Reduce stock) or **Sortir / ajuster** (Remove / adjust): the movement form opens with the product already selected.

View and export the history

1. Open the **Historique** (History) tab.
2. Filter by type (**Entry**, **Exit**, **Transfer**, **Adjustment**) and by site, or click **Réinitialiser** (Reset).
3. Click **CSV** or **PDF** to export the filtered movements.

Carry out a stocktake

1. Open the **Inventory** tab. The **Sélection du périmètre** (Scope selection) step appears.
2. Choose the **Site**, the **Category** and the **Opérateur responsable** (Responsible operator).
3. Click **Démarrer le comptage** (Start counting).
4. At the **Saisie des quantités** (Quantity entry) step, enter the **Qté comptée** (Counted qty) for each item: the **Écart** (Variance) and the **Valeur écart** (Variance value) are calculated.
5. Click **Générer le rapport** (Generate report), then fill in the **Justification** (Explanation) for the variances.
6. Click **Valider & ajuster le stock** (Validate & adjust stock), then **Confirmer les ajustements** (Confirm adjustments).

Good to know

- An item's status is calculated from its thresholds: **Stockout** at zero, **Low stock** below the minimum threshold, **Overstock** above the maximum, **Normal** otherwise. In the table, stock shows in red at zero and in orange below the minimum threshold.
- Alert levels: a stockout is **Critique** (Critical). A low stock is **Élevé** (High) if it falls to half the threshold or less, **Moyen** (Medium) otherwise. An overstock is **Faible** (Low).
- An expiry alert appears 45 days before the date; it becomes **Élevé** (High) at 15 days.
- The minimum and maximum thresholds are set on each item's record, in the Catalogue.
- Stock never goes below zero: if you remove more than the available stock, it is set back to zero. So check the **Stock après opération** (Stock after operation) before you confirm.
- The stocktake report shows the **Références comptées** (Items counted), the **Écarts détectés** (Variances found), the **Impact valeur** (Value impact) and the **Compliance** rate. Each line is marked **Conforme** (Compliant), **Excédent** (Surplus) or **Manquant** (Missing).

- The **Historique des inventaires** (Stocktake history) in the first step lists validated stocktakes, with their variances and value impact.

Transfers

Menu : Stock > Transfers · Included from the Starter plan

What this module is for

This module organises moving goods from one site to another, with an approval workflow in several steps. Stock at the origin site goes down at shipment, and stock at the destination site goes up at reception. Each step is recorded, and the team can exchange messages on each transfer.

What you see on screen

- **Header:** the title **Inter-site transfers** and the **New transfer** button.
- **Indicators:** **Active** (including drafts), **In transit**, **Valeur en transit** (Value in transit: transfers approved and on the way) and **Urgents** (Urgent, with the number delivered late).
- **Three tabs:** **En cours** (In progress), **Historique** (History) and **Flux inter-sites** (Inter-site flows).
- **Filters** (**En cours** (In progress) and **Historique** (History) tabs): the site, the status (**Received** or **Cancelled**, in the history), the **Overdue** button and **Réinitialiser** (Reset).
- **En cours (In progress) tab:** one card per transfer with its reference, status, product, departure and arrival sites, and the **Urgent** or **Overdue** labels.
- **Historique (History) tab:** the table of received or cancelled transfers (**Reference**, **Product**, **Quantity**, **De** (From), **Vers** (To), **Status**, **Date demande** (Request date), **Delivery date**, **Value**).
- **Flux inter-sites (Inter-site flows) tab:** the value and number of movements per route, then, for each site, what is **Entrant** (Incoming), **Sortant** (Outgoing) and the net balance.

Common tasks

Create a transfer

1. Click **New transfer**.
2. Choose the **Référence à transférer** (Reference to transfer). The **Site d'origine** (Origin site) and the quantity **Disponible sur ce site** (Available at this site) are displayed.
3. Choose the **Site de destination** (Destination site) and enter the **Quantity**.
4. Set the **Priorité** (Priority) (**Normal** or **Urgent**), the **Date d'arrivée prévue** (Expected arrival date) and the **Motif** (Reason).
5. Confirm with **Créer le brouillon** (Create draft).

Move a transfer forward

1. Click the transfer card. Its record opens on the **Aperçu** (Overview) tab.
2. Under **Action suivante** (Next action), add a note on the step if needed.
3. Click the button offered:
 - **Soumettre pour validation** (Submit for approval) (draft);
 - **Valider le transfert** (Approve transfer) (pending);
 - **Expédier — sortie de stock** (Ship — stock exit) (approved): stock at the origin site goes down;
 - **Confirmer la réception** (Confirm reception) (in transit): stock at the destination site goes up.

Cancel a transfer

1. In the transfer record, click **Cancel**.
2. Enter the **Motif d'annulation...** (Cancellation reason...).
3. Confirm. If the goods had already left, the quantity is returned to the origin site's stock.

Talk with the team

1. In the transfer record, open the **Messages** tab.
2. Write your message, using @ to mention a colleague.
3. The message is visible to the whole team with access to the transfer.

Good to know

- The steps follow this order: **Draft, Pending, Approved, In transit, Received**.
- A pending, approved or in-transit transfer is **Overdue** as soon as its expected arrival date has passed. The number of days late is shown on its card.
- A received or cancelled transfer can no longer be changed; it moves to the **Historique** (History) tab.
- The **Historique** (History) section of the record shows each step with its date and note.
- Inter-site flows only count transfers that are approved, in transit or received.
- You can also create a transfer from a site's record, in the Sites module.

Stocktakes

Menu : Stock > Stocktakes · Included from the Essential plan

What this module is for

This module helps you plan stocktakes at your sites: when they take place, who is in charge and how long they should last. You can then track their progress. It is designed for site managers and

stock managers who organise counting campaigns.

What you see on screen

- **Header:** the **Planification des Inventaires** (Stocktake planning) title and the **Planifier un inventaire** (Schedule a stocktake) button.
- **Indicators:** **Inventaires planifiés** (Scheduled stocktakes), **En cours** (In progress), **Terminés** (Completed) (with the number of products checked and the completion rate) and **Overdue**.
- **Progression globale** (Overall progress) for the year: a completion bar and the number of stocktakes **Planifiés** (Scheduled), **En cours** (In progress), **Terminés** (Completed), **Overdue** and **Reportés** (Postponed).
- **Two views:** **Liste des tâches** (Task list) and **Vue calendrier** (Calendar view).
- **Liste des tâches** (Task list): the **Rechercher site ou responsable...** (Search site or owner...) search box, the **All**, **Planifiés** (Scheduled), **En cours** (In progress), **Terminés** (Completed) and **Overdue** filters, then one card per stocktake (site, priority, dates, owner, estimated hours, progress and discrepancies found).
- **Vue calendrier** (Calendar view): a monthly calendar where coloured dots mark the days with stocktakes, next to the task list.

Common tasks

Schedule a stocktake

1. Click **Planifier un inventaire** (Schedule a stocktake).
2. Choose the **Site** from your active sites.
3. Fill in **Date début** (Start date) and **Date fin** (End date).
4. Enter the **Responsable assigné** (Assigned owner). If you leave it empty, the site manager is used.
5. Choose the **Priorité** (Priority) (**Haute** (High), **Moyenne** (Medium), **Basse** (Low)) and the **Durée estimée (h)** (Estimated duration (h)).
6. Add **Notes** if needed (500 characters maximum).
7. Confirm with **Planifier** (Schedule).

Update the status of a stocktake

1. On the stocktake card, click **Gérer** (Manage).
2. Under **Changer le statut** (Change status), click **Planifié** (Scheduled), **En cours** (In progress), **Terminé** (Completed) or **Reporté** (Postponed).
3. The message **Statut mis à jour avec succès** (Status updated successfully) confirms the change.

View the details of a stocktake

1. Click **Détails** (Details) on the card.
2. Read the **Notes**, the number of **Produits à inventorier** (Products to count), the **Durée estimée** (Estimated duration) and the **Équipe assignée** (Assigned team).

Find the stocktakes for a given date

1. Open the **Vue calendrier** (Calendar view).
2. Change month with the arrows.
3. Click a day marked with a dot: the list now shows only that day's stocktakes.
4. Click **Effacer le filtre** (Clear filter) to see all stocktakes again.

Good to know

- Calendar and badge colours: blue for **Planifié** (Scheduled), orange for **En cours** (In progress), green for **Terminé** (Completed), red for **Overdue**, grey for **Reporté** (Postponed).
- The completion rate is the share of completed stocktakes out of all stocktakes.
- This module is for organising stocktakes. Counting and stock adjustment are done in the **Inventory** tab of the Stock module.

Production capacity

Menu : Stock > Production capacity · Included from the Enterprise plan

What this module is for

This module shows the load on your production lines and machines. It spots bottlenecks, compares scenarios to increase capacity and anticipates, week by week, the gap between demand and available capacity. It is designed for production and plant managers.

What you see on screen

- **Header:** the **Production Capacity** title.
- **Bottleneck banner:** when machines are bottlenecks, a banner lists them with their level (**Critique** (Critical), **Élevé** (High), **Modéré** (Moderate), **Faible** (Low)). Click a machine to open its details.
- **Indicators:** **Charge globale** (Overall load) (all lines combined), **Goulots détectés** (Bottlenecks detected) (including critical ones), **OEE moyen** (Average OEE) (target 85%) and **Écart capacité** (Capacity gap) (demand compared with capacity).
- **Four tabs:** **Vue d'ensemble** (Overview), **Ressources machines** (Machine resources), **Simulation** and **Prévision capacité** (Capacity forecast).

- **Overview:** one card per production line with its status, team, load, **Cadence** (Rate) (actual vs. target), **Rebuts** (Scrap) rate, number of **Machines** and the products made.
- **Machine resources:** the table with **Machine**, **Status**, **Charge actuelle** (Current load), **OEE**, **Opérateurs** (Operators), **Tendance semaine** (Weekly trend) and **Goulot** (Bottleneck).

Common tasks

Examine a machine

1. Open the **Ressources machines** (Machine resources) tab.
2. Click a machine's row.
3. The details show the **Charge actuelle** (Current load), the **Charge planifiée** (Planned load), the **OEE**, the **Efficacité** (Efficiency) and the **Charge hebdomadaire (L→D)** (Weekly load (Mon→Sun)).
4. Also check the **MTBF**, the **Prochaine maintenance** (Next maintenance), the **Opérateurs** (Operators) present versus the number required and the **Compétences requises** (Required skills).
5. If the machine is a bottleneck, the reason is shown under **Goulot d'étranglement** (Bottleneck).

Compare capacity increase scenarios

1. Open the **Simulation** tab.
2. Go through the suggested scenarios, for example adding a night shift, buying an extra machine or partial subcontracting.
3. For each one, compare the **Nouvelle capacité** (New capacity), the **Coût estimé** (Estimated cost) and the **Délai** (Lead time).
4. Click a scenario to display the **Recommandation** (Recommendation) and the number of bottlenecks resolved.

Anticipate difficult weeks

1. Open the **Prévision capacité** (Capacity forecast) tab.
2. Read the **Prévision Demande vs Capacité — 8 semaines** (Demand vs Capacity forecast — 8 weeks) chart.
3. In **Détail semaine par semaine** (Week-by-week details), find the weeks marked **Déficit** (Shortfall), where demand exceeds capacity.

Good to know

- Line and machine statuses: **Disponible** (Available), **Chargé** (Loaded), **Surchargé** (Overloaded), **Maintenance**, **Offline**.
- Load bars are green up to 60%, blue up to 85%, orange up to 100% and red beyond.

- The **Charge globale** (Overall load) indicator is highlighted when it exceeds 90%.
- In the forecast, each week's **Écart** (Gap) compares demand and capacity, as a percentage.

Maintenance (CMMS)

Menu : Stock > Maintenance (CMMS) · Included from the Enterprise plan

What this module is for

The CMMS (maintenance management) tracks your equipment: its condition, availability, work orders, breakdowns, preventive maintenance schedule and spare parts. It also shows the cost of ownership of each piece of equipment. It is designed for maintenance managers, technicians and site managers.

What you see on screen

- **En-tête** (Header): the title **GMAO — Gestion des Actifs & Équipements** (CMMS — Asset & Equipment Management).
- **Bandeau des pannes** (Breakdown banner): when equipment is broken down, a red banner shows how many items are affected and how many work orders are late.
- **Indicateurs** (Indicators): **Équipements** (Equipment, including in service), **Disponibilité moy.** (Avg. availability, target 98%), **MTBF moyen** (Average MTBF: mean time between failures, with the MTTR, mean time to repair), **Coût maintenance** (Maintenance cost, compared with budget) and **OT planifiés** (Scheduled work orders, including those in progress).
- **Cinq onglets** (Five tabs): **Équipements** (Equipment), **Ordres de travail** (Work orders), **Historique pannes** (Breakdown history), **Planning maintenance** (Maintenance schedule) and **Pièces de rechange** (Spare parts).
- **Onglet Équipements** (Equipment tab): the filters **All**, **En service** (In service), **En maintenance** (Under maintenance), **En panne** (Broken down), then one card per item (photo, status, criticality, availability, MTBF, MTTR, **Prochaine maintenance** (Next maintenance)).
- **Onglet Ordres de travail** (Work orders tab): one card per order with its number, type (**Préventive** (Preventive), **Corrective**, **Prédictive** (Predictive)), status, the **Technicien** (Technician), **Durée estimée** (Estimated duration), **Main d'œuvre** (Labour), **Pièces** (Parts) and **Pièces nécessaires** (Parts required).

Common tasks

View an equipment record

1. In the **Équipements** (Equipment) tab, filter by status if needed.

2. Click the equipment card.
3. The **Vue d'ensemble** (Overview) tab shows the **Disponibilité** (Availability), **MTBF (h)**, **MTTR (h)**, **OEE**, **Mise en service** (Commissioning date), **Fin garantie** (Warranty end), plus the manufacturer, model, serial number and location.
4. The **Maintenance** tab lists the equipment's work orders and breakdowns.
5. The **Coût de possession** (Cost of ownership) tab shows the **Coût d'acquisition** (Purchase cost), **Valeur actuelle** (Current value), **Maintenance YTD** (since the start of the year), **Coût Total de Possession (TCO)** (Total Cost of Ownership, TCO) and the depreciation rate.

Analyse breakdowns

1. Open the **Historique pannes** (Breakdown history) tab.
2. Check the **Coût pannes YTD** (Breakdown cost YTD), **MTBF moyen** (Average MTBF) and **MTTR moyen** (Average MTTR).
3. Go through the table (**Équipement** (Equipment), **Date**, **Cause**, **Impact**, **Durée** (Duration), **Coût total** (Total cost), **Status**). The total cost also includes lost production.

Prepare preventive maintenance

1. Open the **Planning maintenance** (Maintenance schedule) tab.
2. Read, week by week, the equipment concerned, the type of work, the duration and the technician.

Check spare parts

1. Open the **Pièces de rechange** (Spare parts) tab.
2. Look for parts with the **Out of stock** status and the label **Critique** (Critical).
3. Restock them from the Stock module.

Good to know

- Equipment statuses: **En service** (In service), **En maintenance** (Under maintenance), **En panne** (Broken down), **Hors service** (Out of service). Criticality: **Critique** (Critical), **Élevée** (High), **Moyenne** (Medium), **Faible** (Low).
- Work order statuses: **Planifié** (Scheduled), **En cours** (In progress), **Terminé** (Completed), **Overdue**.
- Spare parts come from your stock references. A part switches to **Out of stock** as soon as its stock falls below the minimum stock. A banner then shows the number of parts to restock.
- Equipment availability is shown in green from 95%, and its OEE from 85%.

Purchasing

Purchase orders

Menu : Purchasing › Purchase orders · Included from the Starter plan

What this module is for

This module brings together your supplier orders, from entry to receipt. Each receipt you record automatically adds the received quantities to the stock of the delivery site. It is designed for buyers, stock managers and site managers.

What you see on screen

- The **New order** button, at the top right.
- Four indicators: **Commandes totales** (Total orders), **En cours** (In progress, receipt expected), **Valeur commandée** (Ordered value, excluding cancelled orders) and **Fournisseurs actifs** (Active suppliers).
- Four tabs: **Orders**, **Suppliers**, **KPIs fournisseurs** (Supplier KPIs) and **Planning livraisons** (Delivery schedule).
- In **Orders**: a search bar (number, supplier or site) and one card per order showing its status, amount, delivery date, items and a progress bar for partial receipts.

Common tasks

Create a supplier order

1. Click **New order**.
2. Choose the **Supplier** (required) and, if needed, the **Site de livraison** (Delivery site).
3. Enter the **Date de commande** (Order date) and the **Date de livraison prévue** (Expected delivery date).
4. Optionally add **Tags** (for example **Urgent**, **Récurrent** (Recurring), **Sous contrat** (Under contract)).
5. For each item, choose the **Référence produit** (Product reference): the unit price fills in and the **Current stock** is displayed. Adjust the **Qty** and the **Prix unitaire** (Unit price).
6. Click **Ajouter un article** (Add an item) to add another line. The cross removes a line.
7. Add **Notes** if needed, then click **Valider la commande** (Confirm order).

Receive a delivery

1. On the order card, click **Réceptionner** (Receive). The button is also available in the order details.
2. At the top, you see the **Unités commandées** (Units ordered), the **Déjà reçues** (Already received) and the **Restant à recevoir** (Remaining to receive).
3. For each item, enter the quantity in **Reçu maintenant** (Received now). You can also enter the **Lot number** and the **Péremption** (Expiry) date.
4. To receive everything at once, click **Tout recevoir** (Receive all).
5. A box tells you whether this is a **Réception totale** (Full reception) or a **Partial reception**, and what will remain to be received.
6. Click **Valider la réception** (Confirm reception).
7. Check the summary, then click **Confirmer et mettre à jour** (Confirm and update). To correct a quantity, click ← **Edit**.

A stock entry is then created for the delivery site, with the lot and expiry date you entered. A message confirms the number of units added to stock.

Edit or cancel an order

1. Click the order card to open its details.
2. Click **Edit**, change the information, then click **Mettre à jour** (Update).
3. To cancel it, click **Cancel**, then **Oui, annuler la commande** (Yes, cancel the order).

Reschedule a delivery

1. Open the **Planning livraisons** (Delivery schedule) tab.
2. Drag an order in the calendar to another day.
3. Click a day to see the deliveries planned. The **Prochaines livraisons** (Upcoming deliveries) list shows the deliveries to come.

Good to know

- The possible statuses are **Ordered**, **Confirmed**, **Reçu partiel** (Partially received), **Received** and **Cancelled**.
- Only orders awaiting receipt can be received, edited or cancelled.
- You cannot receive more than the remaining quantity of an item.
- Cancelling an order does not remove quantities already received from stock.
- The **Suppliers** tab shows each supplier with its rating, lead time, payment terms and contract. Click a supplier to see its **Volume cumulé** (Cumulative volume) and its **Dernières commandes** (Latest orders).
- The **KPIs fournisseurs** (Supplier KPIs) tab calculates the **Taux de conformité moyen** (Average compliance rate, orders received in full), the **Délai moyen de livraison** (Average

delivery time), delays, partial receipts and the **Volume mensuel (6 mois)** (Monthly volume, 6 months) of each supplier.

Suppliers

Menu : Purchasing > Suppliers · Included from the Starter plan

What this module is for

This module ranks your suppliers with an automatic score. The score is based on punctuality, service level and quality. It helps buyers spot the best partners and the ones to watch.

What you see on screen

- Four indicators: **Score moyen** (Average score, out of 100), **Ponctualité moy.** (Avg. punctuality), **Service level** and **Volume total** (Total volume) with the number of orders.
- A search bar, **Rechercher un fournisseur...** (Search a supplier...).
- A sector filter (**All industries** by default).
- A sort menu: **Trier par score** (Sort by score), **Trier par ponctualité** (Sort by punctuality), **Trier par taux de service** (Sort by service level) or **Trier par nb commandes** (Sort by number of orders).
- A table with the columns **Rang** (Rank), **Supplier**, **Score global** (Overall score), **Ponctualité** (Punctuality), **Service**, **Cmdes** (Orders), **Volume** and **Contract**.
- A legend below the table that explains how the score is calculated and the colour thresholds.

Common tasks

Compare your suppliers

1. Choose a criterion in the sort menu. The best supplier appears first.
2. Filter by sector or type a name to narrow the list.
3. Read the **Score global** (Overall score): the bar, the level (**Excellent**, **Bon** (Good), **Moyen** (Average), **Faible** (Low)) and the trend in points.

View a supplier's details

1. Click the supplier's row.
2. The **Tendance 6 mois** (6-month trend) area shows a monthly chart. Switch between **Ponctualité** (Punctuality) and **Service**.
3. The **Métriques détaillées** (Detailed metrics) area shows the **Délai promis** (Promised lead time) and the actual lead time, the **Commandes en retard** (Late orders), the **Annulations**

(Cancellations), the **Taux de défauts** (Defect rate), the **Valeur commandée** (Ordered value), the **Payment terms** and the **Contract**.

4. The **Analyse qualitative** (Qualitative analysis) area lists strengths and weaknesses, and the supplier's contact.
5. Click the row again to close the details.

Reset the search

1. If no supplier matches, click **Reset filters**.

Good to know

- The score is weighted as follows: punctuality 40%, service level 35%, defects 15%, contract 10%.
- The level thresholds are: **Excellent** from 90, **Bon** (Good) from 75, **Moyen** (Average) from 60, **Faible** (Low) below.
- Punctuality shows in green from 90%, orange from 80%, red below.
- Service level shows in green from 95%, orange from 85%, red below.
- A supplier only appears once it has orders.
- This module is for viewing only: you cannot make changes from this screen.

Advanced suppliers

Menu : Purchasing > Advanced suppliers · Included from the Enterprise plan

What this module is for

This module gives you an in-depth view of your suppliers. It covers detailed evaluation, delivery lead times, ongoing negotiations and contracts. It is designed for buyers and purchasing managers.

What you see on screen

- At the top right, the active business sector and the **New supplier** button.
- Six indicators: **Suppliers**, **Score moyen** (Average score), **Taux ponctualité** (On-time rate), **Volume total** (Total volume), **Négociations actives** (Active negotiations) and **Contrats actifs** (Active contracts).
- Four tabs: **Vue d'ensemble** (Overview), **Performance**, **Négociations** (Negotiations) and **Contrats** (Contracts).

Common tasks

Browse and sort your suppliers

1. Stay on the **Vue d'ensemble** (Overview) tab.
2. Type a name or a sector in **Rechercher un fournisseur...** (Search for a supplier...).
3. Choose a sort order: **Trier par score** (Sort by score), **Trier par volume** (Sort by volume), **Trier par ponctualité** (Sort by on-time rate) or **Trier par nom** (Sort by name).
4. Each card shows the overall score, four mini-bars (**Qualité** (Quality), **Délais** (Lead times), **Price, Service**), the **Ponctualité** (On-time delivery), the **Délai moy.** (Avg. lead time), the **Volume**, certifications and the trend in points.

View a supplier's details

1. Click a card, or a row in the **Performance** tab.
2. The details panel shows the four scores as circles, then the **Contact, Email, Phone** and **Payment terms**.
3. You also find the **Ponctualité** (On-time delivery), **Délai moyen** (Average lead time), **Taux défauts** (Defect rate), **Évolution ponctualité (6 mois)** (On-time trend, 6 months), **Points forts** (Strengths), **Points faibles** (Weaknesses) and **Certifications**.
4. Close the panel with the cross or by clicking outside it.

Compare performance

1. Open the **Performance** tab.
2. For each supplier, the table shows: **Score global** (Overall score), **Qualité / Délais / Prix / Service** (Quality / Lead times / Price / Service), **Ponctualité** (On-time delivery), **Délai promis** (Promised lead time), **Délai réel** (Actual lead time), **Défauts** (Defects) and **Tendance** (Trend).
3. The search and sort you chose in **Vue d'ensemble** (Overview) also apply here.

Track negotiations

1. Open the **Négociations** (Negotiations) tab.
2. At the top, you see the counters **All, En cours** (In progress) and **Terminées** (Completed), plus the total **Économies potentielles** (Potential savings).
3. Each negotiation shows its subject, the supplier, the assigned person, its status and the target saving.
4. Read the **Valeur actuelle** (Current value), **Objectif cible** (Target), **Échéance** (Deadline), the notes and the **Historique** (History) of exchanges.

View contracts

1. Open the **Contrats** (Contracts) tab.

- Four figures sum up the situation: **Contrats actifs** (Active contracts), **Expiring soon**, **Total value** and **Remise moyenne** (Average discount).
- The table lists **Supplier**, **Type**, **Status**, **Value**, **Remise** (Discount), **Payment**, **Fin** (End), **Pénalités** (Penalties) and **Auto-renouv.** (Auto-renewal).

Good to know

- Scores are shown in green from 90, in orange from 75 and in red below that.
- Negotiations can be **En cours** (In progress), **Pending**, **Terminée** (Completed) or **Annulée** (Cancelled).
- Contracts can be **Active**, **Expiring soon**, **Expired** or **Draft**.
- Économies potentielles** (Potential savings) only add up negotiations in progress.
- This screen is for viewing only: you cannot create or edit a negotiation or contract from it.

Procurement

Menu : Purchasing › Procurement · Included from the Business plan

What this module is for

This module gives you purchase suggestions. They are calculated from current stock, consumption and supplier lead times. It helps buyers and stock managers know what to order, how much and by what date.

What you see on screen

- Top right, two shortcuts: **Orders** and **Suppliers**.
- Four clickable cards: **Critique** (Critical) (order immediately), **Priorité haute** (High priority) (order this week), **À planifier** (To plan) (2 to 4 weeks ahead) and **Budget estimé** (Estimated budget).
- A **Produit, fournisseur...** (Product, supplier...) search box, priority buttons (**All**, **Critique** (Critical), **Élevée** (High), **Moyenne** (Medium), **Faible** (Low)) and an **All industries** filter.
- The list of suggestions. Each one shows the product, the **Current stock** with a gauge of days remaining, the **Supplier** and the suggested quantity (**Suggestion**).
- At the bottom, the number of suggestions displayed and the **Budget total estimé** (Total estimated budget).

Common tasks

Spot urgent purchases

- Click the **Critique** (Critical) or **Priorité haute** (High priority) card to filter the list.

2. For each product, read the gauge of days of stock remaining and the daily consumption.
3. Read the **Commander avant le** (Order before) date and the **Réception prévue** (Expected delivery).
4. The grey line under each suggestion explains the reason for the recommendation.

Mark a suggestion as ordered

1. Click **Commander** (Order) on the right of the suggestion.
2. The suggestion then shows the **Ordered** badge.

Handle several suggestions at once

1. Tick the box to the left of the products you want.
2. A bar shows the number of selected products and the estimated budget.
3. Click **Créer les commandes** (Create orders). To untick everything, click **Deselect**.

Good to know

- The possible priorities are **Critique** (Critical), **Élevée** (High), **Moyenne** (Medium) and **Faible** (Low).
- The stock gauge is red when the remaining stock covers less than the delivery lead time. It is orange up to twice that lead time, and green beyond.
- The consumption trend is shown as ↑ **hausse** (↑ rising), ↓ **baisse** (↓ falling) or — **stable** (— stable).
- The **Ordered** badge does not create a supplier order. To actually place the order, use the **Orders** shortcut.
- The **À planifier** (To plan) card counts medium and low priorities. However, clicking it only shows medium priorities.

Strategic sourcing

Menu : Purchasing > Strategic sourcing · Included from the Enterprise plan

What this module is for

This module gives you a strategic view of your purchasing. It covers detailed supplier evaluation, tracking of calls for tender and total cost of ownership (TCO) analysis. It is for purchasing managers and senior management.

What you see on screen

- The **Nouvel appel d'offres** (New call for tender) button, at the top right.

- An **Économies réalisées (YTD)** (Savings achieved (YTD)) banner. It shows the amount saved since the start of the year, the **Objectif** (Target) and the **Progression objectif économies** (Savings target progress), plus the **Stratégiques** (Strategic), **AO actifs** (Active tenders) and **À risque** (At risk) counters.
- Four indicators: **Fournisseurs stratégiques** (Strategic suppliers, with the average score), **Appels d'offres** (Calls for tender), **Dépenses totales** (Total spend) and **Analyses TCO** (TCO analyses).
- Three tabs: **Scoring Fournisseurs** (Supplier scoring), **RFP Management** and **Analyse TCO** (TCO analysis).

Common tasks

Evaluate a strategic supplier

1. In the **Scoring Fournisseurs** (Supplier scoring) tab, type a name or a category in **Rechercher un fournisseur...** (Search a supplier...).
2. Filter by level with **Tous les niveaux** (All levels), **Stratégique** (Strategic), **Préféré** (Preferred), **Approuvé** (Approved) or **Conditionnel** (Conditional).
3. Each card shows the level, the risk, the **Score global** (Overall score), the **Dépenses** (Spend), the **ESG**, the **Innovation**, the trend and the date of the next evaluation.
4. Click a card to open the detailed record.
5. The **Scoring** tab details each criterion, with its weight, score and a comment.
6. The **Profil** (Profile) tab shows the **Dépenses annuelles** (Annual spend), the **Score ESG** (ESG score), the **Score Innovation** (Innovation score), the **Tendance** (Trend), the **Certifications**, the **Contact** and the **Prochaine évaluation** (Next evaluation).
7. The **Forces / Faiblesses** (Strengths / Weaknesses) tab lists the strong points and weak points.

Track a call for tender

1. Open the **RFP Management** tab.
2. Each card shows the reference, status, category, estimated value, deadline and owner.
3. You can also see the **Fournisseurs invités** (Invited suppliers), the **Offres reçues** (Bids received) and the **Taux de réponse** (Response rate).
4. Click a card to open the details.
5. The **Vue d'ensemble** (Overview) tab shows the **Valeur estimée** (Estimated value), the **Économies réalisées** (Savings achieved), the dates and the **Fournisseur retenu** (Selected supplier).
6. The **Offres** (Bids) tab compares the price, lead time, warranty and score of each bid. The chosen bid has the **Retenu** (Selected) badge.
7. The **Lignes** (Lines) tab lists the items requested, with their estimated price.

Read a TCO analysis

1. Open the **Analyse TCO** (TCO analysis) tab.
2. Each analysis shows the total cost, the savings and a bar split by cost item. The cost items are **Acquisition**, **Exploitation** (Operation), **Maintenance**, **Fin de vie** (End of life) and **Risque** (Risk).
3. Click an analysis to see the **TCO Total** (Total TCO), the **Coûts cachés** (Hidden costs), the savings compared with the alternative supplier, the **Décomposition du TCO** (TCO breakdown) and the **Recommandation** (Recommendation).

Good to know

- Call-for-tender statuses are **Draft**, **Released**, **Évaluation** (Evaluation), **Attribué** (Awarded) and **Cancelled**.
- Score bars are green from 80%, orange from 60% and red below that.
- The **Taux de réponse** (Response rate) is the number of bids received divided by the number of invited suppliers.
- Hidden costs are also shown as a percentage of the total TCO.
- This screen is for viewing only: you cannot edit or create a supplier or an analysis from this screen.

Indirect spend

Menu : Purchasing > Indirect spend · Included from the Enterprise plan

What this module is for

This module tracks spending that does not go through stock: expense reports, purchase requests and overheads. Amounts are split by cost centre. It is designed for approvers, department heads and accounting.

What you see on screen

- At the top right, the **Export** and **Nouvelle note de frais** (New expense report) buttons.
- An alert banner when expense reports are waiting for approval. It shows how many there are, the amount committed and the average approval time.
- Four indicators: **Budget total** (Total budget, with the percentage used), **Dépenses YTD** (Spending YTD), **En attente validation** (Awaiting approval) and **Violations politique** (Policy violations).
- Four tabs: **Notes de frais** (Expense reports), **Demandes d'achat** (Purchase requests), **Centres de coût** (Cost centres) and **Reporting**.

Common tasks

Approve or reject an expense report

1. In the **Notes de frais** (Expense reports) tab, find the report. You can type a name, reference or description in **Rechercher une note de frais...** (Search for an expense report...).
2. If needed, filter with **Tous les statuts** (All statuses), **Pending**, **Approuvé** (Approved), **Rejeté** (Rejected) or **Payé** (Paid).
3. Click the eye icon at the end of the row.
4. The **Détail dépenses** (Expense details) tab lists each expense, flags any **Justificatif manquant** (Missing receipt) and shows the **Violations de politique détectées** (Policy violations detected).
5. The **Circuit validation** (Approval workflow) tab shows each approval level, with the person and their status.
6. The **Politique** (Policy) tab shows the **Plafond repas** (Meal limit), the **Plafond hôtel** (Hotel limit) and whether a **Justificatif** (Receipt) is required.
7. If the report is pending, click **Approuver** (Approve) or **Rejeter** (Reject). Otherwise, click **Close**.

View purchase requests

1. Open the **Demandes d'achat** (Purchase requests) tab.
2. The table shows **Reference**, **Objet** (Subject, with the justification), **Demandeur** (Requester), **Supplier**, **Priorité** (Priority), **Amount** and **Status**.

Track budgets by cost centre

1. Open the **Centres de coût** (Cost centres) tab.
2. Each card shows the code, name, manager, amount spent against budget, **Consommation** (Consumption) as a percentage and the **Restant** (Remaining).
3. Below, the **Répartition par catégorie** (Breakdown by category) area compares spending with the budget for each category.

Analyse spending

1. Open the **Reporting** tab.
2. The **Évolution mensuelle Budget vs Réel** (Monthly trend — Budget vs Actual) chart compares budget and actual for each month.
3. The **Synthèse budgétaire** (Budget summary) shows the **Budget annuel total** (Total annual budget), **Dépenses YTD** (Spending YTD), **Restant disponible** (Remaining available), **Taux de consommation** (Consumption rate) and **Économies vs N-1** (Savings vs N-1).

4. The **Performance processus** (Process performance) area shows the **Délai validation moyen** (Average approval time), **NDF ce mois** (Expense reports this month), **Violations politique** (Policy violations) and reports **En attente paiement** (Awaiting payment).

Good to know

- The possible statuses are **Pending**, **Approuvé** (Approved), **Rejeté** (Rejected) and **Payé** (Paid).
- Purchase request priorities are **Haute** (High), **Moyenne** (Medium) and **Basse** (Low).
- A cost centre shows **Alerte budget** (Budget alert) as soon as its consumption exceeds 90%.
- The number of violations appears in red under the amount of each report concerned.
- Only **Pending** reports can be approved or rejected.

Supplier contracts

Menu : Purchasing > Supplier contracts · Included from the Enterprise plan

What this module is for

This module brings your supplier contracts together. It alerts you before they expire and tracks whether each supplier keeps its commitments. It is designed for buyers, purchasing managers and legal staff.

What you see on screen

- The **Nouveau contrat** (New contract) button, at the top right.
- A red banner when contracts need immediate action. Each contract concerned appears there as a button.
- Four indicators: **Contrats actifs** (Active contracts, out of the total), **Expiring soon** (within 90 days), **Total value** and **Conformité moy.** (Avg. compliance).
- Three tabs: **Contrats** (Contracts), **Renouvellements** (Renewals) and **Engagements** (Commitments).

Common tasks

Find a contract

1. In the **Contrats** (Contracts) tab, type a supplier or a reference in **Rechercher un contrat...** (Search a contract...).
2. Filter by status with **Tous les statuts** (All statuses) and by category with **Toutes catégories** (All categories).

3. Each card shows the category, the status, the description, the **Value**, the **Renouvellement** (Renewal, D-number of days), the **Responsable** (Owner) and the **Conformité engagements** (Commitment compliance).
4. If no contract appears, click **Reset filters**.

View the details of a contract

1. Click a card.
2. The **Vue d'ensemble** (Overview) tab shows the **Valeur du contrat** (Contract value), the payment terms and the **Score de conformité** (Compliance score). It also shows the **Start date** and **Fin** (End) dates, the **Renouvellement** (Renewal), the **Responsable** (Owner), the **Renouvellement auto** (Auto-renewal) and the **Tags**.
3. The **Engagements** (Commitments) tab compares the **Cible** (Target) and the **Actuel** (Current) value for each commitment, with a compliance percentage.
4. The **Jalons** (Milestones) tab shows the timeline of contract stages, completed or not.
5. The **Documents** tab lists the contract documents, with their type and date.

Renew a contract

1. Open the contract details.
2. Click **Renew**.
3. The message **Contrat renouvelé pour 12 mois**. (Contract renewed for 12 months.) confirms the operation.

Plan ahead for expiry dates

1. Open the **Renouvellements** (Renewals) tab.
2. The **Calendrier des renouvellements** (Renewal calendar) sorts contracts from most to least urgent.
3. The countdown shows in red under 30 days or if the contract has expired. It is orange under 90 days and green beyond.
4. The **Auto** label indicates an automatic renewal.

Good to know

- The possible statuses are **Active**, **Expiring soon**, **Expired**, **Draft**, **En négociation** (Under negotiation) and **Suspendu** (Suspended).
- The categories are **Fourniture** (Supplies), **Service**, **Maintenance**, **Logistics**, **IT** and **Consulting**.
- The compliance bar is green from 85%, orange from 65% and red below.
- Expired contracts do not appear in **Renouvellements** (Renewals).
- The **Engagements** (Commitments) tab groups all contracts that have commitments, with their target and current value.

Supplier performance

Menu : Purchasing > Supplier performance · Included from the Enterprise plan

What this module is for

This module checks that your suppliers meet their service commitments, called SLAs. You also track periodic evaluations and improvement plans here. It is designed for buyers and quality managers.

What you see on screen

- The **Nouvelle évaluation** (New evaluation) button, at the top right.
- An **Alertes critiques SLA** (Critical SLA alerts) box, when a supplier is in difficulty. Each alert offers a **View details** button.
- Four indicators: **Fournisseurs suivis** (Tracked suppliers, including compliant ones), **Breaches SLA** (SLA breaches, with the number of suppliers at risk), **Score moyen** (Average score) and **Actions ouvertes** (Open actions, with the time until the next evaluation).
- Three tabs: **Vue d'ensemble** (Overview), **Tableau SLA** (SLA table) and **Plans d'amélioration** (Improvement plans).

Common tasks

Record an evaluation

1. Click **Nouvelle évaluation** (New evaluation).
2. Choose the **Supplier**.
3. Enter the **Period**, for example S1 2026.
4. Enter the **Score global /100** (Overall score /100), between 1 and 100.
5. Add a **Commentaire** (Comment) if needed.
6. Click **Enregistrer l'évaluation** (Save evaluation).

View a supplier's situation

1. In **Vue d'ensemble** (Overview), type a name in **Rechercher un fournisseur...** (Search a supplier...).
2. Each card shows the score out of 100, three service indicators, the alerts and the **Prochaine éval.** (Next eval.) date.
3. Click the card to open the supplier record.
4. The **SLA & Indicateurs** (SLA & Indicators) tab shows each indicator with its status, its weight, its **Cible** (Target), its **Actuel** (Current) value and a trend curve.
5. The **Plan d'amélioration** (Improvement plan) tab lists the actions, with their impact, owner, due date and progress.

6. The **Évaluations** (Evaluations) tab shows past and upcoming evaluations, with the evaluator, the score per criterion and the comment.

Compare all suppliers

1. Open the **Tableau SLA** (SLA table) tab.
2. The **Tableau de bord SLA — Vue consolidée** (SLA dashboard — Consolidated view) shows, for each supplier, the **Score**, the number of indicators that are **Conformes** (Compliant), **À risque** (At risk) and **Breach**, and the **Dépenses** (Spend).
3. Click a row to open the supplier record.

Track corrective actions

1. Open the **Plans d'amélioration** (Improvement plans) tab.
2. For each supplier, read the number of completed actions and the list of actions, with their due date and status.
3. Click **View details** to open the full record.

Good to know

- An indicator's status can be **Conforme** (Compliant), **À risque** (At risk), **Breach** (commitment not met) or **N/A**.
- A card has a red border if a commitment is not met, orange if an indicator is at risk, and green otherwise.
- A supplier counts as compliant from a score of 85.
- Improvement actions can be **À faire** (To do), **En cours** (In progress), **Terminé** (Done) or **Cancelled**. Their impact can be high, medium or low.
- Evaluations can be **Réalisée** (Completed), **Planifiée** (Planned), **Overdue** or **Draft**.
- **Actions ouvertes** (Open actions) count the actions that are **À faire** (To do) and **En cours** (In progress).

Tenders

Menu : Purchasing > Tenders · Included from the Business plan

What this module is for

This module tracks your calls for tenders, from publication to contract award. It compares supplier bids using a score weighted by criterion. It is designed for buyers and purchasing managers.

What you see on screen

- The **Nouvel appel d'offres** (New call for tenders) button, at the top right.
- Six indicators: **Total AO** (Total tenders), **Publiés** (Published), **En évaluation** (Under evaluation), **Attribués** (Awarded), **Budget total** (Total budget) and **Économies moy.** (Avg. savings)
- A **Rechercher un appel d'offres...** (Search a call for tenders...) search and status buttons: **All**, **Draft**, **Released**, **En évaluation** (Under evaluation), **Attribué** (Awarded) and **Cancelled**.
- One card per call for tenders. It shows the reference, status, title, department, owner, **Budget estimé** (Estimated budget) and keywords. It also shows the number of **Réponses** (Responses), the remaining **Délai** (Time left), the **Lauréat** (Winner) or the **Meilleur score** (Best score), and the **Scores des offres** (Bid scores) of the top three suppliers.

Common tasks

Find a call for tenders

1. Type a title or reference in the search bar.
2. Click a status to filter the list.
3. If nothing appears, click **Réinitialiser** (Reset).

Compare the bids received

1. Click the call for tenders card.
2. The **Vue d'ensemble** (Overview) tab shows the **Budget estimé** (Estimated budget), the **Date limite** (Deadline), the **Réponses reçues** (Responses received), the **Jours restants** (Days left), the **Description** and the **Classement des offres** (Bid ranking).
3. The **Comparaison** (Comparison) tab shows one card per supplier. Each card shows its score out of 100, the score for each criterion, the **Prix total** (Total price), the **Livraison** (Delivery), the **+ Points forts** (+ Strengths) and the **- Points faibles** (- Weaknesses).
4. Below these cards, a table cross-references each **Critérior** and its **Poids** (Weight) with each supplier's score. The last line gives the **Score total pondéré** (Weighted total score).
5. The **Critères** (Criteria) tab shows the description and weight of each criterion, as well as the **Total des pondérations** (Total weighting).

Award the contract

1. Open a call for tenders with the **En évaluation** (Under evaluation) status.
2. Click **Attribuer le marché** (Award contract).
3. The contract automatically goes to the bid with the best total score.
4. The window closes and the call for tenders moves to the **Attribué** (Awarded) status.

Good to know

- The statuses of a call for tenders are **Draft**, **Released**, **En évaluation** (Under evaluation), **Attribué** (Awarded), **Cancelled** and **Clôturé** (Closed).
- A response can be **Soumis** (Submitted), **Pending**, **Disqualifié** (Disqualified), **Lauréat** (Winner) or **2ème** (2nd).
- The **Délai** (Time left) shows **Auj.** (Today) on the deadline day, then **Clôturé** (Closed) once it has passed.
- In the details window, the **Jours restants** (Days left) appear in red when the deadline is 7 days away or less.
- The **Attribuer le marché** (Award contract) button only appears for calls for tenders that are **En évaluation** (Under evaluation).

Sales & customers

Invoicing

Menu : Sales & customers › Invoicing · Included from the Starter plan

What this module is for

Invoicing covers the whole sales and financial cycle: invoices, quotes, payments, reminders, credit notes, VAT and cash flow. It is designed for accountants, salespeople and site managers. Sales documents are generated from customer orders.

What you see on screen

- Top right: the number of synchronised orders and the **Settings** button.
- The tabs, arranged in three groups: **Ventes** (Sales), **Analyse** (Analysis) and **Purchasing**. A red badge flags items that need attention.
- On the sales tabs, four indicators: **Chiffre d'affaires encaissé** (Revenue collected), **En attente de paiement** (Awaiting payment), **Factures en retard** (Overdue invoices) and **Devis en cours** (Open quotes).

Sales group

- **Documents**: the list of invoices, quotes, delivery notes, purchase orders and credit notes. You can filter by period (**Tout** (All), **Mois** (Month), **Trimestre** (Quarter), **Année** (Year)), by type and by status. A summary shows the **Total facturé TTC** (Total invoiced incl. VAT), the **Encaissé** (Collected) and the **Reste à encaisser** (Outstanding).
- **Clients**: each client's outstanding balance, the **Balance âgée des encours** (Aged receivables) chart (from **Non échu** (Not due) to **90 jours et plus** (90 days and over)) and the clients who are late.
- **Paiements** (Payments): confirmed receipts, which you can filter by period and payment method.
- **Relances** (Reminders): the **Factures en retard** (Overdue invoices), **Historique des relances** (Reminder history) and **Règles automatiques** (Automatic rules) sub-tabs.
- **Remises & Tarifs** (Discounts & Pricing): **Remises clients** (Client discounts), **Tarifs par catégorie** (Prices by category) and **Remises volume** (Volume discounts).
- **Devis interactifs** (Interactive quotes): tracking of sent quotes (views, reminders, signature) and their conversion into invoices.
- **Contrats** (Contracts): subscription contracts, with the **MRR (HT)** (MRR excl. VAT), the **ARR (HT)** (ARR excl. VAT) and the contracts that **Expirent dans 60 j** (Expire within 60 days).

- **Retours & Avoirs** (Returns & Credit notes): return requests, from **Demande reçue** (Request received) to **Avoir émis** (Credit note issued), with their accounting impact.
- **SAV & Réclamations** (After-sales & Complaints): customer tickets, with their priority, status and deadline tracking.

Analysis group

- **Dashboard**: monthly revenue, collection rate, aged receivables and top clients, over 3, 6 or 12 months.
- **Rapports multi-sites** (Multi-site reports): a consolidated view by site, with a period comparison and **Excel** and **PDF** exports.
- **TVA & Comptabilité** (VAT & Accounting): **Déclarations TVA** (VAT returns), **Export comptable** (Accounting export) and **Taux & règles** (Rates & rules) by sector.
- **Prévision trésorerie** (Cash flow forecast): expected receipts and payments over 30, 60 or 90 days.

Purchasing group

- **Suppliers**: purchase invoices, the supplier list and statistics.
- **BC Automatiques** (Automatic POs): stock alerts, purchase order proposals and replenishment rules.

Common tasks

Create an invoice

1. In the **Documents** tab, click **Nouvelle facture** (New invoice). For a quote, click **Quotes**.
2. Choose the client in **Client *** (Client *). Their usual discount is applied automatically.
3. Fill in the **Date d'émission** (Issue date), the **Date d'échéance** (Due date) and the **Mode de paiement** (Payment method).
4. Click **Ajouter un produit** (Add a product), then search for the item by name or reference.
5. Adjust the quantity, price, discount and VAT of each line.
6. Confirm with **Valider & Envoyer** (Confirm & Send), or click **Enregistrer brouillon** (Save draft).

Send a document or record a deposit

1. Click a document in the list to open it.
2. Click **Email**, choose a **Modèle de message** (Message template), then click **Envoyer** (Send).
3. For a partial payment, click **Acomptes** (Deposits), then **Enregistrer un paiement** (Record a payment).
4. Click **PDF** to download the document.

Send a reminder to a late client

1. Open the **Relances** (Reminders) tab, then the **Factures en retard** (Overdue invoices) sub-tab.
2. Click **Envoyer relance** (Send reminder) on the invoice concerned.

Good to know

- The totals in the document list are recalculated each time you change the period or a filter.
- In **Paielements** (Payments), the **Exporter en CSV** (Export to CSV) button exports the filtered list.
- In **Prévision trésorerie** (Cash flow forecast), you can export with **Exporter le prévisionnel PDF** (Export forecast to PDF) and **Exporter en CSV** (Export to CSV). The running total starts from zero: no bank balance is taken into account.
- In **Contrats** (Contracts), the **Générer facture** (Generate invoice), **Renouveler la licence** (Renew licence) and **Renouveler et facturer** (Renew and invoice) buttons act on your clients' licences.
- The **Settings** button lets you set up your company, document **Numérotation** (Numbering), **Coordonnées bancaires** (Bank details) and the **Legal notice** printed on PDFs.

Quotes

Menu : Sales & customers › Quotes · Included from the Starter plan

What this module is for

Quote management lets you prepare your sales proposals, track when the customer views them, collect the signature and turn an accepted quote into an invoice. It is designed for salespeople and sales managers.

What you see on screen

- Five indicators at the top: **Total devis** (Total quotes), **Signés** (Signed), **Pending**, **Valeur pipeline** (Pipeline value) and **Taux conversion** (Conversion rate).
- A search box **Rechercher un devis ou client...** (Search a quote or customer...).
- Status filters: **All**, **Brouillons** (Drafts), **Envoyés** (Sent), **Consultés** (Viewed), **Signés** (Signed), **Convertis** (Converted) and **Expirés** (Expired).
- The list of quotes. Each card shows the number, status, customer, salesperson, site, amount including tax and expiry date. The number of views and the **Dernière consultation** (Last viewed) date appear once the customer has opened the quote.

- The **Nouveau devis** (New quote) button, at the top right.

Common tasks

Create a quote

1. Click **Nouveau devis** (New quote).
2. Fill in the **Client *** (Customer) and, if needed, the **Email**, **Phone** and **Address**.
3. Enter the **Prestation / produit *** (Service / product).
4. Enter the **Qty**, the **P.U. HT** (Unit price excl. tax), the **TVA %** (VAT %) and the **Validité (j)** (Validity, days).
5. Check the **Total TTC estimé** (Estimated total incl. tax).
6. Confirm with **Créer le devis** (Create quote). The quote is created as a draft and its record opens.

View a quote

1. Click a card in the list.
2. The record shows the customer, dates, salesperson, **Remise globale** (Overall discount), lines and totals (**Sous-total HT** (Subtotal excl. tax), **TVA** (VAT), **Total TTC** (Total incl. tax)).
3. The **Suivi en temps réel** (Real-time tracking) panel shows the history: creation, sending, views, reminders, signature, conversion.
4. The **Statistics** block shows the **Vues** (Views), the **Validité** (Validity) and the **Remise accordée** (Discount granted).
5. Click the back arrow to return to the list.

Send the customer a reminder

1. Open a quote with the **Envoyé** (Sent) status.
2. Click **Relancer** (Send reminder). The reminder is added to the tracking.

Get a quote signed

1. Open a quote that is **Envoyé** (Sent) or **Consulté** (Viewed).
2. Click **Signer** (Sign).
3. Enter the **Nom complet du signataire *** (Signatory's full name).
4. Click in the **Zone de signature** (Signature area) to add the signature.
5. Confirm with **Signer le devis** (Sign quote).

Convert a quote into an invoice

1. Open a quote with the **Signé** (Signed) status.
2. Click **Convertir en facture** (Convert to invoice).

3. Confirm with **Convertir** (Convert). The invoice number then appears on the record and in the list.

Good to know

- A red **Expire dans ...j !** (Expires in ... days!) badge flags sent or viewed quotes that expire within three days.
- The **Valeur pipeline** (Pipeline value) adds up sent, viewed and signed quotes.
- The **Taux conversion** (Conversion rate) compares signed or converted quotes with all quotes that have left draft status.
- The **Lien d'acceptation client** (Customer acceptance link) block shows the address to send to the customer, with a **Copy** button.
- A signed quote shows the note **Signé électroniquement** (Electronically signed), with the signatory's name, the date and the time.

Sales targets

Menu : Sales & customers > Sales targets · Included from the Business plan

What this module is for

This module lets you track how well each salesperson and each sector meets their sales targets, as well as their field activity. It is designed for sales managers and site management. It is a read-only screen: you cannot enter targets here.

What you see on screen

- At the top right, the period selector: **Monthly**, **Trimestriel** (Quarterly) or **All**. If a business sector is selected, its name appears next to it and the data is limited to that sector.
- Four tabs: **Vue globale** (Overall view), **Par commercial** (By salesperson), **Par secteur** (By sector) and **Activité** (Activity).
- **Vue globale** (Overall view): four indicators (**CA total réalisé** (Total revenue achieved), **Taux d'atteinte global** (Overall achievement rate), **Objectifs dépassés** (Targets exceeded), **À risque / manqués** (At risk / missed)) and the **Atteinte des objectifs — Vue d'ensemble** (Target achievement — Overview) chart, which compares the **Objectif** (Target) and the **Réalisé** (Achieved) of each salesperson.
- **Par commercial** (By salesperson): one card per salesperson, with a progress ring, their status, the period, then the **CA réalisé** (Revenue achieved), the **Orders**, the **Nvx clients** (New customers) and the **Marge** (Margin), each compared with its target.
- **Par secteur** (By sector): one card per sector, with the **CA réalisé** (Revenue achieved), the **Objectif** (Target), the **Orders**, the **Top performer** and a progress bar.

- **Activité** (Activity): the feed of recent sales actions (**Appel** (Call), **RDV** (Meeting), **Email**, **Quotes**, **Commande** (Order), **Visite** (Visit)), with the customer, the amount if any and the date.

Common tasks

See how the team is doing

1. Choose the period at the top right.
2. Stay on the **Vue globale** (Overall view) tab.
3. Read the **Taux d'atteinte global** (Overall achievement rate) and the number of salespeople **À risque / manqués** (At risk / missed).

View a salesperson's details

1. Open the **Par commercial** (By salesperson) tab.
2. Click the salesperson's card.
3. The profile shows three rings: **CA réalisé / objectif** (Revenue achieved / target), **Commandes / objectif** (Orders / target) and **Nouveaux clients / objectif** (New customers / target).
4. The **Activités récentes** (Recent activities) section lists their latest actions.
5. Click the back arrow to return to the list.

Compare sectors

1. Open the **Par secteur** (By sector) tab.
2. Compare the progress bars and the percentage shown under each card.

Good to know

- Each target has a status: **En bonne voie** (On track, blue), **À risque** (At risk, orange), **Dépassé** (Exceeded, green) or **Manqué** (Missed, red). The colour of the rings and bars follows this status.
- The **Marge** (Margin) is shown in green when it reaches the target, and in red otherwise.
- In the activity feed, a thumbs-up means a positive outcome and a thumbs-down a negative outcome.
- The **Vue globale** (Overall view) chart only shows monthly targets.

Objectives per rep

Menu : Sales & customers > Objectives per rep · Included from the Business plan

What this module is for

This module tracks the individual targets of each salesperson: revenue, visits, quotes, conversion and new customers. It also offers coaching messages and an action plan for each person. It is designed for sales team managers.

What you see on screen

- A row of seven team indicators: **CA équipe** (Team revenue), **Objectif CA** (Revenue target), **Taux atteinte** (Achievement rate), **Objectifs atteints** (Targets reached), **À risque** (At risk), **Manqués** (Missed) and **Score coaching** (Coaching score).
- A progress bar for the team's revenue, with the amount achieved and the target.
- The **Export** and **Définir objectifs** (Set targets) buttons, at the top right.
- Three tabs:
 - **Vue équipe** (Team view): the month's **Classement équipe** (Team ranking), sorted by revenue. It shows the **Commercial** (Salesperson), their **Zone** (Area), the **CA réalisé** (Revenue achieved), the **Objectif** (Target), the **Taux** (Rate), the **Visites** (Visits), the **Conversion**, the **Score coaching** (Coaching score) and the **Status**.
 - **Objectifs individuels** (Individual targets): one card per salesperson with their revenue bar and their **Visites** (Visits), **Quotes**, **Convers.** (Conversion) and **Coaching**. Status filters are available.
 - **Coaching automatique** (Automatic coaching): unread messages, grouped by salesperson.

Common tasks

View a salesperson's profile

1. Click a line in the ranking or a card in the **Objectifs individuels** (Individual targets) tab.
2. The profile opens with their status, period, area and coaching score.
3. Go through the four tabs of the profile:
 - **Objectifs** (Targets): revenue compared with the target and with the previous year (**N-1** (Previous year)), the **Visites terrain** (Field visits), the **Devis émis** (Quotes issued), the **Taux de conversion (%)** (Conversion rate, %), the **Nouveaux clients** (New customers), the **Points forts** (Strengths) and the **Axes d'amélioration** (Areas for improvement).
 - **Hebdo** (Weekly): week-by-week details (**Objectif CA** (Revenue target), **Réalisé** (Achieved), **Taux** (Rate), **Visites** (Visits), **Quotes**, **Signés** (Signed)) and the **Évolution hebdomadaire CA** (Weekly revenue trend) chart.
 - **Coaching**: the score out of 100 and the messages (**Conseil** (Tip), **Alerte** (Alert), **Félicitations** (Congratulations), **Action requise** (Action required)).
 - **Plan d'action** (Action plan): the numbered list of actions planned for the period.

4. Close the profile with the cross or by clicking outside it.

Handle coaching messages

1. Open the salesperson's profile, then the **Coaching** tab. The number of unread messages appears in brackets.
2. Read the message. A red dot marks an unread message.
3. Click **Marquer comme lu** (Mark as read).

Spot salespeople who are struggling

1. Open the **Objectifs individuels** (Individual targets) tab.
2. Click the **À risque** (At risk) or **Objectif manqué** (Target missed) filter.

Good to know

- Possible statuses: **Dans les clous** (On track), **À risque** (At risk), **Target reached**, **Objectif manqué** (Target missed) and **Pending**.
- Percentages are shown in green from 100%, in orange between 80 and 99%, and in red below 80%.
- The coaching score is green from 80, orange between 60 and 79, and red below 60.
- The top three in the ranking are marked with a medal.
- On individual cards, a red badge shows the number of unread coaching messages.

Customer CRM

Menu : Sales & customers > Customer CRM · Included from the Business plan

What this module is for

The CRM centralises your prospects and clients: where they are in the sales cycle, the value of open deals, past interactions and each contact's level of interest. It is designed for sales staff and their managers.

What you see on screen

- The **Nouveau contact** (New contact) button, at the top right. If a business sector is selected, its name appears next to it.
- Eight indicators: **Prospects**, **Leads chauds** (Hot leads), **Taux conversion** (Conversion rate), **Valeur moy.** (Avg. value), **Pipeline total** (Total pipeline), **Gagnés/mois** (Won/month), **Perdus/mois** (Lost/month) and **Cycle moyen** (Average cycle).
- Four tabs:

- **Pipeline**: six summary cards (**Leads**, **Qualifiés** (Qualified), **Proposition** (Proposal), **Négociation** (Negotiation), **Gagnés** (Won), **Perdus** (Lost)) with the number of contacts and the total value. Below them, a column board shows open deals, from **Leads** to **Négociation** (Negotiation).
- **Contacts & Prospects**: the full list, with search and filters.
- **Historique** (History): all interactions (**Appel** (Call), **Email**, **Réunion** (Meeting), **Demo**, **Quotes**, **Note**, **Visite** (Visit)).
- **Scoring**: prospects grouped into **Chaud** (Hot), **Tiède** (Warm) and **Froid** (Cold), then the **Détail des scores par prospect** (Score details by prospect).

Common tasks

Add a contact

1. Click **Nouveau contact** (New contact).
2. Fill in the **Prénom** (First name) and **Nome** (required).
3. Complete the **Entreprise** (Company), **Rôle**, **Assigné à** (Assigned to), **Email** and **Phone** fields.
4. Choose the **Status** and the **Score**.
5. Enter the **Valeur (€)** (Value, €) and the **Probabilité de signature (%)** (Signing probability, %).
6. Confirm with **Créer le contact** (Create contact).

Search for a contact

1. Open the **Contacts & Prospects** tab.
2. Type a name or company in **Rechercher un contact...** (Search for a contact...).
3. Narrow down with the **Tous les statuts** (All statuses) and **Tous les scores** (All scores) lists.

View a contact record

1. Click a contact, from the pipeline, the list or the scoring tab.
2. The record shows the **Email**, **Phone**, **Valeur estimée** (Estimated value), **Probabilité** (Probability), **Source**, **Assigné à** (Assigned to), **Tags** and **Notes**.
3. The **Prochaine action** (Next action) and the **Historique des interactions** (Interaction history) appear at the bottom of the record.
4. Close the record with the cross or by clicking outside it.

See the contacts at a pipeline stage

1. In the **Pipeline** tab, click a summary card, for example **Négociation** (Negotiation).
2. The **Contacts & Prospects** tab opens, filtered on that stage.

Good to know

- The **Pipeline total** (Total pipeline) adds up the estimated value of contacts at the **Lead**, **Qualifié** (Qualified), **Proposition** (Proposal) and **Négociation** (Negotiation) stages.
- The **Taux conversion** (Conversion rate) compares deals won with all closed deals, won or lost.
- On each pipeline card, the bar shows the signing probability. The icon (flame, sun or snowflake) shows the score.
- In the **Historique** (History), a green dot marks a positive outcome and a red dot a negative one. The planned **Suivi** (Follow-up) date appears when there is one.
- When a business sector is selected, the lists show only that sector's contacts.

Customer contracts

Menu : Sales & customers > Customer contracts · Included from the Business plan

What this module is for

This module brings together the contracts signed with your clients: maintenance, service, supply, licence, partnership or framework agreement. It helps you track their deadlines, milestones and renewals, and warns you before they expire. It is designed for sales and administrative managers.

What you see on screen

- An orange **alertes actives** (active alerts) banner when contracts need your attention. Each alert offers a **Voir contrat** (View contract) link.
- Seven indicators: **Total contrats** (Total contracts), **Actifs** (Active), **Expiring soon**, **Expirés** (Expired), **Brouillons** (Drafts), **Total value** and **MRR** (monthly recurring revenue).
- A filter bar: the search box **Rechercher client, référence...** (Search client, reference...) and the lists **Tous les statuts** (All statuses) and **Tous les types** (All types). The number of contracts shown appears on the right.
- A grid of cards, one per contract. Each card shows the client, the reference, the status, the type, the days remaining, a bar showing elapsed time, the total value, the monthly value, the manager and the renewal method.
- At the bottom, the **Calendrier des renouvellements automatiques** (Automatic renewal calendar), sorted by date.

Common tasks

Find a contract

1. Type the client name or the reference in the search box.

2. Narrow down by status (**Active**, **Expiring soon**, **Expired**, **Draft**, **Suspendu** (Suspended), **Renouvelé** (Renewed)).
3. Narrow down by type (**Fourniture** (Supply), **Maintenance**, **Service**, **Accord-cadre** (Framework agreement), **License**, **Partenariat** (Partnership)).

View a contract's details

1. Click the contract card, or **Voir contrat** (View contract) in the alert banner.
2. Go through the four tabs of the contract:
 - **Vue d'ensemble** (Overview): the **Total value**, the **Monthly** value, the **Renouvellement** (Renewal) method, the **Niveau SLA** (SLA level), the **Durée du contrat** (Contract term) (**Start date**, **Fin** (End), **Préavis** (Notice period)), the **Conditions** (Terms), the **Description** and the **Notes internes** (Internal notes).
 - **Jalons** (Milestones): the contract steps, marked **Fait** (Done) or **À venir** (Upcoming), with their amount if any.
 - **Historique** (History): past renewals, with their period and amount.
 - **Documents**: the files attached to the contract.
3. Close the contract with **Close**.

Renew a contract

1. Open the contract.
2. Click **Renew**.
3. The contract is updated and its alerts disappear from the banner.

Good to know

- The days-remaining badge changes colour: grey beyond 90 days, orange between 31 and 90 days, red at 30 days or less. An expired contract shows **Expiré il y a ...j** (Expired ... days ago).
- The bar on each card shows how much of the contract has already elapsed. It uses the same colours as the badge.
- In the calendar, the label **dans ...j** (in ... days) turns orange when the renewal is less than 90 days away.
- The **MRR** adds up the monthly value of all contracts.

Recurring customer revenue

Menu : Sales & customers > Recurring customer revenue · Included from the Enterprise plan

What this module is for

This module tracks the recurring revenue from your client contracts: annual revenue (ARR), monthly revenue (MRR), upcoming renewals and each client's churn risk. It is designed for sales management and client relationship managers.

What you see on screen

- A red banner, **Renouvellements urgents — Action requise** (Urgent renewals — Action required), listing contracts to renew within 30 days. Each line offers a **Voir** (View) link.
- Four indicators: **ARR Total** (Total ARR), **MRR, Net Revenue Retention** (revenue retained, including additional sales) and **Renouvellements urgents** (Urgent renewals).
- The **Nouveau contrat** (New contract) button, at the top right.
- Three tabs:
 - **Contrats** (Contracts): the list of contracts, with a search box and status filters.
 - **Revenus ARR/MRR** (ARR/MRR revenue): the curve **MRR — Évolution 7 mois** (MRR — 7-month trend), the **Décomposition ARR** (ARR breakdown) and the **ARR par client** (ARR by client) ranking.
 - **Pipeline renouvellements** (Renewal pipeline): upcoming deadlines sorted by urgency.

Common tasks

Search for a contract

1. Open the **Contrats** (Contracts) tab.
2. Type the client name in **Rechercher un client...** (Search for a client...).
3. Filter by status: **All**, **Active**, **Expiring soon**, **En négociation** (In negotiation) or **Expired**.

View a contract

1. Click a contract, from any tab or from the alert banner.
2. The header of the contract shows the status, the risk level (**Churn Faible** (Low churn), **Modéré** (Moderate) or **Élevé** (High)), then the **ARR, MRR, NPS** (customer satisfaction) and **Health Score** (account health).
3. Go through the three tabs:
 - **Détails** (Details): **Start date**, **Fin** (End), **Renouvellement** (Renewal), **Invoicing**, **Total value**, **Account Manager**, **CSM**, **Users**, **Upsell potentiel** (Upsell potential), **Modules souscrits** (Subscribed modules) and **Notes**.
 - **Historique renouvellements** (Renewal history): the old value, the new value and the percentage increase.
 - **Jalons** (Milestones): the timeline of contract steps.
4. Close the contract with the cross or by clicking outside it.

Renew a contract

1. Open the contract.
2. Click **Initier renouvellement** (Start renewal).
3. A green message confirms the new end date.

Prepare upcoming renewals

1. Open the **Pipeline renouvellements** (Renewal pipeline) tab.
2. Read the counters **Renouvellements < 30 jours** (Renewals < 30 days), **Renouvellements 30-90 jours** (Renewals 30–90 days) and **Pipeline upsell total** (Total upsell pipeline).
3. Work through the contracts from top to bottom: the most urgent appear first.

Good to know

- The label **J-...** (D-...) shows the number of days before renewal. It is red at 30 days or less, and orange between 31 and 90 days.
- The coloured edge on the left of each contract is red if churn risk is high, orange if the contract expires soon, and green otherwise.
- The **NPS** is green from 70, orange between 50 and 69, and red below that. The **Health Score** is green from 80, orange between 60 and 79, and red below that.
- The **Décomposition ARR** (ARR breakdown) starts from existing ARR, adds expansion, subtracts lost ARR (**ARR Churné** (Churned ARR)) and ends with the **ARR Total (fin période)** (Total ARR, end of period). It also shows **Gross Revenue Retention** and **Net Revenue Retention**.
- A green **Upsell** badge flags potential for additional sales.

Promotions

Menu : Sales & customers > Promotions · Included from the Business plan

What this module is for

This module groups your promotions and sales discounts: percentage or fixed-amount discounts, "buy one, get one free" offers, bundles and tiers. You can activate them, track their use and test their effect on an order before placing it. It is designed for sales and marketing managers.

What you see on screen

- The **Nouvelle promotion** (New promotion) button, top right.
- Four indicators: **Promotions actives** (Active promotions), **Utilisations totales** (Total uses), **Économies générées** (Savings generated) and **Règles configurées** (Rules configured).

- Four tabs:
 - **Règles** (Rules): the list of promotions, with filters by status (**All**, **Active**, **Planifiée** (Scheduled), **En pause** (Paused), **Expirée** (Expired)) and by type (**Tous types** (All types), **Remise %** (% discount), **Remise fixe €** (Fixed discount €), **1 acheté = 1 offert** (Buy 1 get 1 free), **Pack groupé** (Bundle), **Palier de remise** (Discount tier)).
 - **Applications**: the **Historique des applications de promotions** (Promotion application history), with the **Promotion**, **Client**, **Document**, **Date**, **Montant initial** (Initial amount), **Remise** (Discount), **Montant final** (Final amount) and **Site**.
 - **Simulateur** (Simulator): a discount calculation on a test order.
 - **Analytics**: the **Top promotions par économies générées** (Top promotions by savings generated) and breakdowns **Par type** (By type), **Par statut** (By status) and as a **Résumé global** (Overall summary).

Common tasks

Create a promotion

1. Click **Nouvelle promotion** (New promotion).
2. Enter the **Nom de la promotion** (Promotion name) and a **Description**.
3. Choose the **Type de remise** (Discount type) and enter the **Valeur de remise** (Discount value).
4. Choose the **Déclencheur** (Trigger): **Toujours applicable** (Always applicable), **Quantité minimum** (Minimum quantity), **Montant minimum** (Minimum amount), **Segment client** (Client segment), **Période définie** (Set period), **Première commande** (First order) or **Combinaison produits** (Product combination).
5. Fill in the **Date de début** (Start date) and, if needed, the **Date de fin (optionnel)** (End date (optional)) and the **Code promo (optionnel)** (Promo code (optional)).
6. Confirm with **Créer la promotion** (Create promotion).

Edit, activate or pause a promotion

1. In the **Règles** (Rules) tab, find the promotion.
2. To edit it, click the pencil icon, then **Mettre à jour** (Update).
3. To activate or suspend it, click the switch on the right. Green means active.

Simulate a discount

1. Open the **Simulateur** (Simulator) tab.
2. Enter the **Montant de la commande (€)** (Order amount (€)) and the **Quantité commandée** (Quantity ordered).
3. Choose the **Sector** and the **Type de client** (Client type) (**Client existant** (Existing client) or **Nouveau client** (New client)).

4. Read the **Résultat de simulation** (Simulation result): the initial amount, each discount applied and the **Montant final** (Final amount).
5. The **Promotions déclenchées** (Promotions triggered) block gives the reason for each discount.

Good to know

- Only active promotions are taken into account by the simulator.
- Promotions are applied in order of priority. Only one non-cumulative promotion can apply. Promotions marked **Cumulable** (Cumulative) are added to the others.
- Some discounts are capped: the simulator takes this cap into account.
- The simulator shows the **Économie totale** (Total savings) in euros and as a percentage of the order.
- Each rule shows its number of uses and the amount saved by your clients.

Sales geolocation

Menu : Sales & customers > Sales geolocation · Included from the Enterprise plan

What this module is for

This module gives a geographical view of your sales force: where your sales reps are, what they are doing, which areas they cover and the outcome of their visits today. It is designed for sales managers and regional management.

What you see on screen

- At the top right, the **Live** indicator and the **Export** button.
- An orange field alert banner, when a situation needs your attention.
- Eight indicators: **Commerciaux** (Sales reps), **Actifs aujourd'hui** (Active today), **Visites réalisées** (Visits completed), **Objectif visites** (Visit target), **CA signé auj.** (Revenue signed today), **CA mois** (Revenue this month), **Objectif mois** (Monthly target) and **Taux conversion** (Conversion rate).
- Four tabs:
 - **Carte interactive** (Interactive map): the **Carte des commerciaux — France** (Sales rep map — France), with each rep's photo on the map and a status legend. On the right, the **Équipe commerciale** (Sales team) list.
 - **Commerciaux** (Sales reps): one card per rep, with their status, **CA mensuel** (Monthly revenue), **Visites aujourd'hui** (Visits today), **Clients**, **Quotes** and **Conversion**.
 - **Zones de couverture** (Coverage areas): one card per area, with its manager, **Taux de couverture** (Coverage rate), **Clients**, number of departments (**Dép.** (Dept.)),

- **Potentiel** (Potential) and the list of departments.
- **Visites du jour** (Today's visits): the table of all visits for the day.

Common tasks

View a sales rep's activity

1. In the **Carte interactive** (Interactive map) tab, click the rep's photo, on the map or in the **Équipe commerciale** (Sales team) list. You can also click their card in the **Commerciaux** (Sales reps) tab.
2. The right-hand panel shows their **CA du mois** (Revenue this month) against target, their **Visites aujourd'hui** (Visits today) and their conversion rate.
3. Read their **Clients actifs** (Active clients), **Devis en cours** (Open quotes) and **Prochain RDV** (Next appointment).
4. The **Visites du jour** (Today's visits) section lists their appointments, with the time, client, outcome and amount.
5. To contact them, click **Appeler** (Call) or **Email**.
6. Close the panel with the cross.

Track today's visits

1. Open the **Visites du jour** (Today's visits) tab.
2. At the top of the table, read the number of visits signed, pending and refused.
3. The table shows the **Time**, **Commercial** (Sales rep), **Client**, **Address**, **Durée** (Duration), **Résultat** (Outcome) and **Amount**.
4. At the bottom, read the total number of visits and the **Total signé** (Total signed).

Check an area's coverage

1. Open the **Zones de couverture** (Coverage areas) tab.
2. Compare the coverage rates and revenue potential of each area.

Good to know

- Sales rep statuses: **Active** (green), **En réunion** (In a meeting) (purple), **En déplacement** (Travelling) (orange), **Absent** (grey) and **Offline** (red). The coloured dot appears on the photo.
- Visit outcomes: **Signé** (Signed), **Pending**, **Refusé** (Refused) and **Planifié** (Scheduled).
- Revenue percentages are green from 100%, orange between 80 and 99%, and red below that.
- An area's coverage rate is green from 80%, orange between 60 and 79%, and red below that.

Field dashboard

Menu : Sales & customers > Field dashboard · Included from the Business plan

What this module is for

The field dashboard is the personal space of the travelling sales rep. It brings together the day's schedule, the clients in your area, your results for the month and your latest actions. It is designed for quick checks between two appointments.

What you see on screen

- A green banner at the top: your name, job title, area and current location. Below it, the **Progression du jour** (Today's progress) shows the number of tasks done, the percentage completed and the tasks remaining.
- Four personal indicators, with a progress bar when a target exists.
- Four tabs: **Aujourd'hui** (Today), **Clients**, **My KPIs** and **Activité** (Activity).
- A round + button at the bottom right, which opens the quick actions: **Appel rapide** (Quick call), **Nouveau devis** (New quote), **Check-in visite** (Visit check-in) and **Note rapide** (Quick note).

Common tasks

Follow your schedule for the day

1. Stay on the **Aujourd'hui** (Today) tab. The title **Planning du ...** (Schedule for ...) shows the date.
2. Each task shows its type (**Visite** (Visit), **Appel** (Call), **Quotes**, **Demo**, **Suivi** (Follow-up)), the client, the address, the time and the planned duration.
3. A red **Priorité haute** (High priority) label marks urgent tasks.
4. Click **Y aller** (Go there) to travel to the client.
5. Once the task is done, click the circle on the left. The task is crossed out and the **Progression du jour** (Today's progress) updates.
6. Click the circle again to undo.

View a client in your area

1. Open the **Clients** tab. The list **Clients de ma zone** (Clients in my area) shows, for each client, their level of interest (**Chaud** (Hot), **Tiède** (Warm) or **Froid** (Cold)), score, sector, the date of the **Dernier contact** (Last contact) and the next action.
2. Click a client to open their record.
3. The record shows the address, phone, email, any **Devis en attente** (Pending quote) and the **Prochaine action** (Next action).

4. Use the **Appeler** (Call), **Quotes** or **Check-in** buttons.
5. Click **Retour à la liste** (Back to list) to return.

Review your results

1. Open the **My KPIs** tab.
2. The **Objectif mensuel** (Monthly target) block compares **Réalisé** (Actual) revenue with the **Objectif** (Target), and shows the percentage **Atteint** (Achieved) and the amount still to achieve.
3. The **Évolution mensuelle** (Monthly trend) block compares each month with its target.
4. Four counters sum up your activity: **Appels passés** (Calls made), **Visites réalisées** (Visits completed), **Devis envoyés** (Quotes sent) and **Commandes signées** (Orders signed).

View your recent activity

1. Open the **Activité** (Activity) tab.
2. The **Activité récente** (Recent activity) list shows your latest interactions, with the client, outcome, date and any amount.

Good to know

- In **My KPIs**, a month is shown in green when the target is met, and in orange otherwise.
- Completed tasks stay visible in the schedule, greyed out.
- The bar on each personal indicator shows your progress towards the matching target.

Finance

Financial statement

Menu : Finance > Financial statement · Included from the Enterprise plan

What this module is for

The consolidated financial dashboard gives an overview of the company's financial health: revenue, margins, cash, amounts to collect from clients and amounts owed to suppliers. It is designed for management, accountants and financial controllers. It is a view-only screen.

What you see on screen

- At the top right, the **Export** button and the **Real time** indicator.
- An orange **alertes financières** (financial alerts) banner, which lists the points to watch with their amount.
- Eight indicators: **Chiffre d'affaires YTD** (Revenue YTD, since the start of the year), **Marge brute** (Gross margin), **EBITDA** (operating profit before depreciation and amortisation), **Trésorerie disponible** (Available cash), **Créances clients** (Client receivables), **Dettes fournisseurs** (Supplier payables), **DSO (jours)** (DSO, days: average time clients take to pay) and **BFR** (Working capital requirement). Each shows its trend, and a progress bar when a target is set.
- Five tabs:
 - **Vue d'ensemble** (Overview): the **Flux financiers par département** (Financial flows by department) (revenue in green, expenses in red, balance on the right) and three summary blocks: **Position de trésorerie** (Cash position), **Créances clients** (Client receivables) and **Dettes fournisseurs** (Supplier payables).
 - **Trésorerie** (Cash): the chart of receipts, payments and net balance by month, then the **Trésorerie cumulée prévisionnelle** (Forecast cumulative cash) table.
 - **P&L** (income statement): the monthly chart of revenue, gross margin and EBITDA, then the **Détail P&L mensuel** (Monthly P&L details) table.
 - **Créances** (Receivables): the **Balance âgée des créances clients** (Aged client receivables).
 - **Dettes** (Payables): the **Échéancier fournisseurs** (Supplier payment schedule).

Common tasks

Check cash for the next 30 days

1. Stay on the **Vue d'ensemble** (Overview) tab.
2. In the **Position de trésorerie** (Cash position) block, read the amount **Disponible aujourd'hui** (Available today).
3. Read the **Encaissements prévus (30j)** (Expected receipts, 30 d), the **Décaissements prévus (30j)** (Expected payments, 30 d) and the **Prévision à 30j** (30-day forecast).

Analyse the income statement

1. Open the **P&L** tab.
2. In the table, read by month the **Chiffre d'affaires** (Revenue), **Coût des ventes** (Cost of sales), **Marge brute** (Gross margin), **Charges opérationnelles** (Operating expenses) and **EBITDA**.
3. The last column, **Total YTD**, gives the total since the start of the year. The last row shows the **Taux de marge brute** (Gross margin rate).

Spot clients who are late paying

1. Open the **Créances** (Receivables) tab.
2. Read the totals: **Total créances** (Total receivables), **À échéance** (Not yet due), **Overdue** and **DSO moyen** (Average DSO).
3. The table is sorted from the longest delay to the shortest. It shows the **Client**, **Amount**, **Échéance** (Due date), **Retard** (Delay) and **Status**.
4. A **Relancer** (Send reminder) button appears on each overdue receivable.

Prepare supplier payments

1. Open the **Dettes** (Payables) tab.
2. Read the totals: **Total dettes** (Total payables), **À venir** (Upcoming), **Urgent (<7j)** (Urgent, <7 d) and **Overdue**.
3. The schedule is sorted by date. Each line shows the number of days remaining or overdue, and offers a **Payer** (Pay) button.

Good to know

- In the **Trésorerie** (Cash) tab, forecast months are marked **Prév.** (Fcst.) and shown in lighter colours.
- The monthly cash status is **Excellent** above €50,000 net balance, **Positif** (Positive) between €0 and €50,000, and **Négatif** (Negative) below zero.

- Receivable statuses: **À échéance** (Not yet due), **Retard <30j** (Late <30 d), **Retard 30-60j**** (Late 30–60 d) and ****Retard >60j** (Late >60 d).
- Payable statuses: **À venir** (Upcoming), **Urgent** (less than 7 days) and **Overdue**.

Department budgets

Menu : Finance > Department budgets · Included from the Business plan

What this module is for

This module tracks each department's budget: planned amount, actual spending, committed spending and year-end forecast. It flags departments at risk of going over budget. It is designed for management, financial controllers and department heads.

What you see on screen

- At the top right, the **Export** and **Nouveau budget** (New budget) buttons.
- A red **alertes budgétaires** (budget alerts) banner. Each alert offers a **View details** link.
- Five indicators: **Budget annuel total** (Total annual budget), **Dépensé YTD** (Spent YTD, since the start of the year), **Engagé** (Committed), **Restant** (Remaining) and **Taux moyen** (Average rate) of consumption.
- The **Consommation globale YTD** (Overall consumption YTD) bar, which separates **Dépensé** (Spent), **Engagé** (Committed) and **Disponible** (Available).
- Four tabs:
 - **Départements** (Departments): one card per department, with status filters.
 - **Comparaison** (Comparison): a table of all departments, with a **Total** row.
 - **Dépenses récentes** (Recent expenses): the list of latest expenses, across all departments.
 - **Alerts**: all alerts, with their date and the department concerned.

Common tasks

Spot departments in difficulty

1. Stay on the **Départements** (Departments) tab.
2. Click the **À risque** (At risk) or **Dépassement** (Overspent) filter.
3. On each card, read the **Consommation YTD** (Consumption YTD), **Dépensé** (Spent), **Engagé** (Committed) and the share of the **Budget annuel** (Annual budget) already used.
4. At the bottom of the card, compare the **Budget annuel** (Annual budget) with the forecast (**Prév. (Fcst.)**). The forecast is shown in red if it exceeds the budget.

View a department's details

1. Click a card, a row in the **Comparaison** (Comparison) table or **View details** in an alert.
2. The record shows the manager, headcount and status.
3. Go through the record's three tabs:
 - **Vue d'ensemble** (Overview): **Budget annuel** (Annual budget), **Alloué YTD** (Allocated YTD), **Dépensé YTD** (Spent YTD), **Engagé** (Committed), **Restant** (Remaining), **Prévision fin d'année** (Year-end forecast), the **Consommation YTD** (Consumption YTD) bar and the **Répartition par catégorie** (Breakdown by category) (**Personnel** (Staff), **Équipement** (Equipment), **Services**, **Déplacements** (Travel), **Marketing**, **Informatique** (IT), **Formation** (Training), **Divers** (Miscellaneous)).
 - **Monthly**: for each month, the **Alloué** (Allocated), **Dépensé** (Spent), **Engagé** (Committed) and percentage used.
 - **Dépenses** (Expenses): the department's recent expenses, with their status.
4. Close the record with the cross or by clicking outside it.

Compare all departments

1. Open the **Comparaison** (Comparison) tab.
2. The table shows the **Budget annuel** (Annual budget), **Alloué YTD** (Allocated YTD), **Dépensé YTD** (Spent YTD), **Engagé** (Committed), **Restant** (Remaining), **Taux burn** (Burn rate, pace of spending), **Prévision EOY** (EOY forecast, end of year) and **Status**.

Good to know

- Budget statuses: **Dans les clous** (On track), **À risque** (At risk), **Dépassement** (Overspent) and **Sous-consommé** (Underspent).
- Consumption rates are green up to 90%, orange between 91 and 100%, and red above 100%.
- The year-end forecast is shown in red as soon as it exceeds the annual budget, and in green otherwise.
- Each expense has a status: **Approuvé** (Approved), **Pending** or **Refusé** (Rejected).

HR & talent

Human resources

Menu : HR & talent > Human resources · Included from the Business plan

What this module is for

The **Human Resources** module brings together the day-to-day management of your teams: headcount, attendance, leave requests, the weekly schedule and payslips. It is designed for site managers and the people in charge of HR.

What you see on screen

- **En-tête** (Header): the title **Human Resources**, the active sector if there is one, and the number of employees shown.
- **Cinq onglets** (Five tabs): **Vue d'ensemble** (Overview), **Employés** (Employees), **Congés** (Leave), **Planning** (Schedule) and **Fiches de paie** (Payslips). An orange badge on **Congés** (Leave) shows the number of pending requests.
- **Vue d'ensemble** (Overview): four indicators (**Effectif total** (Total headcount), **Présents aujourd'hui** (Present today, with the number working remotely), **Absents** (Absent, for leave and sickness), **Masse salariale** (Payroll, gross monthly)). Below them, **Statut des équipes aujourd'hui** (Team status today) (**Présent** (Present), **En congé** (On leave), **Maladie** (Sick), **Télétravail** (Remote work)) and **Répartition par département** (Breakdown by department).
- **Employés** (Employees): one record per person with their status, contract (**CDI** (Permanent), **CDD** (Fixed-term), **Intérim** (Temporary), **Apprenti** (Apprentice)), job title, department, site, start date, **Salaire brut** (Gross salary), **CP restants** (Paid leave remaining), **RTT restants** (RTT days remaining) and email address.
- **Congés** (Leave): the leave balances of four employees, the filters **All**, **Pending**, **Approuvées** (Approved), **Refusées** (Rejected), then the list of requests.
- **Planning** (Schedule): a weekly grid (Monday to Sunday), one row per employee, with a legend **Travail** (Work), **Congé** (Leave), **Maladie** (Sick), **Télétravail** (Remote work), **Formation** (Training).
- **Fiches de paie** (Payslips): a choice of **Period**, four totals (**Masse salariale brute** (Gross payroll), **Total net versé** (Total net paid), **Charges patronales** (Employer contributions), **Coût total employeur** (Total employer cost)) and the list of payslips for the month.

Common tasks

Handle a leave request

1. Open the **Congés** (Leave) tab.
2. Click **Pending** to show only the requests to handle.
3. Check the leave type, dates, number of days and reason.
4. Click **Approuver** (Approve) or **Refuser** (Reject). A message confirms your choice.

Add a slot to the schedule

1. Open the **Planning** (Schedule) tab.
2. Click **Ajouter un créneau** (Add a slot).
3. Choose the **Employé** (Employee) (required field).
4. Fill in the **Date**, **Type**, **Start date** time and **Fin** (End) time.
5. Add **Notes** if needed.
6. Confirm with **Add**.

Approve and send a payslip

1. Open the **Fiches de paie** (Payslips) tab and choose the **Period**.
2. Click an employee's row to open the payslip details.
3. If the payslip is in **Draft**, click **Valider** (Approve).
4. Once it is **Validée** (Approved), click **Envoyer au salarié** (Send to employee).
5. To send all of the month's approved payslips at once, click **Envoyer toutes les validées** (Send all approved) from the list.

Good to know

- The payslip details show the **Salaire brut de base** (Basic gross salary), **Heures supplémentaires** (Overtime), **Primes et bonus** (Bonuses), **Cotisations salariales** (Employee contributions), **Retenues diverses** (Other deductions) and **Net à payer** (Net pay). The **Coût total employeur** (Total employer cost) adds up gross pay, bonuses and **Cotisations patronales** (Employer contributions).
- A payslip goes through three statuses: **Draft**, **Validée** (Approved), then **Envoyée** (Sent).
- Remaining days (paid leave and RTT) are calculated as the year's entitlement minus the days already taken.
- An approved request shows the name of the person who approved it and the date.
- If a sector is active, the overview and the employee list show only that sector's staff.

HR planning

What this module is for

The **Planification RH & Compétences** (HR & Skills Planning) module helps you track your employees' skills, their training plan and the skills the organisation is missing. It is designed for HR managers and line managers who prepare training needs.

What you see on screen

- **Indicateurs du haut** (Top indicators):
 - **Collaborateurs** (Employees), with the number active and in training;
 - **Score moyen compétences** (Average skills score);
 - **Heures de formation** (Training hours), compared with the **Objectif** (Target);
 - **Écarts critiques** (Critical gaps), with the **Budget formation** (Training budget) used.
- **Quatre onglets** (Four tabs): **Collaborateurs** (Employees), **Matrice Compétences** (Skills matrix), **Plan de Formation** (Training plan) and **Écarts & Besoins** (Gaps & Needs).
- **Collaborateurs** (Employees): a **Rechercher un collaborateur...** (Search for an employee...) box, then one card per person with their status (**Active**, **En congé** (On leave), **Télétravail** (Remote work), **En formation** (In training)), job title, score, training hours against their target, certifications and next training.
- **Matrice Compétences** (Skills matrix): a table that cross-references each employee with the main skills. The level appears as a coloured dot, explained in the **Légende** (Legend): **Débutant** (Beginner), **Intermédiaire** (Intermediate), **Avancé** (Advanced), **Expert**. A dash means the skill is missing.
- **Plan de Formation** (Training plan): one card per course with its status (**Planifiée** (Scheduled), **En cours** (In progress), **Terminée** (Completed), **Annulée** (Cancelled)), category, provider, duration, cost, dates and **Participants**.
- **Écarts & Besoins** (Gaps & Needs): a red banner sums up the number of critical gaps. One card per missing skill shows its priority (**Critique** (Critical), **Haute** (High), **Moyenne** (Medium)) and the figures **Requis** (Required), **Disponible** (Available) and **Écart** (Gap).

Common tasks

View an employee's profile

1. In the **Collaborateurs** (Employees) tab, type a name, job title or department in the search box.
2. Click the employee's card.
3. The window shows their **Score compétences** (Skills score), **Formation** (Training) hours and **Certifications**.
4. Go through the **Compétences** (Skills), **Formations** (Training) and **Certifications** tabs. A skill nearing expiry shows "Expire le" (Expires on) followed by the date.
5. Close the window with the cross or by clicking outside it.

Spot skills to strengthen

1. Open the **Écarts & Besoins** (Gaps & Needs) tab.
2. Start with the **Critique** (Critical) cards.
3. Compare the number of people **Requis** (Required) with the number **Disponible** (Available): green figures represent available people, red ones those who are missing.

Track training progress

1. Open the **Plan de Formation** (Training plan) tab.
2. For a course **En cours** (In progress), read the **Progression** (Progress) bar.
3. For a course marked **Terminée** (Completed), read the **Score moyen** (Average score) out of 100.

Good to know

- An employee's training bar turns green when they reach 100% of their target hours. It stays orange from 60% and turns red below that.
- The matrix only shows the first eight skills in the library.
- To manage the training catalogue, enrolments and certificates, use the **Training** module.

Training

Menu : HR & talent > Training · Included from the Business plan

What this module is for

The **Training Management** module brings together the catalogue of training sessions, employee registrations, attendance tracking and certificate preparation. It is designed for training managers and HR.

What you see on screen

- **Top indicators:** **Sessions totales** (Total sessions), **Inscriptions ouvertes** (Registrations open), **En cours** (In progress), **Attestations générées** (Certificates generated) and **Note moyenne** (Average rating, out of 5).
- **Budget formation annuel** (Annual training budget): the amount spent out of the total budget, with the percentage spent and the amount still available.
- **Three tabs:** **Catalogue formations** (Training catalogue), **Inscriptions** (Registrations) and **Attestations** (Certificates).
- **Catalogue formations** (Training catalogue): a search, **Rechercher une formation...** (Search a training...), a format filter (**Tous formats** (All formats), **Présentiel** (In person), **E-learning**, **Blended**, **Webinaire** (Webinar)) and a status filter (**Tous statuts** (All statuses),

Inscriptions ouvertes (Registrations open), **En cours** (In progress), **Terminée** (Completed), **Complet** (Full)). Each card shows the format, the status, the **Certifiante** (Certifying) label where relevant, the category, the trainer, the price per person, the date, the duration, the location, the number of registrations and the rating.

- **Inscriptions** (Registrations): one row per registration with the employee, the training, the date and the status (**Pending**, **Confirmed**, **Présent** (Present), **Absent**, **Cancelled**), and the score if there is one.
- **Attestations** (Certificates): three counters (**Attestations à générer** (Certificates to generate), **Attestations générées** (Certificates generated), **Formations suivies** (Trainings attended)), then the list of participants present at a certifying training.

Common tasks

View a session

1. In the **Catalogue formations** (Training catalogue) tab, filter or search for the training (by title or category).
2. Click its card.
3. The top of the window shows the **Durée** (Duration), the **Coût/pers** (Cost/person), the **Taux remplissage** (Fill rate) and the **Coût total** (Total cost).
4. Browse the tabs:
 - **Informations** (Information): description, learning objectives, prerequisites, location and dates;
 - **Participants**: the list of registered participants;
 - **Présences & Scores** (Attendance & Scores): attendance, score, certificate and feedback for each participant.
5. Click **Close**.

Generate a certificate

1. Open the session, then the **Participants** tab. You can also use the **Présences & Scores** (Attendance & Scores) tab, or click **Générer PDF** (Generate PDF) in the **Attestations** (Certificates) tab.
2. For a participant marked **Présent** (Present) at a certifying training, click **Générer attestation** (Generate certificate).
3. Check the preview: title, participant name, dates, duration, score, certification and trainer.
4. Click **Générer l'attestation PDF** (Generate PDF certificate).

Good to know

- A session's fill bar is green, then orange from 80% of places, and red when the session is full.

- In **Présences & Scores** (Attendance & Scores), the attendance rate shows in green from 80% and the score in green from 70/100.
- Attendance data only appears once the training has started.
- Only participants present at a **Certifiante** (Certifying) training can receive a certificate.
- The **Attestation** (Certificate) button in the **Inscriptions** (Registrations) tab opens the record of the session concerned directly.

Employee portal

Menu : HR & talent > Employee portal · Included from the Business plan

What this module is for

The **Employee Portal** is each employee's personal space. There you find your payslips, leave balances, training, requests to HR and administrative documents. You can also submit leave requests and HR requests.

What you see on screen

- **Bandeau d'accueil** (Welcome banner): "Bonjour," (Hello,) followed by your name, job title and department. On the right are your **Matricule** (Employee ID), your **Site** and your **Contract**.
- **Six onglets** (Six tabs): **Home**, **Fiches de paie** (Payslips), **Congés** (Leave), **Training**, **Demandes RH** (HR requests) and **Documents**.
- **Home**:
 - company announcements, with the most urgent marked **Important**;
 - four shortcuts: **Demander un congé** (Request leave), **Télécharger ma fiche de paie** (Download my payslip), **Faire une demande RH** (Make an HR request) and **Mes formations** (My training);
 - the **Soldes de congés** (Leave balances) block;
 - the **Dernières demandes de congé** (Latest leave requests) and **Demandes RH récentes** (Recent HR requests) blocks, each with a **View all** link.
- **Fiches de paie** (Payslips): the most recent **Salaire net mensuel** (Monthly net salary, with gross pay and employee contributions), then the list of your payslips with a **Télécharger** (Download) button.
- **Congés** (Leave): the title **Mes congés** (My leave), the **Nouvelle demande** (New request) button, one card per leave type (days remaining, used, total, days pending) and the **Historique des demandes** (Request history).
- **Training**: one card per course with its status (**Inscrit** (Enrolled), **Terminé** (Completed), **Disponible** (Available), **Recommandé**), the label **Certifiante** (Certified) where relevant, the provider, duration, date and your score.

- **Demandes RH** (HR requests): the title **Mes demandes RH** (My HR requests), the **Nouvelle demande** (New request) button and the list of your requests, with their status and the **Réponse RH** (HR response) when there is one.
- **Documents**: your documents (contract, amendments, certificates, etc.), with their type, date, size and a **Télécharger** (Download) button.

Common tasks

Request leave

1. Click **Demander un congé** (Request leave) on the home tab, or **Nouvelle demande** (New request) in the **Congés** (Leave) tab.
2. Choose the **Type de congé** (Leave type). The list shows the days remaining for each type.
3. Enter the **Date de début** (Start date) and the **Date de fin** (End date).
4. Add a **Motif (optionnel)** (Reason, optional) if needed.
5. Click **Envoyer la demande** (Send request). The message **Demande envoyée !** (Request sent!) confirms it has gone to your manager for approval.

Make an HR request

1. Click **Faire une demande RH** (Make an HR request) on the home tab, or **Nouvelle demande** (New request) in the **Demandes RH** (HR requests) tab.
2. Choose the **Type de demande** (Request type): **Attestation employeur** (Employer certificate), **Certificat de travail** (Certificate of employment), **Demande de formation** (Training request), **Télétravail** (Remote work) or **Autre demande RH** (Other HR request).
3. Describe what you need in **Précisions** (Details).
4. Click **Envoyer** (Send). A reply is promised within 48 working hours.

Get a payslip or a document

1. Open the **Fiches de paie** (Payslips) or **Documents** tab.
2. Click **Télécharger** (Download) next to the month or document you want.

Good to know

- The **Envoyer** (Send) button for an HR request stays greyed out until you choose a request type.
- Leave awaiting approval appears in orange under the label "j en attente" (days pending) in your balances.
- A leave request can be **Pending**, **Approuvé** (Approved), **Refusé** (Rejected) or **Cancelled**. An HR request can be **Pending**, **En cours** (In progress), **Traité** (Processed) or **Refusé** (Rejected).

- For a completed, certified course, the **Télécharger l'attestation** (Download certificate) button appears on its card. For a course marked **Disponible** (Available) or **Recommended**, an **S'inscrire** (Enrol) button is shown.

Quality, CSR & risk

CSR

Menu : Quality, CSR & risk > CSR · Included from the Enterprise plan

What this module is for

The **CSR Dashboard** brings together your corporate social responsibility indicators: environment, social and governance. It is designed for management and CSR managers who want to track annual targets and the progress of the action plan.

What you see on screen

- **Header:** the report period and the **Exporter rapport** (Export report) button.
- **Alert banner:** it appears when actions are late ("action(s) RSE en retard", CSR action(s) overdue) and lists their titles.
- **Score RSE Global** (Overall CSR score): a score out of 100, with four gauges: **Score Global** (Overall score), **Environnemental** (Environmental), **Social** and **Gouvernance** (Governance). The target shown is 85/100.
- **Four quick indicators:** **Réduction CO₂** (CO₂ reduction, compared with the previous year), **Énergie renouvelable** (Renewable energy), **Satisfaction RH** (HR satisfaction) and **Fournisseurs RSE** (CSR suppliers, audited and approved).
- **Tabs:** **Vue d'ensemble** (Overview), **Environnemental** (Environmental), **Social**, **Gouvernance** (Governance) and **Plan d'actions** (Action plan).

Common tasks

View the overview

1. Stay on the **Vue d'ensemble** (Overview) tab.
2. Read the **Émissions CO₂ (tCO₂e/mois)** (CO₂ emissions, tCO₂e/month) chart: each bar stacks **Scope 1**, **Scope 2** and **Scope 3**. The red dotted line represents the **Objectif** (Target).
3. Check **Indicateurs sociaux** (Social indicators): monthly satisfaction, with the latest values for **Satisfaction**, **Turnover** and **Heures formation** (Training hours).
4. Go through **Indicateurs clés par pilier** (Key indicators by pillar): two indicators per pillar, with their progress bar.

Look at a pillar in detail

1. Click **Environnemental** (Environmental), **Social** or **Gouvernance** (Governance).
2. Each card shows the value, the unit, the change over one year (in %), the **Objectif** (Target) and the achievement rate.
3. The status badge shows **En bonne voie** (On track), **À risque** (At risk) or **Hors cible** (Off target).

Track the action plan

1. Open the **Plan d'actions** (Action plan) tab.
2. At the top, four counters: **Terminées** (Completed), **En cours** (In progress), **Planifiées** (Planned) and **Overdue**.
3. The **Budget RSE utilisé** (CSR budget used) bar compares the amount spent with the total budget.
4. Each action shows its status, pillar, impact (**Impact fort** (High impact), **moyen** (medium) or **faible** (low)), its **Responsable** (Owner), its **Échéance** (Due date), its **Avancement** (Progress) and its **Budget** use.

Good to know

- The score of each pillar is the average achievement rate of its indicators. For some indicators (emissions, accidents, etc.), a value below the target counts as a success.
- An action's budget bar turns red when more than 90% of the budget has been used.
- The page is read-only: no data entry form is available.

ESG reporting

Menu : Quality, CSR & risk > ESG reporting · Included from the Enterprise plan

What this module is for

Reporting ESG Automatisé (Automated ESG reporting) tracks the preparation of your non-financial reports under the GRI Standards and CSRD/ESRS frameworks. It is designed for CSR managers and finance management, who need to measure data completeness and produce the report.

What you see on screen

- **En-tête** (Header): the **Exporter rapport** (Export report) button.
- **Trois cartes d'avancement** (Three progress cards):
 - **GRI Standards**: number of disclosures published, partial and omitted.
 - **CSRD / ESRS**: topics compliant, in progress and with gaps.

- **Données vérifiées** (Verified data): share of metrics verified by a third party.
- **Onglets** (Tabs): **Reports**, **GRI Standards**, **CSRD / ESRS** and **Métriques ESG** (ESG metrics).

Common tasks

Export a report

1. In the **Reports** tab, find the version you want. Each version shows its status (**Draft**, **En révision** (Under review), **Approuvé** (Approved), **Publié** (Published)), its framework, period, author and completeness.
2. Click **Exporter PDF** (Export PDF). You can also click **Exporter rapport** (Export report) at the top of the page: the most recent version is then offered.
3. Choose the **Format d'export** (Export format): **PDF**, **Excel** or **Word**.
4. In **Sections à inclure** (Sections to include), untick the sections you do not need (**Résumé exécutif** (Executive summary), **Indicateurs GRI/CSRD** (GRI/CSRD indicators), **Données environnementales** (Environmental data), etc.).
5. Click **Générer et télécharger** (Generate and download). The message **Rapport généré avec succès !** (Report generated successfully!) appears, followed by the **Download report** button.

Check GRI disclosures

1. Open the **GRI Standards** tab.
2. Filter with the **Toutes catégories** (All categories) list (**Universel** (Universal), **Économique** (Economic), **Environnemental** (Environmental), **Social**).
3. The legend shows the number of disclosures per status: **Publié** (Published), **Partial**, **Omis** (Omitted), **N/A**.
4. Click a row to open its details: completeness in data points, **Responsable** (Owner), **Dernière mise à jour** (Last updated) and any **Note**.
5. Close with **Close**.

Track CSRD compliance

1. Open the **CSRD / ESRS** tab.
2. The counters **Conformes** (Compliant), **En cours** (In progress), **Écarts** (Gaps) and **N/A** sum up the situation.
3. Topics are grouped by pillar (**Environnemental** (Environmental), **Social**, **Gouvernance** (Governance)), with their materiality level and deadline.
4. For a topic marked **Écart** (Gap), the missing data is listed in red.

Good to know

- The **Métriques ESG** (ESG metrics) tab shows a table: **Indicateur** (Indicator), **Référentiel** (Framework), **Category**, **Value**, **Vérifié** (Verified, with the verifier's name) and **Méthodologie** (Methodology).
- Completeness bars are green from 80–90%, orange below that, and red for low levels.

Non-conformities

Menu : Quality, CSR & risk › Non-conformities · Included from the Enterprise plan

What this module is for

The **Quality Non-Conformities** module lists the quality deviations found during audits, receiving inspections, complaints or after-sales incidents. It tracks each non-conformity (NC) from opening to closure, with its corrective actions. It is designed for quality managers and site managers.

What you see on screen

- **Header:** the **Nouvelle NC** (New NC) button.
- **Red banner:** it flags critical NCs being processed. Click one to open it.
- **Six counters:** **Total NC** (Total NCs), **Critiques** (Critical), **Majeures** (Major), **Clôturées** (Closed), **Liées incidents** (Linked to incidents) and **Récurrentes** (Recurring).
- **Three indicators:** **Délai moyen de clôture** (Average closure time), **Coût total des NC** (Total NC cost) and **Actions dans les délais** (Actions on time).
- **Filters:** the **Rechercher une NC...** (Search an NC...) search (title or number), then **Toutes sévérités** (All severities), **Tous statuts** (All statuses) and **Toutes sources** (All sources). The number of results appears on the right.
- **NC list:** number, severity, status, **Récurrente** (Recurring) and linked incident badges, site, person who detected it, cost and progress of actions.

Common tasks

Report a non-conformity

1. Click **Nouvelle NC** (New NC).
2. Enter the **Titre de la non-conformité** (Non-conformity title).
3. Choose the **Sévérité** (Severity) (**Critique** (Critical), **Majeure** (Major), **Mineure** (Minor), **Observation**) and the **Source**.
4. Write the **Description** (500 characters maximum).

5. If needed, fill in **Lier à un incident SAV (optionnel)** (Link to an after-sales incident, optional) with the ticket number.
6. Confirm with **Créer la NC** (Create NC), or click **Cancel**.

View an NC file

1. Click an NC in the list.
2. The **Vue d'ensemble** (Overview) tab shows the **Description**, the **Source de détection** (Detection source), the person who detected it, the **Produit / Lot** (Product / Lot), the **Coût estimé** (Estimated cost) and, if known, the **Cause racine** (Root cause) with its analysis method.
3. The **Actions** tab lists **Immédiate** (Immediate), **Corrective** or **Préventive** (Preventive) actions, with their owner, due date, status and **Efficacité** (Effectiveness).
4. The **Workflow** tab shows progress in six steps: **Ouvert** (Open), **Analyse** (Analysis), **Plan d'action** (Action plan), **Mise en œuvre** (Implementation), **Vérification** (Verification), **Clôturée** (Closed).
5. Close with **Close**.

Move an NC forward

1. In the **Workflow** tab, find the **Étape actuelle** (Current step).
2. Click **Passer à l'étape suivante** (Go to next step), or **Annuler la NC** (Cancel NC) if it is no longer relevant.

Good to know

- These two buttons are no longer shown once the NC is closed or cancelled.
- The file also shows who verified the effectiveness of the actions, the closure date and the number of attachments.
- An NC can carry the number of an after-sales incident: see the Incidents module.

Product quality

Menu : Quality, CSR & risk > Product quality · Included from the Enterprise plan

What this module is for

The **Qualité Produit — SPC & Contrôles** (Product Quality — SPC & Inspections) module tracks quality during production: inspection points, defect records and statistical control charts. It is designed for quality managers and line supervisors who monitor process stability.

What you see on screen

- **Header:** the **Rapport qualité** (Quality report) and **Nouvelle NC** (New NC) buttons.
- **Red banner:** it flags ongoing critical non-conformities and shows the defect rate compared with the previous week.
- **Five indicators:** **Taux de défaut** (Defect rate), **First Pass Yield** (target 99%), **Cpk moyen** (Average Cpk) (threshold 1.33), **NC ouvertes** (Open NCs) and **Coût qualité** (Cost of quality) (year to date).
- **Tabs:** **Dashboard**, **Points de contrôle** (Inspection points), **Fiches de défauts** (Defect records) and **Cartes SPC/Cpk** (SPC/Cpk charts).

Common tasks

Read the dashboard

1. Stay on the **Dashboard** tab.
2. The **Diagramme de Pareto — Types de défauts** (Pareto chart — Defect types) ranks defects by frequency, with the cumulative percentage.
3. The **Évolution taux de défaut (5 semaines)** (Defect rate trend (5 weeks)) compares each week with the target. The bar is green if it is **Conforme** (Compliant), red if it is **Hors objectif** (Off target).
4. The **État des points de contrôle** (Inspection point status) counts the points that are **Conformes** (Compliant), in **Warning** and **Critiques** (Critical).
5. The **Synthèse Cpk par caractéristique** (Cpk summary by characteristic) positions each measurement against the capability threshold.

Track inspection points

1. Open the **Points de contrôle** (Inspection points) tab.
2. Each card shows the line, the operator, the **Fréquence** (Frequency), the **Dernier contrôle** (Last inspection), the **Taille échantillon** (Sample size), the **Défauts trouvés** (Defects found), the **Taux de défaut** (Defect rate) and the **Prochain contrôle** (Next inspection).
3. Click **Saisir résultat** (Enter result) to record a new inspection.

View a defect record

1. Open the **Fiches de défauts** (Defect records) tab. The table shows **Reference**, **Produit / Ligne** (Product / Line), **Type de défaut** (Defect type), **Sévérité** (Severity), **Qté NC** (NC qty), **Cause racine** (Root cause) and **Status**.
2. Click the icon at the end of the row.
3. The record details the date, batch, operator, photos, the **Cause racine identifiée** (Root cause identified), the **Action corrective** (Corrective action) and the **Données SPC associées** (Related SPC data).

4. Click **Edit** or **Close**.

Analyse a control chart

1. Open the **Cartes SPC/Cpk** (SPC/Cpk charts) tab.
2. Each chart shows **Cpk**, **Cp**, **Moyenne** (Mean) and **Sigma**.
3. On the curve, the red dotted lines mark the upper and lower limits (**UCL/LCL**) and the green dotted line marks the **Moyenne** (Mean). Red points are **hors contrôle** (out of control).

Good to know

- Capability thresholds: Cpk below 1.0 = **Non capable** (Not capable), from 1.0 to 1.33 = **Marginal**, above 1.33 = **Capable**.
- Defect severity: **Mineur** (Minor), **Majeur** (Major), **Critique** (Critical). Statuses: **Ouverte** (Open), **En cours** (In progress), **Clôturée** (Closed).

Internal audits

Menu : Quality, CSR & risk > Internal audits · Included from the Enterprise plan

What this module is for

The **Internal Audits** module helps you plan your audits (internal, external, certification or surveillance), track their checklists and findings, and produce the final report. It is designed for quality managers, auditors and the heads of audited departments.

What you see on screen

- **Header**: the **Planifier un audit** (Schedule an audit) button.
- **Seven counters**: **Total**, **Planifiés** (Scheduled), **En cours** (In progress), **Terminés** (Completed), **Critiques** (Critical) and **Majeures** (Major) findings, **Score moy.** (Avg. score).
- **Tabs**: **Audits**, **Modèles de check-list** (Checklist templates) and **Timeline**.
- **Audits tab**: the **Rechercher un audit...** (Search an audit...) search box (title or department), the **Tous les statuts** (All statuses) and **Tous les types** (All types) filters, then one card per audit. Each card shows the reference, status, type, department, auditor, date, standard, score and findings.

Common tasks

Schedule an audit

1. Click **Planifier un audit** (Schedule an audit).

2. Enter the **Titre de l'audit** (Audit title).
3. Choose the **Type** and the **Norme** (Standard) (ISO 9001:2015, ISO 14001:2015, ISO 27001:2022, CSRD / ESRS, ISO 45001).
4. Enter the **Date de début** (Start date) and the **Date de fin** (End date).
5. Select a **Modèle de check-list** (Checklist template), or **Aucun modèle (check-list vide)** (No template (empty checklist)).
6. Confirm with **Créer l'audit** (Create audit).

View an audit

1. Click an audit card.
2. The **Vue d'ensemble** (Overview) tab shows the **Auditeur principal** (Lead auditor) and their team, the **Dates**, the **Score**, the **Scope**, the **Notes**, the **Avancement** (Progress) and the number of findings by severity.
3. The **Check-list** (Checklist) tab groups the questions by section. Each question has an answer (**Yes**, **Non** (No), **N/A** or **Pending**), a comment and, if needed, a piece of evidence.
4. The **Constats** (Findings) tab lists each gap with its severity, its **Action corrective** (Corrective action), its owner, its **Échéance** (Due date) and its status (**Ouvert** (Open), **En cours** (In progress), **Clôturé** (Closed)).

Produce the audit report

1. In the audit details, open the **Rapport** (Report) tab.
2. If the audit is completed, click **Générer le rapport automatiquement** (Generate report automatically).
3. Once the report is available, click **Télécharger PDF** (Download PDF) or **Envoyer par email** (Send by email).
4. The **Contenu du rapport** (Report content) section shows which parts are ready: cover page, checklist results, findings, score, action plan, signatures.

Good to know

- The generate button stays greyed out until the audit is **Terminé** (Completed).
- The score colour depends on its value: green from 85%, orange from 70 to 84%, red below 70%.
- The **Modèles de check-list** (Checklist templates) tab shows the available templates (standard, number of points and sections), each with a **Utiliser ce modèle** (Use this template) button.
- The **Timeline** tab separates **Audits à venir** (Upcoming audits) from **Audits terminés** (Completed audits). Click an audit to open its details.

Regulatory watch

Menu : Quality, CSR & risk › Regulatory watch · Included from the Enterprise plan

What this module is for

Regulatory Watch brings together alerts on new ISO standards, CSRD obligations and legal changes that affect your company. It helps quality, legal and CSR managers assess the impact of each text and meet deadlines.

What you see on screen

- **Header:** the number of **non lus** (unread) alerts and the **Configurer les sources** (Configure sources) button.
- **Red "Action urgente requise" (Urgent action required) banner:** one banner per critical alert that requires action, with the **Voir les actions** (View actions) button.
- **Six counters:** **Total**, **Nouveaux** (New), **Action requise** (Action required), **En analyse** (Under analysis), **Surveillance** (Monitoring) and **Critiques** (Critical).
- **Tabs:** **Alertes réglementaires** (Regulatory alerts), **Sources de veille** (Watch sources) and **Échéancier** (Deadlines).

Common tasks

Find a regulation

1. In the **Alertes réglementaires** (Regulatory alerts) tab, type a word in **Rechercher une réglementation...** (Search a regulation...) (title or summary).
2. Narrow down with **Tous les niveaux** (All levels) (**Critique** (Critical), **Élevé** (High), **Moyen** (Medium), **Faible** (Low)), **Tous les statuts** (All statuses) and **Toutes catégories** (All categories) (**ISO / Normes** (ISO / Standards), **CSRD / ESG**, **Légal** (Legal), **GDPR**, **Droit du travail** (Labour law), **Environnement** (Environment)).
3. Each card shows the level, status, category, the **Non lu** (Unread) badge, the source, the publication and effective dates, the **Échéance** (Deadline) and the departments concerned.

Analyse an alert

1. Click a card.
2. The **Vue d'ensemble** (Overview) tab shows the **Date d'entrée en vigueur** (Effective date), the **Responsable** (Owner), the **Échéance** (Deadline), the **Résumé** (Summary), the **Impact pour l'entreprise** (Impact on the company), the **Départements concernés** (Departments concerned) and the **Tags**.
3. Click **Consulter le texte officiel** (View the official text) to open the source in a new tab.

4. The **Historique** (History) tab shows the steps: publication, alert creation, impact analysis and compliance validation.

Organise compliance work

1. In the alert details, open the **Actions** tab.
2. Go through the numbered list of **Actions requises** (Required actions).
3. Click **Créer un plan d'action** (Create an action plan) or **Assigner** (Assign).

Track deadlines

1. Open the **Échéancier** (Deadlines) tab.
2. Obligations are sorted by deadline. Each one shows the number of days left (for example **J-30** (D-30)), or **Dépassé** (Overdue) if the date has passed.
3. Click a line to open the alert.

Good to know

- Possible statuses: **New**, **En analyse** (Under analysis), **Action requise** (Action required), **Conforme** (Compliant), **Surveillance** (Monitoring).
- The **Sources de veille** (Watch sources) tab lists the sources you follow, with the number of alerts and the note **Surveillance active** (Active monitoring). Each source has a **Configurer** (Configure) button, and an **Ajouter une source** (Add a source) box is available.

ERM (risk)

Menu : Quality, CSR & risk > ERM (risk) · Included from the Enterprise plan

What this module is for

Gestion des Risques Entreprise (ERM) (Enterprise Risk Management) maps your risks (strategic, operational, financial, cyber, and so on). For each risk, it tracks the mitigation plan and the warning indicators. It is designed for management, internal control and risk owners.

What you see on screen

- **En-tête** (Header): the **Nouveau risque** (New risk) button.
- **Bandeau rouge** (Red banner): it lists critical or high risks. Click one to open it.
- **Quatre indicateurs** (Four indicators): **Risques critiques** (Critical risks, with the number of high risks), **Risques atténués** (Mitigated risks, with accepted ones), **Exposition totale** (Total exposure, gross financial risk) and **Actions en retard** (Late actions, with the average mitigation rate).

- **Onglets** (Tabs): **Liste des risques** (Risk list), **Matrice des risques** (Risk matrix) and **Vue par catégorie** (View by category).

Common tasks

Search for a risk

1. In **Liste des risques** (Risk list), type a title or reference in **Rechercher un risque...** (Search for a risk...).
2. Filter with **Tous les niveaux** (All levels), **Toutes catégories** (All categories) and **Tous les statuts** (All statuses).
3. Each card shows the level, status, **Risque brut** (Gross risk, probability × impact), **Risque résiduel** (Residual risk), **Exposition** (Exposure), the progress of **Actions de mitigation** (Mitigation actions), the trend and the owner.

Review a risk

1. Click a card.
2. The **Vue d'ensemble** (Overview) tab compares the **Risque brut (avant mitigation)** (Gross risk, before mitigation) and the **Risque résiduel (après mitigation)** (Residual risk, after mitigation). It also shows the **Propriétaire** (Owner), **Exposition financière** (Financial exposure), **Tendance** (Trend), **Causes identifiées** (Identified causes), **Conséquences potentielles** (Potential consequences) and **Tags**.
3. The **Plan de mitigation** (Mitigation plan) tab lists the actions (**Réalisé** (Done), **En cours** (In progress), **À faire** (To do)), with their owner, deadline and effectiveness.
4. The **Indicateurs** (Indicators) tab compares the **Value** of each indicator with its **Threshold**.
5. The **Workflow** tab shows the **Cycle de vie du risque** (Risk life cycle) (**Identifié** (Identified), **Évalué** (Assessed), **Atténué** (Mitigated), **Accepté** (Accepted), **Clôturé** (Closed)) and the review dates.
6. At the bottom of the window, click **Edit** or **Mettre à jour le statut** (Update status).

Read the risk matrix

1. Open **Matrice des risques** (Risk matrix).
2. Each risk is placed according to its **Probabilité** (Probability, from 1 to 5) and its **Impact** (from 1 to 5). Hover over a dot to see the risk title.
3. The cell colour follows the score: **Faible (1-3)** (Low, 1–3), **Modéré (4-8)** (Moderate, 4–8), **Élevé (9-15)** (High, 9–15), **Critique (16-25)** (Critical, 16–25).

Good to know

- Risk levels: **Négligeable** (Negligible), **Faible** (Low), **Modéré** (Moderate), **Élevé** (High), **Critique** (Critical). A risk can also be **Escaladé** (Escalated).

- The **Vue par catégorie** (View by category) groups risks by family, with the highest level in each family. Click a title to open the risk.

Business continuity

Menu : Quality, CSR & risk > Business continuity · Included from the Enterprise plan

What this module is for

The **Plan de Continuité d'Activité (PCA/PRA)** (Business Continuity and Disaster Recovery Plan) describes how your company keeps running during a crisis: cyberattack, fire, supply disruption, epidemic, and so on. It brings together crisis scenarios, recovery procedures and test history. It is designed for management, site managers and the crisis team.

What you see on screen

- **En-tête** (Header): the **Activer cellule de crise** (Activate crisis team) button.
- **Niveau de préparation global** (Overall readiness level): a score out of 100, with **Scénarios testés** (Scenarios tested), **Score moyen tests** (Average test score) and the time left before the **Prochain test** (Next test) (D-...).
- **Quatre indicateurs** (Four indicators): **Scénarios PCA** (BCP scenarios, including critical ones), **Tests réalisés** (Tests carried out), **Procédures validées** (Approved procedures, plus drafts) and **Prochain test** (Next test).
- **Onglets** (Tabs): **Scénarios de crise** (Crisis scenarios), **Procédures** (Procedures) and **Historique des tests** (Test history).

Common tasks

View a crisis scenario

1. In the **Scénarios de crise** (Crisis scenarios) tab, search for a scenario with **Rechercher un scénario...** (Search for a scenario...).
2. Each card shows the category, the crisis level (**Mineur** (Minor), **Majeur** (Major), **Critique** (Critical), **Catastrophique** (Catastrophic)), the target recovery time (**RTO**), the acceptable data loss (**RPO**), the result of the **Dernier test** (Last test), the progress of the **Étapes de reprise** (Recovery steps) and the date of the next test.
3. Click the card to open the details.

Prepare for recovery

1. In the scenario details, the **Vue d'ensemble** (Overview) tab shows the **RTO** (recovery time), the **RPO** (maximum data loss) and the **MTPD** (maximum tolerable period of

disruption). It also shows the **Déclencheurs** (Triggers), the **Processus impactés** (Affected processes), the **Responsable PCA** (BCP owner) and the test dates.

2. The **Procédure de reprise** (Recovery procedure) tab lists the steps in order, with their owner, their duration and the label **Critique** (Critical) where needed.
3. The **Contacts crise** (Crisis contacts) tab gives each contact's name, role and phone number. The label **24h/24** (24/7) marks the contacts you can reach at any time.
4. The **Ressources** (Resources) tab shows where each backup resource is located and whether it is **Disponible** (Available) or **Indisponible** (Unavailable).
5. At the bottom of the window, click **Lancer un test** (Run a test) or **Activer la cellule de crise** (Activate the crisis team).

Check past tests

1. Open the **Historique des tests** (Test history) tab.
2. Each test shows its result (**Réussi** (Passed), **Échoué** (Failed), **Partial**, **Planifié** (Scheduled)), its type (**Test grandeur nature** (Full-scale test), **Simulation**, **Exercice sur table** (Tabletop exercise)) and its score out of 100.
3. For a completed test, you see the **Durée** (Duration), the number of **Participants**, the **RTO atteint** (RTO achieved), the **RPO atteint** (RPO achieved) and the **Points d'amélioration identifiés** (Areas for improvement identified).

Good to know

- The **Procédures** (Procedures) tab lists the recovery procedures: area, version, number of steps, owner, last update date and status (**Validée** (Approved), **Draft**, **En révision** (Under review), **Obsolète** (Obsolete)).
- The readiness score is shown in green from 80, in orange from 60 to 79, and in red below that.

Incidents

Menu : Quality, CSR & risk > Incidents · Included from the Enterprise plan

What this module is for

The **Incidents & Tickets SAV** (Incidents & After-sales tickets) module records the requests and incidents reported by your clients, then tracks how they are handled until they are resolved. It checks that service deadlines (SLA) are met and manages escalation to higher levels. It is designed for after-sales service teams and their managers.

What you see on screen

- **En-tête** (Header): the **Nouveau ticket** (New ticket) button.

- **Bandeau rouge** (Red banner): it lists unresolved critical incidents. Click one to open it.
- **Cinq compteurs** (Five counters): **Total tickets**, **Ouverts** (Open), **En cours** (In progress), **Escaladés** (Escalated) and **SLA dépassés** (SLA breached).
- **Trois indicateurs** (Three indicators): **Temps de réponse moyen** (Average response time), **Temps de résolution moyen** (Average resolution time) and **Satisfaction client** (Customer satisfaction, rated out of 5), compared with last month.
- **Filtres** (Filters): the search box **Rechercher un ticket, client...** (Search ticket, client...) (title, client or ticket number), then **Tous les statuts** (All statuses) and **Toutes priorités** (All priorities). The number of results appears on the right.
- **Liste des tickets** (Ticket list): number, priority, status, escalation level (L1, L2), SLA badge, creation date, client, category, assignee and tags.

Common tasks

Create a ticket

1. Click **Nouveau ticket** (New ticket).
2. Enter the **Titre de l'incident** (Incident title).
3. Choose the **Priorité** (Priority) (**Critique** (Critical), **Haute** (High), **Moyenne** (Medium), **Basse** (Low)) and the **Category** (**Hardware**, **Logiciel** (Software), **Réseau** (Network), **Invoicing**, **Livraison** (Delivery), **Qualité** (Quality)).
4. Enter the **Client** and write the **Description** (500 characters maximum).
5. Confirm with **Créer le ticket** (Create ticket), or click **Cancel**.

Handle a ticket

1. Click a ticket in the list.
2. The **Vue d'ensemble** (Overview) tab shows the **Description**, the person and team the ticket is **Assigné à** (Assigned to), the **Category**, the **Créé le** (Created on) date, the **Niveau d'escalade** (Escalation level), the **Tags** and any **Satisfaction client** (Customer satisfaction).
3. The **Chronologie** (Timeline) tab traces the events: creation, assignment, updates, escalations, comments and resolution.
4. Click **Marquer résolu** (Mark as resolved) when the problem is fixed, or **Escalader N1** (Escalate L1) / **Escalader N2** (Escalate L2) to pass the ticket to the next level.
5. Close with **Close**.

Check that deadlines are met

1. In the ticket details, open the **SLA & Escalade** (SLA & Escalation) tab.
2. Check the **Statut SLA** (SLA status) (**SLA respecté** (SLA met) or **SLA dépassé** (SLA breached)), the **Échéance SLA** (SLA deadline), the **Temps de réponse** (Response time) and the **Temps de résolution** (Resolution time).

3. The **Règles SLA par priorité** (SLA rules by priority) table shows the planned response and resolution times. The row matching the ticket is highlighted.

Good to know

- In the list, the SLA badge shows **SLA OK**, **SLA dans ... min** (SLA in ... min, less than an hour left) or **SLA dépassé** (SLA breached).
- The **Marquer résolu** (Mark as resolved) button disappears once the ticket is resolved or closed. Escalation stops at level L2.
- A ticket can be linked to a non-conformity from the Quality Non-Conformities module.

Transformation & projects

Digital transformation

Menu : Transformation & projects › Digital transformation · Included from the Enterprise plan

What this module is for

The **Digital Transformation** module manages your IT projects: progress, budget, return on investment (ROI) and risks. It also gives an overview of the company's digital maturity. It is designed for management, the IT department and project managers.

What you see on screen

- **En-tête** (Header): the **Nouveau projet** (New project) button.
- **Score de maturité digitale** (Digital maturity score): a score out of 100, together with the **Automatisation** (Automation) and **Gouvernance data** (Data governance) rates and the **ROI projeté** (Projected ROI).
- **Quatre indicateurs** (Four indicators): **Projets totaux** (Total projects, including those on track), **À risque** (At risk, and completed), **Budget total** (Total budget, and amount spent) and **Avancement moyen** (Average progress).
- **Onglets** (Tabs): **Projets IT** (IT projects), **Roadmap** and **ROI & Budget**.

Common tasks

Track projects

1. In the **Projets IT** (IT projects) tab, search for a project with **Rechercher un projet...** (Search for a project...).
2. Filter with **Tous les statuts** (All statuses): **En bonne voie** (On track), **À risque** (At risk), **Overdue**, **Terminé** (Completed), **Planification** (Planning), **Cancelled**.
3. Each card shows the category, project manager, status, **Avancement** (Progress), **Budget**, the share **Consommé** (Used), the **ROI projeté** (Projected ROI) and the number of high risks.

Review a project

1. Click a card.
2. The **Vue d'ensemble** (Overview) tab shows the **Avancement** (Progress), **Budget consommé** (Budget used), **ROI projeté** (Projected ROI, and current ROI), **Chef de projet**

(Project manager), **Équipe** (Team), the **Start date** and **Fin prévue** (Planned end) dates, and the **Objectifs** (Objectives).

3. The **Jalons** (Milestones) tab shows the timeline of steps. A green dot marks a milestone reached.
4. The **KPIs & ROI** tab lists the project's indicators and their trend (**En hausse** (Rising), **En baisse** (Falling), **Stable**), then the **Analyse ROI** (ROI analysis): **Budget total** (Total budget), **Dépensé** (Spent), **ROI actuel** (Current ROI) and **ROI projeté** (Projected ROI).
5. The **Risques** (Risks) tab lists the risks with their level (**Faible** (Low), **Moyen** (Medium), **Élevé** (High)).

View the roadmap and budgets

1. Open the **Roadmap** tab to see the planned work, quarter by quarter.
2. Open the **ROI & Budget** tab to compare the **ROI par projet** (ROI by project).
3. At the bottom, you find the **Budget total alloué** (Total budget allocated), the amount **Dépensé à ce jour** (Spent to date, as a % of budget) and the **ROI moyen projeté** (Average projected ROI) across the whole portfolio.

Good to know

- On a project card, the **Consommé** (Used) percentage turns red when the budget spent is more than 10 points ahead of progress.
- Project categories: **Infrastructure**, **Data & BI**, **Automatisation** (Automation), **UX / Design**, **Cybersécurité** (Cybersecurity), **Intégration** (Integration), **Intelligence Artificielle** (Artificial Intelligence).

Innovation hub

Menu : Transformation & projects > Innovation hub · Included from the Enterprise plan

What this module is for

The **Innovation & Ideas Hub** is the company's suggestion box. Employees propose improvements, which are then rated, prioritised and approved step by step. The module is for all employees, as well as the managers who decide on the ideas.

What you see on screen

- **En-tête** (Header): the **Soumettre une idée** (Submit an idea) button.
- **Quatre indicateurs** (Four indicators): **Idées soumises** (Ideas submitted, including this month), **ROI estimé total** (Total estimated ROI, with the investment), **Score moyen** (Average score, out of 10) and **Taux participation** (Participation rate) of employees.

- **Pipeline d'innovation** (Innovation pipeline): the number of ideas **Soumise** (Submitted), **En revue** (Under review), **Approuvée** (Approved), **En développement** (In development) and **Lancée** (Launched). Click a stage to filter the list.
- **Onglets** (Tabs): **Boîte à idées** (Suggestion box), **Roadmap** and **Statistics**.

Common tasks

Propose an idea

1. Click **Soumettre une idée** (Submit an idea).
2. Enter the **Titre de l'idée** (Idea title).
3. Write the **Description**: the problem solved and the expected benefits. A counter shows the number of characters used, up to 500.
4. Choose the **Category**: **Product**, **Processus** (Process), **Client**, **Technologie** (Technology), **CSR** or **RH** (HR).
5. Confirm with **Soumettre** (Submit), or click **Cancel**.

Browse and sort ideas

1. In **Boîte à idées** (Suggestion box), click a status (**All**, **Soumise** (Submitted), **En revue** (Under review), **Approuvée** (Approved), **En développement** (In development), **Lancée** (Launched), **Rejetée** (Rejected)).
2. Filter with **Toutes catégories** (All categories).
3. Choose a sort order: **Trier par priorité** (Sort by priority), **Trier par votes** (Sort by votes), **Trier par ROI** (Sort by ROI) or **Trier par date** (Sort by date).
4. Each card shows the status, category, impact, **Score**, **Votes**, estimated **ROI**, **Avancement** (Progress), author and submission date.

Assess an idea

1. Click an idea.
2. At the top of the window are the **Score**, **Votes**, **ROI net** (Net ROI) and **Priorité** (Priority).
3. The **Détails** (Details) tab shows the **Description**, **ROI estimé** (Estimated ROI), **Coût estimé** (Estimated cost), **Délai** (Lead time), **Impact**, **Complexité** (Complexity), **Sponsor**, progress and **Supporters**.
4. The **Workflow validation** (Approval workflow) tab traces the stages completed, with their date, author and comments.
5. For an idea marked **Soumise** (Submitted) or **En revue** (Under review), click **Approuver** (Approve) or **Rejeter** (Reject).

Good to know

- The **ROI net** (Net ROI) is the estimated ROI minus the estimated cost.

- The **Roadmap** tab spreads the selected ideas across quarters. Click an idea to open it.
- The **Statistics** tab shows the **Répartition par statut** (Breakdown by status), the **Top idées par ROI** (Top ideas by ROI, the first five) and the **Répartition par catégorie** (Breakdown by category) with cumulative ROI.
- Impact levels: **Faible** (Low), **Moyen** (Medium), **Élevé** (High), **Transformationnel** (Transformational).

Cross-functional projects

Menu : Transformation & projects › Cross-functional projects · Included from the Enterprise plan

What this module is for

The **Cross-functional Projects** module tracks projects that involve several departments: schedule, budget split by department, assigned resources and indicators. It is designed for project managers, department heads and senior management.

What you see on screen

- **En-tête** (Header): the **Nouveau projet** (New project) button.
- **Portefeuille projets transverses** (Cross-functional project portfolio): the number of active, on-track and at-risk projects, the **Avancement moyen** (Average progress), the **Budget consommé** (Budget used) and the **Ressources allouées** (Resources allocated).
- **Quatre indicateurs** (Four indicators): **Projets actifs** (Active projects), **Budget total** (Total budget, and amount spent), **Ressources** (Resources, staff involved) and **Jalons en retard** (Late milestones).
- **Onglets** (Tabs): **Projets** (Projects), **Vue portefeuille** (Portfolio view) and **Ressources** (Resources).

Common tasks

Track projects

1. In the **Projets** (Projects) tab, click a status to filter: **All**, **En bonne voie** (On track), **À risque** (At risk), **Overdue**, **Terminé** (Completed), **Planification** (Planning).
2. Each card shows the reference, status, priority, progress, **Budget** and the share used. It also shows the **Jalons** (Milestones) reached, the **Équipe** (Team), the **Fin prévue** (Planned end), the departments involved and the project manager.

Review a project

1. Click a card.

2. At the top of the window you see the **Avancement** (Progress), the **Budget consommé** (Budget used), and the number of **Ressources** (Resources) and **Départements** (Departments).
3. The **Gantt** tab shows the **Diagramme de Gantt** (Gantt chart) over the year, week by week. Each task shows its owner and progress. The colours match the statuses **À faire** (To do), **En cours** (In progress), **Terminé** (Completed) and **Bloqué** (Blocked), and a marker flags the **Tâches critiques** (Critical tasks). The **Jalons** (Milestones) are listed below.
4. The **Budget** tab shows the **Budget total** (Total budget), the amount **Dépensé** (Spent), the **Restant** (Remaining), then the **Budget par département** (Budget by department): amounts **Dépensé** (Spent), **Engagé** (Committed) and allocated.
5. The **Ressources** (Resources) tab lists the people assigned, with their role, department and **allocation** (allocation) percentage.
6. The **KPIs** tab compares each indicator with its **Cible** (Target) and lists the **Risques projet** (Project risks) (**Élevé** (High), **Moyen** (Medium), **Faible** (Low)).

Spot overloaded staff

1. Open the page's **Ressources** (Resources) tab.
2. The **Charge des ressources — Vue consolidée** (Resource workload — Consolidated view) adds up each person's allocation across all their projects.
3. Above 100%, the label **Surchargé** (Overloaded) appears.

Good to know

- The **Vue portefeuille** (Portfolio view) shows the **Répartition budgétaire du portefeuille** (Portfolio budget breakdown) (spent / budget per project) and a grid of projects with status, progress, project manager and end date. Click a project to open it.
- Possible statuses: **En bonne voie** (On track), **À risque** (At risk), **Overdue**, **Terminé** (Completed), **En pause** (On hold), **Planification** (Planning).

Competitive watch

Menu : Transformation & projects > Competitive watch · Included from the Enterprise plan

What this module is for

Competitive Intelligence tracks your main competitors: market share, performance comparison and alerts on their moves (prices, products, acquisitions, partnerships, and so on). It is designed for senior management, marketing and sales teams.

What you see on screen

- **En-tête** (Header): the **Ajouter concurrent** (Add competitor) button.

- **Quatre indicateurs** (Four indicators): **Notre part de marché** (Our market share, with the change since last year), **Alertes non lues** (Unread alerts, with the **New** badge), **Concurrents suivis** (Competitors tracked) and **Position benchmark** (Benchmark position, with the customer satisfaction gap compared with the leader).
- **Onglets** (Tabs): **Alerts** (with the number of unread alerts), **Parts de marché** (Market share), **Benchmarking** and **Concurrents** (Competitors).

Common tasks

Handle competitive alerts

1. In the **Alerts** tab, filter by category: **All**, **Price**, **Product**, **Marché** (Market), **Acquisition**, **Partenariat** (Partnership), **Réglementaire** (Regulatory), **Talent**.
2. Each alert shows its level (**Critique** (Critical), **Attention** (Warning), **Info**), its category, the competitor, the source and the date.
3. Click **View details** to read the description, the **Impact** and the **Action recommandée** (Recommended action). Click **Collapse** to fold the alert.
4. Click **Marquer comme lu** (Mark as read): the unread alert counter goes down.

Analyse the market

1. Open the **Parts de marché** (Market share) tab.
2. The ring chart shows how the market is split between your company and your competitors.
3. The list **Évolution des parts de marché** (Market share trend) shows each player's share and its change. Your row is labelled **Nous** (Us).

Compare yourself with competitors

1. Open the **Benchmarking** tab.
2. For each criterion, compare your value and your score (**Nous** (Us)) with those of each competitor.

Study a competitor

1. Open the **Concurrents** (Competitors) tab. Each card shows the threat level, country, revenue, headcount, market share and scores compared with yours.
2. Click a card.
3. The **Analyse** (Analysis) tab lists the **Forces** (Strengths), **Faiblesses** (Weaknesses) and **Scores comparatifs** (Comparative scores) (**Eux** (Them) / **Nous** (Us)).
4. The **Benchmark** tab shows, criterion by criterion, who performs better.
5. The **Mouvements récents** (Recent moves) tab lists the competitor's latest actions and offers a **Recommandation** (Recommendation).

Good to know

- Threat levels: **Faible** (Low), **Modérée** (Moderate), **Élevée** (High), **Critique** (Critical).
- Marking an alert as read is not kept after the page reloads.

Administration

Settings

Menu : Administration > Settings · Included from the Starter plan

What this module is for

Paramètres système (System settings) brings together the administration of the application: general configuration, appearance, users, roles, alerts, sectors and the audit log. This module is for the administrators of your organisation.

What you see on screen

- **Left menu:** eight tabs, each with a short description. Below the menu, a box shows the application version.
- **Configuration:** a sub-menu with seven sections:
 - **Business sector;**
 - **Formule & modules** (Plan & modules);
 - **Identité visuelle** (Visual identity, the logo);
 - **Brand palette;**
 - **Paramètres applicatifs** (Application settings: name, language, currency, time zone);
 - **Affichage** (Display: density, date format);
 - **Sécurité & sessions** (Security & sessions: time before sign-out, notifications, summary).
- **Brand palette:** the logo green, the **Gamme dérivée du logo** (Range derived from the logo), an **Aperçu avant application** (Preview before applying) and a **Aperçu en direct sur l'application** (Live preview on the application) switch.
- **Users:** the **Total**, **Active**, **Admins** and **Pending** counters, then three sub-tabs: **Users**, **Invitations** and **Historique** (History).
- **Rôles & Accès** (Roles & Access): your **Forfait actif** (Active plan) and two views. **Accès par formule** (Access by plan) shows the table of modules included in each plan. **Rôles utilisateurs** (User roles) details the rights of the **Administrator**, the **Manager** and the **Operator**.
- **Seuils d'alerte** (Alert thresholds): four blocks (**Stock alerts**, **Alertes licences** (Licence alerts), **Alertes transferts** (Transfer alerts), **Résumé et rapports automatiques** (Summary and automatic reports)), each with its own settings.
- **Règles d'alertes** (Alert rules): the list of your custom rules with their **Condition**, **Threshold**, **Fréquence** (Frequency) and number of **Déclenchements** (Triggers).

- **Secteurs** (Sectors): one card per sector with its units of measure, traceability options and an on/off switch.
- **Journal d'audit** (Audit log): the **Journal des actions récentes** (Log of recent actions: action, author, detail, date).

Common tasks

Set up the general configuration

1. Open **Configuration** and choose a section, for example **Paramètres applicatifs** (Application settings).
2. Change the settings you need: **Langue par défaut** (Default language), **Devise principale** (Main currency), **Fuseau horaire** (Time zone), **Format de date** (Date format), logo, and so on.
3. Click **Enregistrer la configuration** (Save configuration). The message "Configuration enregistrée et appliquée." (Configuration saved and applied.) appears.
4. To go back to the original values, click **Réinitialiser** (Reset).

Invite a user

1. Open **Users**, then click **Inviter un utilisateur** (Invite a user).
2. Enter the **Email address**.
3. Choose the **Rôle à attribuer** (Role to assign).
4. Tick the **Sites accessibles** (Accessible sites) and the **Secteurs accessibles** (Accessible sectors).
5. Click **Envoyer l'invitation** (Send invitation).
6. Track the invitation in the **Invitations** sub-tab. You can **Renvoyer** (Resend) or **Révoquer** (Revoke) it.

Create an alert rule

1. Open **Règles d'alertes** (Alert rules), then click **Nouvelle règle** (New rule).
2. Enter the **Nom de la règle** (Rule name, required) and a **Description**.
3. Choose the **Type**, the **Condition**, the **Threshold**, the **Fréquence** (Frequency: **Real time**, **Quotidien** (Daily), **Hebdomadaire** (Weekly)) and the **Sévérité** (Severity).
4. Add **Destinataires** (Recipients) and select the **Sites concernés** (Sites concerned).
5. Click **Créer la règle** (Create rule).

Change the application colour

1. Open **Brand palette**.
2. Choose a shade with the **Pipette** (Colour picker), enter its code, or click **Redétecter** (Detect again).

3. Turn on **Aperçu en direct sur l'application** (Live preview on the application) to try the colour.
4. Click **Appliquer la palette** (Apply palette), or **Revenir au vert d'origine** (Back to the original green).

Good to know

- For an online subscriber account, the plan shown in **Formule & modules** (Plan & modules) comes from your subscription and cannot be changed here. The message "Formule de votre abonnement SaaS..." (Your SaaS subscription plan...) invites you to contact us.
- Modules not included in your plan stay visible in the menu with a padlock.
- The role limits what a user can do. The plan limits which modules are available.
- An invitation expires after 7 days.
- Only French, English and Arabic are fully translated.
- Alert and error colours do not change with the palette.
- An alert rule can be turned on, turned off, edited (pencil) or deleted (bin, then **Confirm**).