SlotsEyes Management

Comprehensive user guide

Complete guide to set up and operate your SlotsEyes platform end to end: access, daily operations, warehouse and master data configuration, administration and analytics.

Table of contents

Welcome to SlotsEyes Management

SlotsEyes Management is the platform your team uses to run the warehouse day to day: bookings, orders, docks, users and reports — all in a single dashboard.

It runs in any browser, with nothing to install. Every user signs in with their email and password, and only sees the sections and data they have permission for.

How to use this manual

The manual is split into five blocks meant to be followed in order the first time you set the platform up. It also works as a daily reference when everything is already running:

1. **Access and navigation** — how to log in and move around the app.
2. **Daily operations** — KPI dashboard and booking management.
3. **Warehouse and master data configuration** — everything you need to create *before* you start operating: dock types, goods, vehicles, resources, forms, documents, warehouses and schedules.
4. **Administration** — users and devices.
5. **Analytics** — reports and event log.

Conventions

- The **blue** button is the primary action (save, create, validate…).
- The **red** button is always destructive (cancel, delete).
- The **status colours** are consistent across the platform: green = confirmed/active, orange = changes/warning, red = pending/error.
- The **Act.** column toggle enables/disables an entry without deleting it, keeping its history.
- To the right of each step you will find the actual screenshot of the screen.

About the screenshots

The screenshots in this manual were captured from the Spanish UI of the application. The interface itself is fully translated: every label you see (“Lista de almacenes”, “Tipos de muelle”, “Listado de empleados”…) appears in your language when you sign in with an English profile.

Block 1

Access and navigation

1. Sign in

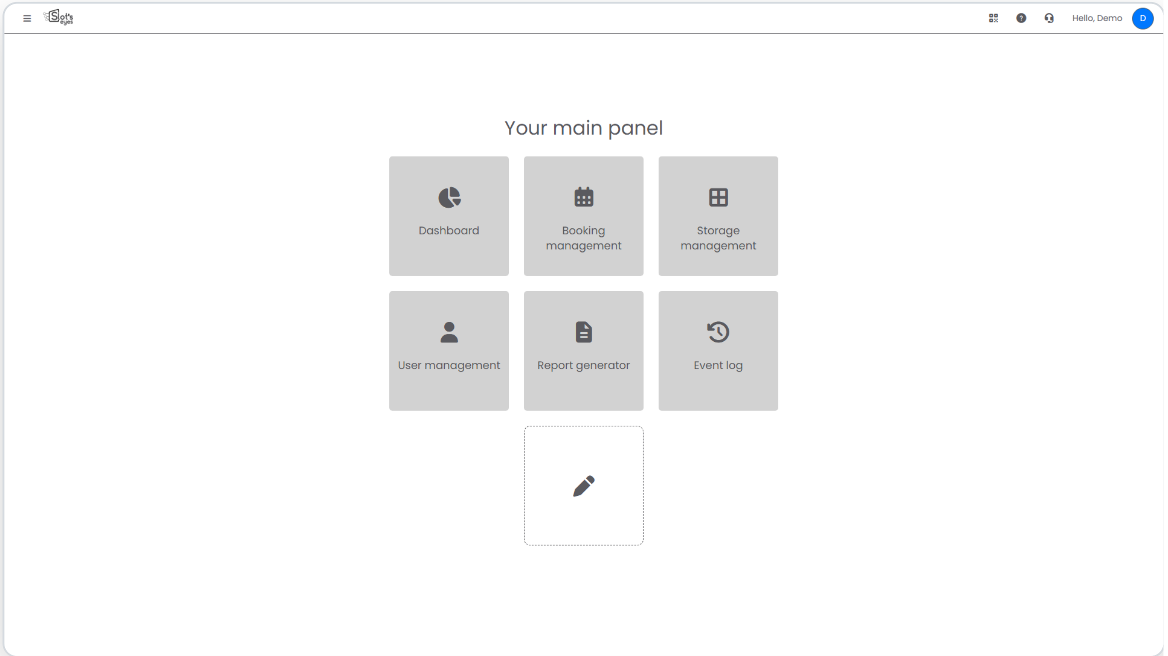
What is this screen?

The first screen when you open SlotsEyes Management. You identify yourself with your email and password, or with your corporate Microsoft or Google account.

How to use it

1. Type your **email address**.
2. Type your **password**.
3. Click **“Sign in”**.
4. If you forgot your password, click *“Recover password”* and we will email you a reset link.
5. You can also use **“Sign in with Microsoft”** or **“Sign in with Google”** if your organisation has them enabled.

> **Good to know:** If your account has access to a single company, you go straight in. If you have multiple, we ask you to pick one first.



Actual screenshot

2. Portal

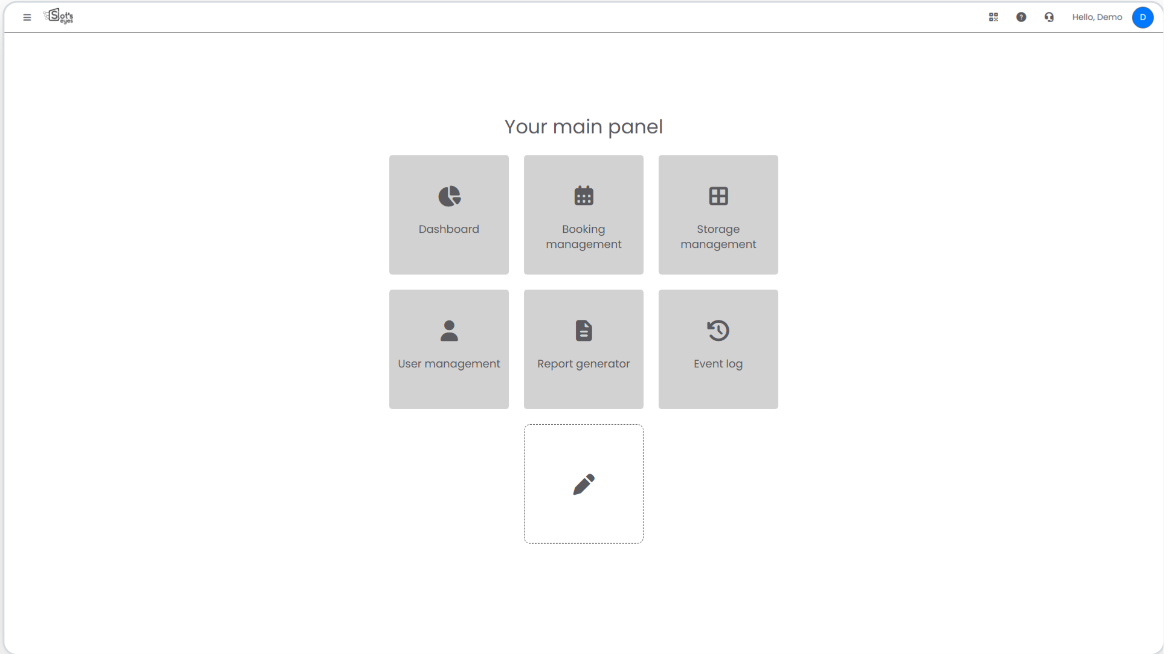
What is this screen?

Once you are in you reach the Portal: a grid of shortcuts to every module. Each user only sees the tiles they have permission for, and can hide or add tiles depending on their day to day.

How to use it

1. Click any tile to enter the corresponding module.
2. Use the tile with the ✏ **(edit)** icon and dashed border to customise the portal: add or remove shortcuts.
3. In the top-left corner you have ☰ to open the side menu with every section.
4. In the top-right corner you have the QR reader, help, support and your profile.

> **Good to know:** The portal is personal. Your customisations do not affect anyone else on the team.



Actual screenshot

3. Side menu

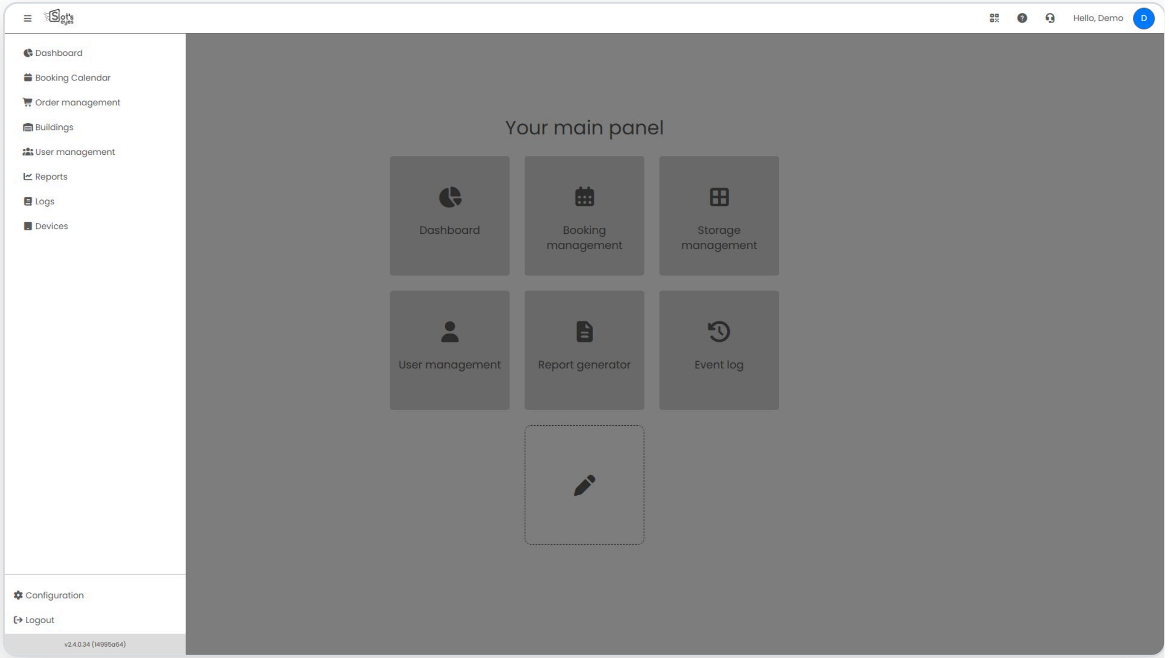
What is this screen?

Main navigation of the app. Available from any screen by clicking the ☰ icon in the top-left corner.

How to use it

1. Click ☰ to open the menu.
2. Each entry in the menu opens a different section.
3. At the bottom you find **Settings**, **Switch company** (if you work with several) and **Sign out**.
4. In the bottom-left corner the version of the app is displayed — useful when reporting an incident.
5. To close the menu, click outside it or click ☰ again.

> **Good to know:** The menu only shows the sections your role has permission for. If you are missing one, contact your company administrator.



Actual screenshot

Block 2

Daily operations

4. Dashboard

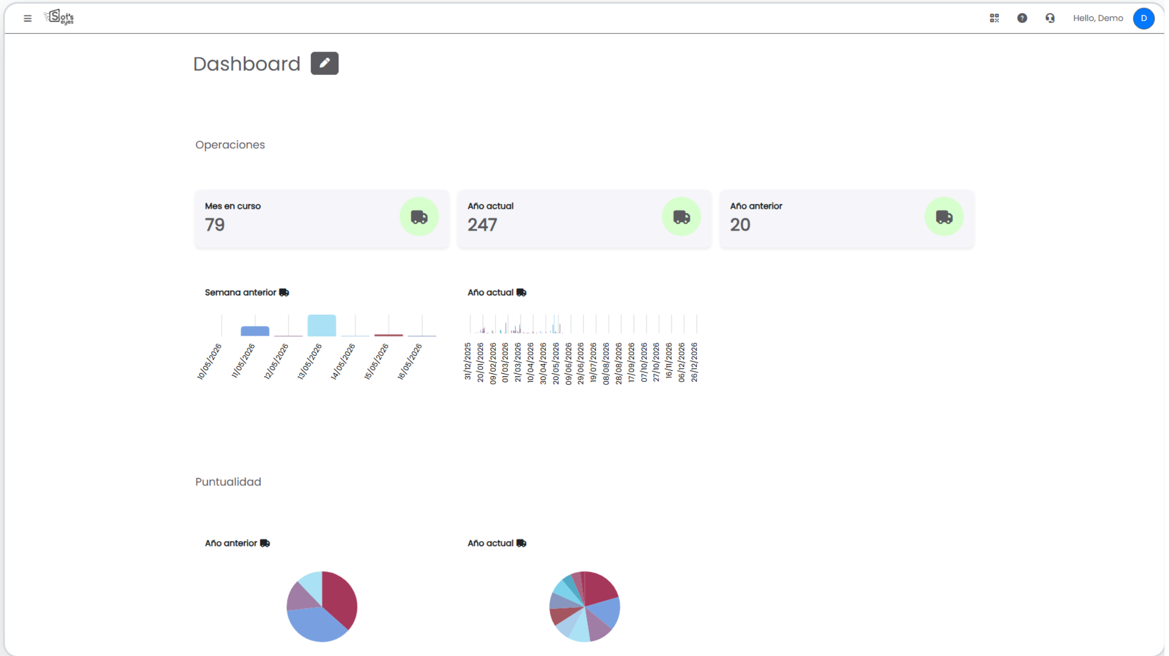
What is this screen?

Sums up the current state of the warehouse in real time with a customisable set of widgets: counters, bar charts, gauges and heatmaps. Every user can customise their own Dashboard.

How to use it

1. Sections (**Operations**, **Punctuality**...) group related widgets.
2. The **counters** at the top show the key KPIs you chose: current month, current year, previous year.
3. The **bar charts** compare periods (previous week vs current year, etc.).
4. The **pie charts** show the distribution of an indicator.
5. Click the ✏ **(edit)** button next to the title *Dashboard* to enter edit mode and add, remove or reorder widgets.
6. Drag and drop widgets to reorder them. Click ✓ when done.

> **Good to know:** Available widgets depend on the user permissions and the company configuration.



Actual screenshot

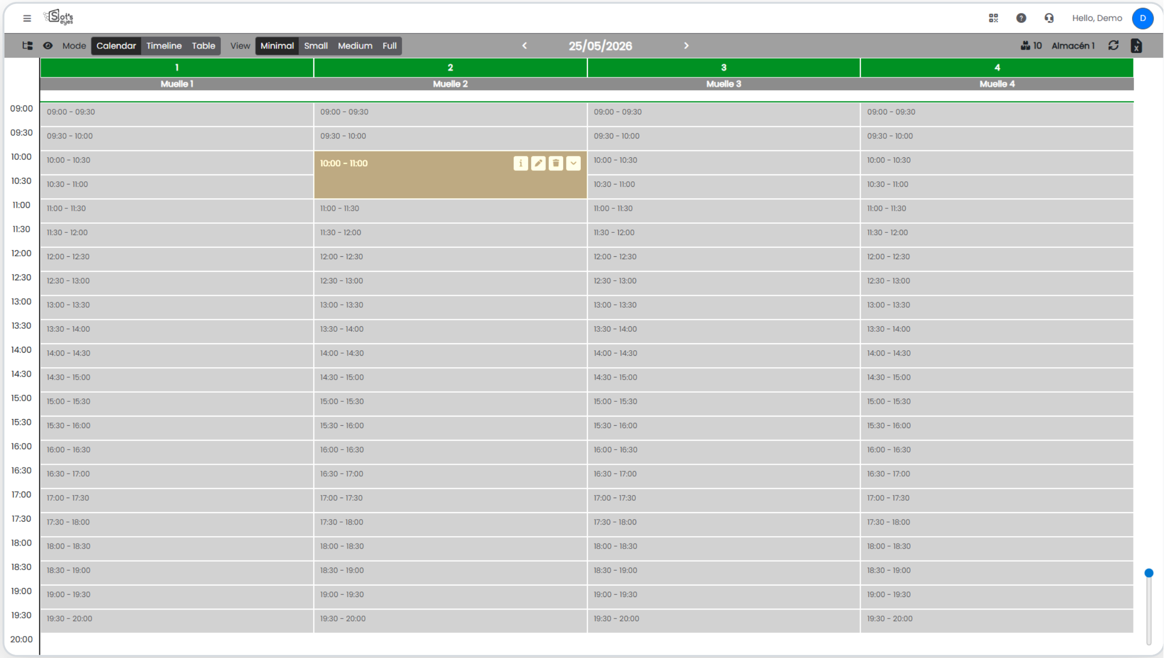
5. Booking management — calendar view

What is this screen?

Main view of the booking module. Shows the selected day with docks as columns and time slots as rows. Lets you see at a glance which docks are busy, free or paused.

How to use it

1. In the top bar you can switch between **Calendar**, **Timeline** (horizontal) and **Table**.
2. Use the **View** control (Minimal / Reduced / Medium / Full) to show more or less detail per booking.
3. Switch days with the ‹ › arrows or click the date to open the calendar.
4. To the right of the navbar you have the active **warehouse** selector and the day's quick indicators.
5. Existing bookings are painted with a status colour and reveal action icons on hover (info, edit, delete, expand).
6. Click an empty slot to create a new booking in that gap.
7. Click the ↻ button at the top right to refresh the calendar.



Actual screenshot

6. Booking form

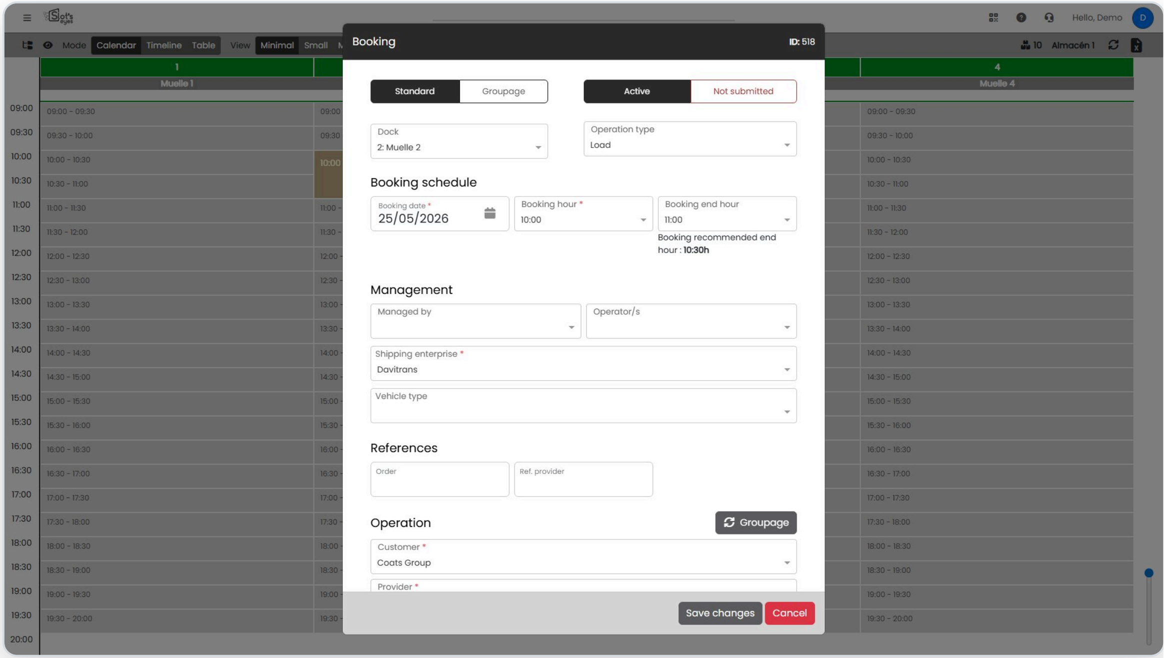
What is this screen?

When you click the •▬ icon of a booking (or create a new one) this modal opens with every field of the booking grouped into blocks.

How to use it

1. The blue header shows the **booking number (ID)**.
2. The top tabs change the **type** (Standard / Multi-operation) and the **presentation status** (Active / No-show).
3. In **Dock** and **Operation type** you define where and what is done.
4. In **Booking schedule** you set the date, start time and end time. The system suggests a *recommended end time*.
5. In **Administration** you assign the manager, the operators, the transport company and the vehicle type.
6. In **References** you add the order code and supplier reference.
7. In **Operation** you pick the customer and supplier, and below you detail the actual goods.
8. When everything is correct, click **“Save changes”**. To discard, click **“Cancel”**.

> **Good to know:** The visible tabs and fields may vary depending on your company and the user role.



Actual screenshot

Block 3

Warehouse and master data configuration

Recommended order

Before operating with bookings you need to configure the **pieces** each booking is built from. Do it in this order to avoid having to go back:

1. **Dock types** and **transport units** — the basis for everything else.
2. **Resources** shared by the warehouse (forklifts, operators, pallet trucks…).
3. **Locations**, **goods groups** and **goods types**.
4. **Vehicle types** accepted at your docks.
5. If you log incidents, **groups** and **types of incident**.
6. **Forms** (for inspections and records) and **documents** required from the carrier.
7. **Recurring bookings** if you have fixed cycles (weekly/monthly).
8. Create your **warehouses** with their docks and **schedules**.

Every configuration screen follows the same pattern: a *table* with search, an active/all filter and a **+** button to create a new entry. The ✏️ icon opens the row for editing; 🕒 shows linked history or schedule; the **Act.** switch enables/disables without deleting.

7. Warehouse list

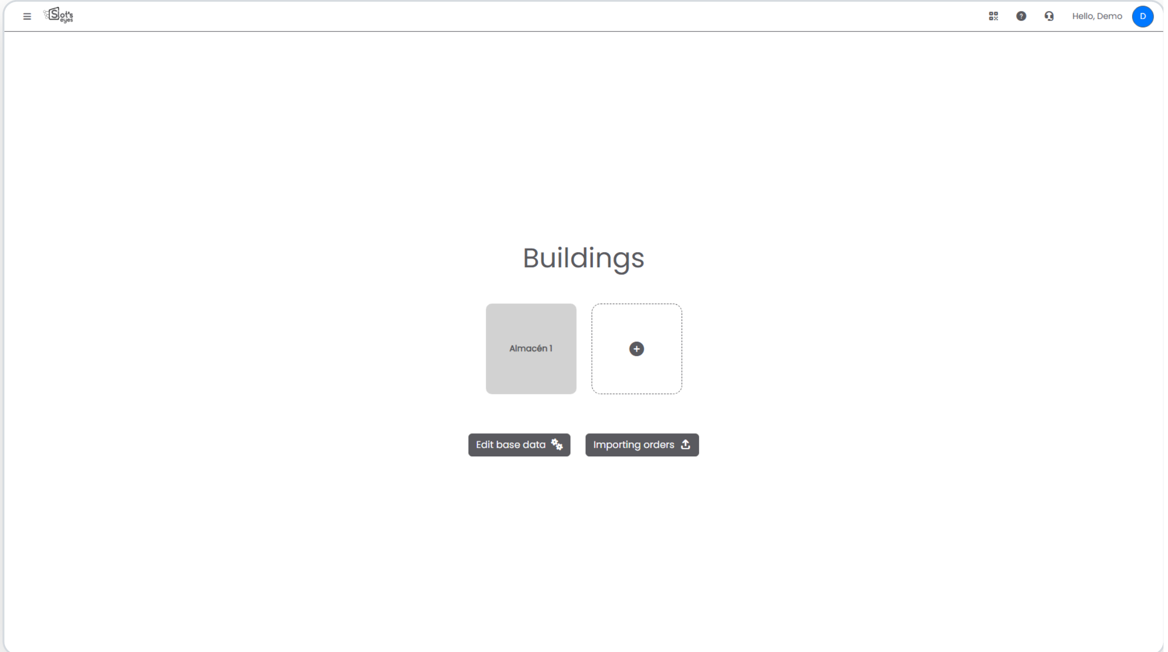
What is this screen?

Entry screen of the management module. Every warehouse appears as a tile, and from here you reach its docks, schedules and the general parameters they all share.

How to use it

1. Click a **warehouse** tile to enter its detail.
2. Click the tile with **+** to create a new one.
3. Click **“General parameters editor”** to access the shared screen for dock types, goods, vehicles, etc.
4. Click **“Order import”** to upload a batch of orders from Excel.

> **Good to know:** General parameters are shared across every warehouse in the company: changing one affects every new booking in every warehouse.



Actual screenshot

8. Warehouse detail — Docks

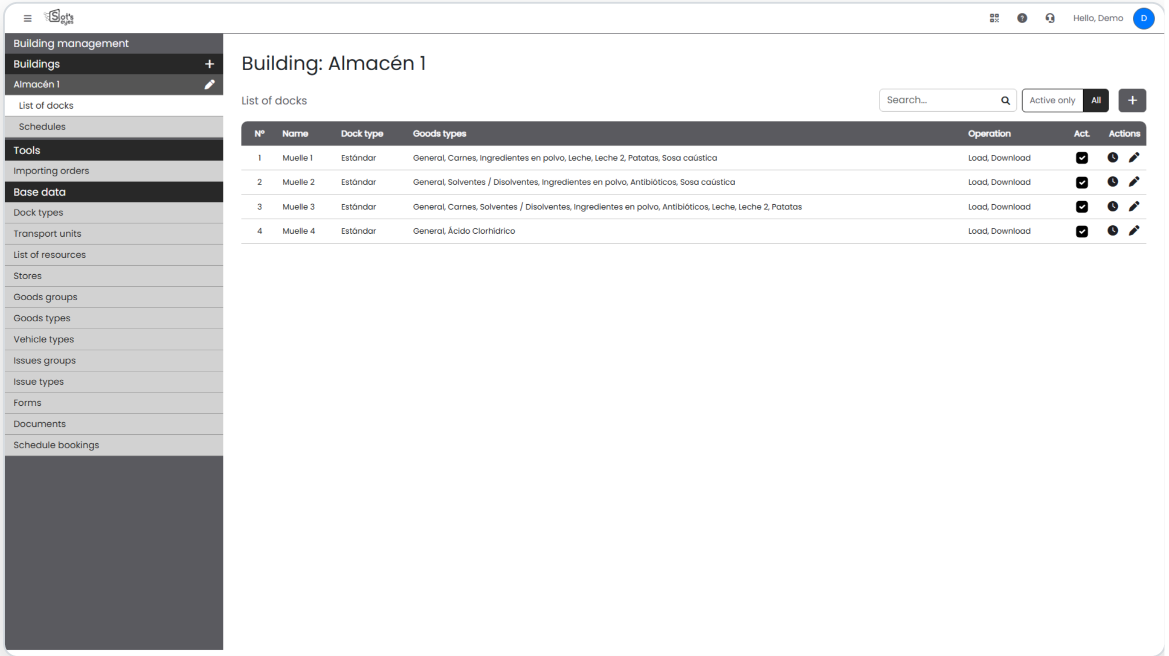
What is this screen?

Inside a warehouse the first thing you see is the list of its docks, with type, accepted goods and operation (loading/unloading).

How to use it

1. The left sidebar lists every warehouse you have; click any to switch.
2. Below the active warehouse you find its two sections: **Dock list** and **Schedules**.
3. Each row in the table is a dock with its number, name, type, accepted goods and operation.
4. Click **+** to create a dock; ✏ on a row to edit it; 🕓 opens its capacity history.
5. At the bottom of the sidebar are the **general parameters**, covered in the following sections.

> **Good to know:** Dock types and goods types must exist before you can create a dock — they are required fields.



Actual screenshot

9. Schedule basics

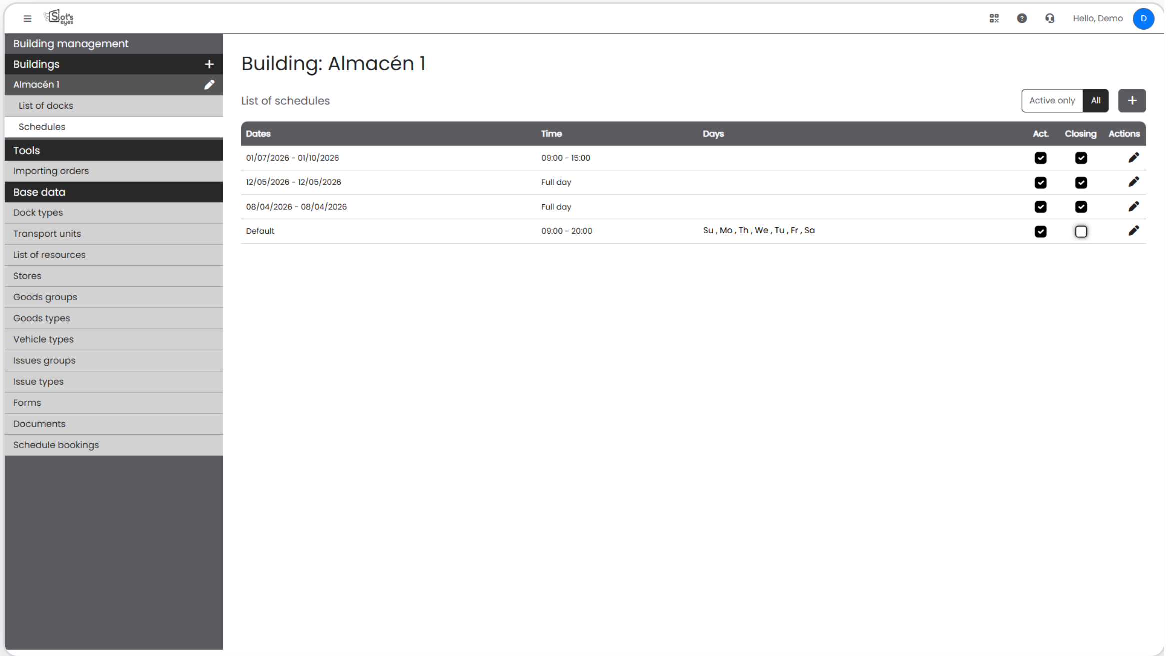
What is this screen?

Every warehouse has its own calendar: a default schedule plus specific exceptions and special periods. Defines when bookings can be made and when the warehouse is closed.

How to use it

1. Each row is a schedule with its **date** range, **time** range, the **weekdays** it applies to and two switches: **Act.** (active) and **Closure** (mark the period as a closure).
2. The **"Default"** row is the base schedule; the rest are exceptions on top of it.
3. For a single closed day (holiday, vacation), add an entry with the same start and end date, mark the whole day or a slot, and activate **Closure**.
4. For a season with a reduced schedule, create an entry with the date range and the time slot that applies.
5. Click **+** to create; ✏ to edit.

> **Good to know:** Carriers will only see free slots within the active schedule. Closures are shown in striped grey on the calendar.



Actual screenshot

10. Dock types

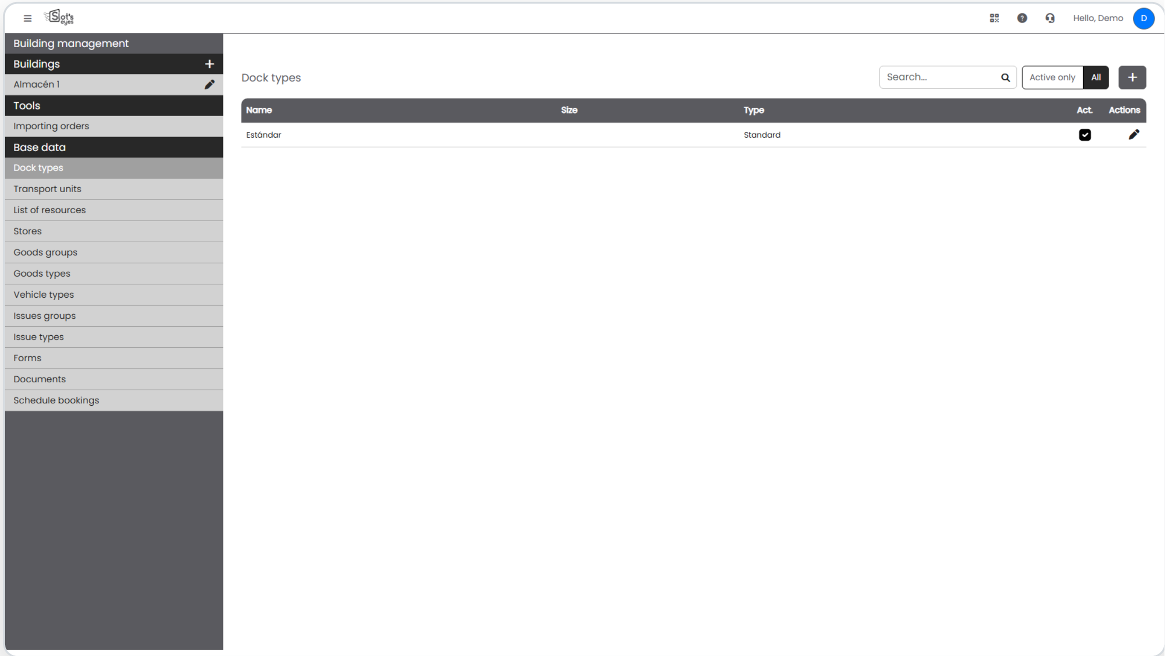
What is this screen?

Catalogue of dock types your company accepts. Each physical dock will be assigned to one of these types.

How to use it

1. Each row is a dock type with its name, size and category.
2. Click **+** to create a new type.
3. Click ✏ to edit a type; the **Act.** switch enables/disables.

> **Good to know:** If you only have one dock type (e.g. a single “Standard”), the factory default is enough. Types are useful to distinguish large/small, refrigerated, tanker etc.



Actual screenshot

11. Transport units

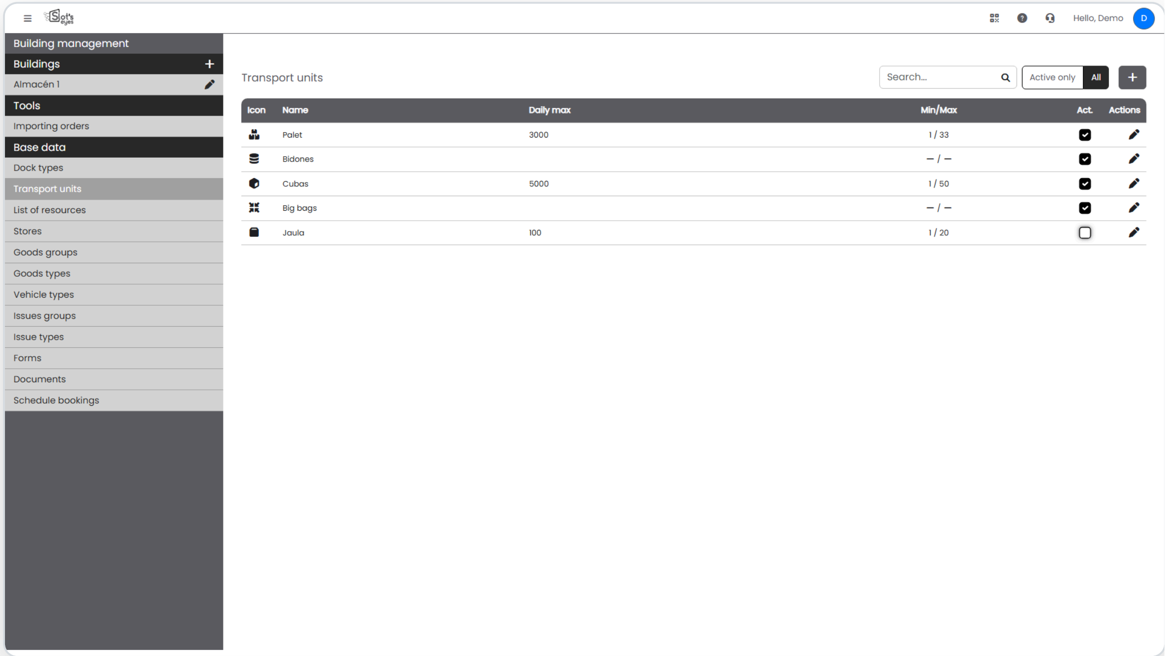
What is this screen?

Catalogue of units that goods are measured in: pallet, drum, IBC, big bag, cage... Each unit has an icon, a daily maximum per warehouse and a minimum/maximum range per booking.

How to use it

1. Each row shows **icon**, **name**, **daily max** and **min/max** range per booking.
2. Click **+** to create a unit: name, icon, max and min.
3. Click ✏ on a row to change it.

> **Good to know:** Transport units get linked later to goods types (e.g. “Solvents” ship in “Drums”).



Actual screenshot

12. Resources

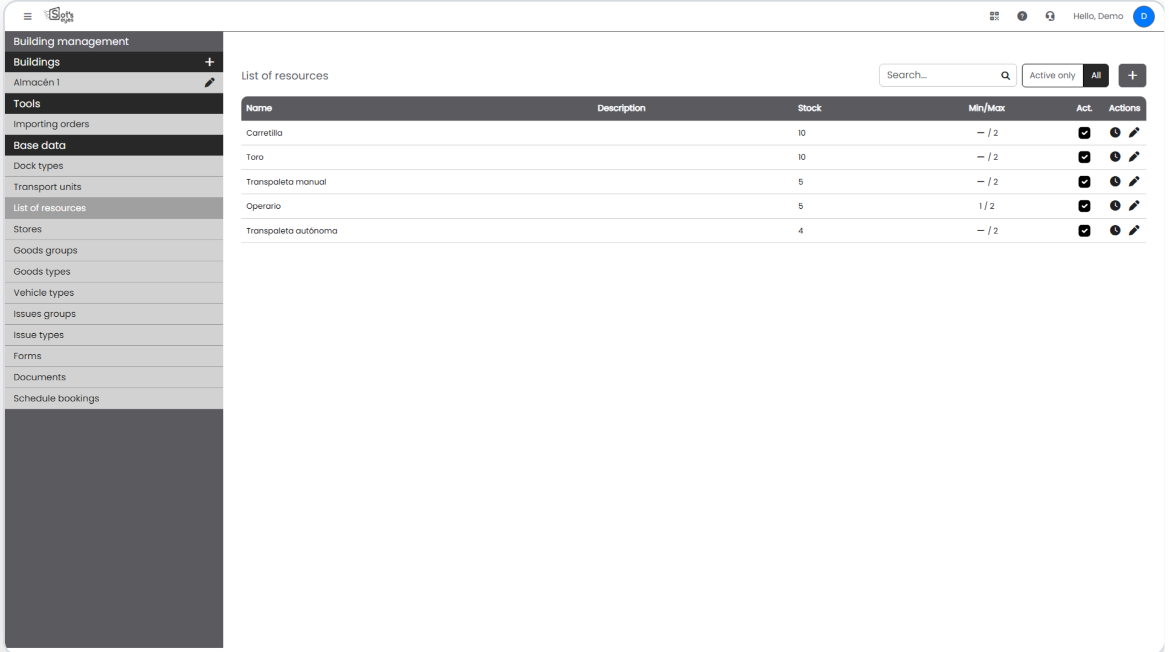
What is this screen?

Inventory of shared warehouse resources: forklifts, hand trucks, pallet trucks, operators... Each booking can request how many of each it needs.

How to use it

1. Each row has **name**, **description**, **stock** and **min/max** per booking.
2. Click **+** to add a resource.
3. If a resource is delicate, tune its min/max so no single booking can claim more than it should.
4. Click to see the occupancy calendar of a resource; to edit.

> **Good to know:** The system prevents scheduling two bookings that would need more resources than you own at the same time.



Actual screenshot

13. Locations

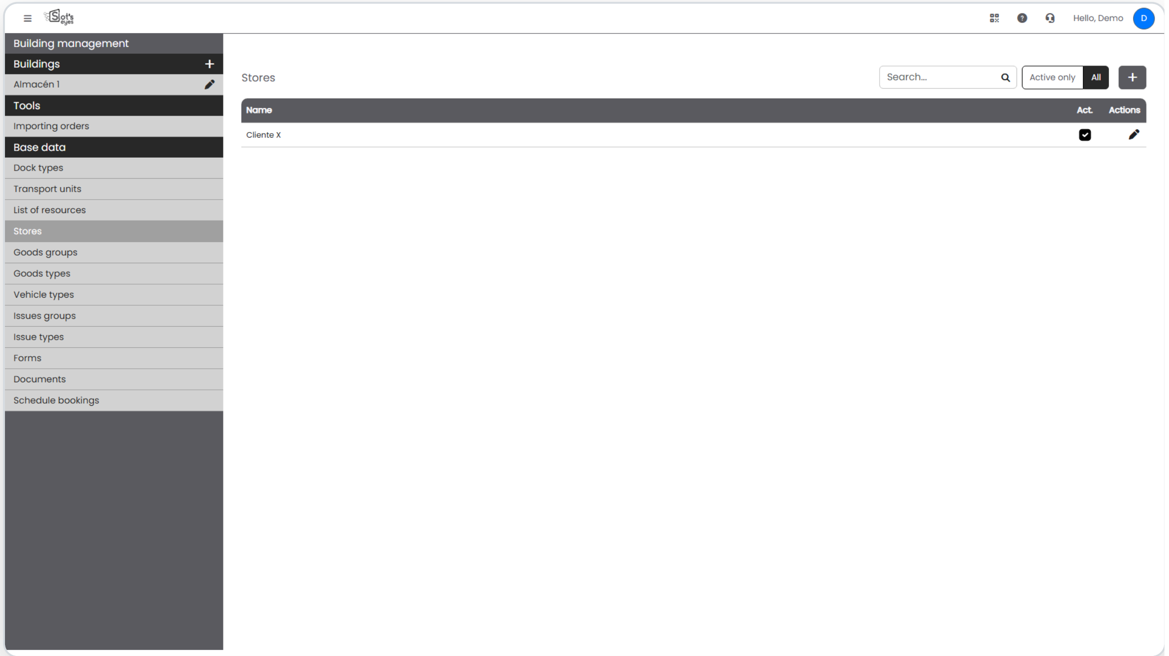
What is this screen?

Physical zones or logical destinations that a booking or an order can be linked to: customers, production lines, cold rooms, etc.

How to use it

1. Click + to create a new location.
2. Click ✏ to rename it.
3. Disable the ones you no longer use; history is preserved.

> **Good to know:** They are optional. If your operations do not need to distinguish zones, a single entry — or none — is enough.



Actual screenshot

14. Goods groups

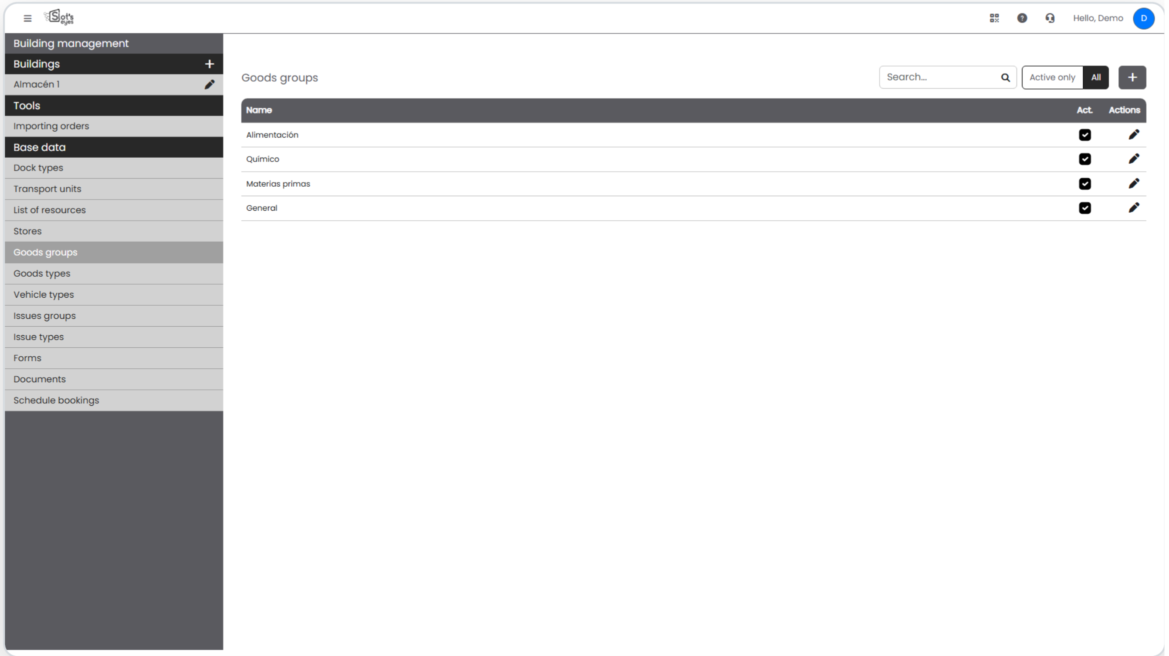
What is this screen?

High-level categories for your goods (Food, Chemical, Raw materials...). Useful to constrain what each dock accepts at a glance.

How to use it

1. Each row is a group.
2. Click **+** to add a new one.
3. When creating a specific goods type you will assign it to one of these groups.

> **Good to know:** Keep the list short and clear. The fewer groups you have, the easier it is to set up the restrictions of each dock.



Actual screenshot

15. Goods types

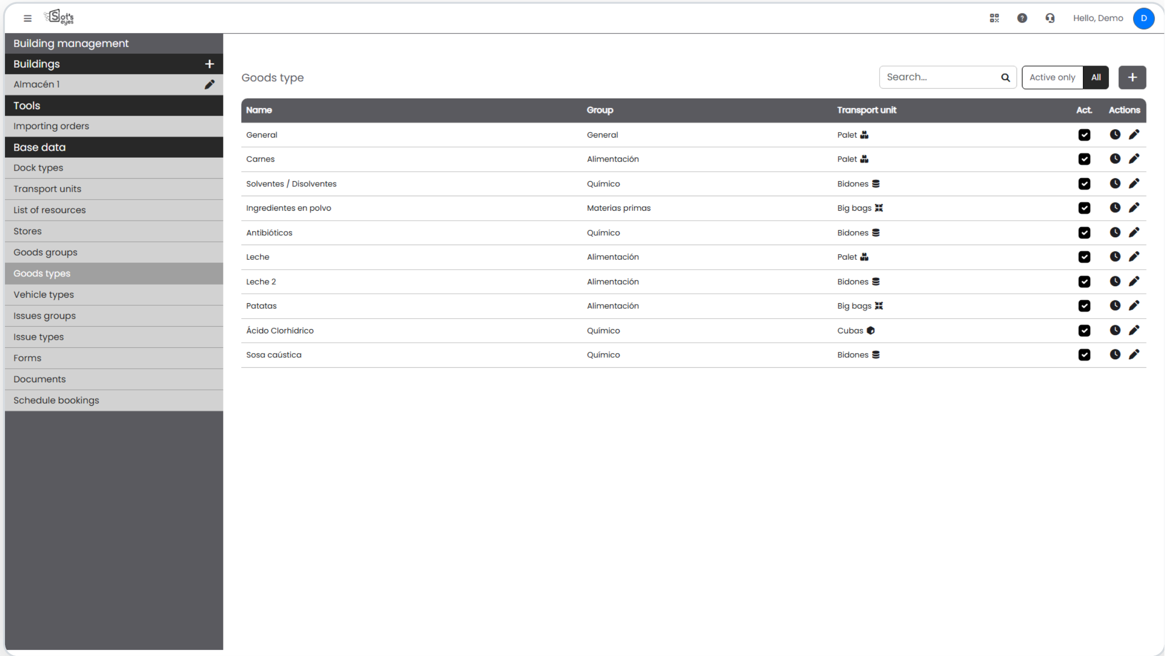
What is this screen?

Specific catalogue of products you move. Each type belongs to a group and ships in a specific transport unit.

How to use it

1. Each row has **name**, **group** and **transport unit**.
2. Click **+** to create a type: name, group, unit and optionally extra rules.
3. Use the icon to see its movement history.

> **Good to know:** Before creating a type its group and its transport unit must already exist.



Actual screenshot

16. Vehicle types

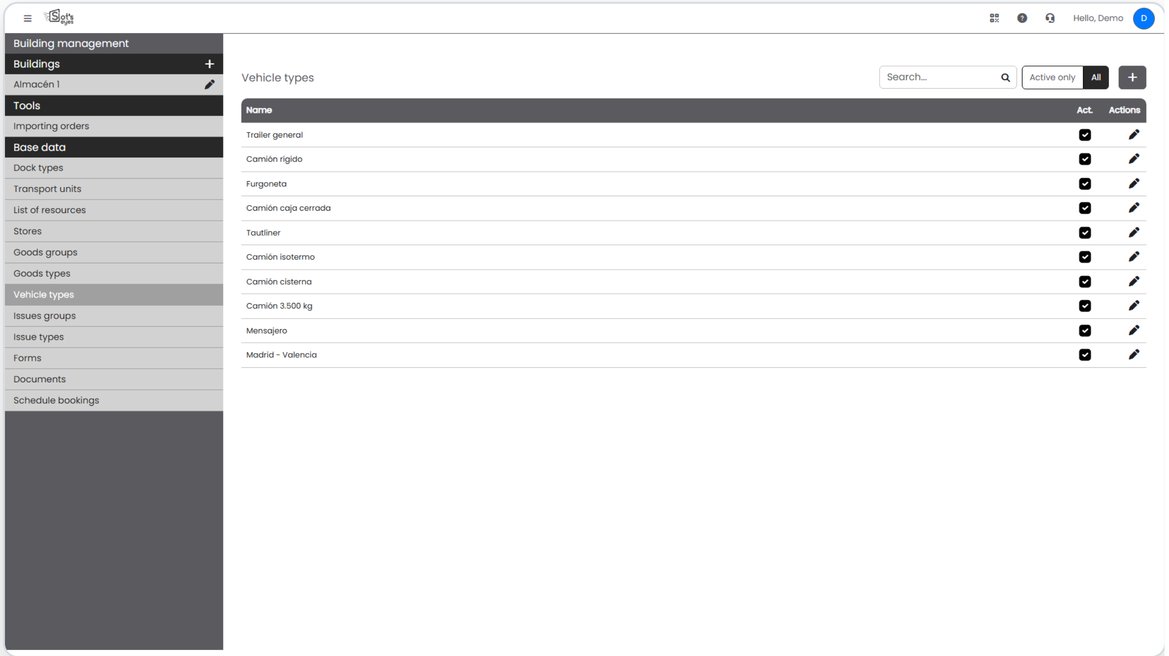
What is this screen?

Catalogue of vehicles you accept at your docks: trailer, van, courier, tanker, specific routes, etc.

How to use it

1. Each row is a vehicle type with its name.
2. Click **+** to add one.
3. Types are then selected on every booking.
4. Disable (Act. off) the vehicles you no longer accept so they no longer appear on new bookings.

> **Good to know:** You can include "routes" as vehicle types (e.g. "Madrid – Valencia") if you have regular lines.



Actual screenshot

17. Incident groups

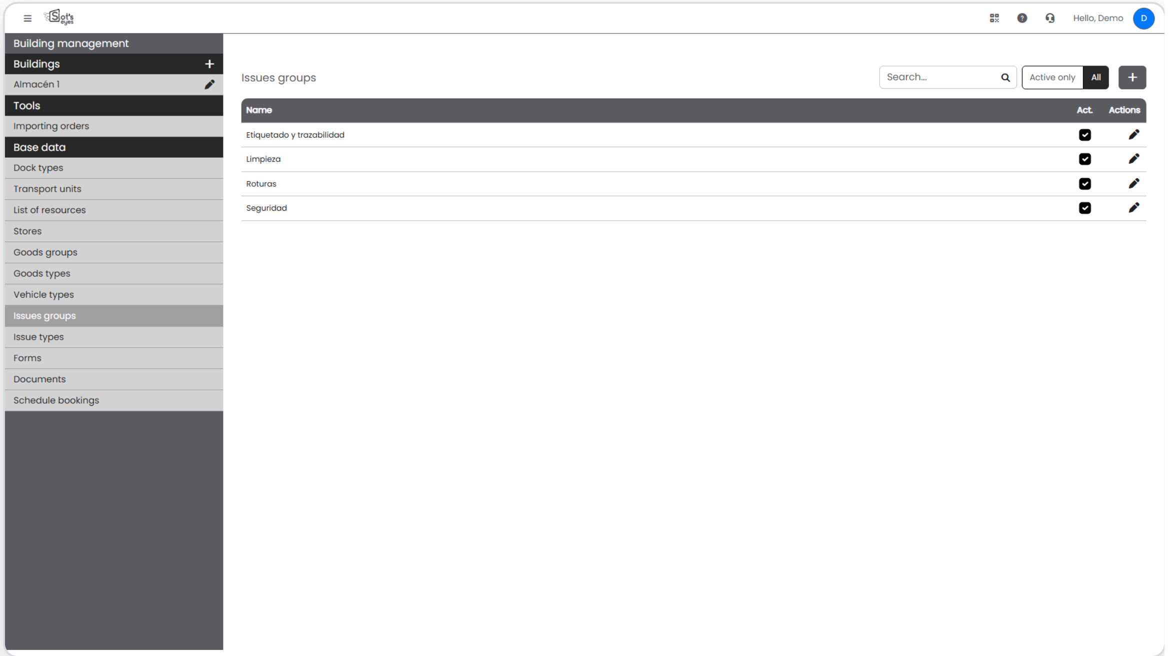
What is this screen?

Categories for the types of incidents that can occur during operations (Labelling, Cleaning, Breakages, Safety...).

How to use it

1. Each row is a group.
2. Click **+** to add a new one.
3. Define groups before creating types — each type is assigned to a group.

> **Good to know:** This section only appears if your company has the incident groups module enabled.



Actual screenshot

18. Incident types

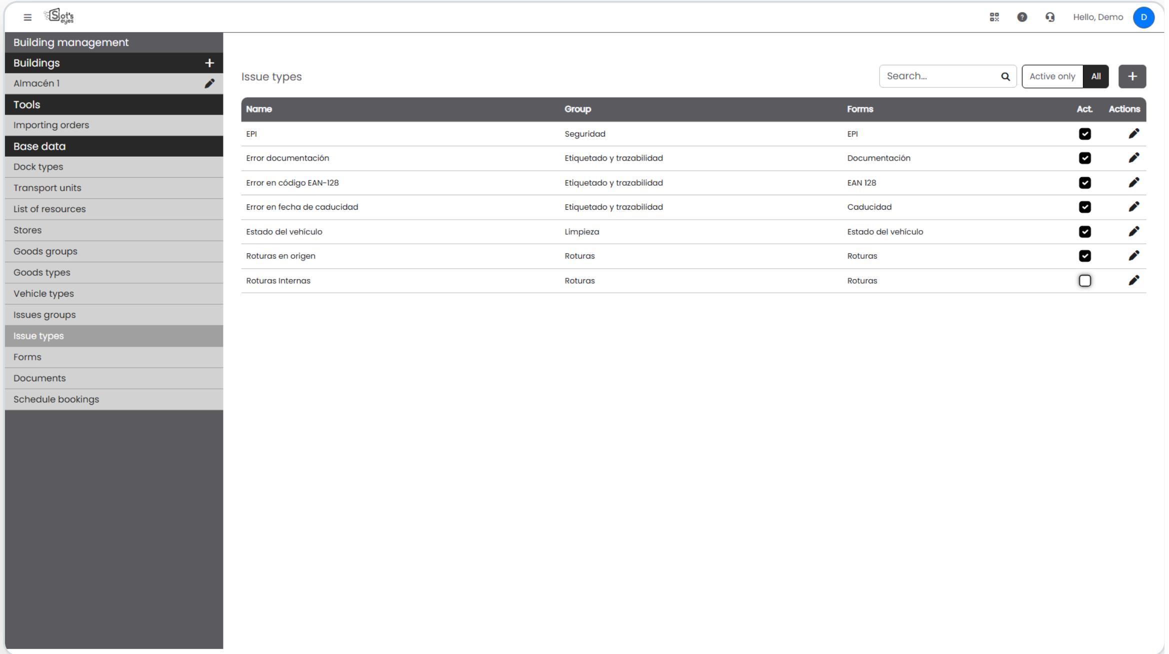
What is this screen?

List of specific incidents your team can log during an operation. Each type belongs to a group and can optionally be linked to a form to capture details.

How to use it

1. Each row shows **name**, **group** and the linked **form**.
2. Click **+** to create a type: name, group and optional form.
3. When the operator logs an incident of this type they are asked to fill the linked form (if any).

> **Good to know:** Incidents are linked to the booking where they occur and appear in reports, the event log and the booking detail.



Actual screenshot

19. Forms

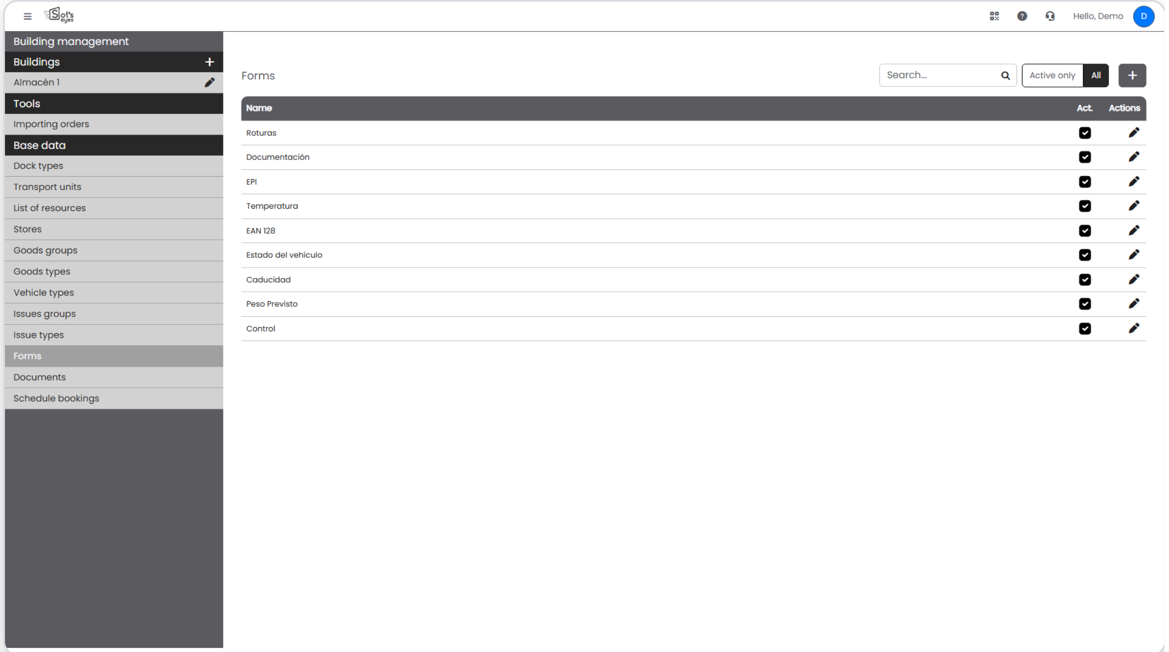
What is this screen?

Reusable form templates. Used to inspect docks, log incidents, validate entries, etc. Each form is a set of customisable fields (text, number, date, photo…).

How to use it

1. Each row is a form.
2. Click **+** to create one: give it a name and add fields.
3. Click ✏ to edit an existing form and modify its fields.

> **Good to know:** Design forms with short, clear fields. They are filled by operators on the ground — fewer clicks is better.



Actual screenshot

20. Documents

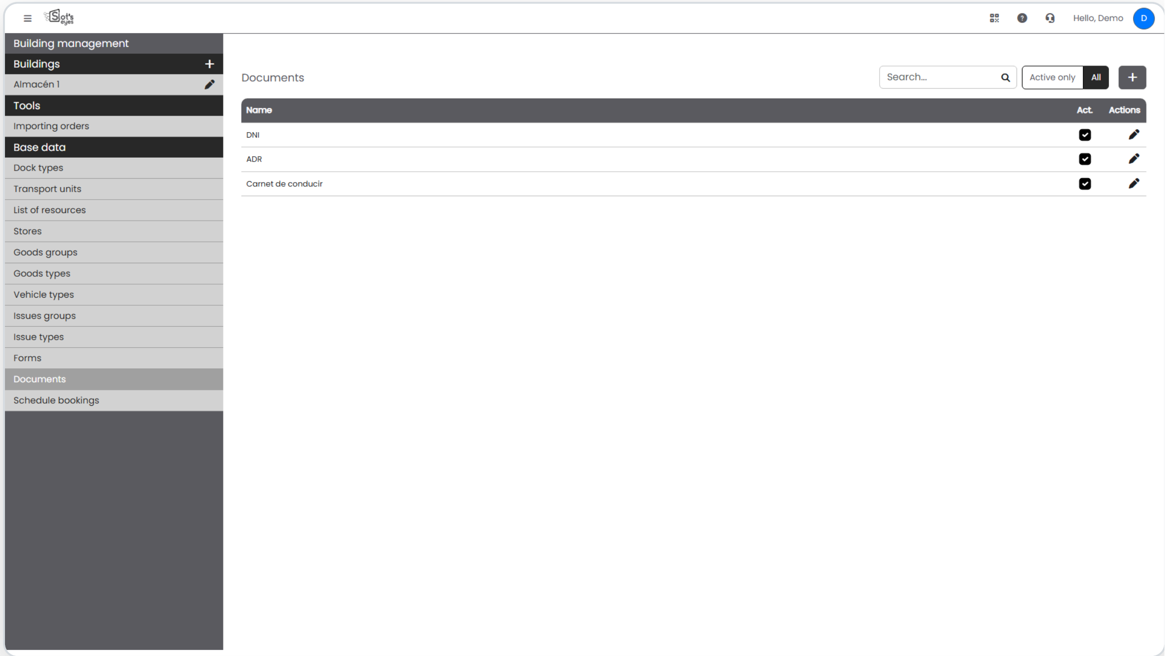
What is this screen?

Catalogue of documents you require from the carrier when making a booking (ID, ADR, driving licence, CMR...). Each document can ask for a reference, expiry date and/or attachment.

How to use it

1. Each row is a document.
2. Click **+** to create one: name, which fields to ask, whether it is mandatory, and whether it is linked to the driver or to the booking.
3. Click ✏ to edit it.

> **Good to know:** If a document is marked as linked to the driver it stays in the driver profile and gets reused automatically — only asked again when it expires.



Actual screenshot

21. Recurring bookings

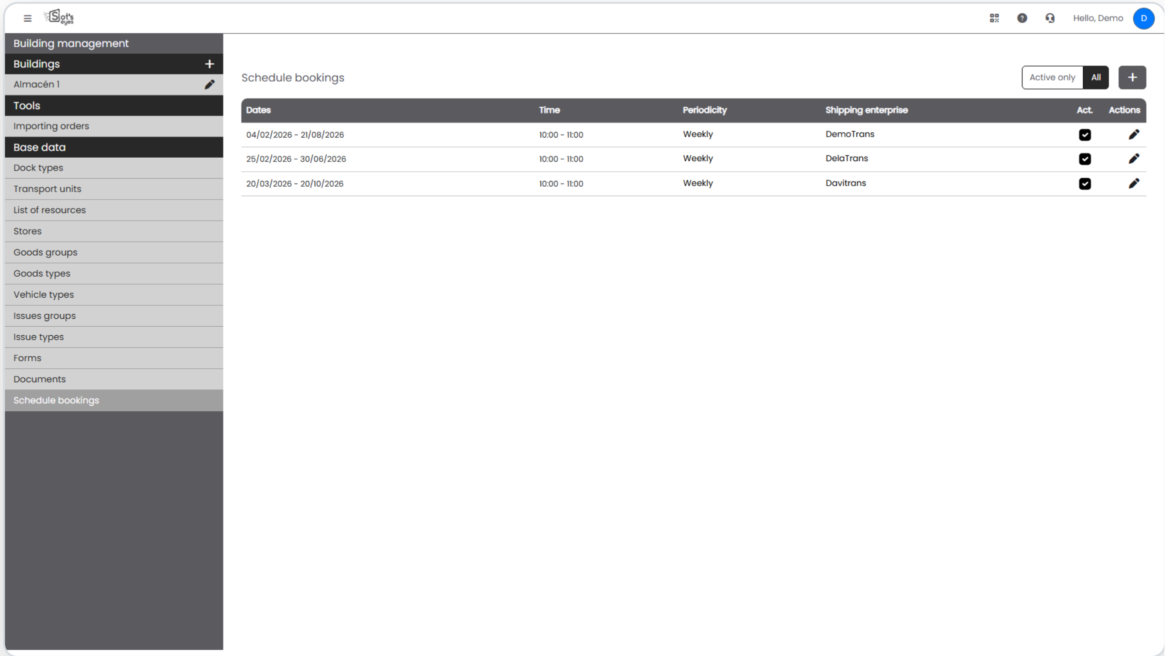
What is this screen?

Templates for recurring bookings. Useful when a carrier comes every Monday at the same time, or when you have fixed weekly/monthly routes.

How to use it

1. Each row is a template with its **date range**, **time**, **periodicity** (weekly, biweekly, monthly...) and **transport company**.
2. Click **+** to create a template.
3. The system automatically generates the actual bookings within the range.
4. Click ✎ to edit the template; pending future bookings will reflect the changes.

> **Good to know:** If a specific booking generated by the template gets changed (e.g. you move it to another slot), the template flags it as an exception and stops touching it.



Actual screenshot

Block 4

Administration

22. User management

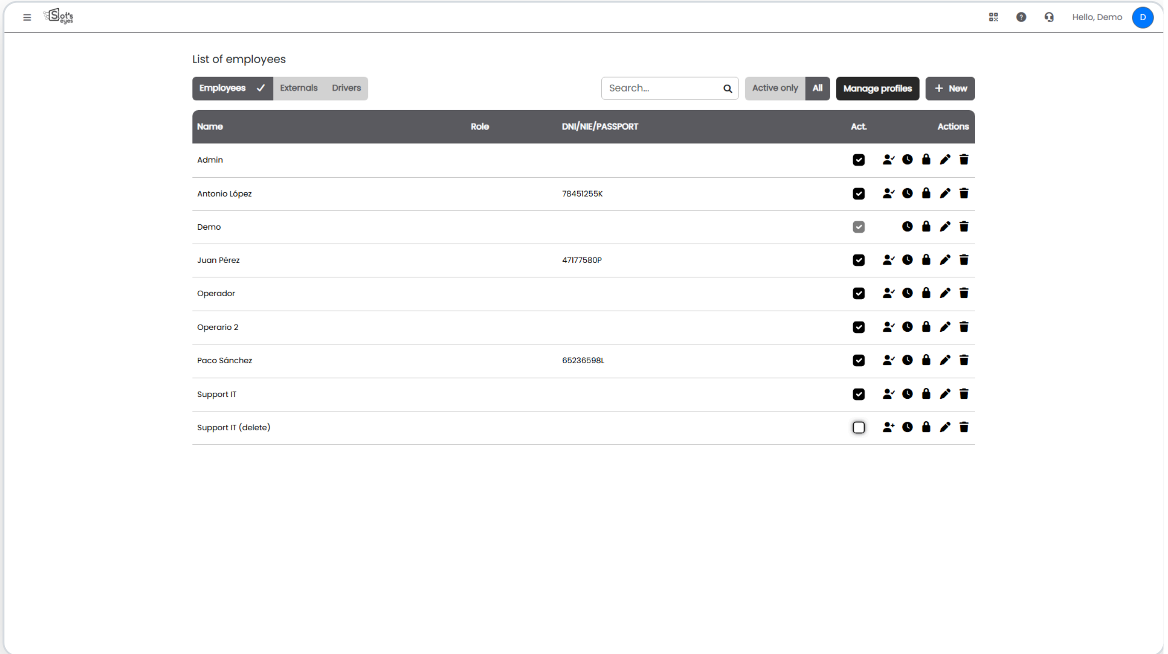
What is this screen?

People with access to the application: internal employees, external users (suppliers, customers) and drivers.

How to use it

1. Top tabs filter between **Employees** (internal), **External** and **Drivers**.
2. Use the **search** to find someone by name, email or ID.
3. Toggle between **"Active only"** and **"All"** to see disabled accounts too.
4. Click **"Manage profiles"** to administer the roles (permissions per profile).
5. Click **"+ New"** to create a user.
6. Each row has these icons: 👤+ grant access, 🕒 schedule, 🔒 password, ✏️ edit and 🗑 delete (with confirmation).

> **Good to know:** A deleted user is deactivated and can no longer log in, but their action history is kept.



Actual screenshot

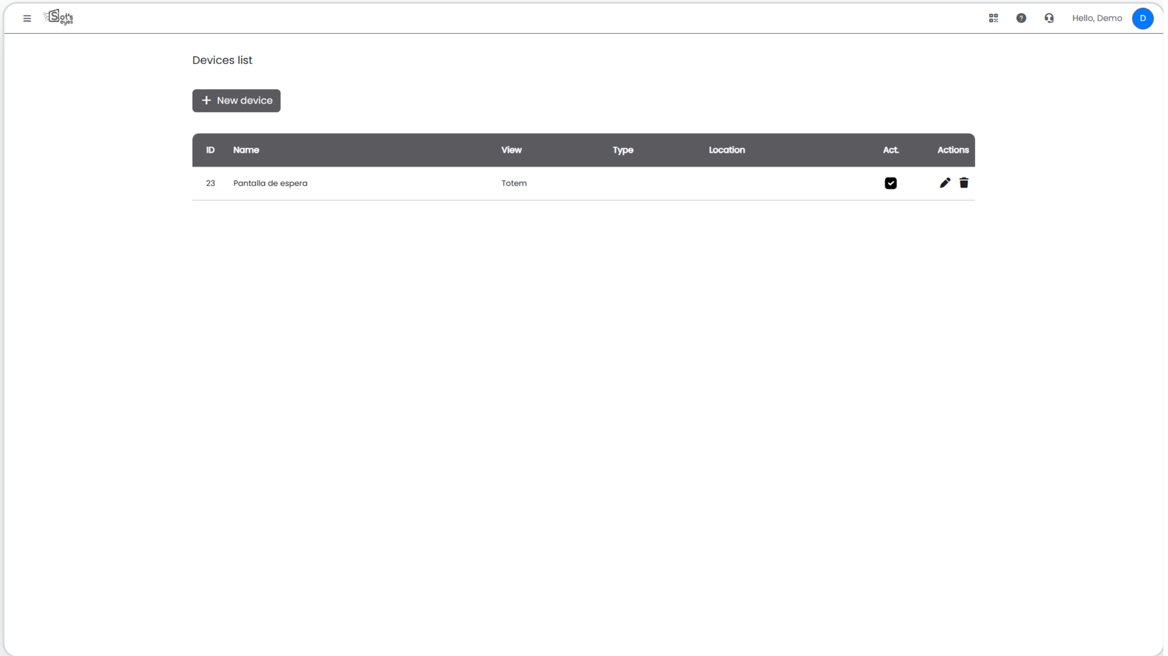
23. Devices

What is this screen?

List of connected devices in your warehouse: totems, waiting displays, tablets, etc.

How to use it

1. Each row shows the internal ID, name, view type (Totem, Airport view...) and location.
2. Click **"+ New device"** to pair a new one. You will need to enter a code in the physical device.
3. Use the **Actions** column icons: ✏️ edit, 🗑 delete.
4. The **Act.** column lets you enable/disable without deleting.



Actual screenshot

Block 5

Analytics

24. Report generator

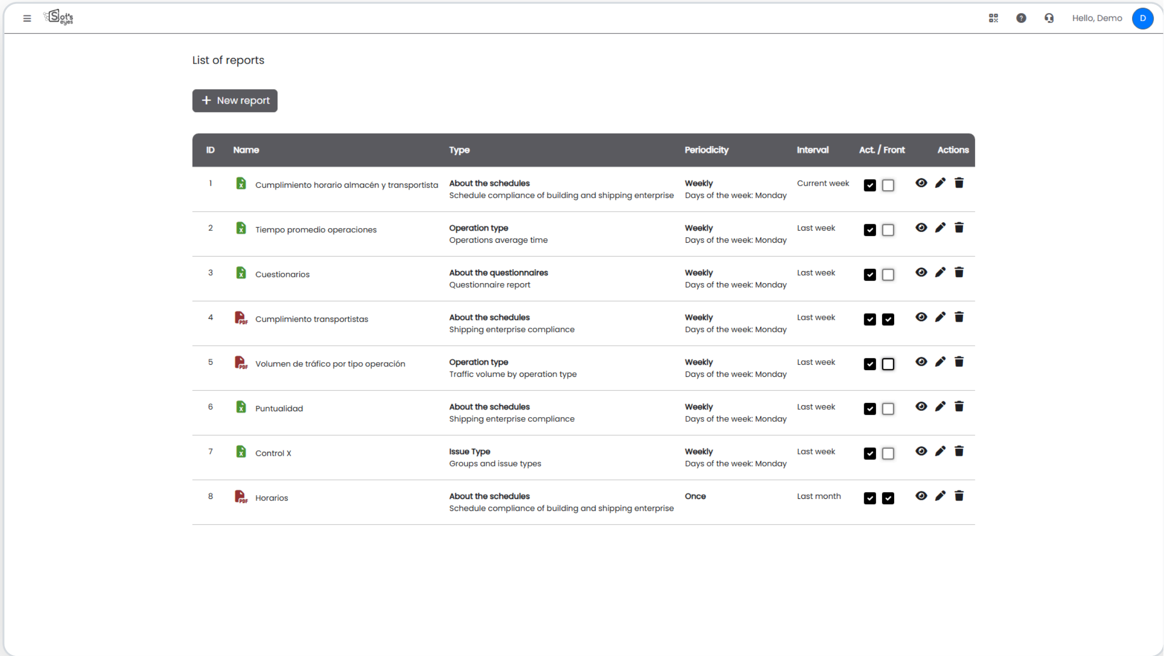
What is this screen?

Create periodic reports (weekly, monthly, yearly) or run a manual one to download as PDF. Each report is a template with its type, periodicity and output format.

How to use it

1. Each row shows **ID**, **name**, **type** (about schedules, about operations…), **periodicity** and **interval**.
2. The icon in the Name column shows the output format: 🟢 Excel, 🔴 PDF.
3. Click **"+ New report"** to create a template.
4. In the **Act./Split** column you have two switches: enable and "split" (run the report in fragments).
5. Use 👁 to view the latest execution, ✏️ to edit the template, 🗑 to delete it.

> **Good to know:** Recurring reports are emailed automatically to their configured recipients.



Actual screenshot

25. Event log

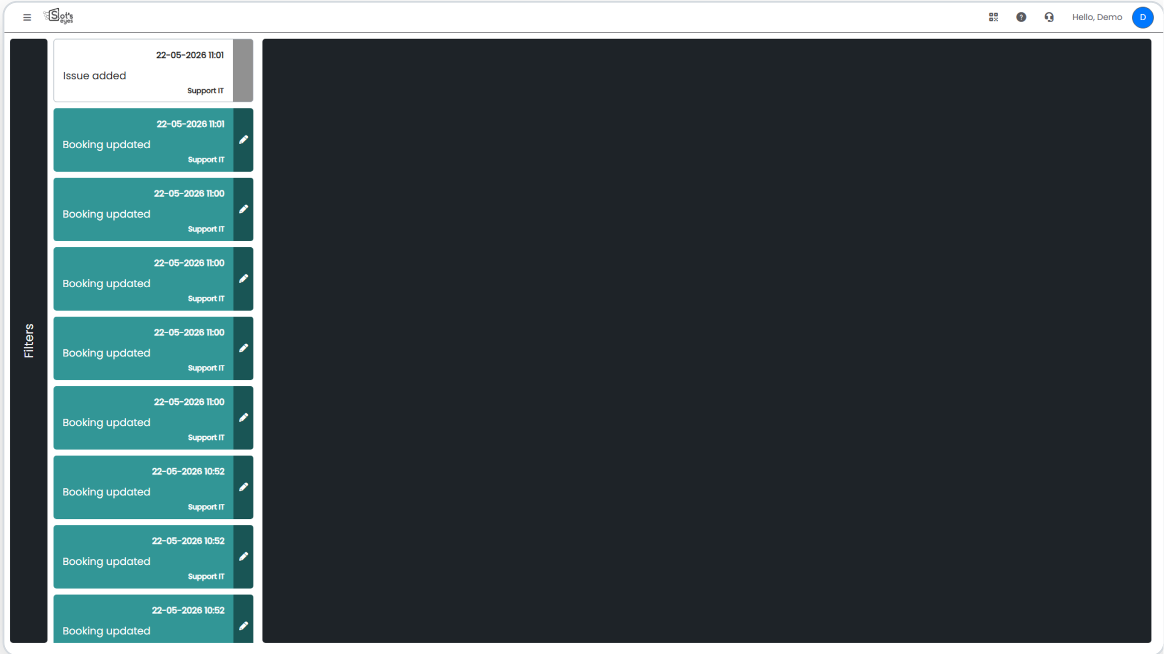
What is this screen?

Full audit trail: who did what and when. Essential to investigate any incident or trace a specific booking.

How to use it

1. Each card is an event with **date and time**, **type** (User access, Booking added, Booking updated, Order added...) and the **user** responsible.
2. Click a card to see the details on the right.
3. Use the vertical **"Filters"** button on the left to filter by date, user or event type.
4. The colour/icon of each card hints at the type: grey for accesses (key icon), white for booking creation (calendar icon), etc.

> **Good to know:** Events are kept long term. If you need to export a range for external analysis, contact support.



Actual screenshot

Next steps

With all of the above in place, your SlotsEyes Management platform is ready to run at full speed. The usual next steps are:

- **Onboard your team** in *Users* with the right permissions and assigned warehouses.
- **Customise the dashboard** of each user with the indicators that matter most to them.
- **Create recurring reports** you want to receive by email automatically.
- **Pair the dock devices** (totems, waiting displays) installed on the floor.
- **Share the public bookings link** with your carriers so they can start booking online.

Need help?

Click the **?** button in the top bar to open the contextual help, or the headset icon to start a chat with the support team.

Frequently asked questions

I forgot my password

Click *"Recover password"* on the sign-in screen, enter your email and we will send you a link to set a new one. The link expires after a few hours.

I cannot see a section I should be able to see

Check with your administrator that your user has the right role and permissions. The side menu only shows the sections your role is allowed to access.

I want to change the date or time of a booking

Open the booking in any of the views, edit *Booking date* and *Booking time*, and click *"Save changes"*.

Can I customise the dashboard?

Yes. Click the ✎ icon next to the *Dashboard* title to enter edit mode and add, remove, reorder or reconfigure each widget. Changes only affect your account.

I work with multiple companies, how do I switch?

From the side menu, at the bottom, click *Switch company*. You do not need to sign out.