Tensor Systems®

Tensor Shift

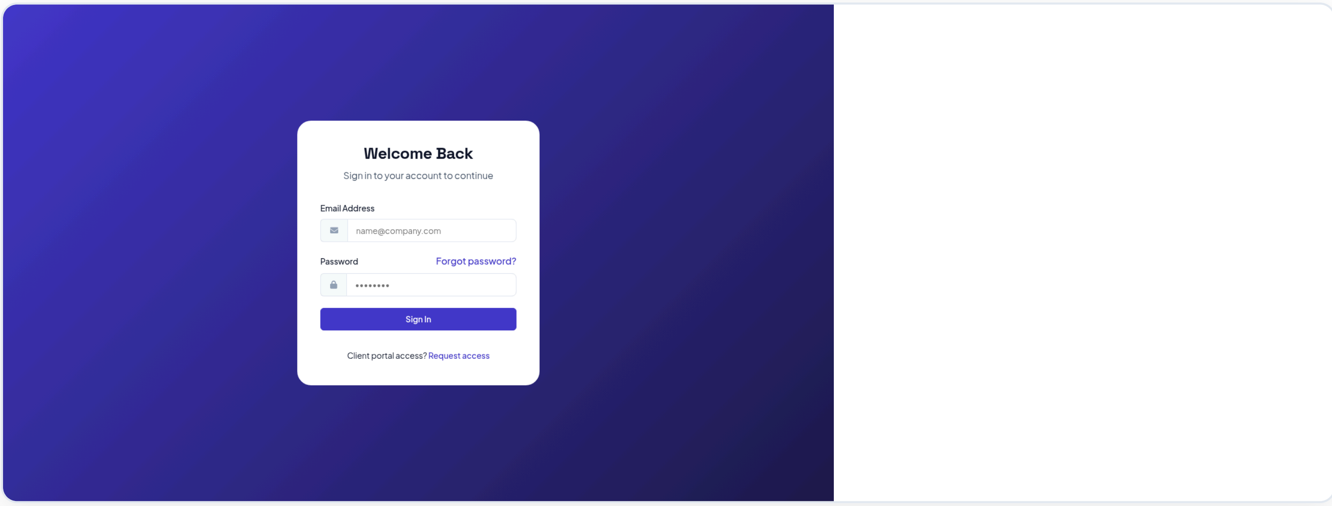
User Guide

Operations & Sales Management Platform
Version 1.0 · July 2026

Contents

01 Getting Started & Logging In

Tensor Shift runs entirely in a web browser — no installation required. Open the URL provided by your administrator and you will be greeted by the login screen.



The Tensor Shift login screen. Enter your email and password to continue.

Logging in

1. Open the Tensor Shift URL in your browser.
2. Enter your **email address** and **password**.
3. Click **Sign In**. You are redirected to the Dashboard.

Tip: If you forget your password, ask your administrator to reset it via Admin → Users.

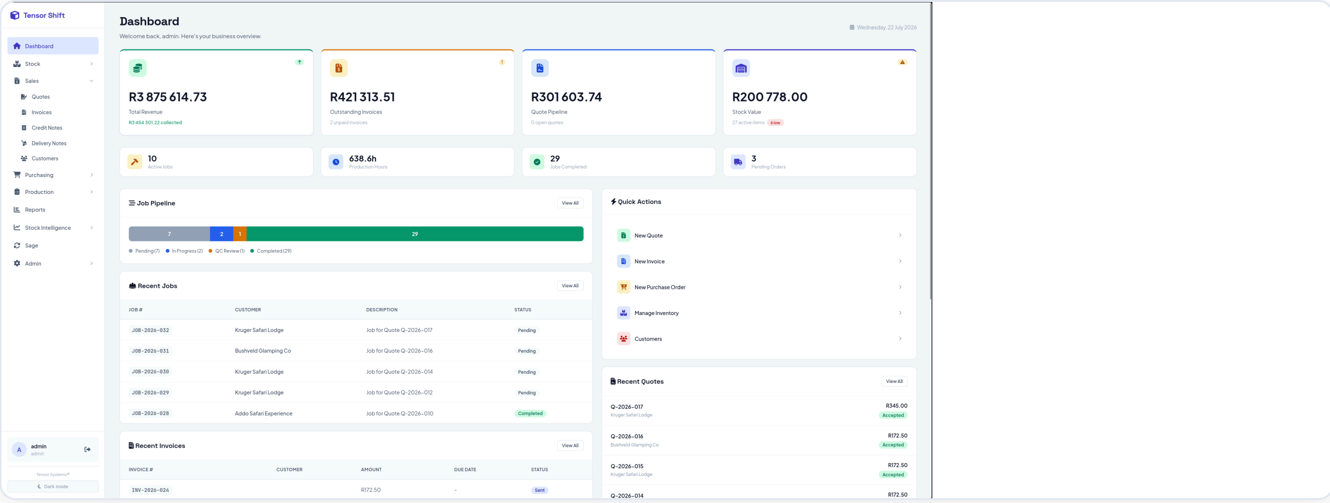
Navigation

The sidebar on the left groups all features into seven areas: **Stock, Sales, Purchasing, Production, Reports, Stock Intelligence,** and **Sage.** Click any group to expand it. Your current location is highlighted in the sidebar.

At the bottom of the sidebar you can see which user you are logged in as and find the **Log out** button (arrow icon). A **Dark mode** toggle is also available for comfortable low-light working.

02 Dashboard

The Dashboard is your business command centre. It shows the most important numbers at a glance and lets you jump to common tasks without navigating through menus.



The Dashboard on a typical working day — KPIs at the top, job pipeline, recent activity, and quick actions on the right.

KPI Cards (top row)

- **Total Revenue** — cumulative paid revenue with a breakdown of how much has been collected.
- **Outstanding Invoices** — total value of unpaid invoices; a warning indicator shows if any are overdue.
- **Quote Pipeline** — total value of open (unsent/sent) quotes not yet converted to an invoice.
- **Stock Value** — current on-hand inventory value. A red "low" badge appears when any item is below its reorder threshold.

Secondary KPIs (second row)

- **Active Jobs** — job cards currently in Pending or In Progress.
- **Production Hours** — total estimated hours across all active jobs.
- **Jobs Completed** — lifetime completed count.
- **Pending Orders** — purchase orders awaiting delivery.

Job Pipeline bar

A stacked horizontal bar shows the distribution of all job cards by status (Pending → In Progress → QC Review → Completed) so production managers can see workflow balance instantly.

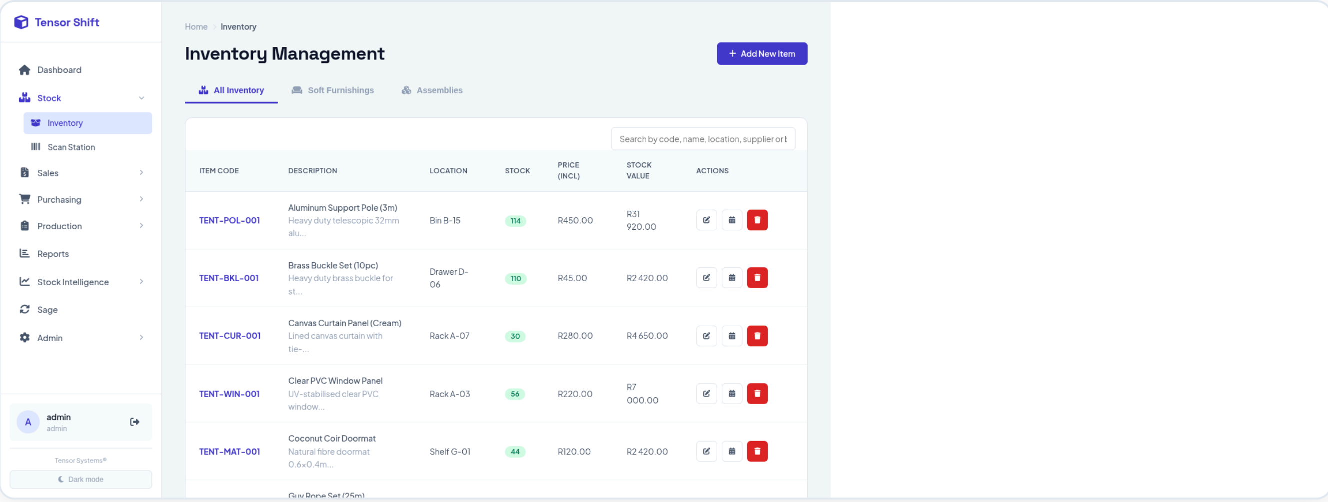
Quick Actions

The panel on the right provides one-click shortcuts to the most common daily tasks: New Quote, New Invoice, New Purchase Order, Inventory Management and Customer listings.

03 Stock Management

The inventory module tracks every item you buy, build, or sell. It covers raw materials, finished goods, and assemblies (products built from multiple components). Stock levels update automatically every time goods are received on a purchase order, issued to a job, or sold via an invoice.

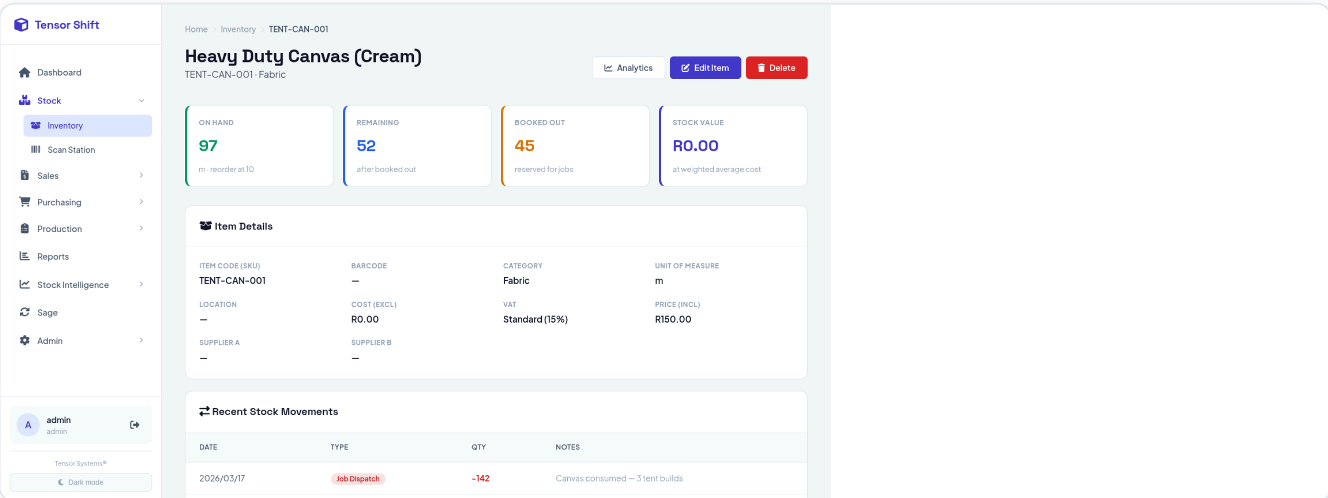
Inventory List



The inventory list showing items, SKUs, quantities, categories, and reorder status.

The list shows each item's name, SKU, category, on-hand quantity, unit price, and a colour-coded status badge. Items below their reorder threshold are highlighted with a **Low Stock** badge (Low Stock) — these should be prioritised when raising purchase orders.

Item Detail Page

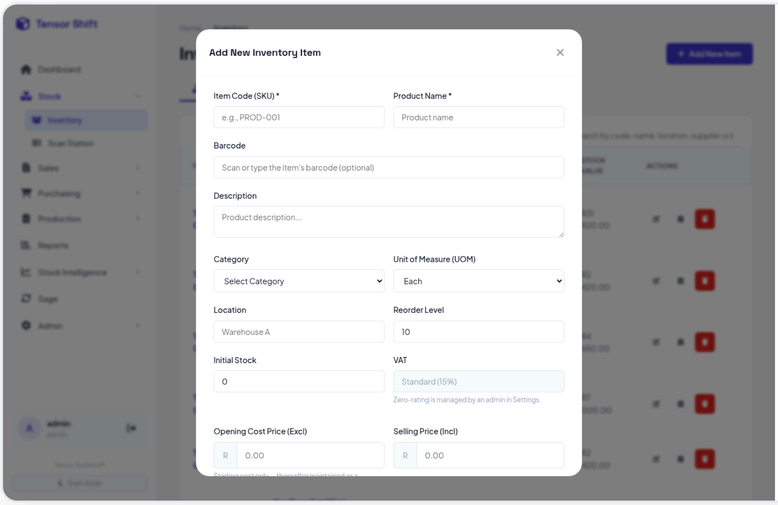


An individual inventory item showing full details, stock history, and BOM components.

Clicking any item opens its detail page, which shows:

- Full specifications (SKU, category, description, cost vs sell price, reorder point, reorder quantity).
- **Stock movement log** — every receive, issue, and adjustment with timestamps and the user who made the change.
- For assembly items: the **Bill of Materials** listing each component and its required quantity.
- A barcode that can be printed for scan-station receiving.

Adding a New Item

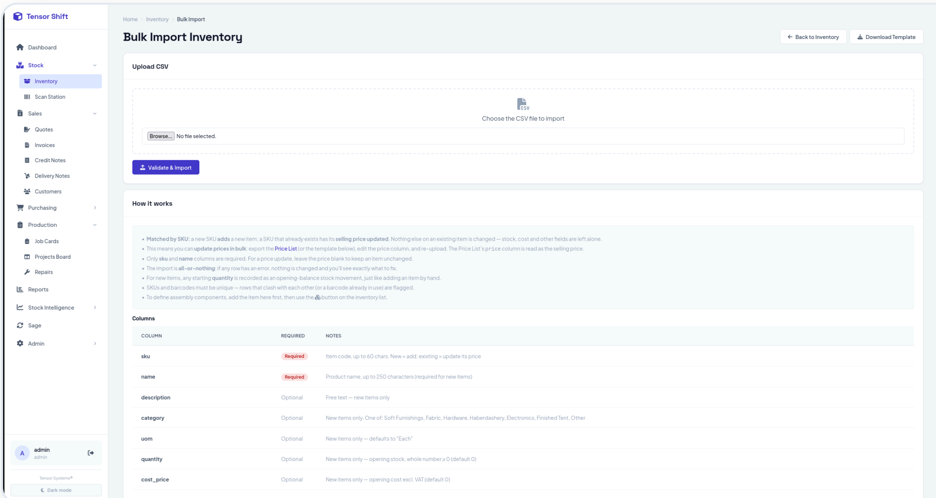


The new item form. Required fields are marked with an asterisk.

1. Go to **Stock** → **Inventory** and click **+Add New Item**.
2. Fill in the name, SKU, category, and pricing.
3. Set a **Reorder Point** so low-stock alerts fire at the right level.
4. If this is an assembly (built from other items), tick **Mark as Assembly** and add the component lines below.
5. Click **Save Item**. The item now appears in the inventory list and in quote/PO item pickers.

> **Assemblies:** When an assembly item is added to a quote and the quote is accepted, Tensor Shift automatically populates the job's Bill of Materials with all the assembly's components. See **Section 10 — Production** for more detail on Job Cards and Bills of Materials.

Bulk Import (CSV)



The bulk import screen: upload a CSV, then a plain-English guide to every column.

When you're loading many items at once — or updating lots of prices — adding them one at a time is slow. **Bulk Import** lets you upload a single CSV (from Excel, Google Sheets, or LibreOffice) and create or update items in one go. Open it from **Stock** → **Inventory** and click **Bulk Import**.

Everything is matched by **SKU**:

- A **new SKU** adds a brand-new item, using all the columns you provide.

- An **existing SKU** updates that item's **selling price only** — stock, cost, and every other field are left untouched. Leave the price blank to skip an item.

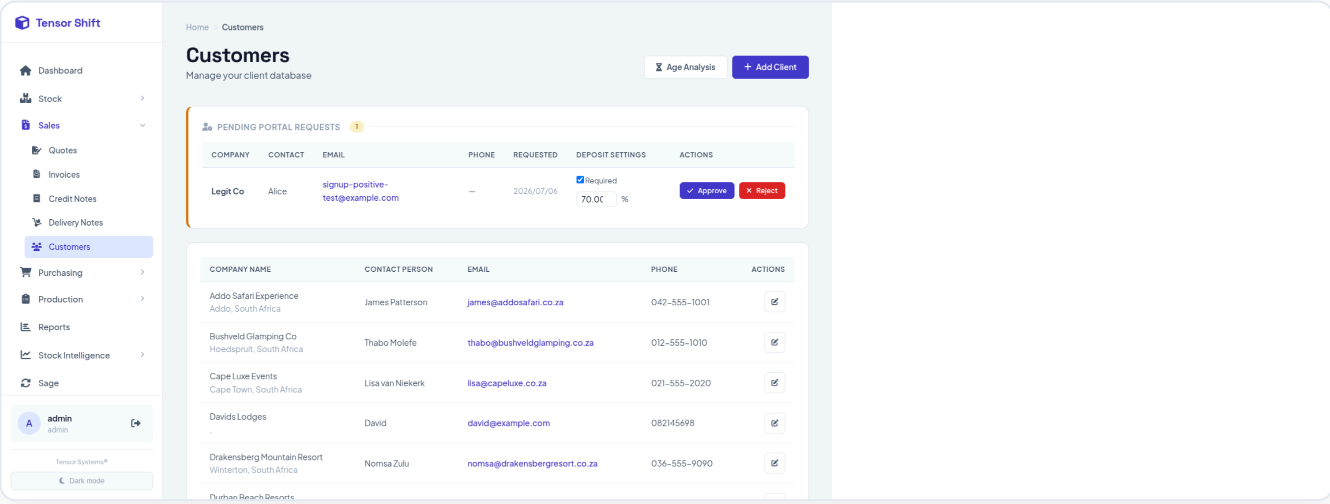
1. Click **Download Template** to get a CSV with the correct column headings and an example row.
2. Fill in your items. Only **sku** and **name** are required; everything else is optional.
3. Click **Choose File**, select your CSV, then **Validate & Import**.
4. Review the result summary — new items, price updates, and anything unchanged.

All-or-nothing & safe: if any row has a problem, **nothing** is imported — the screen lists each bad row and exactly what to fix, so a single typo can never leave your inventory half-updated. New items with an opening quantity get a proper stock movement, just like adding them by hand.

04 Customers

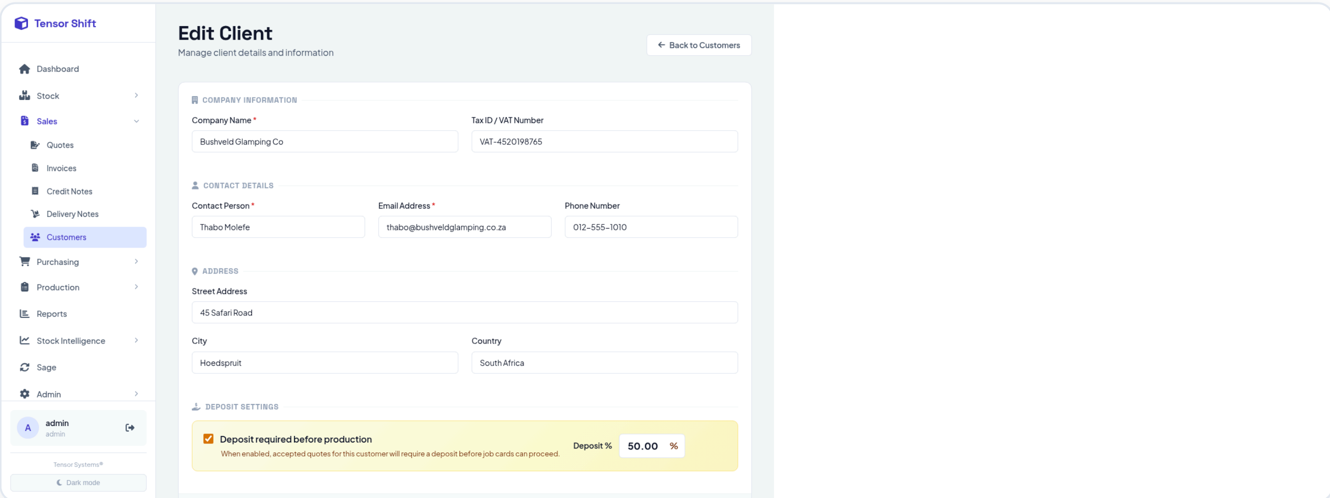
The Customers module is your central contact book for all the companies and individuals you sell to. Customer records link to every quote, invoice, job, and repair, so you always have a complete history in one place.

Customer List



All customers showing company name, contact details, and document history.

Customer Detail



A customer record showing contact details, deposit settings, and their full document history.

To open a customer's full record, click on their name in the customer list.

Each customer record holds:

- **Company details** — name, billing address, email, phone, VAT / Tax ID.
- **Deposit settings** — if a customer requires a deposit before work begins, set the percentage here. Tensor Shift will enforce this on every accepted quote and will not create a job card until the deposit is recorded.
- **Document history** — all quotes, invoices, and credit notes for this customer, with running totals and payment status.
- **Portal access** — generate a secure customer portal login so the customer can view and accept their own quotes online.

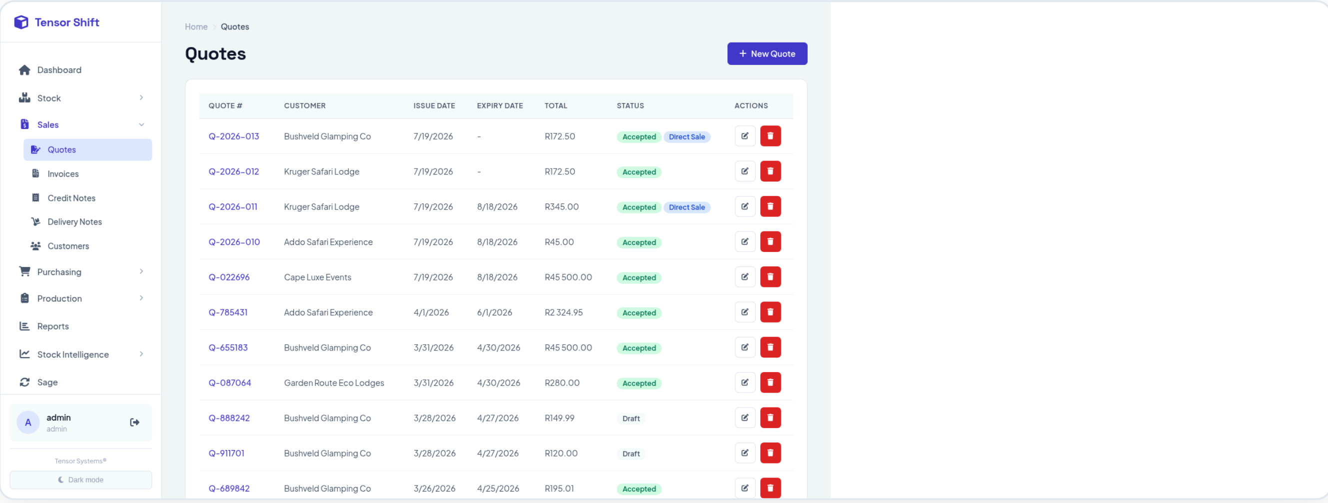
Adding a Customer

Click **+ Add client** from the list. Fill in the required fields (company name, email) and any optional details, then save. The customer is immediately available in quote and invoice forms.

05 Quotes

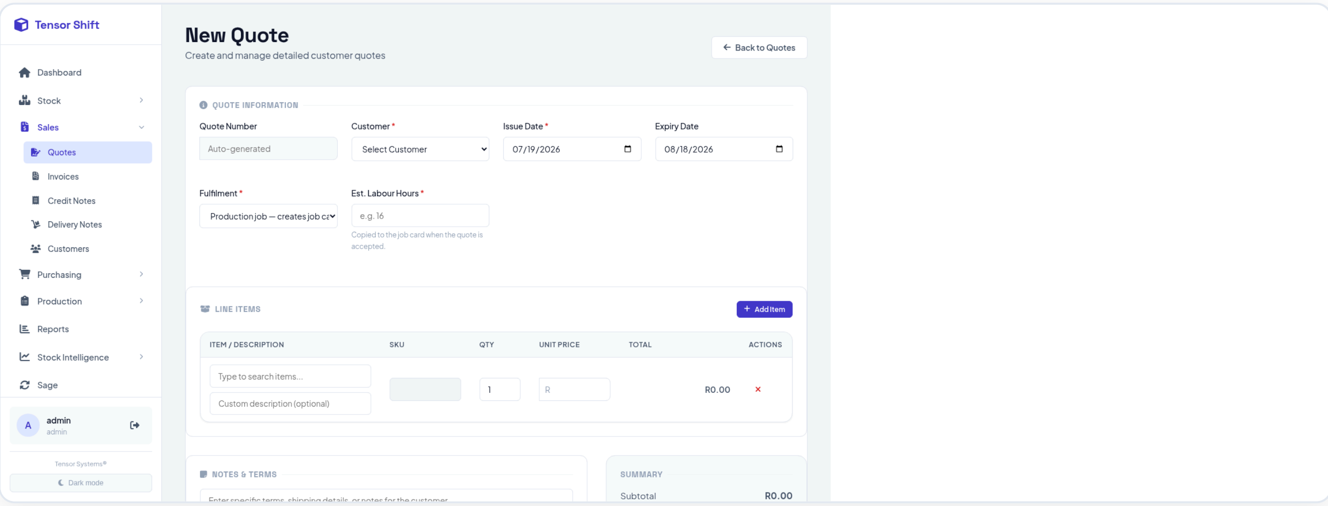
A quote is a priced proposal sent to a customer before work begins. When the customer approves it, accepting the quote in Tensor Shift triggers the next step automatically — either opening a production job or converting it directly to an invoice (for direct sales).

Quotes List



All quotes with their status and fulfilment type badges. "Direct Sale" quotes bypass the job-card workflow.

Creating a Quote

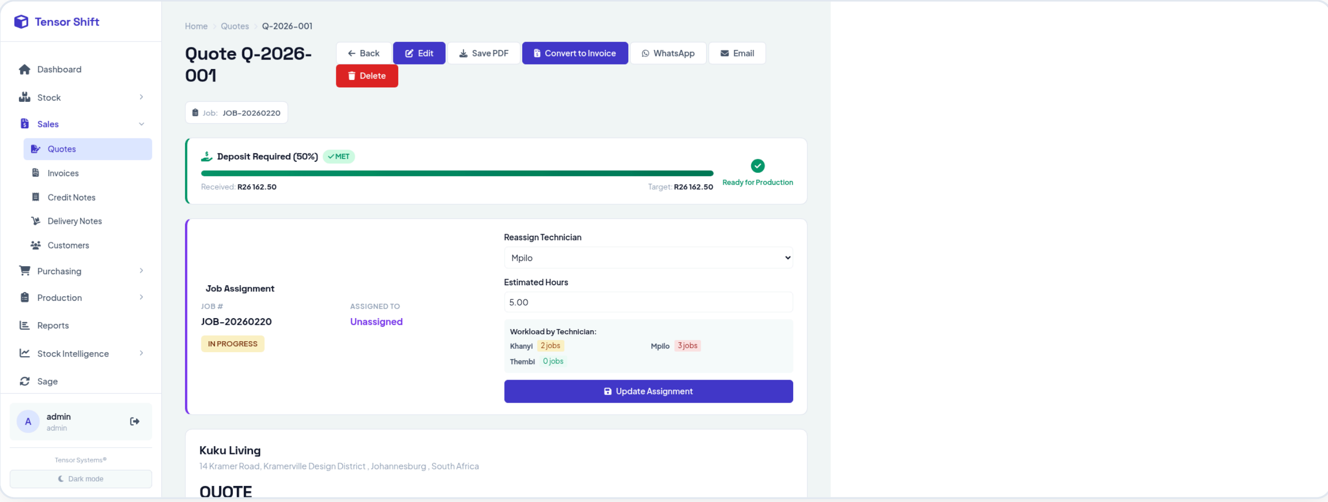


The quote form. The Fulfilment field determines whether acceptance creates a job card or goes straight to invoicing.

1. Go to **Sales** → **Quotes** and click **New Quote**.
2. Select the **Customer** and set issue and expiry dates.
3. Choose a **Fulfilment** type:
   - *Production job* — accepted quote creates a Job Card and BOM. Requires estimated labour hours.
   - *Direct sale* — stock sold as-is, no job card created. Convert straight to an invoice.

4. Add line items by typing in the search box to find items from inventory. Adjust quantities and unit prices.
5. Add any notes and click **Save Quote**.

Quote View & Actions



An accepted quote. "Convert to Invoice" becomes the primary action once a quote is accepted.

From the quote view you can:

- **Send** the quote to the customer by email or WhatsApp (the status changes to Sent).
- **Accept** the quote internally (or let the customer accept it through the portal). For production quotes, a Job Card and BOM are created automatically. For direct sales, the quote moves straight to accepted with no job.
- **Convert to Invoice** — available on any accepted quote. Creates a draft invoice with all line items and any deposit already recorded.
- **Save PDF** — download a print-ready PDF version to attach to an email manually.

Quote Statuses

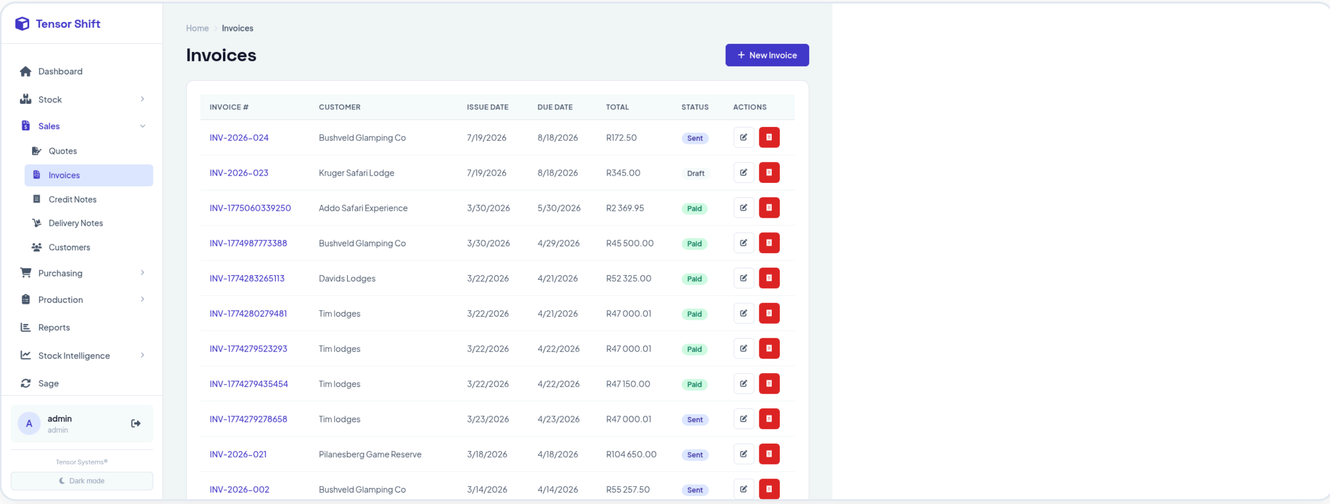
- **Draft** — work in progress, not yet sent.
- **Sent** — delivered to the customer, awaiting response.
- **Accepted** — approved; production or invoice conversion can proceed.
- **Rejected / Expired** — closed quotes retained for history.

> **Deposits:** If the customer record has a deposit percentage set, Tensor Shift will not create the job card until the deposit is recorded. You will see a deposit tracking card on the accepted quote page.

06 Invoices

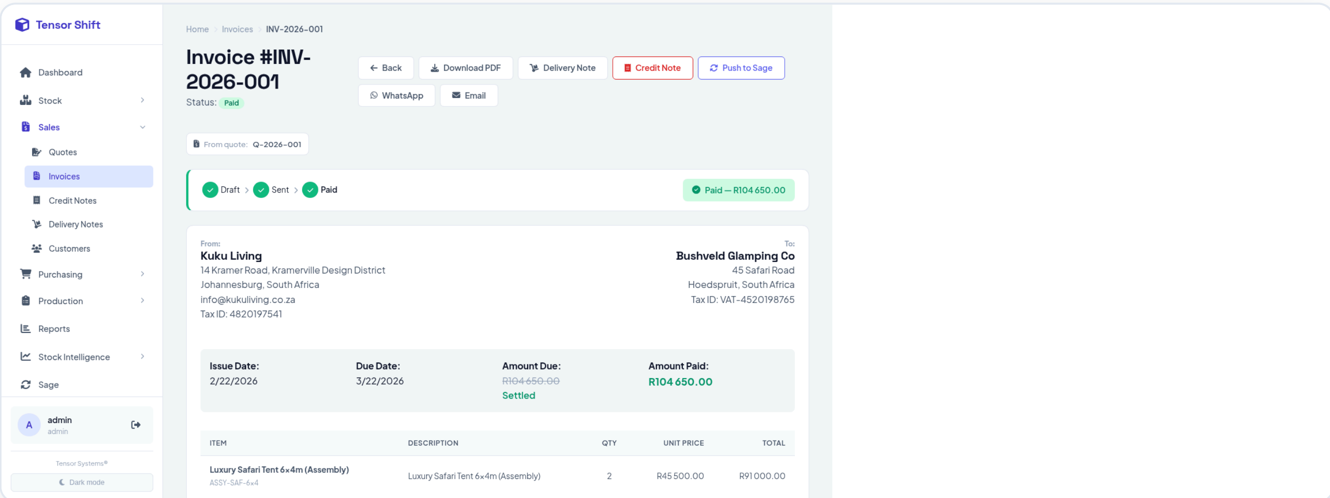
Invoices are the formal payment requests sent to customers. Most invoices are created by converting an accepted quote, but you can also create a standalone invoice directly.

Invoices List



All invoices showing status, amounts due, and payment totals at a glance.

Invoice View & Actions



An invoice showing line items, tax, and payment status. The primary button shifts based on what action is due.

To open an invoice, go to **Sales → Invoices** and click on any invoice in the list, or navigate directly from a customer's record.

From an invoice you can:

- **Record Payment** — log a full or partial payment. The status updates to Partially Paid or Paid automatically, and the collected amount updates the Dashboard revenue KPI.
- **Issue Invoice** — mark it as officially sent to the customer (changes status from Draft to Issued).
- **Create Credit Note** — if goods are returned or the invoice is disputed, this links a credit note to the original invoice.
- **Create Delivery Note** — generate a delivery/dispatch note from the invoice's line items.
- **Save PDF / Email / WhatsApp** — send directly to the customer.

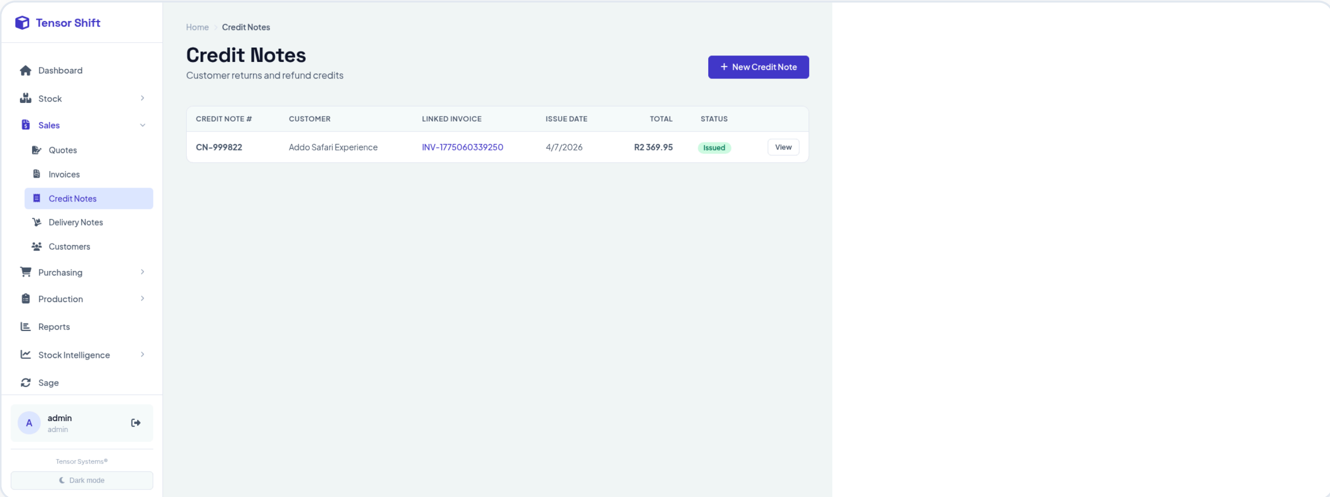
Invoice Statuses

- **Draft → Issued → Partially Paid → Paid**

- **Overdue** appears automatically when the due date passes and the invoice is unpaid.

07 Credit Notes

Credit notes reverse or partially reverse an issued invoice — for example, when goods are returned or a billing error is corrected.



The credit notes list. Each credit note links back to its source invoice.

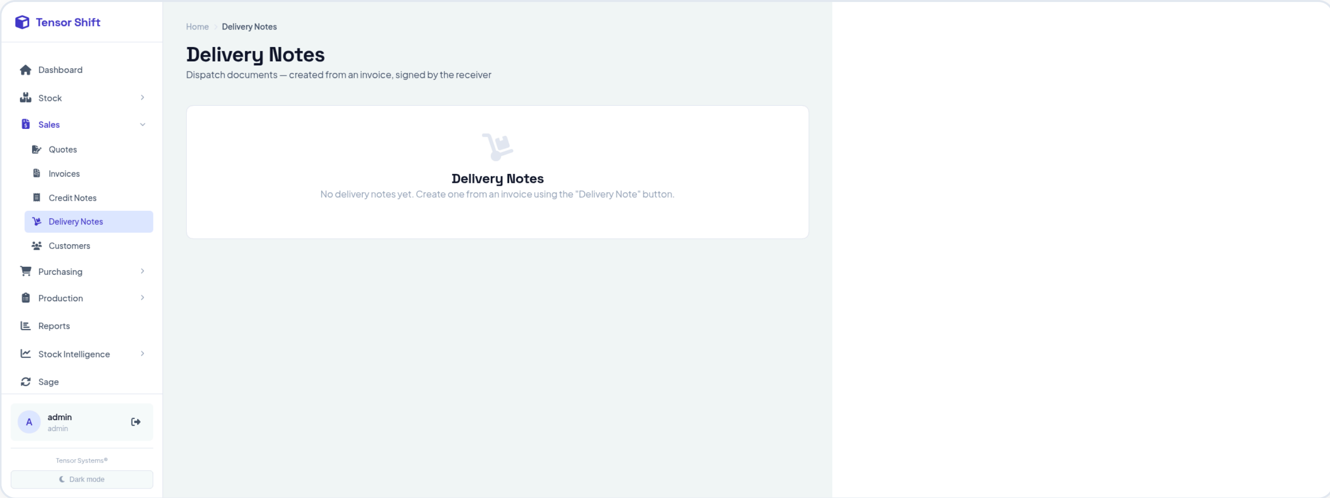
Creating a Credit Note

1. Open the invoice you want to credit and click **Create Credit Note**.
2. Adjust quantities or amounts if issuing a partial credit, then save.
3. The credit note is linked to the original invoice. The Age Analysis report reflects the net balance automatically.

> **Automatic stock return:** When a credit note is created, any line linked to an inventory item is added back into stock automatically, and a movement is logged against that item — no manual adjustment needed.

08 Delivery Notes

Delivery notes accompany goods when they leave your facility. They list what was dispatched, allowing the customer to verify they received the correct items and quantities.



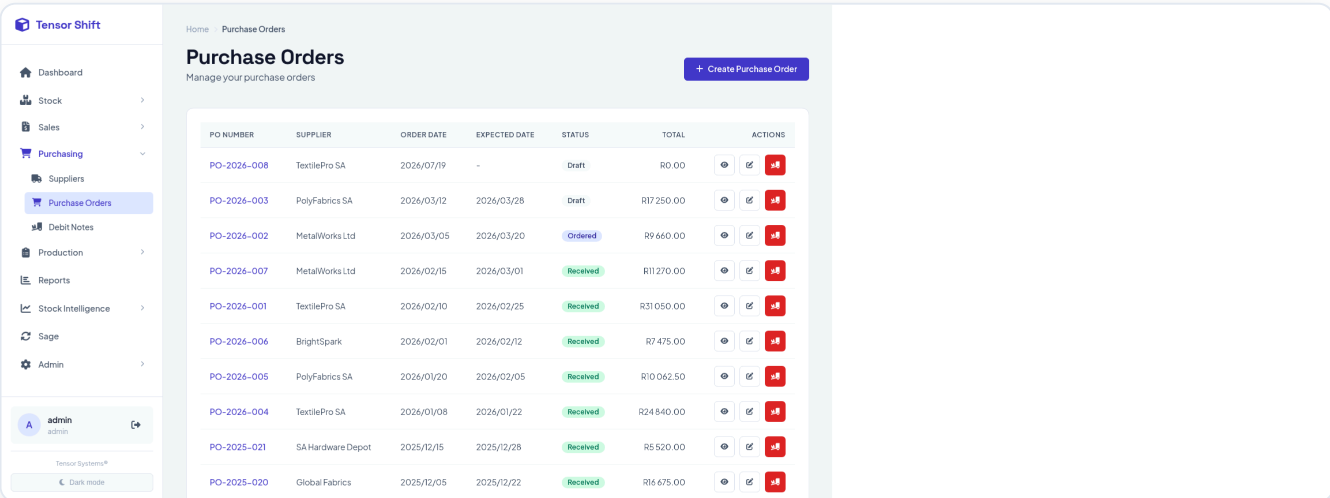
Delivery notes, each linked to its source invoice.

Create a delivery note from any invoice by opening the invoice (go to **Sales → Invoices** and click the invoice), then clicking the **Create Delivery Note** button found in the Invoice View & Actions panel. The note inherits the invoice's line items. You can then print or PDF it for the driver or customer.

09 Purchase Orders

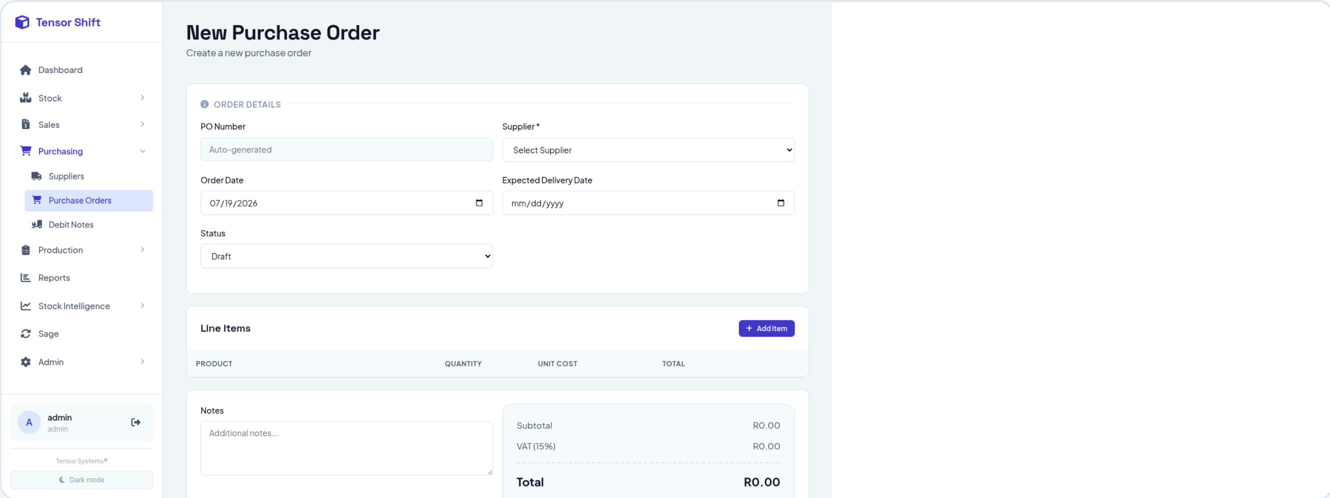
Purchase orders (POs) are sent to suppliers when you need to restock inventory. When goods arrive, you receive them on the PO and stock levels update automatically.

Purchase Orders List



All purchase orders with supplier, status, and total value.

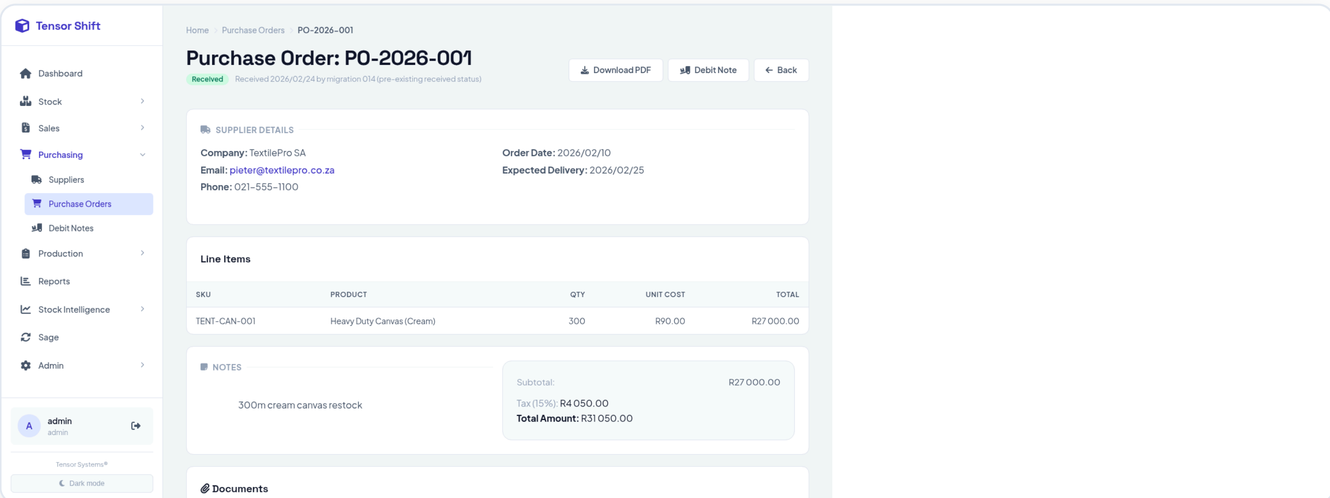
Creating a Purchase Order



The new PO form. Select a supplier, add the items you are ordering, and set quantities.

1. Go to **Purchasing → Purchase Orders** and click **Create purchase order**.
2. Select the **Supplier** and set an expected delivery date.
3. Add line items from your inventory catalogue. The system pre-fills unit cost from the item's cost price.
4. Save and send the PDF to the supplier. The PO status is now *Pending*.

Receiving Goods



A purchase order detail page. Use "Receive Items" to log what arrived.

When goods arrive, open the PO and click **Receive Items**. Enter the actual quantities delivered (which may differ from the ordered amount for partial deliveries). On saving:

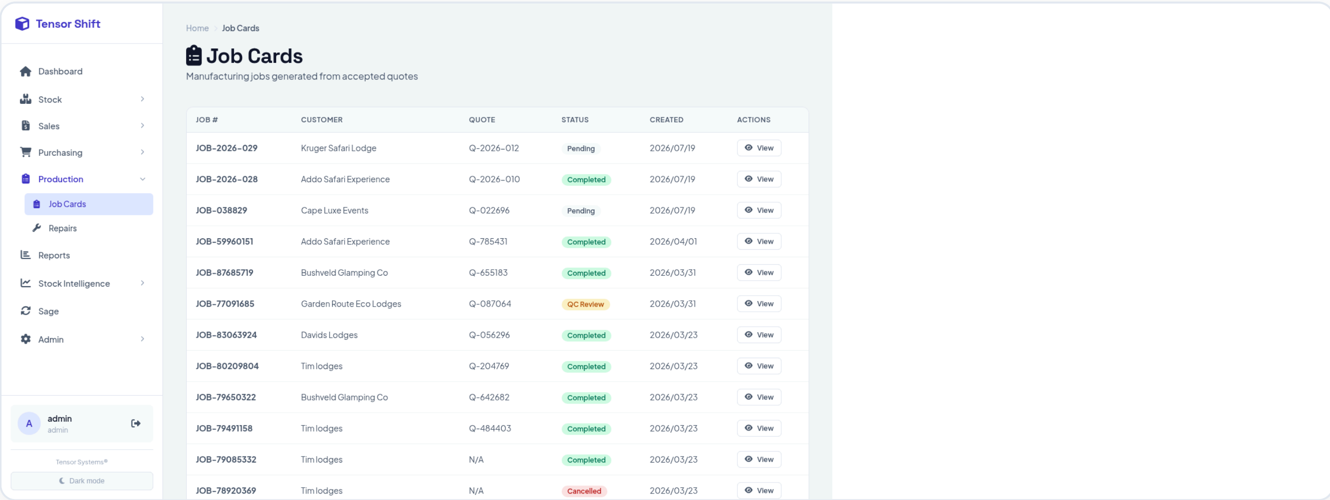
- Stock levels increase immediately for each received item.
- The unit cost is updated using a **weighted average costing** method to keep your cost price accurate.
- The PO status changes to *Partially Received* or *Received*.

> **Supplier invoices from Sage:** If your Sage Business Cloud account is connected, supplier invoices can be synced automatically — see the Sage section.

10 Production — Job Cards & BOMs

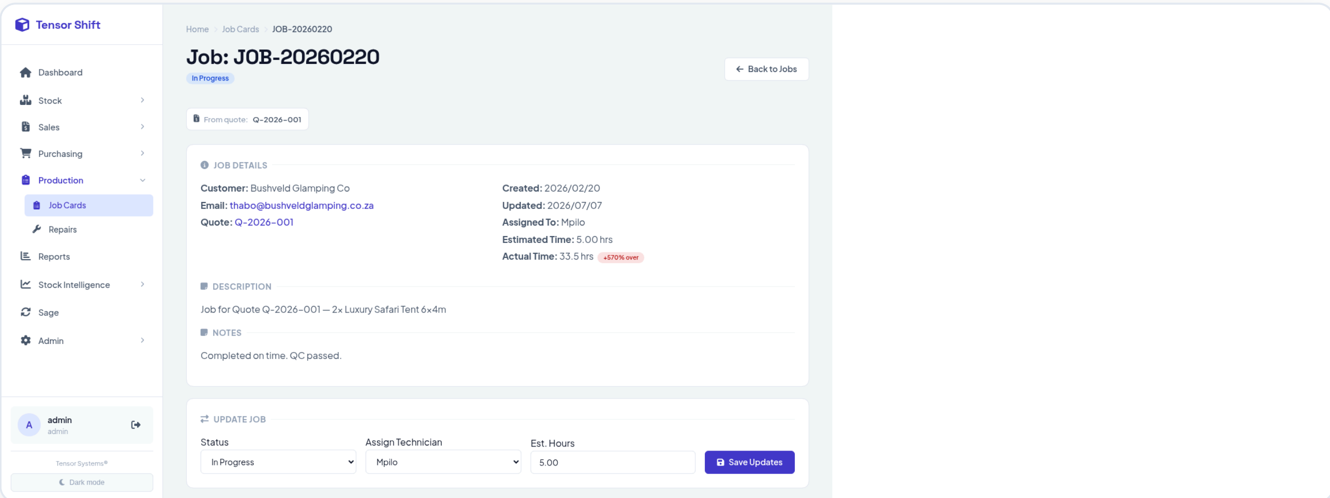
When a production quote is accepted, Tensor Shift automatically creates a Job Card and a Bill of Materials (BOM). The job card tracks the work; the BOM tracks the materials consumed.

Job Cards List



All job cards, filterable by status. The pipeline view shows where work is piling up.

Job Card Detail



A job card in progress. Customer, quote reference, assigned technician, estimated vs actual hours, and status are all shown.

From a job card you can:

- **Update status** — move the job through: Pending Production → In Progress → QC Review → Completed.
- **Assign a technician** — link the job to one of your team members so it appears on their personal dashboard.
- **Log actual hours** — technicians record time spent; the system flags jobs running significantly over their estimate.
- **View & edit the BOM** — check which materials have been issued, add components not originally listed, or adjust quantities.
- **Upload photos** — before/after or in-progress images attached to the job card.
- **QC Check** — a pass/fail quality control checklist before the job is marked completed.

Bill of Materials (BOM)

The BOM lists every material required for the job. For assembly items on the quote, components are pulled in automatically. You can add, edit, or remove items at any time before the job is completed.

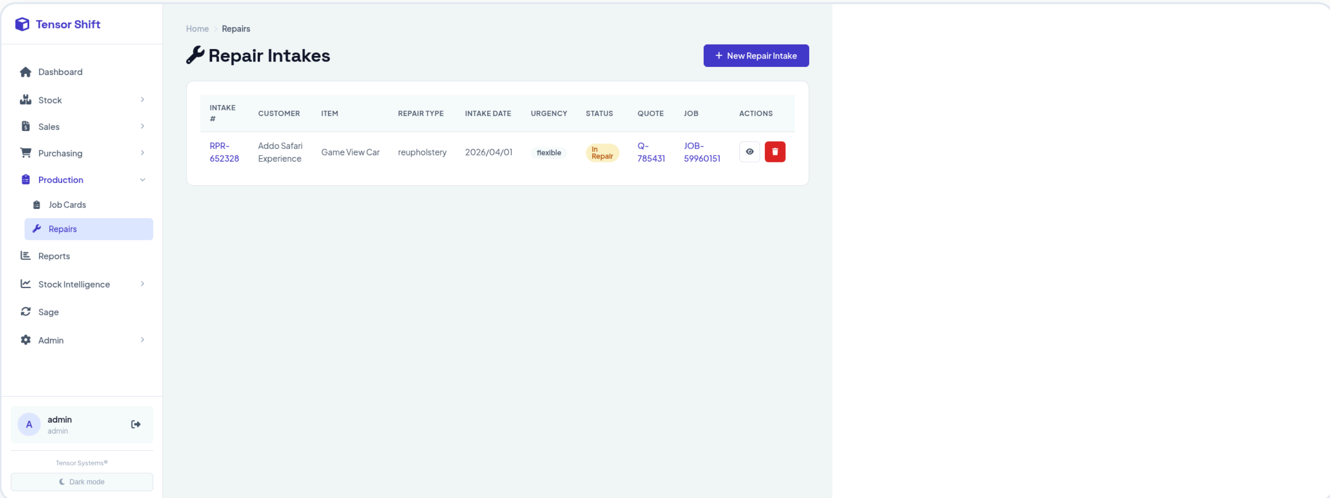
When you **issue materials** from the BOM, stock levels in the inventory decrease immediately. This is how Tensor Shift keeps on-hand quantities accurate without any manual adjustments.

> **Tip:** The Dashboard's job pipeline bar gives production managers a real-time view of how work is distributed across the four statuses.

11 Repair Intakes

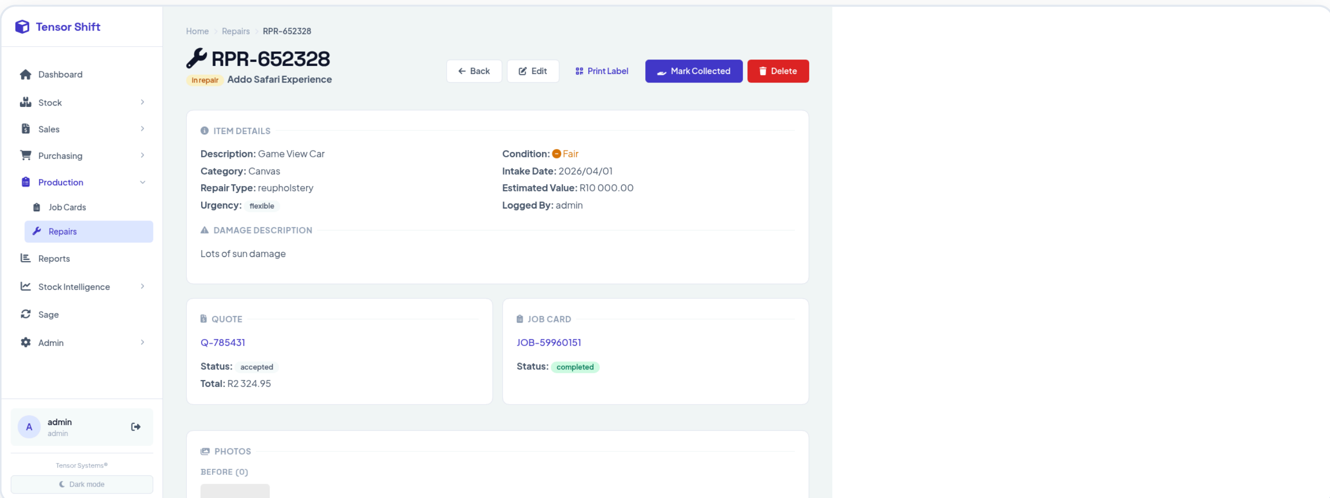
The Repairs module handles customer items brought in for repair, refurbishment, or re-upholstery. It tracks the item from intake through to customer collection, with photos and linked documents at each stage.

Repairs List



All repair intakes, showing the customer, item, urgency, and current status.

Repair Detail



A repair record in progress. The linked quote and job card statuses are shown directly on the page.

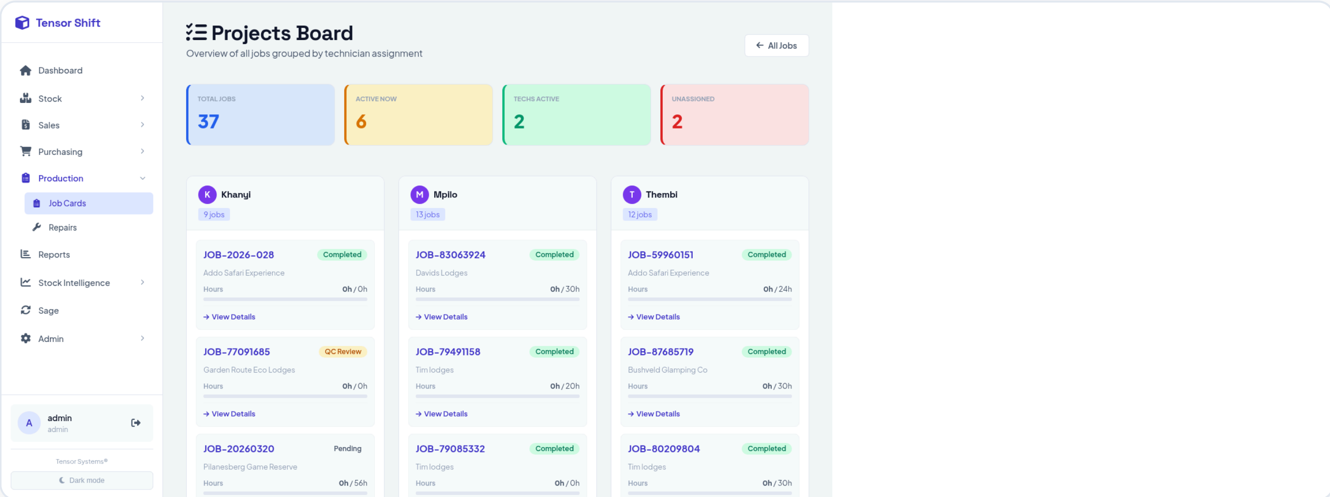
Repair Workflow

1. **Intake** — log the item: description, category, repair type, condition, urgency, estimated value, and before photos.
2. **Quote** — create a quote from the intake (always a production quote). The intake number links directly to the quote.
3. **Accept** — customer approves the quote; a job card is auto-created.
4. **Complete** — technician finishes the repair; QC passes; job is marked completed.
5. **Collect** — click **Mark Collected** on the repair record. A collection label can be printed for the item.

Urgency levels (*flexible, standard, urgent, critical*) are visible in the list view so your team can prioritise incoming repairs.

12 Projects Board

The Projects Board gives managers a Kanban-style view of all active jobs, grouped by the technician assigned to each one. It is the fastest way to see workload balance across your team.



To access the Projects Board, go to **Production** → **Projects Board** in the left-hand navigation menu.

All jobs grouped by technician. KPI tiles at the top show total, active, technicians active, and unassigned jobs.

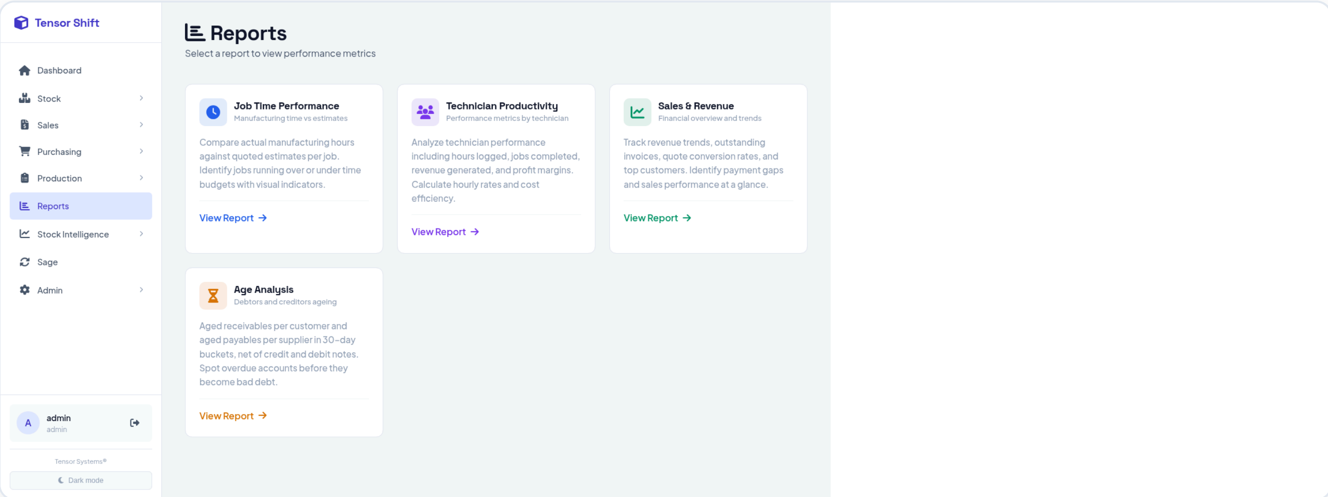
Each technician column shows their assigned jobs with status badges and hours logged vs estimated. Click **View Details** on any job to open the full job card.

Jobs with no technician assigned appear in a separate **Unassigned** count — aim to keep this at zero.

> **Technician self-view:** Technicians can log in and see only their own jobs via the Technician Dashboard, which also provides a timer for logging hours against specific tasks.

13 Reports

The Reports hub gives management a set of pre-built analytical reports. There are no date pickers needed — each report loads with sensible defaults and lets you filter from there.



The four available reports, each with a plain-English description of what it answers.

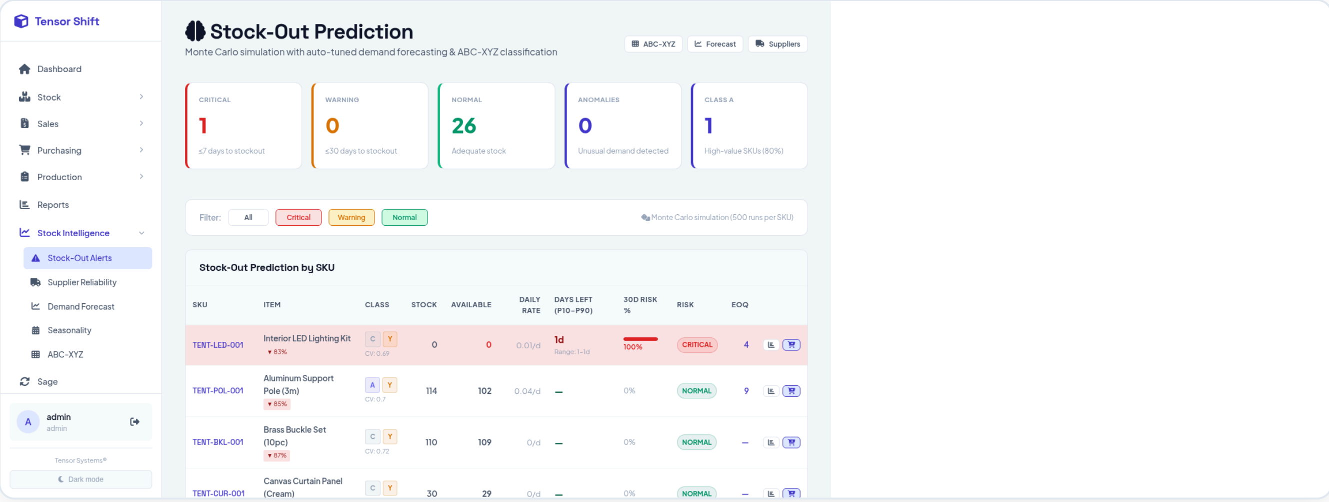
Available Reports

- **Job Time Performance** — compares actual manufacturing hours against the quoted estimate for every job. Green/red indicators highlight jobs running over or under budget. Use this to improve quoting accuracy over time.
- **Technician Productivity** — hours logged, jobs completed, and revenue generated per technician. Calculates an effective hourly rate to identify your most cost-efficient team members.
- **Sales & Revenue** — revenue trends, invoice conversion rates from quotes, top customers by spend, and outstanding payment gaps. Identifies which customers consistently pay late.
- **Age Analysis** — aged receivables per customer and aged payables per supplier in 30-day buckets, net of any credit or debit notes. Essential for spotting overdue accounts before they become bad debt.

14 Stock Intelligence

Stock Intelligence uses your historical sales data to generate machine-learning forecasts that help you stay ahead of demand rather than reacting to stockouts. The models run automatically; you simply read the results and act.

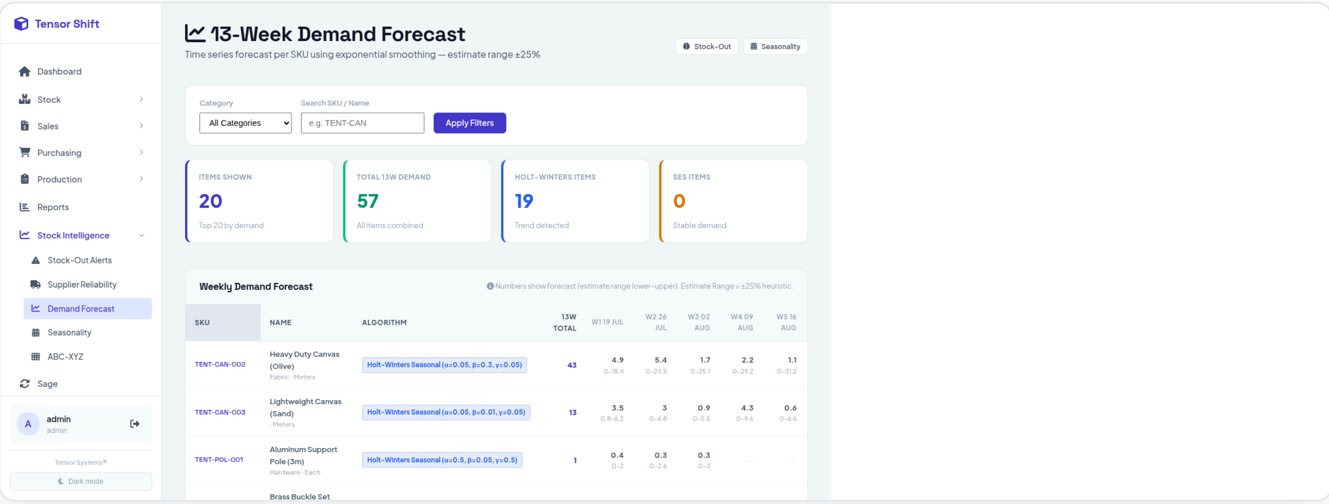
Stockout Risk



Items ranked by stockout risk. The model estimates how many days of stock remain at the current rate of consumption.

Each item is classified as **Critical, High, Medium,** or **Low** risk. Critical items have less than 7 days of stock at current demand — raise a purchase order immediately. The recommended order quantity is pre-calculated for you.

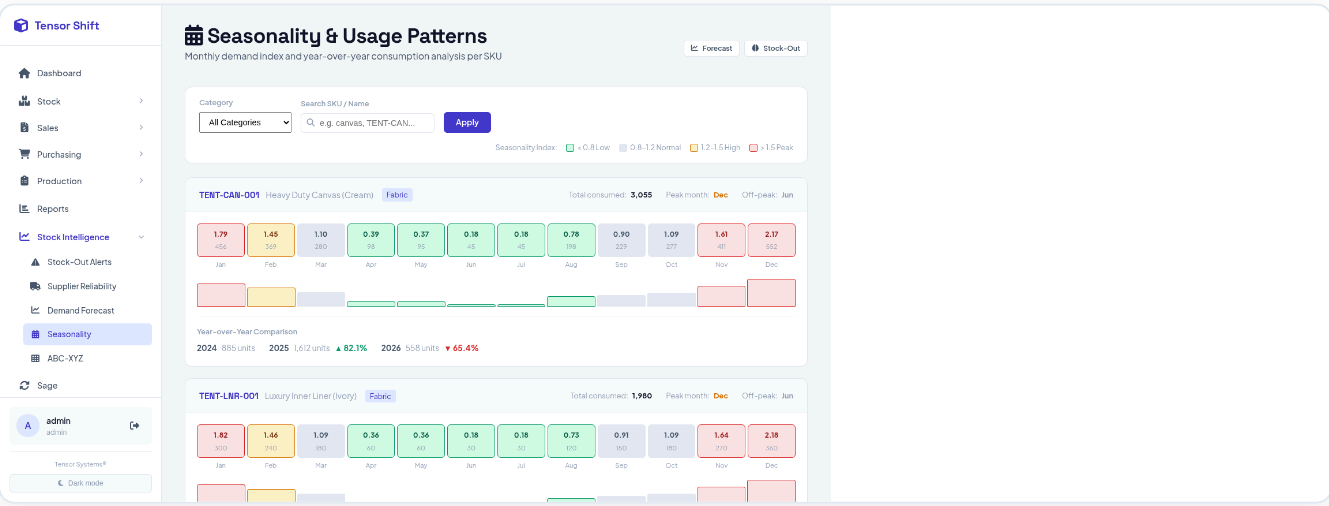
Demand Forecast



30-day demand forecasts per item, with confidence intervals. The chart shows historical actuals alongside the predicted range.

The forecast uses your real transaction history. Items with more history produce tighter confidence intervals. Use the forecast to plan purchase orders 2–4 weeks ahead and avoid unnecessary safety stock.

Seasonality



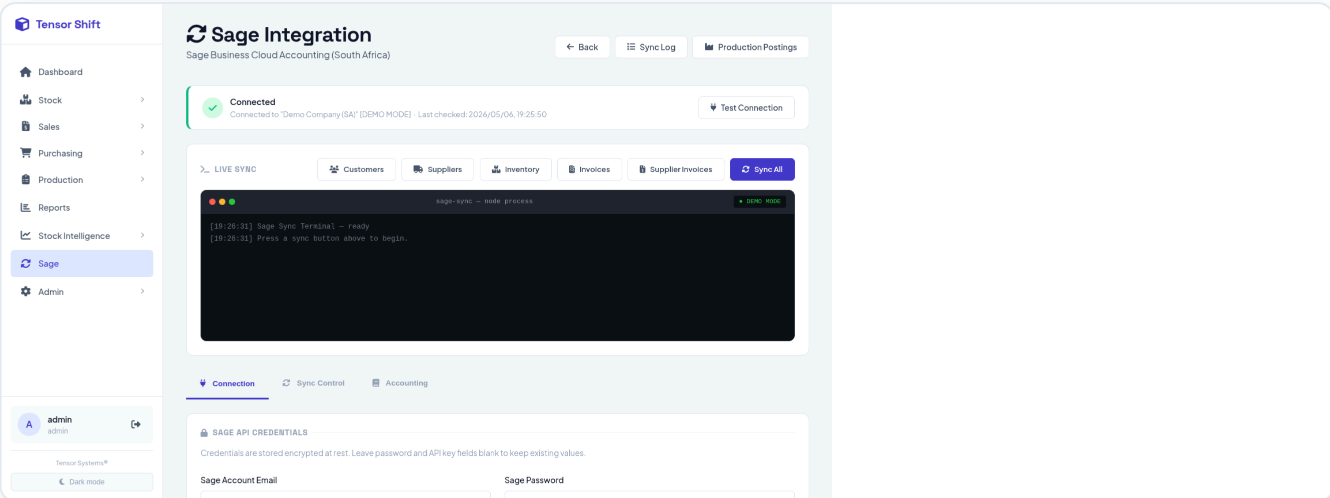
Month-by-month seasonality patterns showing which periods drive the highest demand for each item category.

Seasonality analysis reveals recurring demand spikes — so you can stock up before a busy period rather than scrambling during it. The chart highlights months where sales are significantly above or below the annual average.

> **Note:** Stock Intelligence also includes per-SKU profitability, ABC/XYZ classification, and supplier performance analytics, accessible from the sidebar sub-menu.

15 Sage Integration

Tensor Shift connects directly to Sage Business Cloud Accounting (South Africa). The integration keeps customers, suppliers, inventory, invoices, and supplier invoices in sync between the two systems so you don't need to enter data twice.



The Sage Integration page. A live terminal shows sync activity in real time. The "Connected" banner confirms the API link is active.

What syncs

- **Customers** — Sage customer records are imported and matched to Tensor Shift customers by email.
- **Suppliers** — Sage suppliers are pulled in and linked to purchase orders.
- **Inventory** — item names and prices are kept consistent. Stock quantities are managed in Tensor Shift.
- **Invoices** — accepted Tensor Shift invoices can be pushed to Sage so your accountant sees them without re-keying.
- **Supplier Invoices** — supplier invoices from Sage are pulled in and linked to your purchase orders.

Running a sync

Click any of the category buttons (*Customers, Suppliers, Inventory, Invoices, Supplier Invoices*) to sync that entity, or click **Sync All** to run all of them in sequence. The terminal window shows each record processed in real time.

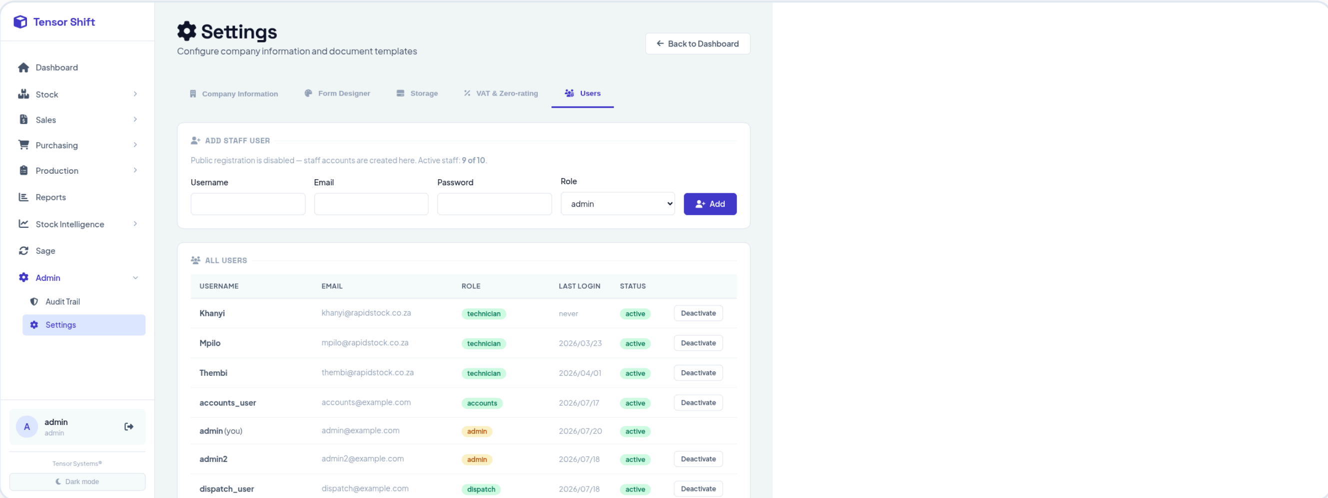
Syncs also run automatically on a schedule (every 15 minutes) so the two systems stay aligned without manual intervention.

> **Demo mode:** While the integration is in demo mode (as shown in the badge), no real Sage data is read or written. Contact your administrator to activate the live connection.

16 Administration

The Admin section is restricted to users with the *admin* role. It covers user management, company settings, and system configuration.

User Management



The user management page. Admins can add users, change roles, reset passwords, and deactivate accounts.

Each user account has:

- **Role** — controls what they can see and do (see Section 18 — User Roles).
- **Email** — used for login.
- **Status** — active or deactivated. Deactivating a user immediately revokes access without deleting their history.

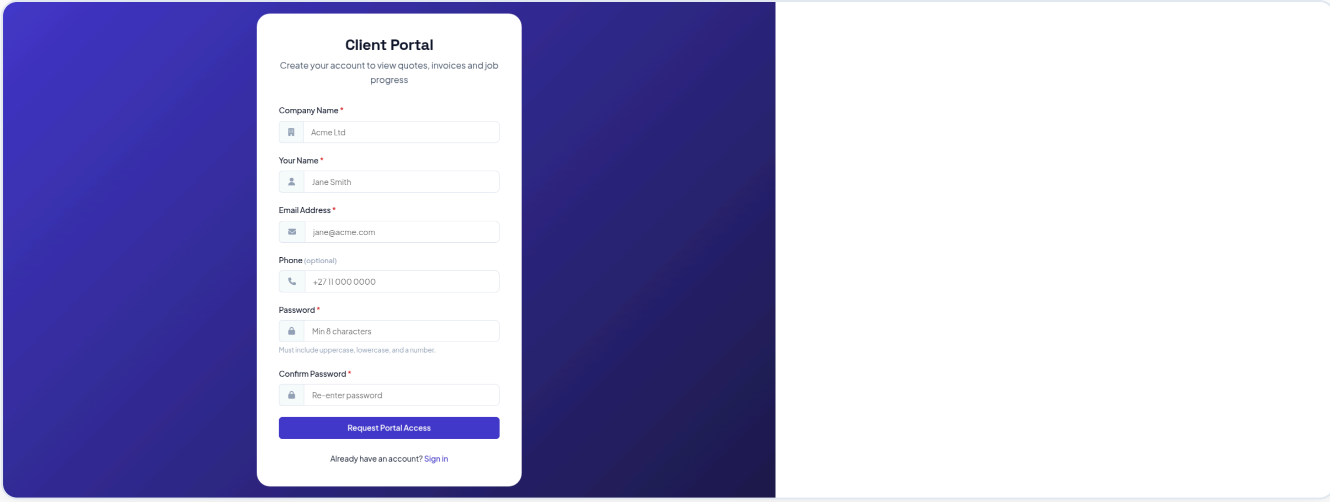
Company Settings

Under **Admin** → **Company Settings** you can set:

- Company name, address, and logo (displayed on PDFs).
- Default VAT rate applied to new quotes and invoices.
- Bank details printed on invoice PDFs.

17 Customer Portal

The Customer Portal is a separate, secure login that gives your customers access to their own quotes and invoices — without giving them access to any internal data.



The customer-facing login page. Customers use a separate email/password set up by your admin team.

What customers can do

- **View quotes** sent to them and accept or decline directly — no email back-and-forth required.
- **View invoices** and their payment status.
- **Download PDF** copies of any document.

Setting up a customer portal login

1. Open the customer's detail page and click **Create Portal Access**.
2. Enter the email address the customer will use to log in.
3. Share the portal URL and their temporary password with the customer.

> **Tip:** When a customer accepts a quote through the portal, Tensor Shift processes it exactly as if staff had clicked Accept — the job card is created (or not, for direct sales) automatically.

18 User Roles & Permissions

Tensor Shift uses role-based access control. Every user is assigned one role that determines which parts of the system they can reach. Roles cannot be combined — assign the role that covers the broadest set of tasks the user needs.

Role	Who it is for	Key access
admin	System administrators, business owners	Full access to every module including user management and company settings.
sales	Sales staff, account managers	Quotes, invoices, customers, credit & delivery notes, inventory (view), reports. Cannot manage users or change company settings.
accounts	Finance / bookkeeping	Invoices, credit notes, purchase orders, supplier invoices, reports, age analysis. Cannot create or accept quotes.
production_manager	Workshop / floor supervisors	Job cards, BOMs, repairs, purchase orders, inventory, projects board, quotes (view/accept). Cannot edit financial settings.
technician	Workshop technicians	Their own assigned job cards and the technician dashboard only. No access to pricing, customers, or financial data.
dispatch	Logistics / delivery staff	Delivery notes and job cards (view only). Cannot create or edit documents.
customer	External customers via portal	Their own quotes and invoices only. Completely isolated from all other customer and internal data.

Security note: Customer portal logins use a separate, isolated authentication path. A customer logging in can never see another customer's data, even if they guess a URL.