OPTIMISE
STREAMLINE • TRACK • CONTROL
PART OF
SAFPRO

WELCOME

OPTIMISING YOUR OPERATION SAFELY

SAFPRO

Common industry challenges

- Non-compliant product and suppliers
- Spend leakage
- Poor visibility of user history
- Purchasing admin time
- Manual requisition processes
- Limited control of day-to-day expenditure

Our overarching objectives

- Driving compliance
- Restrict to core product range appropriate to roles
- Automated approval processes
- Alert systems for compliance
- Streamline ordering process from user
- Live 24/7 reporting and MI
- Control by budgeting with points allowance
- Multiple authorisation levels

MODULES

OPTIMISE

OPTIMISE STOCK

A quick and straightforward way to order your requirements. You can instantly access your key products which are categorised into product groups i.e. Footwear, Outerwear, Trousers, Gloves etc.

OPTIMISE PACK

Offers all the advantages of the Trade module and lots more. All ordering is wearer specific, allowing you full control and management of all requirements for all employees.

ADMINISTRATION

Chosen users have the ability to amend administrative details. Immediate changes can be made to Optimise from adding new employees to amending delivery addresses.

ACCESS TO OPTIMISE

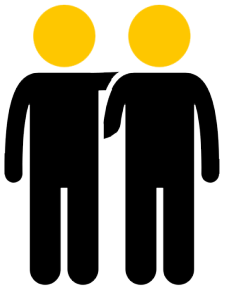
OPTIMISE

MANAGER

Full visibility & access to all aspects of the portal. See details for all employees across all areas of the company.

AREA MANAGER

Ability to access & view employees within an area (i.e. North & South) or for managing multiple teams.



SUPERVISOR

Management of a single team or location, with visibility of only these employees.

USER

Login & view their own personal details & order history. Visibility of their rolespecific range only.

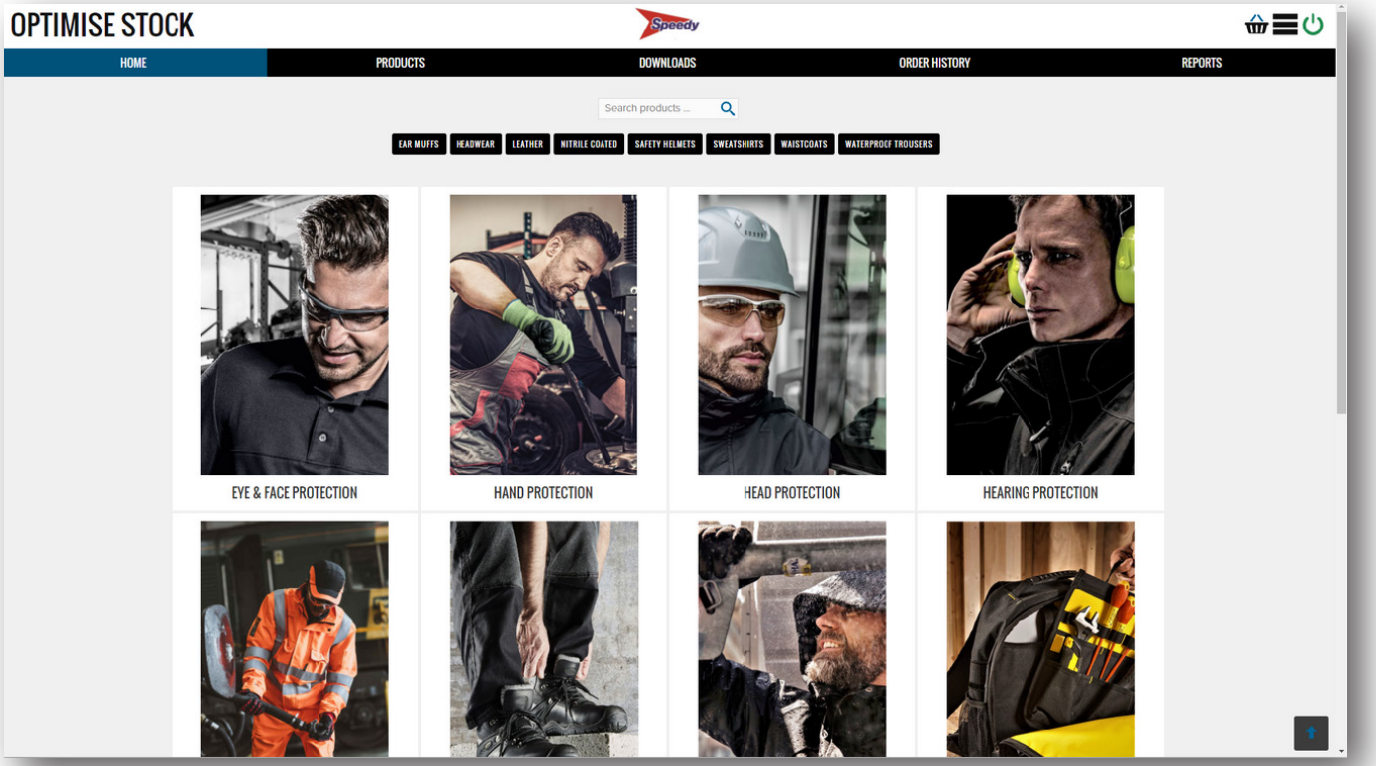
“SAFPRO MAKE THINGS A LOT EASIER; WE’VE GOT A LOT OF ENGINEERS SO WE NEED A LOT OF PPE AND UNIFORMS. THE PORTAL IS EASY TO USE AND NAVIGATE; IT’S MADE THINGS EASIER FOR THE END USERS AND THE MANAGEMENT SIDE”

Chubb

ORDERING

OPTIMISE STOCK

OPTIMISE

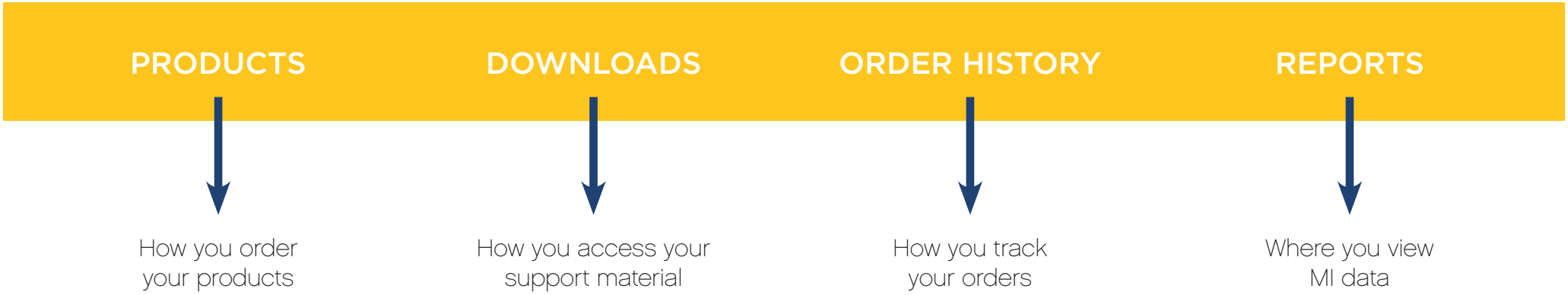


- Fast ordering of stock products across the size range
- Only allow access to an approved
- product range
- Preloaded with your special prices
- Ability to order 24 hours a day, seven
- days a week
- Online catalogue to easily browse the range available
- Authorisation process for different
- pend levels
- Full online reporting facility in various
- breakdowns and formats
- Check order status and consignment details for delivered orders

OPTIMISE PACK

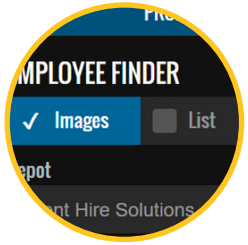
The Optimise Pack system is preloaded with an employees' data, including name, job role, branch and other relevant information. By selecting the employees name you will be able to view the range of products available for that employee. When processed, orders will be delivered and received with their name clearly marked for ease of distribution or receipt. For full visibility and reporting purposes, the employees previous orders will be stored on Optimise.

- Order for individual employees, one order can be placed for multiple employees
- Receive all packages clearly labelled for the wearer
- Points system to control allocation to each employee
- Full reporting by wearer and by branch
- Ability to be given access to personally manage employee details



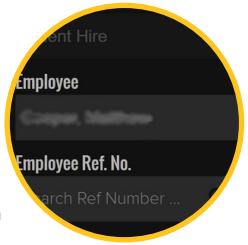
ORDERING PROCESS

OPTIMISE



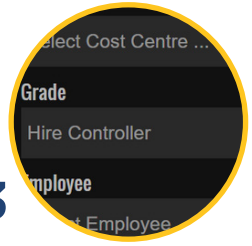
1

Images or List view for visual support or speedy ordering



2

Order by individual to receive items packed per wearer

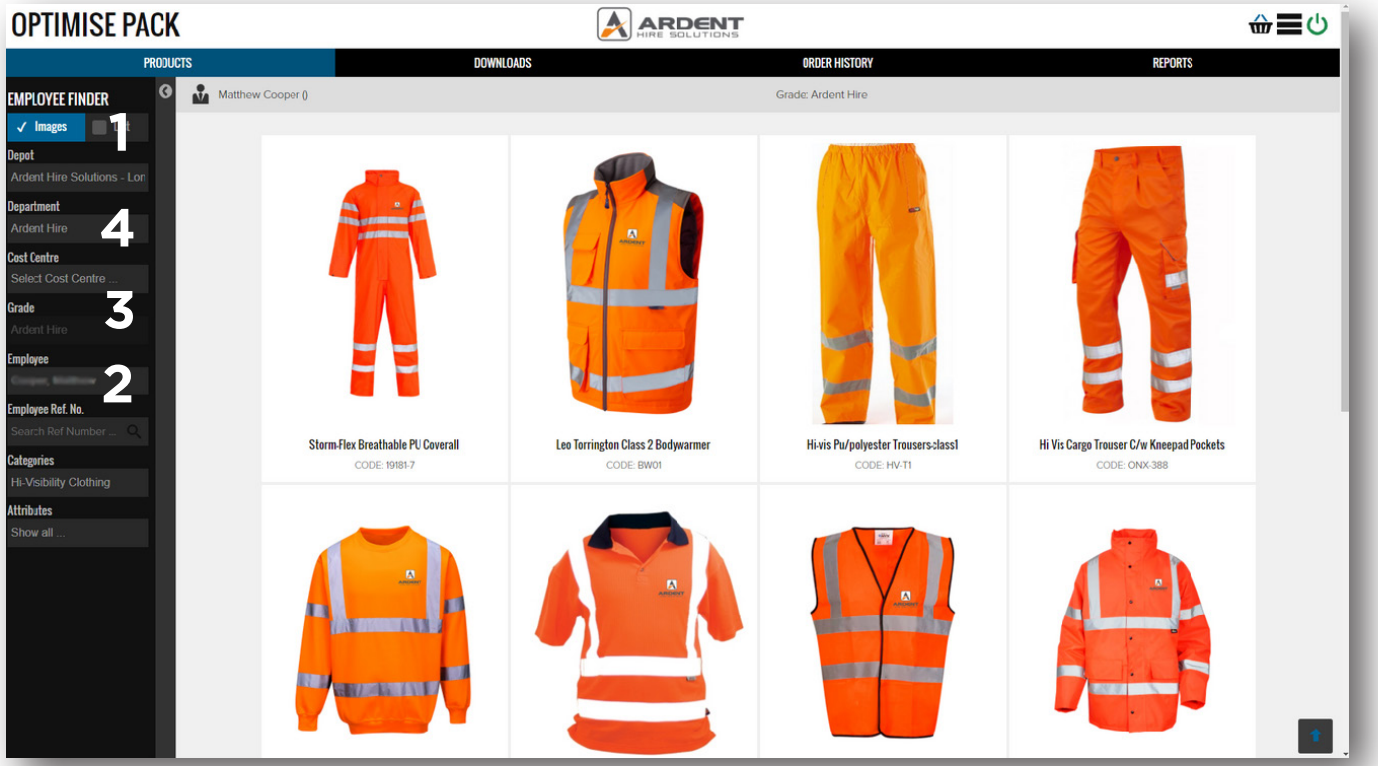


3

Role specific wardrobe to the associated job role

4

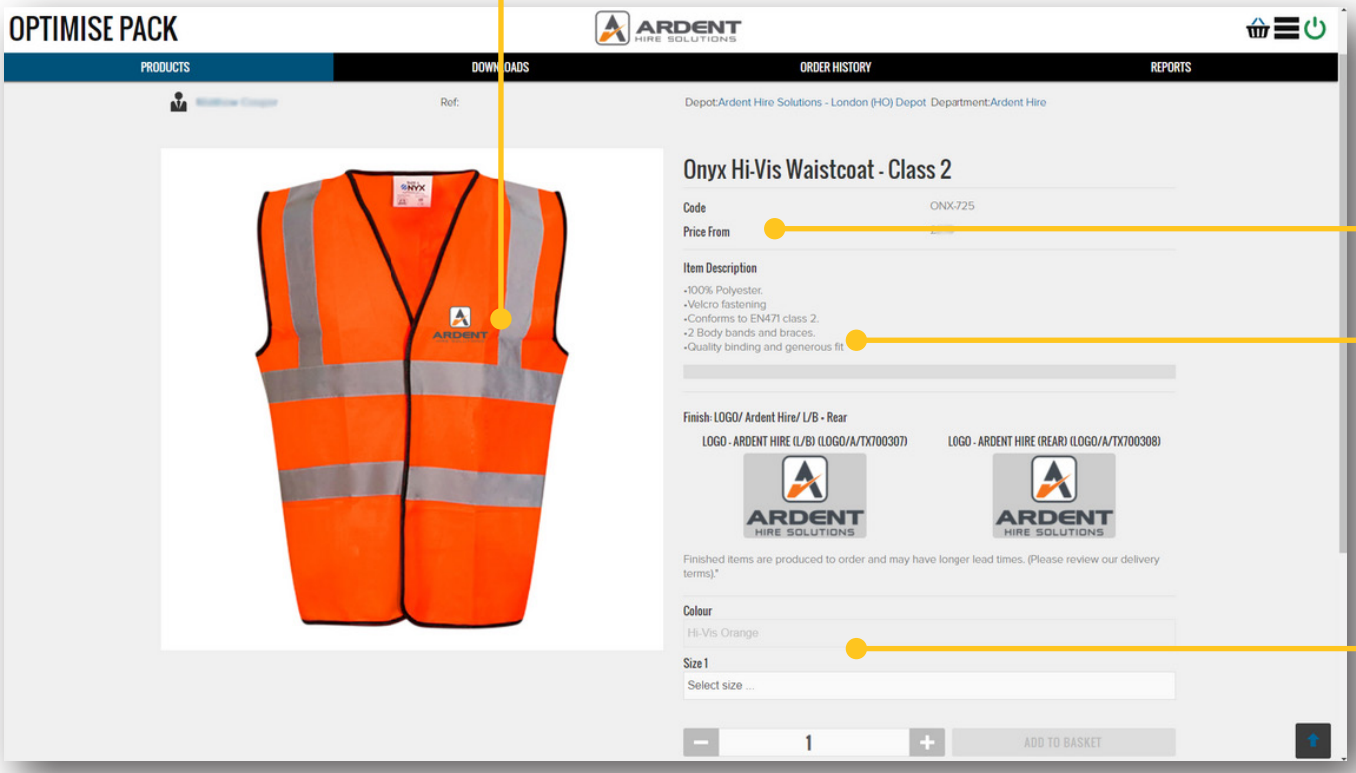
Breakdown of employees by depot, department & cost centre



PRODUCT PAGE OVERVIEW

OPTIMISE

Image of branding to provide accuracy when placing orders



ability for contract price to be **hidden or visible**

detailed product description for clarity when selecting products

required size, quantity etc. **simply selected** before adding to basket

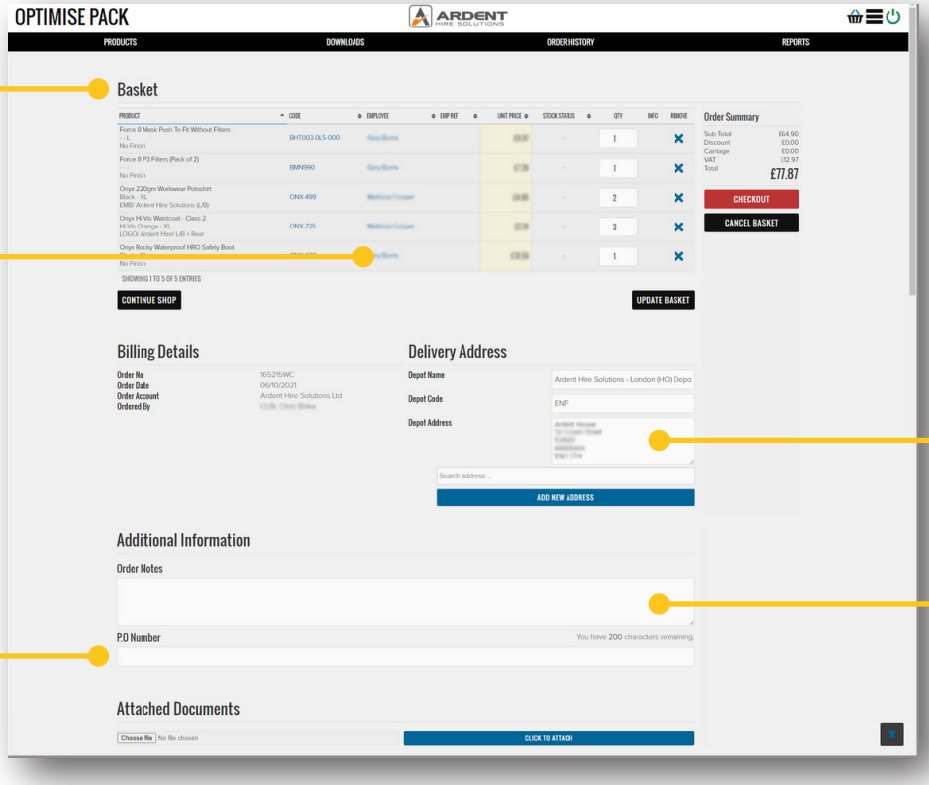
ENTERING THE BASKET

OPTIMISE

overview of the basket and details of items purchased

click on employee to see a complete quick **purchase history visual**

insert PO number for the order, which can be **made mandatory** across all orders



delivery addresses can be **defaulted** or ability to **add new** address

any **further information required** for order including notes or an attachment

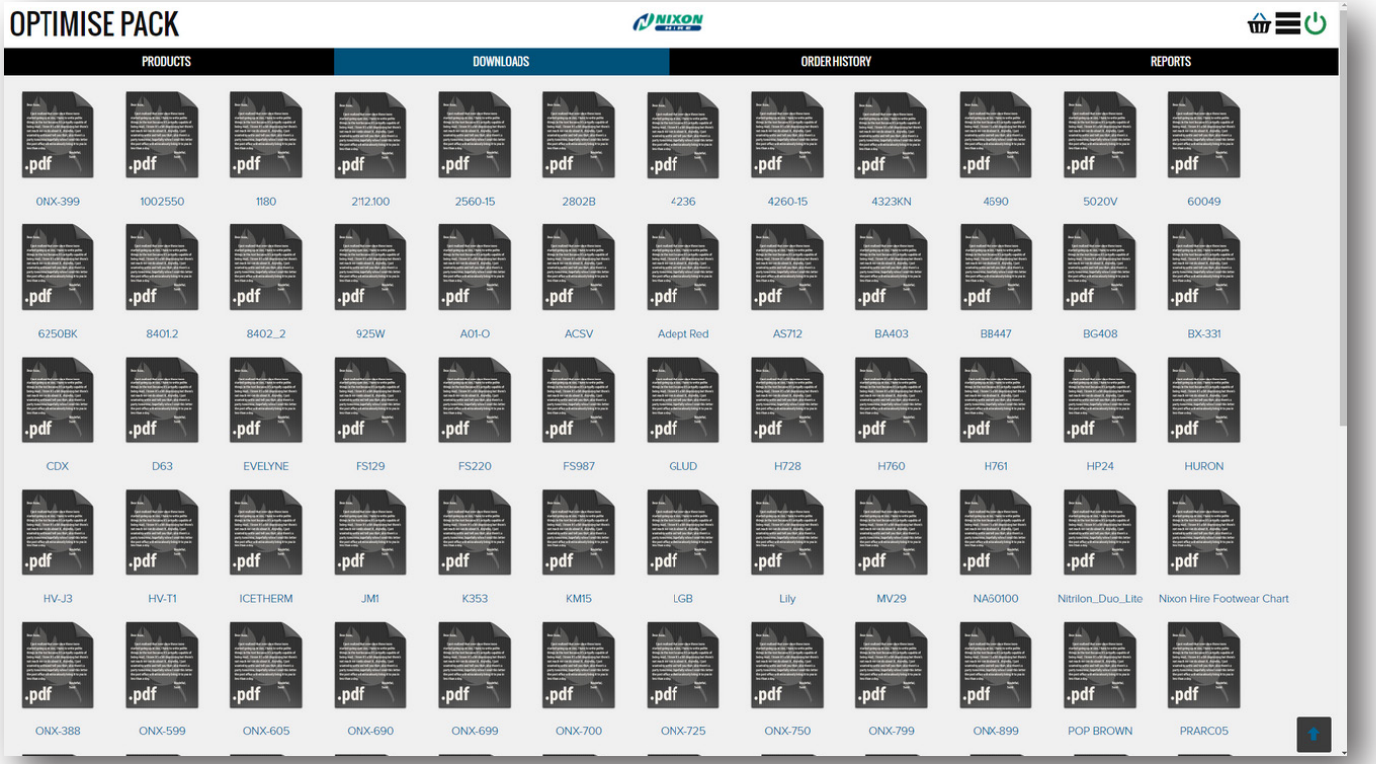
“SINCE WE HAVE SWITCHED TO USING SAFPRO AND THEIR PORTAL, SPEEDY HAS ACHIEVED CONTROL OVER EMPLOYEE SPEND WHICH HAS MET WITH BUDGETS AND ENSURED WE HIT OUR SAVINGS TARGETS FORECAST FOR THE LAST FINANCIAL YEAR.”

Speedy

DOWNLOADS

DOWNLOADS LIBRARY

OPTIMISE



Access your support material through the downloads portal. This information is available to all portal users.

Here are some examples of support material you might include:

- Sizing guides
- Specification sheets
- Declarations of conformity
- Optimise user overview
- Optimise portal video guides
- Safpro support team information sheet
- Technical & standards advice

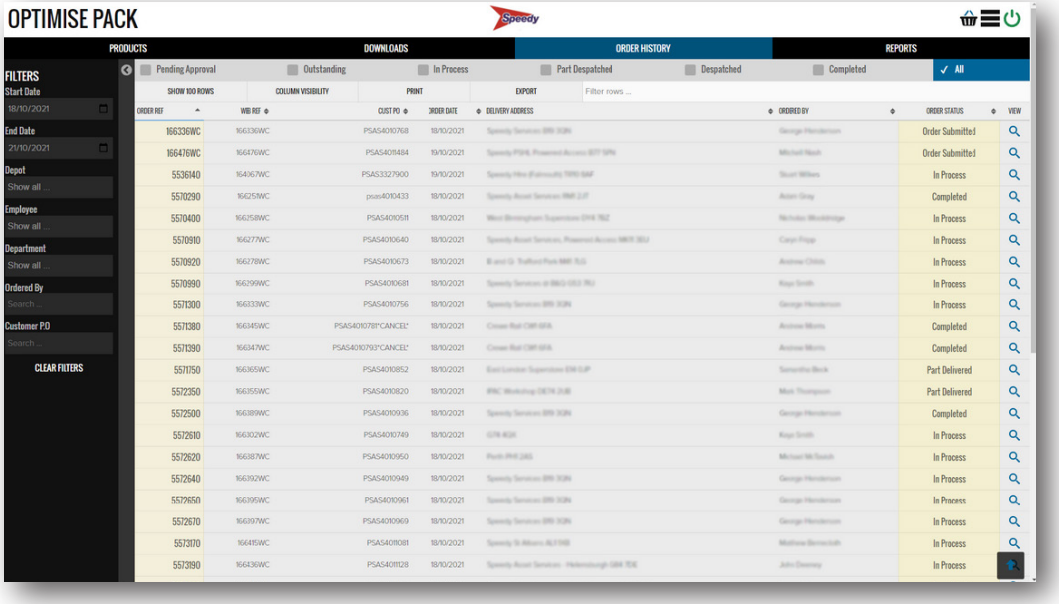
ORDER HISTORY

ORDER HISTORY

To complete a transparent ordering cycle, Optimise users will be able to see the live status of their orders. Order History updates can simply be exported in various formats or emailed to an email address of choice.

Within this module you can filter the search by the below details:

- Date range
- Depot
- Employee
- Department
- Ordered by
- Customer PO



PENDING APPROVAL

Orders waiting for approval from managers

OUTSTANDING

Orders with Safpro waiting to be downloaded

IN PROCESS

Orders in Safpro's system, being processed

PART DISPATCHED

Orders dispatched but still items outstanding

DISPATCHED

Orders fully dispatched waiting to be invoiced

COMPLETED

Orders that are fully delivered and fully invoiced

ALL

All orders placed on Optimise

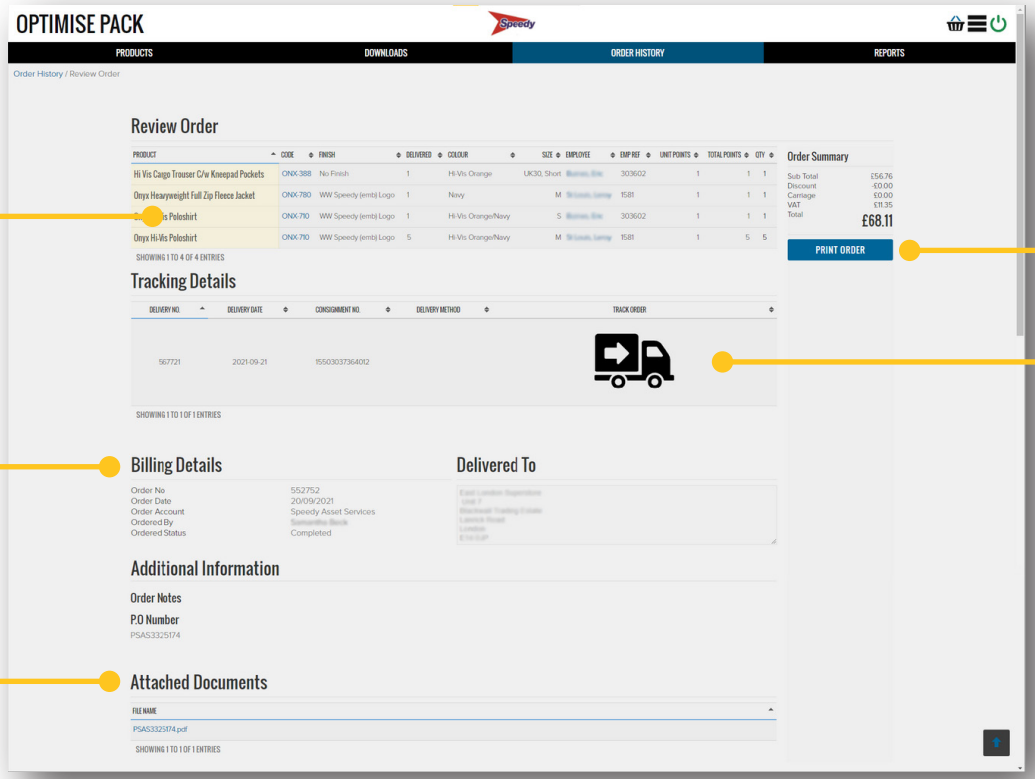
REVIEWING ORDERS

OPTIMISE

full picture of **items ordered** for each employee

all information visible for **billing and delivery**

your **order attached** for reference and clarity



ability to **print order** for reference or queries

delivery **tracking** available

“ONLY DEFINED ITEMS CAN BE ORDERED WHICH ENSURES CONSISTENT PRODUCTS ARE USED TO ENSURE CORRECT STANDARDS ARE ADHERED TO. THIS IS A GREAT CHOICE WHERE YOU HAVE NUMEROUS LOCATIONS AND STAFF LOCATED AROUND THE UK IT HAS WORKED FOR KONECRANES AND WE HAVE FOUND THE ORDERING SYSTEM TO BE BENEFICIAL FOR THE WAY WE WORK.”

KONECRANES®

REPORTING

REPORTING OVERVIEW

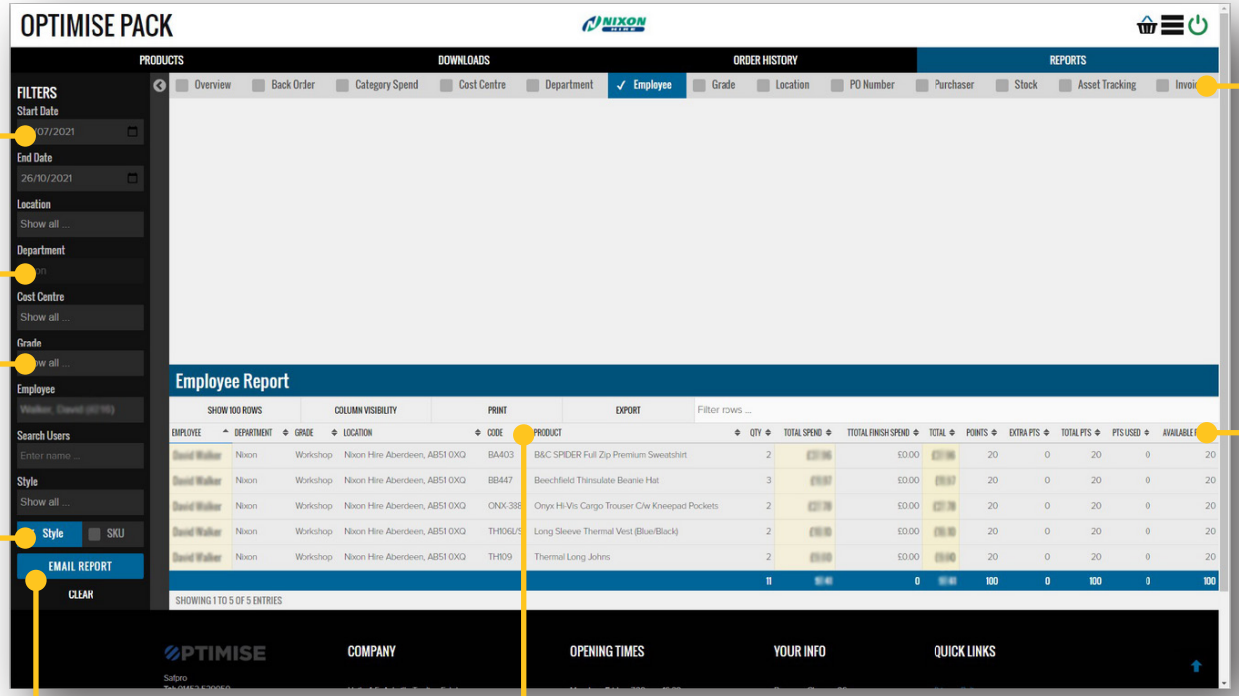
OPTIMISE

filter any date period
from start of trading

high level reporting on
depot or department

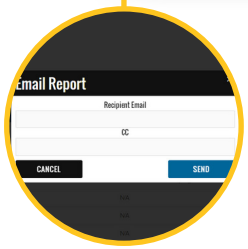
medium level reporting
into **job role or cost centre**

advanced **intricate filters**
for usage and employee
and style

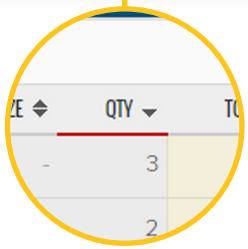


full suite of reports
from start to end

view of **points control allocation** and usage,
for category points
system



share your report directly
with a
colleague



toggle filters
for flexibility
when reporting
in Optimise
e.g. highest to
lowest qty

EMPLOYEE SKU REPORT

OPTIMISE

export and drill down into your reports

SKU filter provides additional information including **colour, size, decoration of product**

Employee Usage Report

SHOW 100 ROWS | COLUMN VISIBILITY | PRINT | EXPORT | Filter rows ...

EMPLOYEE	PRODUCT	FINISH	COLOUR	SIZE	QTY	TOTAL	LAST ORDERED
David Walker (#216)	B&C SPIDER Full Zip Premium Sweatshirt	EMB/ Nixon-colour triple embroidery logo	Black	M	2	[illegible]	30/09/21
David Walker (#216)	Beechfield Thinsulate Beanie Hat	EMB/ Nixon-embroidery logo	Black	-	3	[illegible]	20/10/21
David Walker (#216)	Long Sleeve Thermal Vest (Blue/Black)	N/A	Blue	M	2	[illegible]	30/09/21
David Walker (#216)	Onyx Hi-Vis Cargo Trouser C/w Kneepad Pockets	N/A	Hi-Vis Orange	UK30, Reg	2	[illegible]	22/07/21
David Walker (#216)	Thermal Long Johns	N/A	Blue	M	2	[illegible]	30/09/21
					11	[illegible]	

easy-access & visibility of when **orders are placed** for compliance

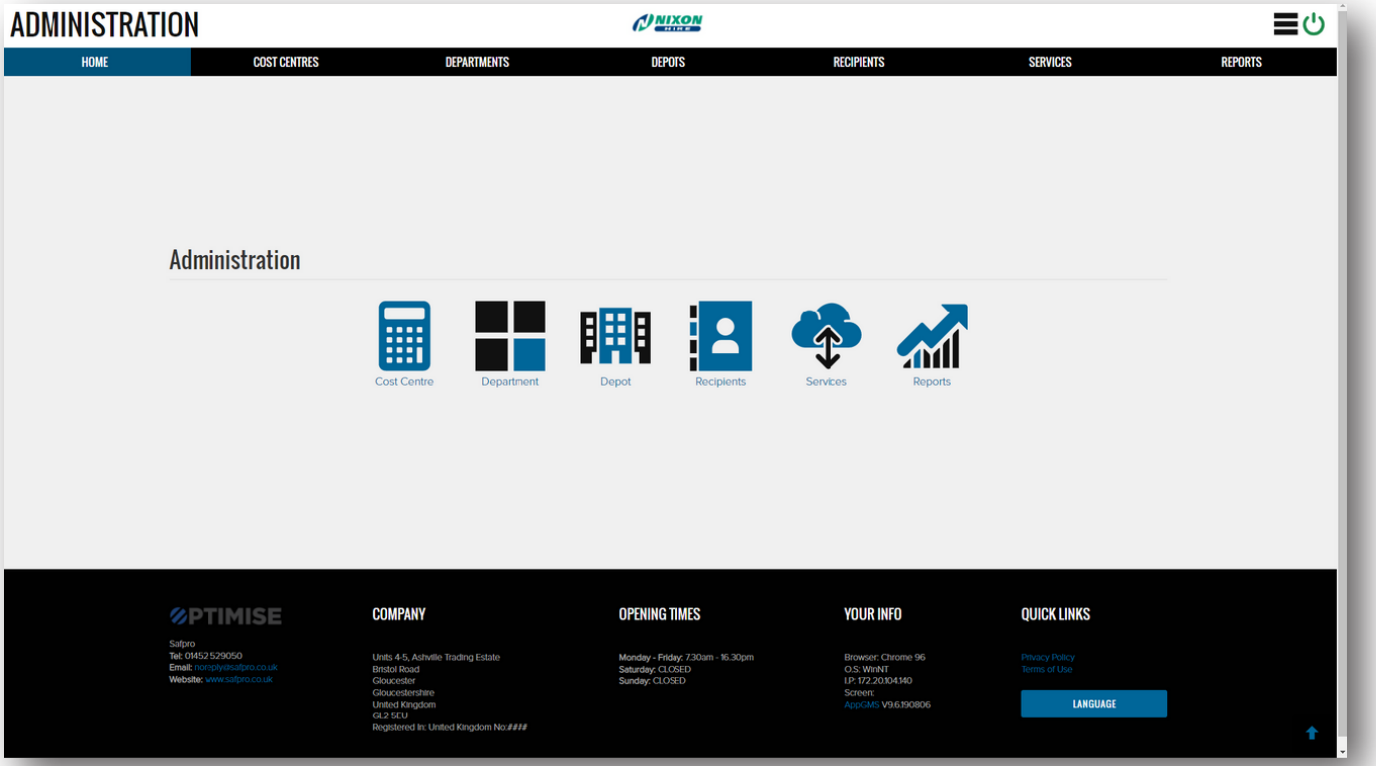
FULL SUITE OF REPORTS

OPTIMISE

Full picture of spend & usage within your authorised area of visibility	**OVERVIEW**	**BACK ORDER**	Overview of orders outstanding & details of items yet to be dispatched
A visual of all spend & usage within the different categories taken	**CATEGORY SPEND**	**COST CENTRE**	Visibility of spend & usage within filtered cost centre
Visibility of spend & usage within filtered departments	**DEPARTMENT**	**EMPLOYEE**	All individual employee spend & usage data available including date of purchase
Overview per grade as to the spend & usage over a chosen time period	**GRADE**	**LOCATION**	Narrow down to report on the spend & usage of delivery locations and depots
Details of all PO's placed including total value and quantity of items within order	**PO NUMBER**	**PURCHASER**	Ability to report on spend & usage from the employees that place orders
Visibility of quantities taken of each product line & usage per line	**STOCK**	**INVOICE**	Overview of all invoices processed through Optimise showing what has been delivered

ADMINSTRATION

STREAMLINE THE ADMIN



- Chosen users can be given access to the Administration Module. You will be able to maintain your own portal, keeping locations, employees, and cost centres up-to-date.
- Adding new starters will enable you to order their new starter workwear and PPE kits as they are immediately live to order for.
- Deactivating employees will remove them from your ordering section, but their order history remains visible to you.

SOLUTIONS

ABOVE AND BEYOND

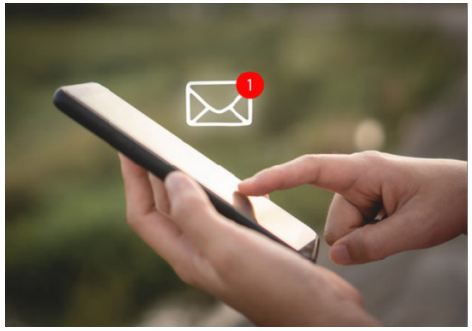
OPTIMISE

AUTOMATED POINTS CONTROL

The two key outcomes are, firstly, an automated approval where points allocation for non-essential products can be orders up to and not beyond the agreed allocation in a set time period - for example, four points for four polo shirts in a rolling 12 month period. Secondly, you can have the assurance that operatives are not able to order outside their allowance and this in turn can relieve your team or the administrative tasks of checking and approving orders.

AUTHORISATION PROCESS

By introducing an authorisation process within Optimise, your teams at all levels can be assured requests for PPE will be captured and traceable, and prompts action by authorisers to avoid delays in this process. Different levels of authorisation can be set to fit your management structure. A two stage authorisation is available allowing line managers to approve and an administration department to insert a purchase order number.



REPLENISHMENT ALERT

Reminders are sent to the wearer's device, showing a replenishable range of core product available to the wearer, such as consumable PPE. The alert will fire on a custom time period. Wearers are required to self audit and ensure their personal compliance throughout their working week. This can all be cost managed by a points allocation to keep within budgets set.

INSPECTION ALERT

Optimise can generate automated email alerts notifying your team of assets which are due inspection. The asset owner, or other responsible personnel, will follow the alert process through to the inspection criteria within Optimise. The inspection is performed and the result is recorded, and will now be auditable in the reports module. If the asset fails, the user can immediately request a replacement item; if the asset passes, Optimise will schedule the next inspection date.

THANK YOU

We appreciate you taking the time to look through our overview of the Optimise ordering and management portal. Please reach out if you require any further details or would like a demo to explore how Optimise can benefit your organisation.

01452 529050
sales@safpro.co.uk
www.safpro.co.uk