

## Manage workbooks

For support and questions:  
[support.brugle.com](https://support.brugle.com)  
[support@brugle.com](mailto:support@brugle.com)



# Table of contents

## Manage workbooks

Manage workbooks	3
The workbooks widget	3
The workbooks menu	5



## Manage workbooks

Every business has his own projects and product classifications, to enable this kind of product grouping, we have created *Workbooks*. You can access the workbooks by the widget on your homepage or the menu.

### The workbooks widget

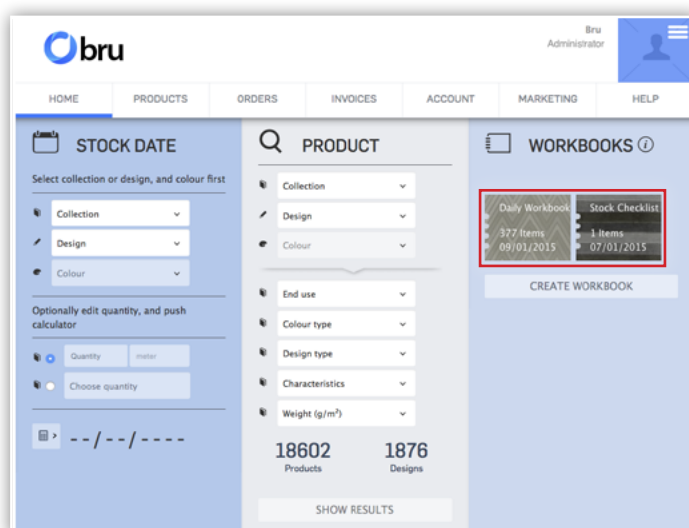
You can find the workbooks widget on the right side of your homepage. As soon as you have visited your first product detail page and completed a stockcheck, two default workbooks will appear, *Daily workbook* and *Stock checklist*.

#### *Daily workbook*

Every time you visit a product detail page, the daily workbook will keep a record of this product, this enables you to retrieve a product once viewed. As the name suggests this list is emptied on a daily basis.

#### *Stock checklist*

The stock checklist records the products of your last hundred stock checks.

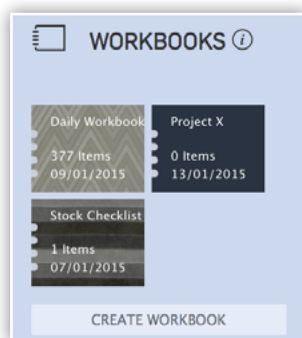


#### *Create workbook*

##### **Step Instruction**

- 1 By clicking on the button *Create workbook* in the widget you can easily add different projects. Choose a meaningful name, so you can easily manage a growing quantity of workbooks. A new thumbnail is added, the workbook is still empty. You can search for a product, as you learned in the tutorial *Explore products*.

##### **Image**



## Step Instruction

2 You can add a product directly to a workbook if the product page is showing in the list view, by clicking on a workbook icon.

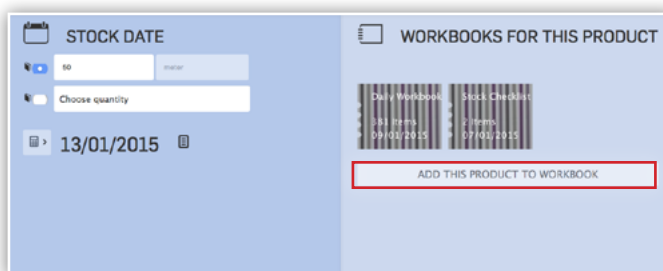
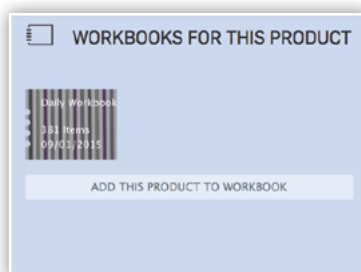
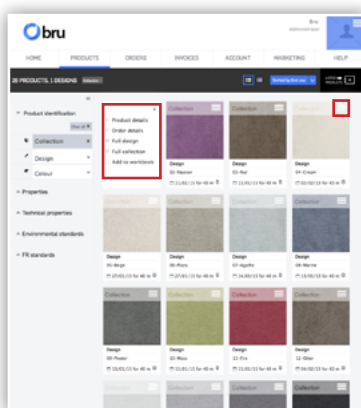
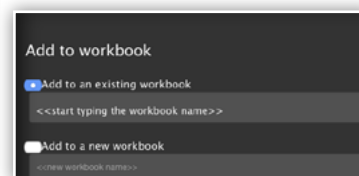
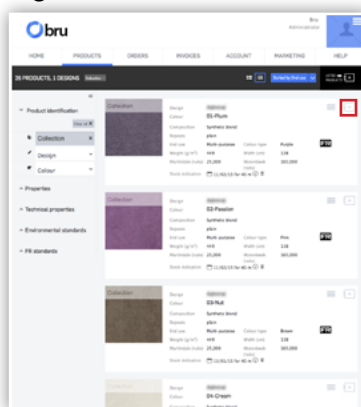
3 A pop up screen will appear and by selecting the proper workbook it will be added to that workbook. Or you can choose to make a new workbook in this screen.

4 In the thumbnails view you can access this functionality is hidden in the actions menu. You can find this by clicking on the icon in the right top corner of the thumbnail.

5 If you need more product details before adding it to your workbook, visit the product detail page. Scroll down to find the workbook options for this product.

6 You can see that the product is already added to the *Daily workbook* because you just checked the product detail page. By using the stockdate check, it appears in the menu on the right in the *Stock checklist*. By clicking on *Add this product to workbook*, the pop up window will appear, where you can choose your own workbook or make a new one.

## Image



## The workbooks menu

Via the menu in the navigation bar, you can find the workbook page where all workbooks are listed.

### Step Instruction

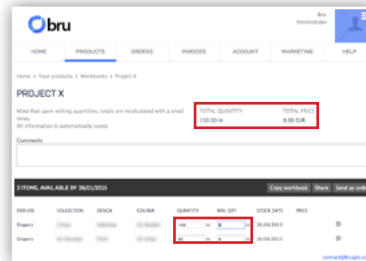
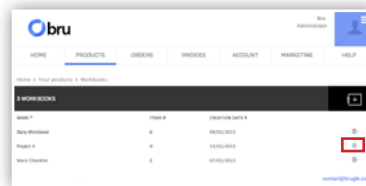
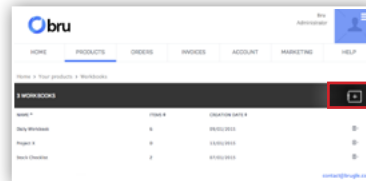
1 The workbook icon enables you to create a new workbook.

2 Via the action menu of a specific workbook you can view or edit the workbook. You can review or modify the data of each product line in the workbook.

3 Note that when modifying the quantity the total price, quality and availability for the product are updated.

4 Notice the buttons on the right. First, *Copy workbook*. Type a new name for the copy. Creating copies can be useful, when certain projects require the same kind of projects. A copied workbook is managed separately and follows its own trajectory.

### Image



**Step Instruction**

5 This is not the case for option two, *Share*. Choosing the share option, provides a link that you can forward manually by email. You send a live view of the workbook. Every change you make in the workbook is visible for the other party as well.

6 If the receiver wants to work in this workbook he can copy this workbook, to break the link and make his own workbook.

7 Third option, *Send as order*, complete the order details and send it out. For safety reasons, we manually check each online order.

**Image**

