Administrator's Guide

Version: 7.0

Smartx Hub® is a 100% cloud-based Platform, asset tracking software that allows users to view enterprise assets located across multiple locations.

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Content

1. Audience

This document provides guidelines for system administrators to configure the Platform, manage users, and set-ups external components programs like GPS, SMS servers or tokens for API(s).

2. Getting Started- Smartx Hub®

Smartx Hub® is a 100% cloud-based Platform, asset tracking software that allows users to view enterprise assets located across multiple locations. Leveraging RFID and other advanced Smart technologies, the platform gives you real-time visibility of your assets and allows you to automate the business processes associated with asset life cycles.

Smartx Hub® unifies asset visibility data from many sources, such as Barcoding, Beacon Tags, Passive RFID, GPS, and sensors, and turns this data into automated business processes.

Note: *This document is divided into several sections, which explain the functions of Smartx Hub® on the web platform.*

2.2. General Configuration

The general configuration lets you control how your site is displayed, such as the logo and the company location.
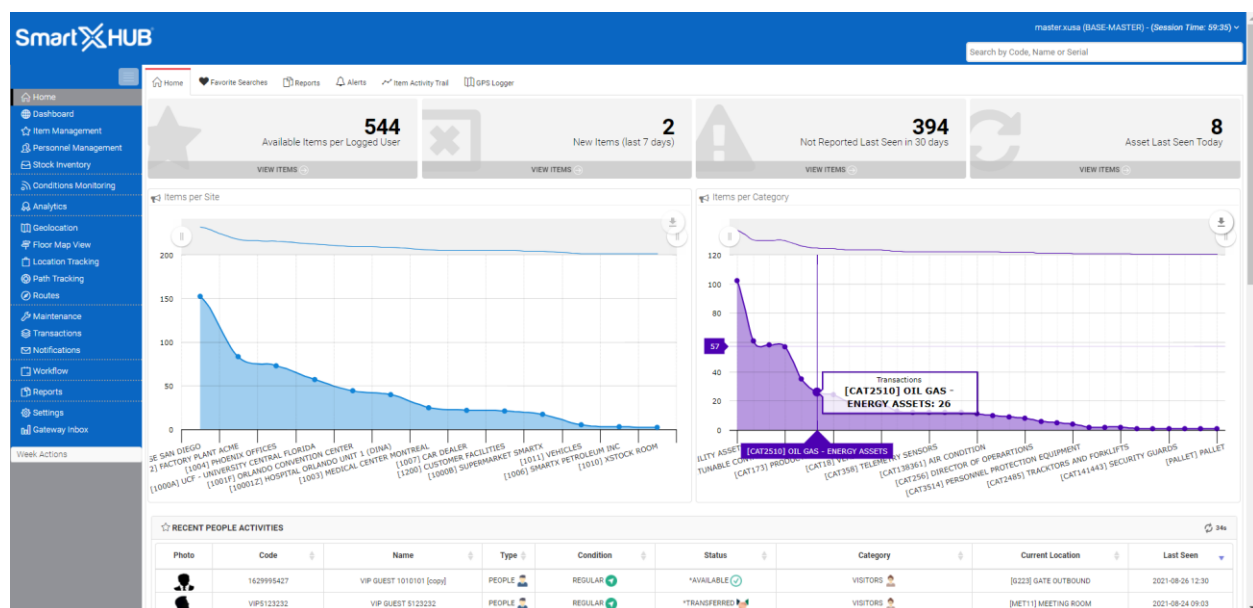
2.2.1 Company Address

To change the general settings:

1. Go to the **Settings Settings tab**.
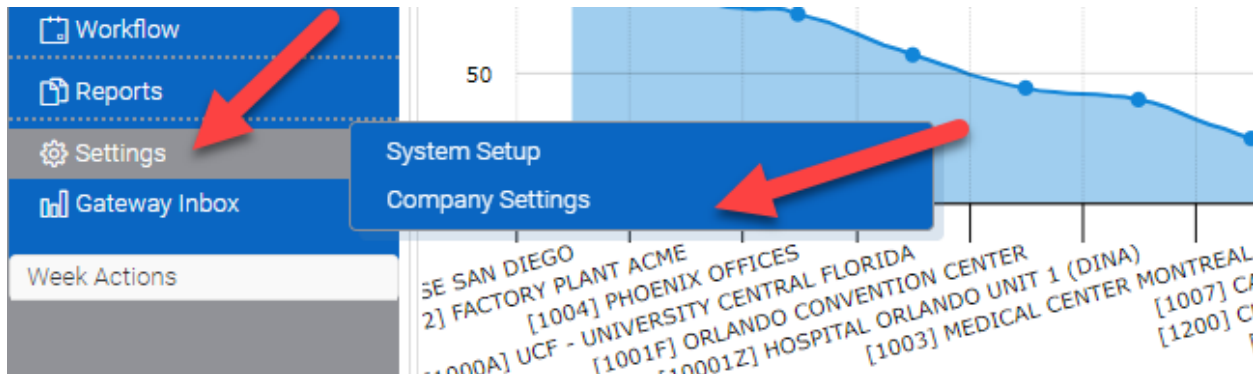
2. In the general configuration page, select the **Company Address** tab.

   The Company address page opens.

3. Update the general and financial information of your company

4. Click the **Save Changes** button.

2.2.3 Changing the logo

To replace the Smartx Hub® logo for your company's logo.

1. Go to the **General Settings tab**.
2. On the general configuration page, select the **Company Settings tab.**
   The general configuration page opens.
3. Click the upload button to upload the new logo from your files.
4. Once uploaded, it is saved automatically.

3. System Setup

This chapter explains how to set up the master data in Smartx Hub®.

It is assumed that the basic configuration has already been carried out.

The settings tab is where data used by the rest of the system is entered. If setting up the system for the first time, the information under this function should be entered before working with the asset data section. If planning to import asset data from a spreadsheet using the import function found under Configuration-Import and Export, it is also recommended that master data be set up in this section before import.

As indicated by the buttons listed along the left-hand side of the screen, the following data is entered under master data:
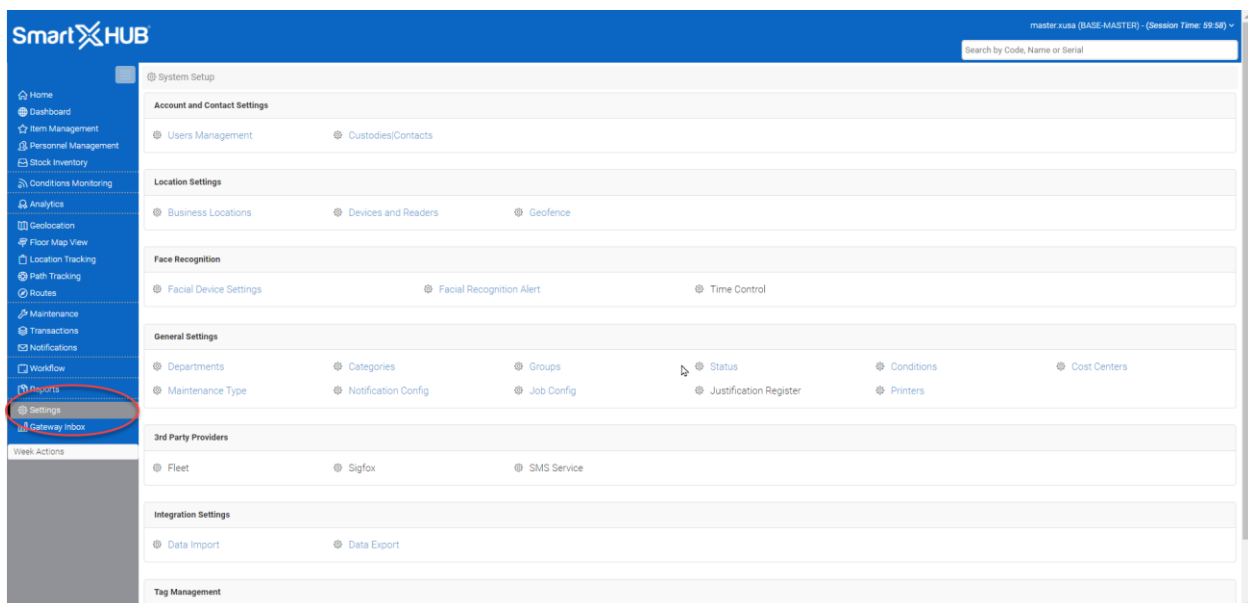
User Management: The access to the administrative features of the system.

Department: It is an area of responsibility

Categories: Information that is common for a group of assets.

Groups: A set of assets or devices that the organization wants to associate with one another for business purposes.

Custody/ Contacts: People or companies responsible for assets.

Status: Statuses of the assets.

Conditions: It is the measure of the health of the assets.

Cost Center: The unit within an organization where costs may be charged for accounting purposes.

Mass Change Messages: The cause for making changes, in mass, to the assets.

Business Locations: Company structure, including buildings and rooms. The site, area, and zone.

Tags RFID/Label: Passive RFID tags.

Tags Smart Tags: Active beacon tags.

Devices and Readers: RF readers are associated with the platform.

Import and Exports: Import and export data.

3.1. User Manager - Users

Smartx Hub® can be accessed only by authorized users. An authorized user may access some or all the Smartx Hub® functions. This is implemented via a permission based security template.

This section describes how to define users and how determine their Smartx Hub® permissions.

3.1.1. Defining Permission Template

A permission corresponds to an operation that a user is permitted to carry out in Smartx Hub®, such as creating and deleting items. Users are assigned one or more permissions, granting them the permission to perform the operations included in their roles.

All permissions are pre-defined in Smartx Hub®. You can create roles by setting their permissions. For example, a role system administrator would include all the permissions pre-defined in Smartx Hub®.

It is important to mention that permissions are completely independent for one another, and one permission does not automatically grant another permission, even if it is required. For example, if you need to give a user the ability to add and delete items you must give the user the role also the permission to view the assets.
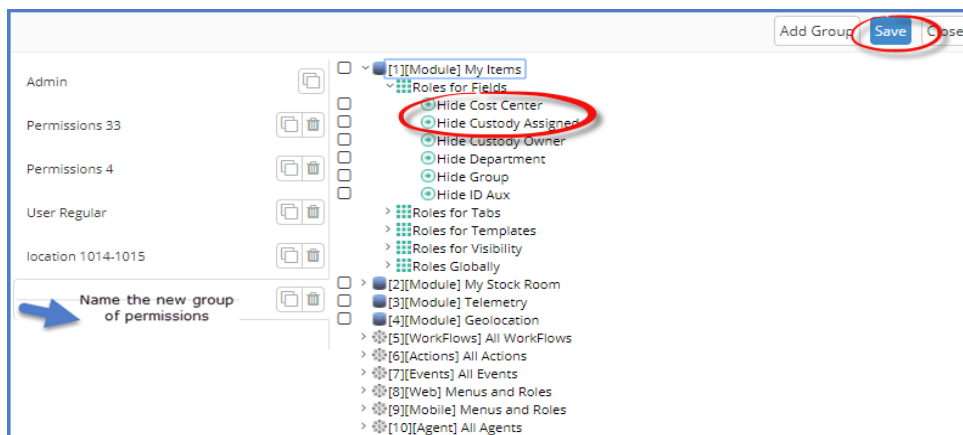
To define Permissions:

1. Select the **Settings tab**.

2. In the navigation pane, select the **User Manager** tab.

3. Click the **Permission Template** tab.

   The new permissions page is open.
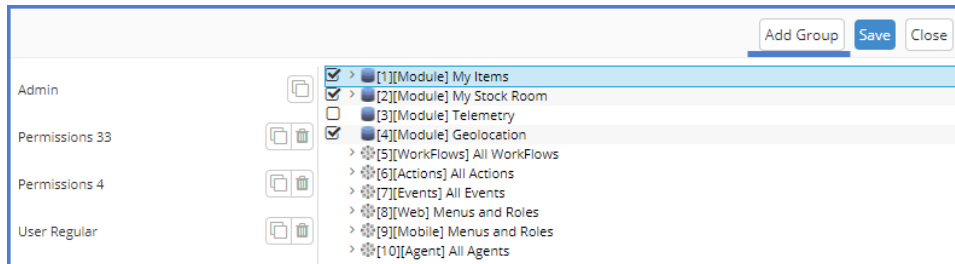
4. Click the **Add Group** button, and name the new group of permission

5. Double-click the permissions in the **available permission pane** to add this role.

6. Once selected, all the permission to be assigned to the user click the **save button.**

   The new permission group appears in the User Permission window.

3.1.2. Item Visibility for Your Users

This module exposes configurable and extendable visibility settings. You can use the Smartx Hub® item visibility option to enable or disable menu items on the front end.
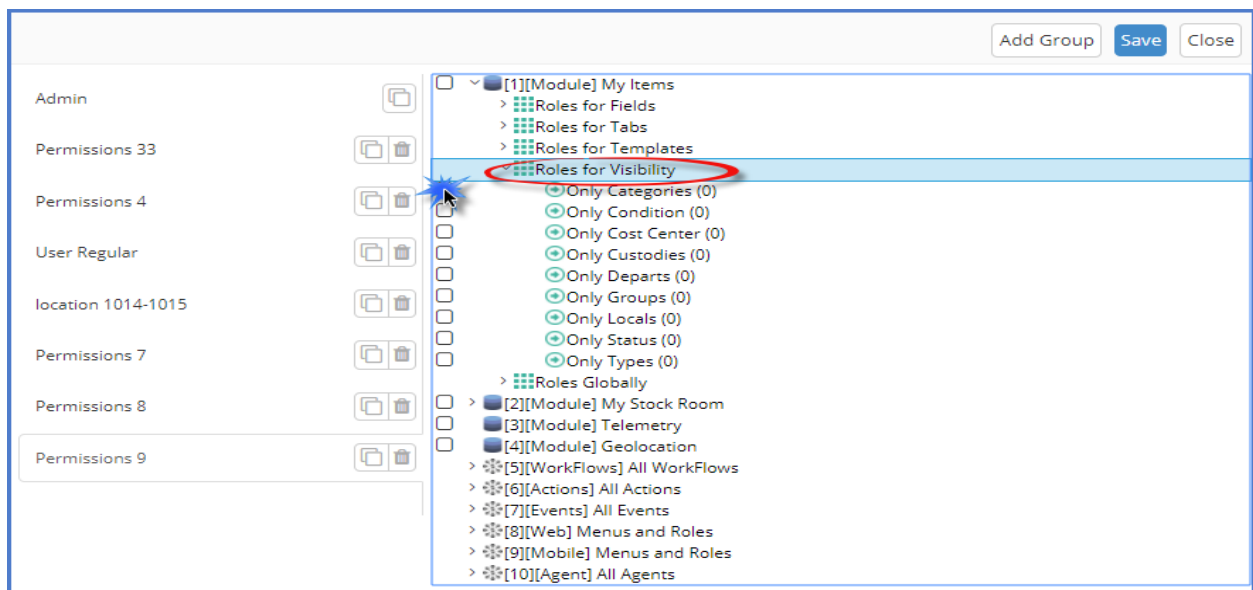
To define item visibility:

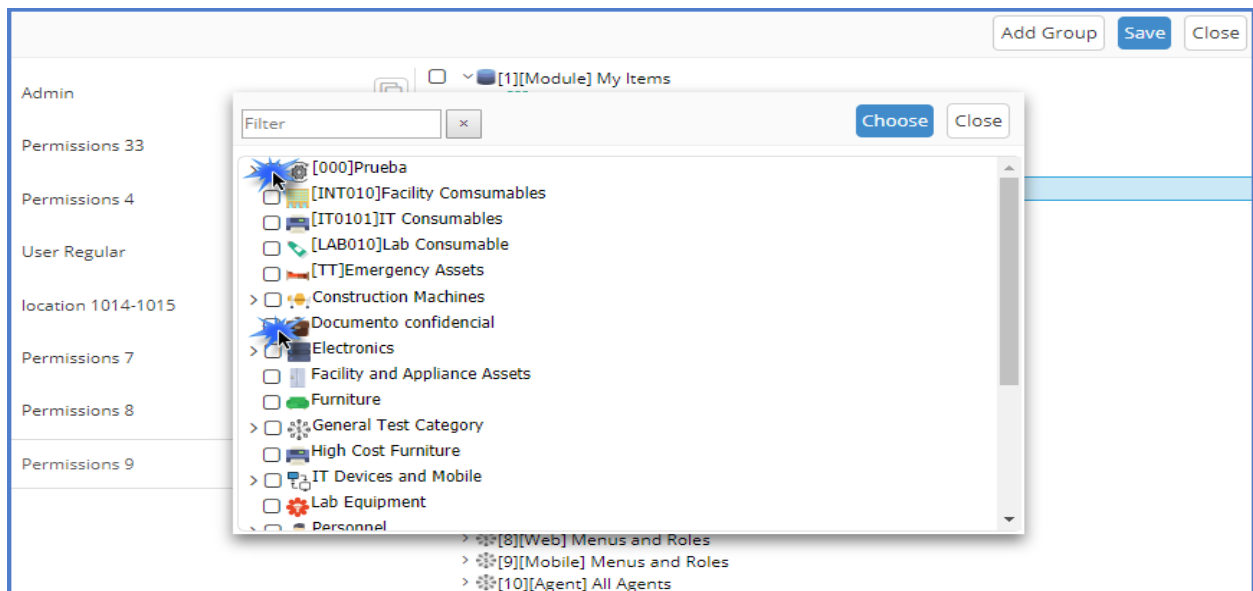1. Select the **Settings tab**.

2. In the navigation pane, select the **User Manager** tab.

3. Click the **Permission Template** tab.

   The new permissions page is open.

4. Click the **Add Group** button, and name the new group of permission

5. In the **available permission pane**, double click the **My Items Module**.

6. Select **Roles for Visibility**
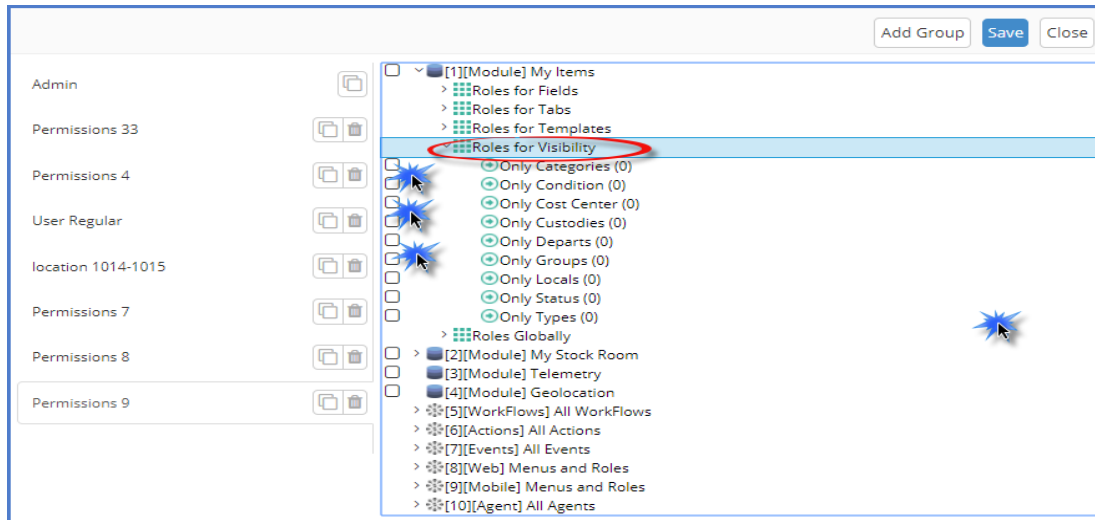
7. Mark the check box of each option you want to manage and double click on it.

8. The filter pane for each option opens, and you can adjust the item visibility option according to your preferences.

9. Click the **save button** to save the changes regarding the visibility option based on users.
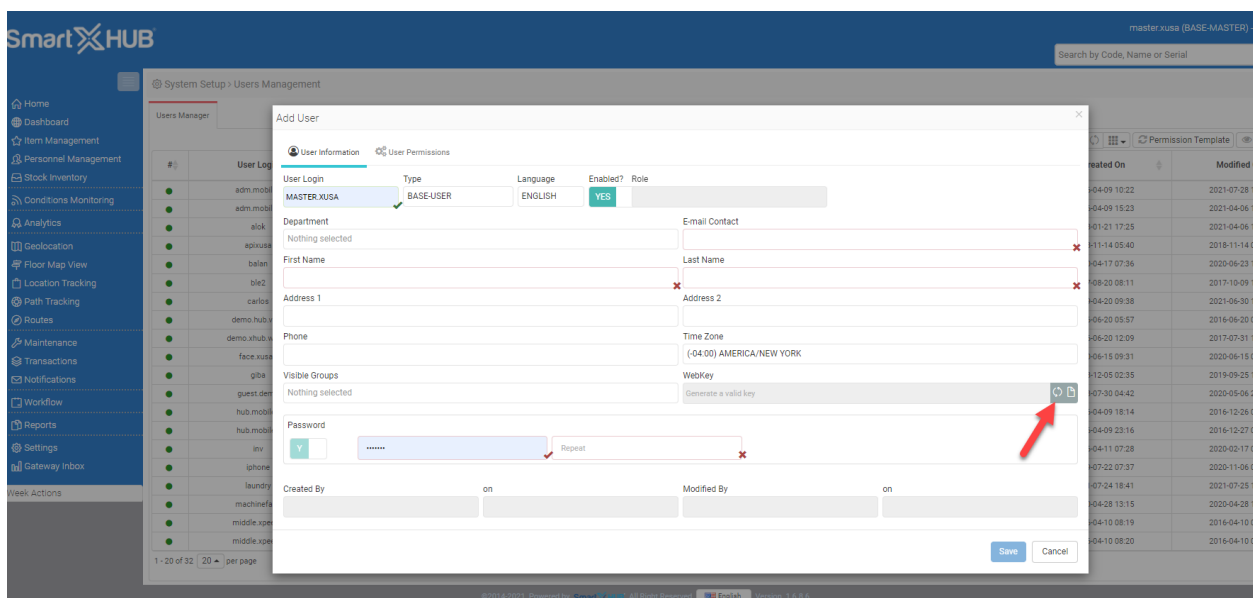
3.1.3. Defining Users

To define a user:

10. Select the **Settings tab**

11. In the navigation pane, select the **User Manager** tab

12. Click the **Add User** [+] button.

    The new User page opens.

13. User **Login**, type the login information for the user.

14. **Type** of user, select the role you want to assign to this user. A user must be assigned to at least one role.

15. Activate the **Enable** option to allow the user to access Smartx Hub®. Select No to freeze the user's rights temporarily.

16. Add the **email address** to contact the user you are defining.

17. Enter the general info such as **name, last name, address,** and the **local setting** (Time Zone where the user is located).

18. **In visible groups**, select the group the user can access or control regarding visibility permissions on assets.

19. Generate a valid **WebKey** automatically by clicking on the generating a valid key ⟳ button. (Optional)

20. Create a password and confirm it in the repeat field.

Now, the permissions should be assigned to the user.

21. Click the **User's Permission** tab.

The user permission tab opens to select the group of permissions added previously.
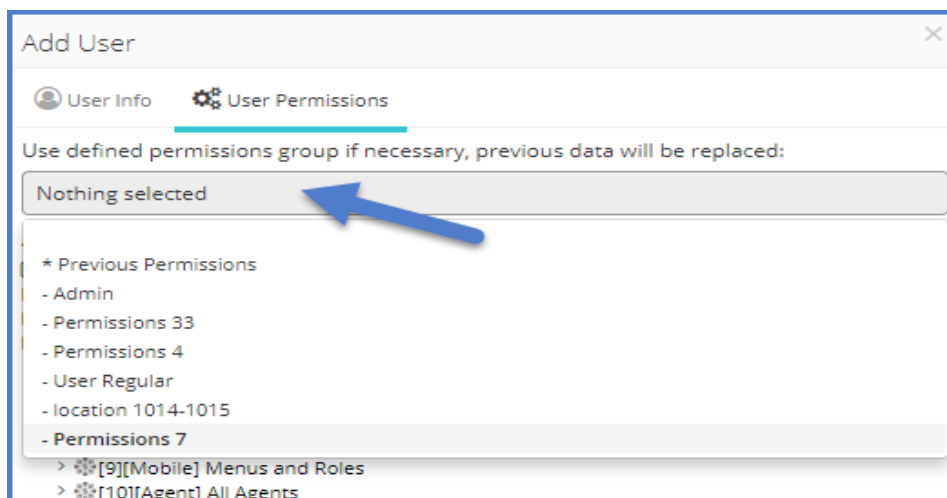
22. Go back to User info and click the **Save** button

The new user appears in the user work area.

3.1.4. Searching Users

Use the **Search** box at the top of the user's page to find users. Enter a few characters included in any user's textual details, such as first name and last name, to find the users who meet the criteria.
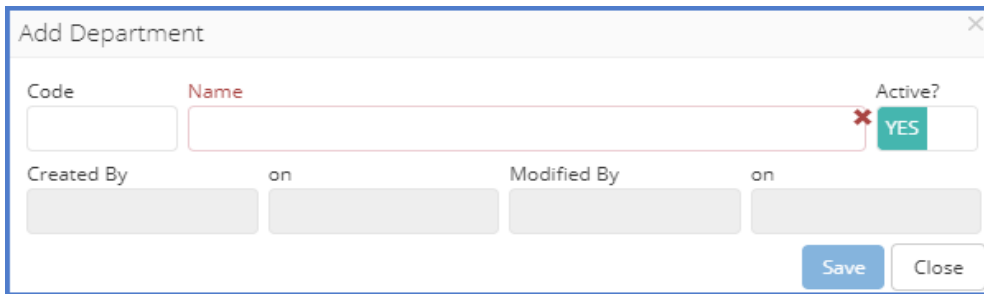
3.2. Departments

A department is not a physical location like a building or a room. It is an area of responsibility like the purchasing or the human resources department. Two physically located assets in one room may belong to two different departments. In this case, department affiliation is a visibility feature.

3.2.1. Creating Departments

To create a department:

1. Click the **Settings tab** and then the **Departments** tab.
2. Click the **Add** department ➕ button.

    The add department form opens.

3. Enter a code and a name for the department click the **Save** button.

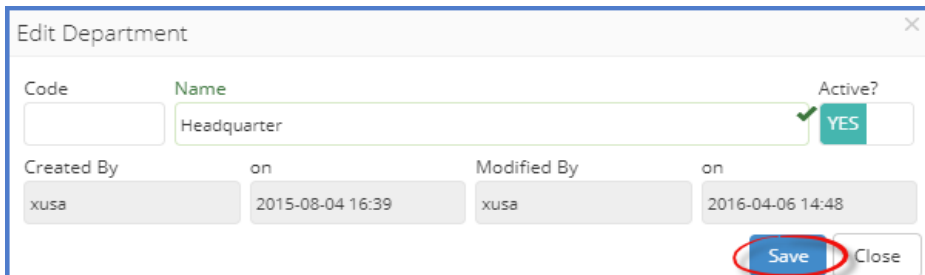The new department appears on the department page.

3.2.2. Searching Departments

Use the search box at the top of the department's page to find departments. Enter a few characters in any department's textual details, such as the name to find the department that meets the criteria.

3.2.3. Editing Departments

To edit an existing department:

1. On the departments' page, click the **Edit** Department 📝 button.
2. Update the information.
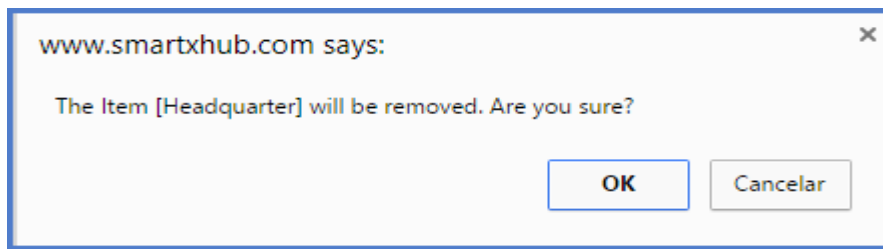3. Click the **Save** button to add the changes.

3.2.4. Deleting Departments

1. On the department page, click on the **Delete** department 🗑 button.
2. **Confirm** the deletion when prompted. The department will be erased from any related records.

www.smartxhub.com says:

The Item [Headquarter] will be removed. Are you sure?

OK   Cancelar

3.3 Category

The standard information for a group of assets is collected under the category tab. The categories may have subcategories or child categories.

3.3.1. Creating New Categories

To set up a new main category:

1. Click the **Settings tab** and then the **Categories** tab.
2. Click the **Add** category ✚ button.

    The new category form opens.

You can add an icon to category

3. Click the add icon [ ] button to open the picture selection box. Select the picture. You have ten different icon categories to choose from according to your preferences.

4. Enter the new category information, such as code, and name, select the category type and add some notes if applicable. Click yes to activate the new category.
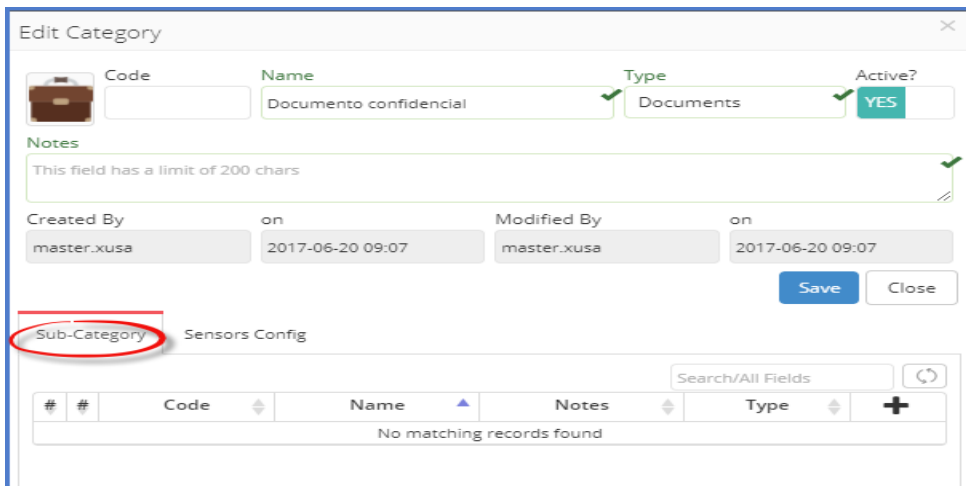5. Click the **Save** button.

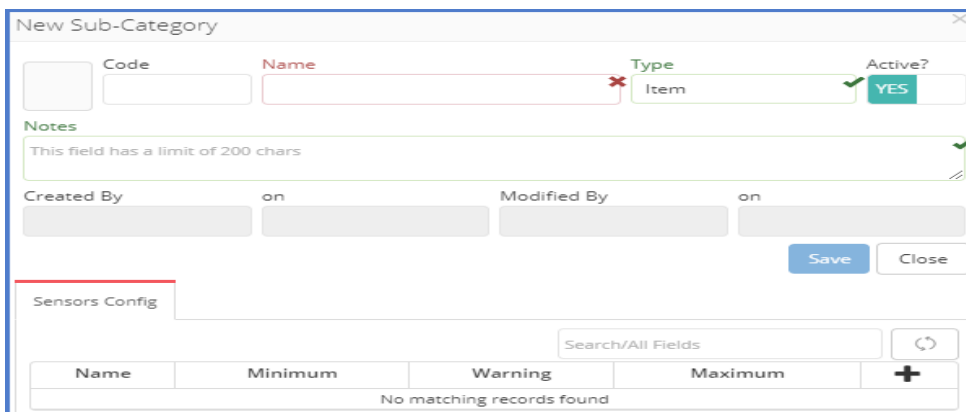   The new category appears on the category page.

Sub-Categories

The subcategories are related to the main categories, so it is essential to create the new main category first, and then relate it to this.

1. **Create** the main category as explained above

2. Click the **Edit** button

   The edit category form opens.

3. Click the **Add** subcategory ✚ button. The new sub-category form will open.

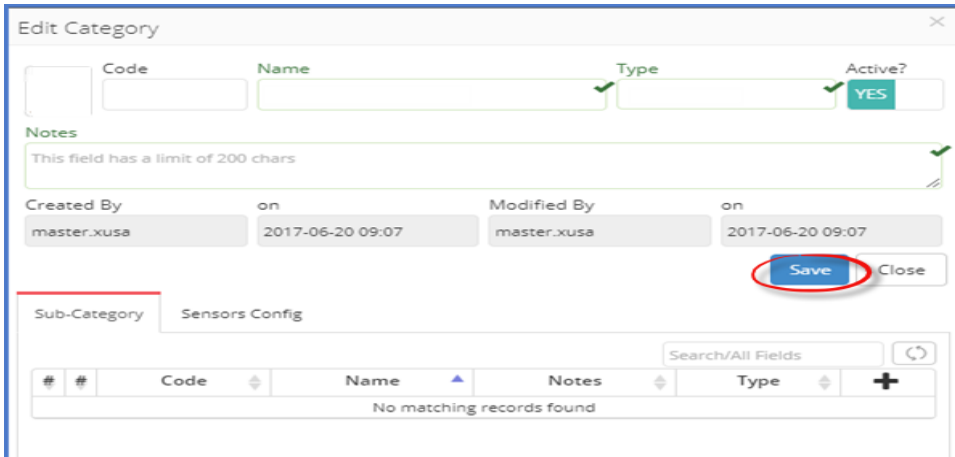4. **Enter** the sub-category information, then click the **Save** button.

3.3.2. Searching Categories

Use the search box at the top of the categories page to find categories. Enter a few characters in any category's textual details, such as the name to find the category that meets the criteria.
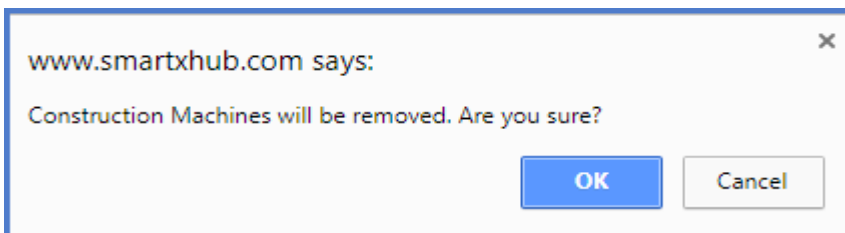
3.3.3. Editing Categories

To edit an existing category:

1. On the categories page, click the **Edit** category [icon] button.

2. Update the information.

3. Click the **Save** button to add the changes.

3.3.4. Deleting Categories

1. On the categories page, click on the **Delete** category [icon] button.

2. **Confirm** the deletion when prompted. The category will be erased from any related records.
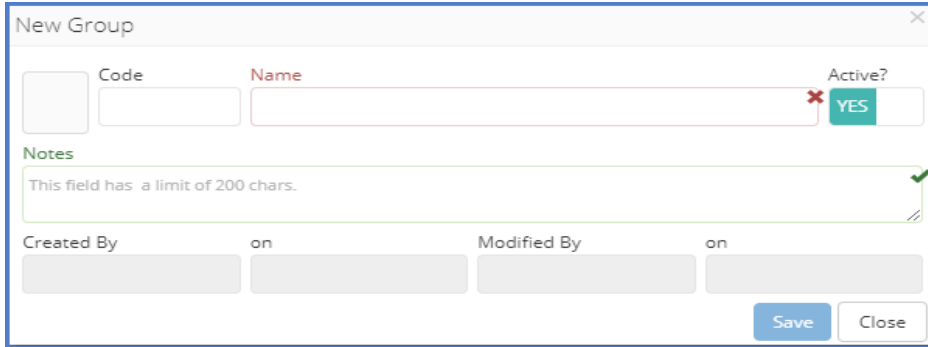

3.4. Groups

The set of assets or devices that the organization wants to associate with one another for business purposes can be set up in the group tab. Groups are a key factor in setting up permissions and alarm rules.

3.4.1 Creating Groups

To create a group:

1. Click the **Settings tab** and then the **Groups** tab.

2. Click the **Add** group ✚ button.

   The new group form opens.

You can add an icon to the new group

3. Click the add icon [ ] button to open the picture selection box. Select the picture according to your preferences. You have ten different icon categories for you to choose from.

4. Enter a code, name, and some notes for the group and click the **Save** button.

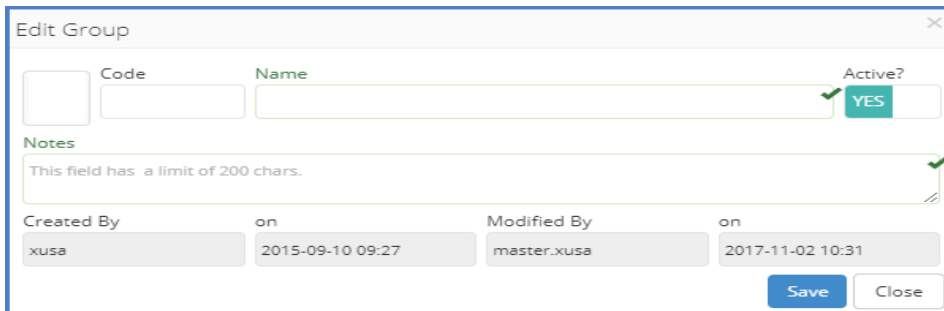   The new group appears on the group page.

3.4.2 Searching Groups

Use the search box at the top of the groups' page to find groups. Enter a few characters in any group's textual details, such as the name to find the group that meets the criteria.

3.4.3. Editing Groups

To edit an existing group:

1. On the groups' page, click the **Edit** group ✎ button.

2. Update the information.

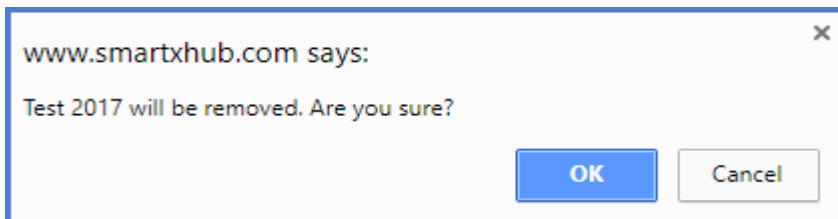3. Click the **Save** button to add the changes.

3.4.4 Deleting Groups

1. On the groups page, click on the **Delete** Group 🗑 button.

2. **Confirm** the deletion when prompted. The group will be erased from any related records.

www.smartxhub.com says:

Test 2017 will be removed. Are you sure?

OK   Cancel
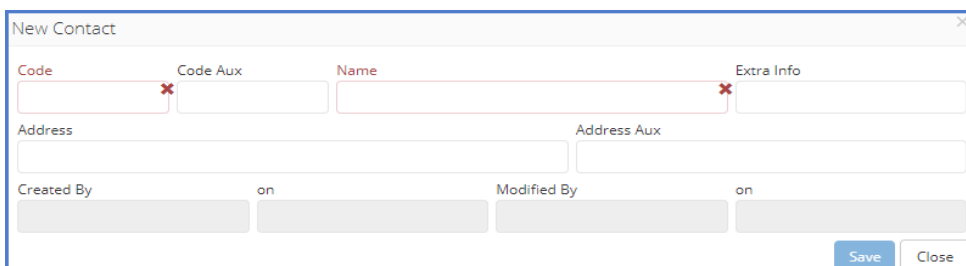
3.5 Custodies- Contacts

The custodian can be a person or a company responsible for the assets.

3.5.1. Creating Custodies-Contacts

To add new custody.

1. Click the **Settings tab** and then the **Custodies** tab.

2. Click the **Add** custody ➕ button.

The new custody-contact form opens.

3. Enter all the details for the custody contact and click the **Save** button.

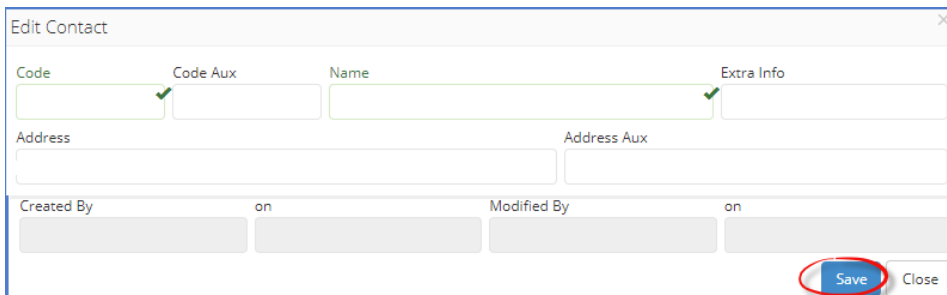The new custody appears on the custody-contact page.

3.5.2. Searching Custodies-Contacts

Use the search box at the top of the custodian's page to find custodies-contacts. Enter a few characters in any custodies textual details, such as the name to find the custody contact that meets the criteria.

3.5.3. Editing Custodies-Contacts

To edit an existing Custody-Contact:
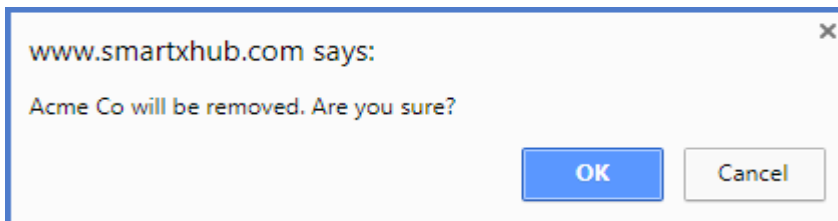
1. On the custody-contact page, click the **Edit** custody ✎ button.

2. Update the information.

3. Click the **Save** button to add the changes.

3.5.4. Deleting Custodies-Contacts

1. On the custody-contact page, click on the **Delete** custody-contact 🗑 button.

2. **Confirm** the deletion when prompted. The custody contact will be erased from any related records.

3.6. Item Status

Items may be assigned status such as "Available," "Out of Order," and like. The status is important to determine the item's records.
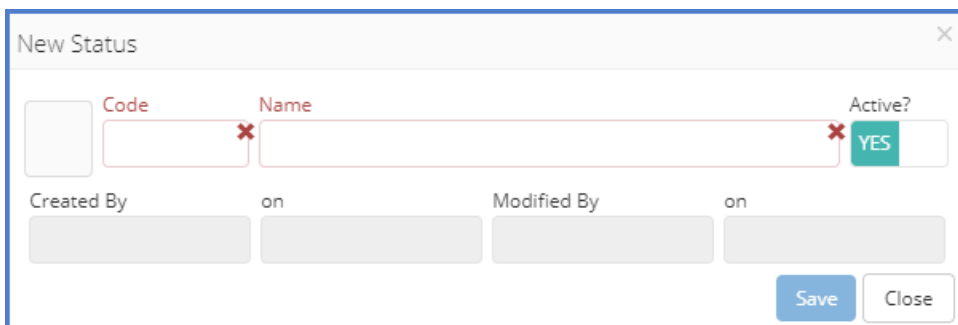
In this section, you can define the status of an item and its icon.

3.6.1 Creating Statuses

To add a new status:

1. Click the **Settings tab** and then the **Status** tab.
2. Click the **Add** status ✚ button.

   The new status form opens.

You can add an icon to the status you are adding.

3. Click the add icon ☐ button to open the picture selection box. Select the icon for this status.

   You have ten different icon categories to choose from according to your preferences.

4. Enter a code
5. In **Name**, enter the status that will appear in the asset record.
6. Make sure to click the **activate** tab to activate the status.
7. Click the **Save** button.

   The new status appears on the status page.

3.6.2. Searching Statuses

Use the search box at the top of the statuses page to find statuses. Enter few characters included in any status textual details, such as the name to find the status that meets the criteria.

3.6.3. Editing Statuses
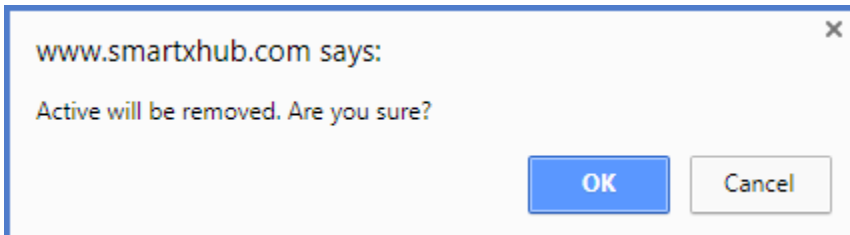
To edit an existing Status:

1. In the statuses page, click the **Edit** status ✎ button.

2. Update the information.

3. Click the **Save** button to add the changes.

3.6.4. Deleting Statuses

1. In the statuses page, click on the **Delete** status 🗑 button.

2. **Confirm** the deletion when prompted. The status will be erased from any related records.

3.7. Condition

The term condition refers to the measure of the health of the assets.
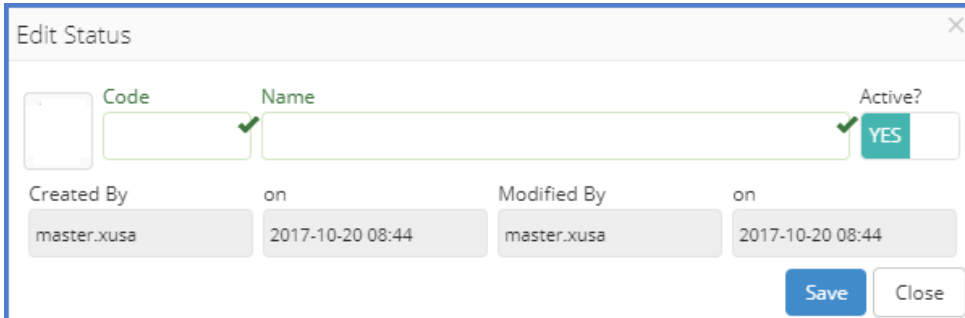
3.7.1. Creating Conditions

To create a new condition:

1. Click the **Settings tab** and then the **Condition** tab.

2. Click the **Add** condition ✚ button.

   The new condition form opens.

3. Enter a code and a name for the condition that applies for the items and click the **Save** button.

4. Make sure to **activate** the new condition to allow the user to relate items to this.

   The new condition appears on the conditions page.

3.7.2 Searching Conditions

Use the search box at the top of the conditions page to find conditions. Enter a few characters included in any condition textual details, such as the name to find the condition that meets the criteria.

3.7.3. Editing Conditions

To edit an existing condition:

1. On the conditions page, click the **Edit** Condition button.

2. Update the information.

3. Click the **Save** button to add the changes.

3.7.4. Deleting Conditions

1. In the conditions page, click on the **Delete** condition button.

2. **Confirm** the deletion when prompted. The conditions will be erased from any related records.

3.8. Cost Center

The unit within an organization which costs may be charged to for accounting purposes.

3.8.1 Creating Cost Centers

To create a cost center:

1. Click the **Settings tab** and then the **Cost Center** tab.

2. Click the **Add** cost center ✚ button.

   The new cost center form opens.

3. Enter a code and a name for the cost center and click the **Save** button.

   The new cost center appears on the cost center page.
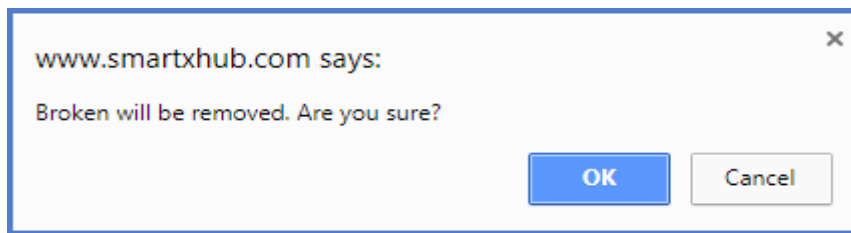
3.8.2. Searching Cost Centers

Use the search box at the top of the cost centers page to find cost centers. Enter a few characters in any cost center's textual details, such as the name to find the cost center that meets the criteria.

3.8.3. Editing Cost Centers

To edit an existing cost center:

1. On the cost centers page, click the **Edit** cost center 🖉 button.

2. Update the information.

3. Click the **Save** button to add the changes.

3.8.4. Deleting Cost Centers

1. On the cost centers page, click on the **Delete** cost center 🗑 button.

2. **Confirm** the deletion when prompted. The cost center will be erased from any related records.

3.9. Mass Change Reason

Regular business cycles sometimes require you to make the same change to a large group of assets. In these situations, Smartx Hub® provides an engine that processes what you request from the processing menu within the application. In addition, this section provides information about Mass Change reasons.

Processing mass changes with asset management consists of a definition and a processing phases. First, you define the selection criteria and changes to the selected data, and then run the Mass Change process (either online or in the background).

3.9.1. Creating Mass Change Reasons

To add the mass change reasons:

1. Click the **Settings tab** and then the **Mass Change Reason** tab.

2. Click the **Add** mass change reason ✚ button.

The detail form opens.

3. Enter the reason for mass changes and click the **Save** button.

3.9.2. Searching Mas Change Reasons

Use the search box at the top of the mass change reason page to find them. Enter a few characters included in any mass change reason's textual details, such as the name to find the one that meets the criteria.

3.9.3. Editing Mass Change Reasons

To edit an existing mass change reason:

1. On the mass change reason page, click the **Edit** button.
2. Update the information.
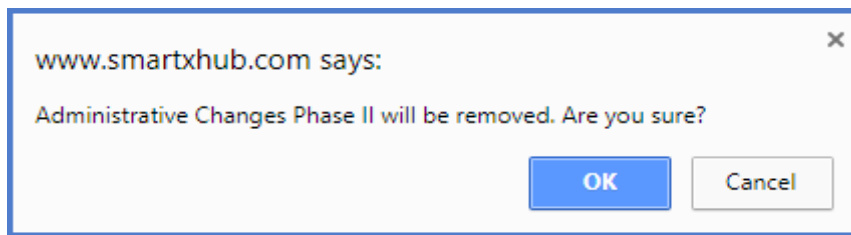3. Click the **Save** button to add the changes.

3.9.4. Deleting Mass Change Reasons

1. On the mass change reason page, click on the **Delete** button.
2. **Confirm** the deletion when prompted. The mass change reason will be erased from any related records.

www.smartxhub.com says:

Administrative Changes Phase II will be removed. Are you sure?

OK   Cancel

3.10. Business Locations,

The concept of location that Smartx Hub® manages allows organizing the items within the company's structure—going from a macro to a micro-location concept.

The three fundamental location concepts used through Smartx Hub® are

Site: The spatial location of a building, facility, or structure. For example, The Main Campus of Smartx Technology Inc.

Area: Areas are divisions of the campus or building like small parts or floors. The image illustrates the Meeting Area.

Zone: It is the physical zone where the items are located. In the image, you can see different meeting rooms as zones.

3.10.1. Creating Sites

To add a new site

1. Click the **Settings tab** and then the **Business Location** tab.

2. Click the **Add** site Add Site button.

   The site details form opens.

3. Enter the code and the name.
4. Optionally, add some notes if applicable.
5. Click the **save** button.

Note: The new site appears on the business location page; however, Smartx Hub® will generate a warning message requesting an area related to the new site.

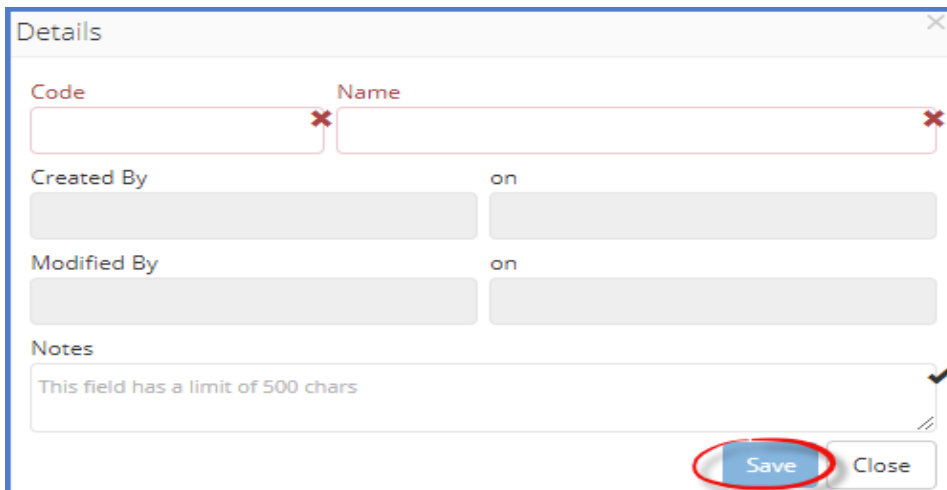[222] - Warning:Site needs at least one Area, without it will be ignored

3.10.2. Searching Sites

Use the filter box at the top of the business locations page to find sites. Enter a few characters included in any site's textual details, such as the name to find the one that meets the criteria.

3.10.3. Editing Sites

To edit an existing site:

1. On the business locations page, right-click the site you want to modify**.**

2. From the drop-down menu. Click the **edit** site 📝 button.

3. **Update** the information in the site details form.

4. Click the **Save** button to add the changes.

3.10.4. Deleting Sites

1. On the business location page, **right-click** the site you want to delete.

2. From the drop-down menu, click on the **Delete** site 🗑 button.

3. **Confirm** the deletion when prompted. The site will be erased from any related records.

www.smartxhub.com says:

[222]Production Company Inc will be removed. Are you sure?

OK   Cancel
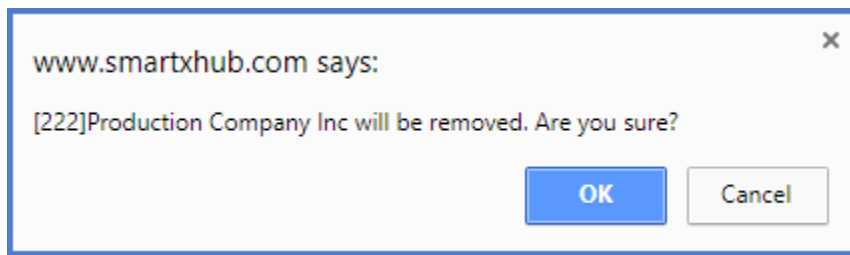
3.11. Areas

It is important to mention that areas are directly related to the significant space of location, which means sites.

3.11.1. Adding Areas

To add a new area:

1. Click the **Settings tab** and then the **Business Location** tab.

2. **Right-click** the site where you want to add the area, then click the **add** ✚ area button.

    The area detail form opens.

3. Enter all the area's detailed information and click the **Save** button.

4. You can add a picture to represent the area (drag and drop pictures from your picture files). The best picture's resolution is 200X200 JPG.

Note: The new area appears on the business location page; however, Smartx Hub® will generate a warning message requesting a zone to be related to the new area
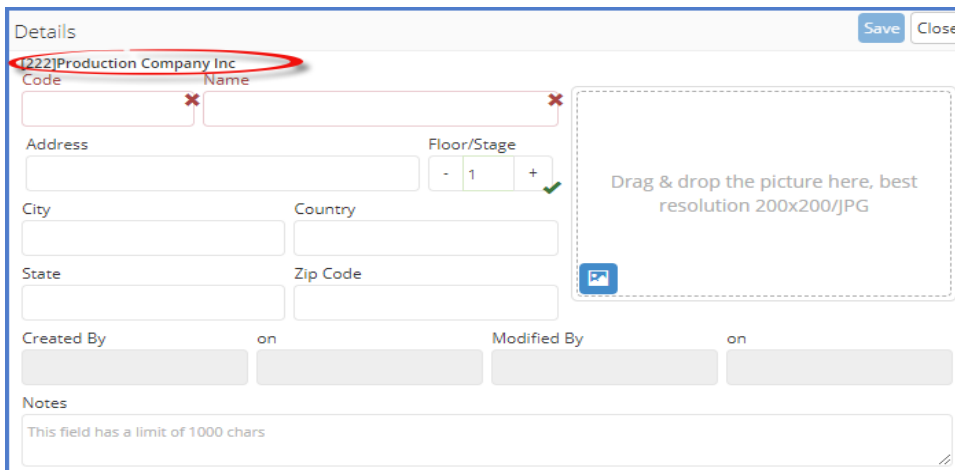
3.11.2. Searching Areas

Use the filter box at the top of the business locations page to find areas. Enter a few characters included in any area's textual details, such as the name to find the one that meets the criteria.
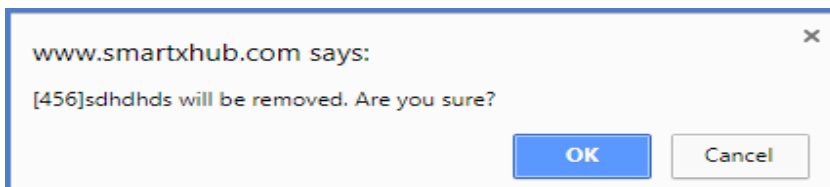
3.11.3. Editing Areas

To edit an existing area:

5. On the business locations page, right-click the area you want to modify.

6. From the drop-down menu. Click the **edit** area ✏️ button.

7. **Update** the information in the area details form.

8. Click the **Save** button to add the changes.

3.11.4. Deleting Areas

1. On the business location page, **right-click** the area you want to delete.

2. From the drop-down menu, click on the **Delete** area 🗑️ button.

3. **Confirm** the deletion when prompted. The area will be erased from any related records.
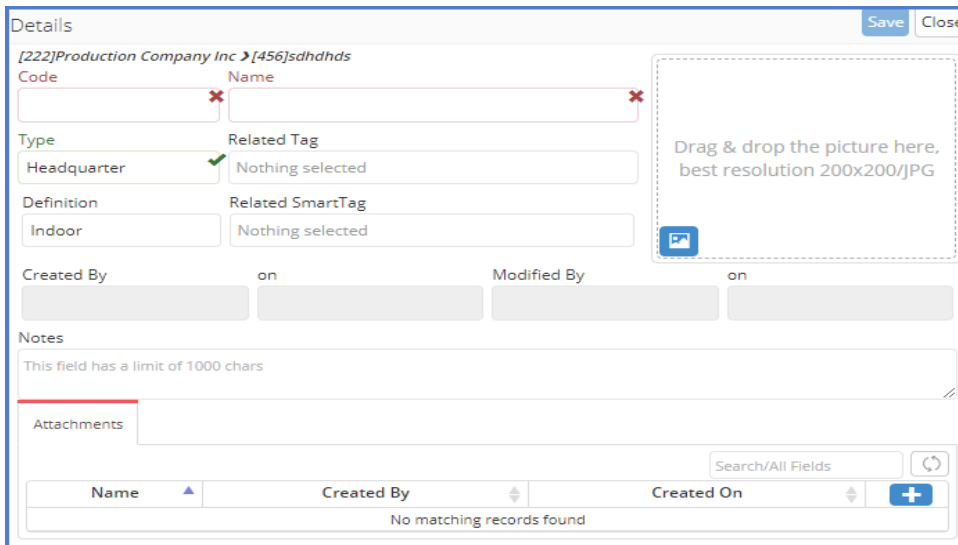

3.12. Zones

are linked to the areas.

3.12.1. Creating a Zone

To link a zone to a specific area:

1. Click the **Settings tab** and then the **Business Location** tab.

2. **Right-click** the area you want to add the zone, then click the **add** zone ✚ button.

   The zone detail form opens.

3. Enter all the area's detailed information.
4. Optionally, add some notes if applicable.
5. An upload ✚ button that allows attaching a document to the record is available.
6. Click the **Save** button.

Under the main site path, the zone appears on the business location page.

1. Click the **Add** button✚. The zone details form will appear.

3.12.2. Searching Zones

Use the filter box at the top of the business locations page to find zones. Enter a few characters included in any zone's textual details, such as the name to find the one that meets the criteria.

3.12.3. Editing Zones

To edit an existing Zone:

1. On the business locations page, right-click the zone you want to modify**.**

2. From the drop-down menu. Click the **edit** zone 🖉 button.

3. **Update** the information in the zone details form.

4. Click the **Save** button to add the cha.

3.12.4. Deleting Zones

1. On the business location page, **right-click** the zone you want to delete.

2. From the drop-down menu, click on the **Delete** zone 🗑 button.

3. **Confirm** the deletion when prompted. The zone will be erased from any related records.

3.13. RFID Tags/Label – Registering Passive RFID Tags

Assets will be monitored through their tags, active or passive. Smartx Hub® lets you associate them with assets. You can register tags using one of the following assets:
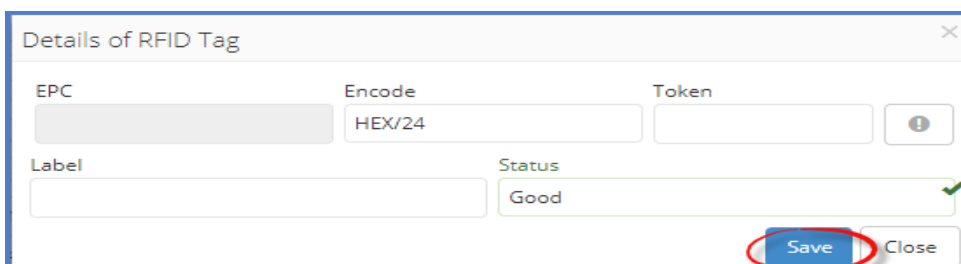
● Manually.

● By importing large numbers of tags.

3.13.1. Registering Passive RFID Tags Manually

To register tags one by one, you need to know the tag ID.

1. Click the **Settings tab**, then the **RFID Label Tags** tab.

2. Select **Tags RFID/Label.**

3. Click the **Add** New Tag➕ button.

The RFID Tag Detail form appears.

4. In the **Token**, enter the tag ID. I.e., B0000427.

5. Generate the tag's EPC automatically, by clicking the automatically tag's EPC [ⓘ] button.

6. In the **Label**, enter the Tag ID to make this visible.

7. In the **Status**, select according to the status of the tag.

3.13.2. Searching RFID Label Tags

Use the search box at the top of the RFID label tags page to find tags. Enter a few characters in any tag's textual details, such as the tag label, to find the tag that meets the criteria.

3.13.3. Editing RFID Label Tags

You can access RFID label tag entries for modifications:

1. Mark its checkbox
2. Click the RFID label tag **Edit** button, then View/edit
3. **Update** the information and click the **save** button.

3.14. Location RFID Tags

The RFID tags can be associated with locations too. To do so, you need to know the tag's ID.

3.14.1 Registering an RFID Location Tag

To register an RFID Location Tag.

1. Click the **Settings tab**, then the **RFID Label Tags** tab.
2. Select the **RFID Location Tag** tab.
3. Click the **Add** New Tag button.

   The RFID location Tag Detail form opens.

5. In the **Token**, enter the tag ID. I.e., B0000427.

6. Generate the tag EPC automatically by clicking the automatic tag's EPC ⓘ button.

7. In the **Label**, enter the Tag ID if you want to make this visible.

8. In the **Status**, select according to the tag's status:

5.   Click the **save** button.

3.14.2. Searching RFID Location Tags

Use the search box at the top of the RFID location tags page to find tags. Enter a few characters in any tag's

textual details, such as the tag label, to find the tag that meets the criteria.

3.14.3. Editing RFID Location Tags

You can access RFID location tag entries for modifications:

4.   Mark its checkbox

5.   Click the RFID location tag **Edit** ▤ button, then View/edit

6.   **Update** the information and click the **save** button.
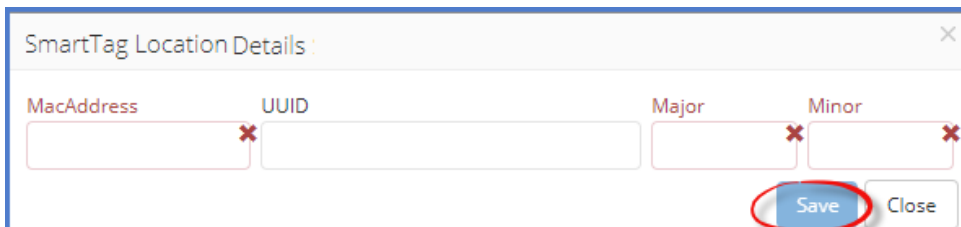
3.15. Parameters

You can also configure the status of your RFID tags.

3.15.1. Adding Tag's Status

To add the status of an RFID tag:

1. Click the **Settings tab** and then RFID Tag/Label.
2. Select the Tag Parameter Tab.
3. Click the **Add** tag parameter ✚ button.

   The new tag form opens.

4. In **Name,** enter the status of the RFID tag. I.e., damaged, destroyed, or encoded.
5. 6. Click the **save** button.

3.15.2. Searching Tag's Status

Use the search box at the top of the tag's status page to find the tag's status. Enter a few characters included in any status's textual details to find the one that meets the criteria.

3.16. Registering SmartTags (Active RFID Tags)

Now, let' us see how to register SmartTags (Active RFID tags)

1. Click the **Settings tab**, then the **SmartTags** tab.
2. Click the **Add** New SmartTag ✚ button.

   The SmartTag location Tag Detail form opens.

3. Enter the SmartTag's parameters and click the **save** button.

3.16.1. Searching SmartTags

Use the search box at the top of the SmartTag page to find SmartTags. Characters are included in any tag's textual details to find the tag that meets the criteria.

3.16.2. Editing SmartTags
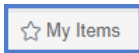
You can access SmartTag entries for modifications:

7. Mark its checkbox

8. Click the SmartTag **Edit** button, then View/edit

9. **Update** the information and click the **save** button.

3.17. Location SmartTag

SmartTags can be used as location tags

3.17.1 Registering Location SmartTags

To register a Location SmartTag.

1. Click the **Settings tab**, then the **SmartTags** tab.

2. Select the **Location SmartTags** tab.

3. Click the **Add** new location smartTags ✚ button.

   The new Location SmartTag Detail form opens.

4. **Enter** the SmartTag identifier parameters and click the **save** button.

3.17.2. Searching Location SmartTag

Use the search box at the top of the location SmartTags page to find tags. Enter a few characters in any SmartTag's textual details to find the tag that meets the criteria.

3.17.3. Editing Location SmartTag

You can access location SmartTags entries for modifications:

5. Mark its checkbox

6. Click the location SmartTag **Edit** ▤ button, then View/edit

7. **Update** the information and click the **save** button.

4.   Working with Items

This section explains how to create items in Smartx Hub® so that they can be tracked.

In Smartx Hub®, you define the items you want to monitor, assign a tag to them and manage alerts and notifications based on the item's location, movement, condition, and business status by configuring rules in the application.
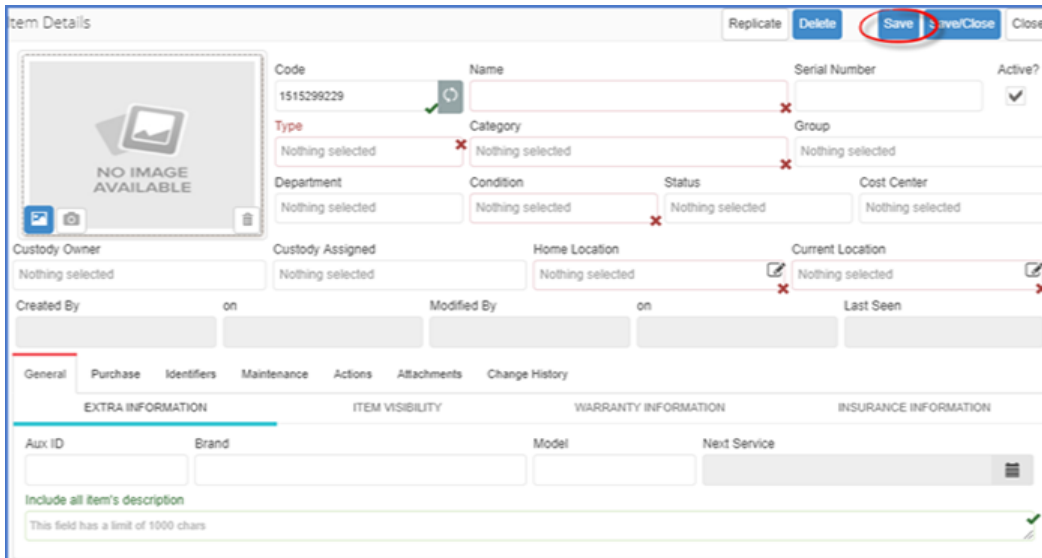
Items are listed in the work area. When selecting the items ☆ My Items to tab in the navigation pane, items are listed in the work area.

4.1 Creating Assets Manually

To create an asset:

1. Click the **My Items** tab.

2. Click the **Add** item ✚ button.

The item dialog box opens.

3. Enter the information described below:

Image

Optionally, upload an image for the item from your image files.

Code

Enter the identification of the asset.

Name

Enter the item's name.

Serial Number

If the asset has an internal serial number, enter it here.

Type

Click the "more" button and click the type of asset you are creating. The type of asset refers to items, documents, or people.

Category

Click the "more" button and select the category you want to associate with the item. The category has to do with the standard information for a group of assets. Category can be divided into subcategories. Smaller categories are related to the main one.

Group

Selects the group with which you want to associate the item. Groups are user-defined and are related to the set of items or devices that the organization wants to associate with one another for business purposes.

Department

Select the department that the item is associated with.

Condition

From the drop-down list, select the condition of the item.

Status

Select the status of the new item.

Cost Center

Select the cost center. The unit to the item's costs may be charged for accounting purposes.

Custody Owner

Select the person or company who owns the item.

Custody Assigned

Select the person or company in charge of the care of the item.

Home Location

Select the location to which the item belongs.

Current Location

Select the current physical zone where the asset is located**.**

General

Under the General tab, enter the following information.

Aux ID

Enter the additional item's ID if applicable.

Brand

Enter the brand of the item.

Model

The model of the item.

Next Service

Specify the date of the next scheduled service for the item.

Description

Enter a detailed description of the item.

After entering the basic asset information, it is time to associate it with an RFID tag previously added to the platform.

4.2.   Associating Tags to items

You can associate active or passive RFID tags to your items

To relate the tag to the item when adding the item.

1. After adding the entire item's details, click the **identifiers** tab.

2. You have three different types of tags to be related; RFID tags, Label tags, and SmartTags. Select according to your preferences by clicking on it.

3. Click the **refresh** button to load all the tags available.

4. Click the **view** tag button of the tag you want to associate to the item, then select relate.

5. Confirm the action when prompted.
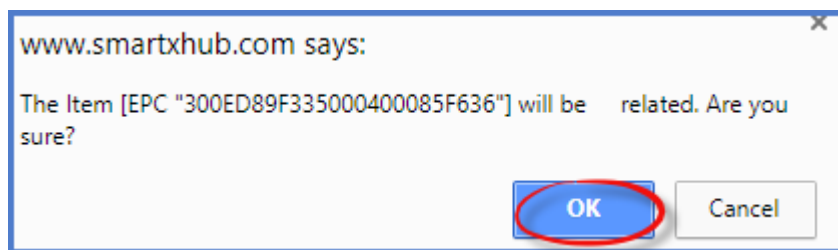
The tag is related to the item, and its information appears on the left side of the item detail's form.

6. When you are done associating tags with the item, click the save button to **save** the data or the **save/close** button to save the data and close the dialog box.

4.3. Importing Data
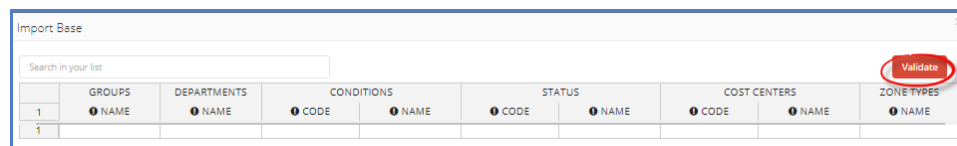
You can use an excel template that will help you import the data into Smartx Hub® quickly.

To Import data:

1. Go to the **Settings tab**, and then select the **data import** tab.
2. Click the import data tab, and select the template icon based on the section you want to import.

   ● Base Import Template

- Location Template
- Category Template
- Item Template
- RFID Tag Template
- SmartTag Template

3. Select the icon you want to import. Each row in the file will create a new item record in Smartx Hub®. Fill in the spreadsheet with the desired values.
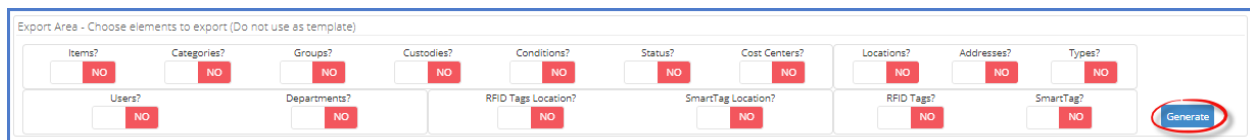
4. Perform the data import operation by clicking the validate button.

4.4.   Exporting the System Parameters

To export the system parameters, follow these steps:

1. Go to **Configuration** and select **Data Export.**

2. **Check** the entities you want to export.

3. Click the **Generate** button to export.
The data output will be available in an excel spreadsheet.

5.   SMS Provider Set-up

Users must go to "Settings" at the main menu, then System Set-up, and select SMS Services.
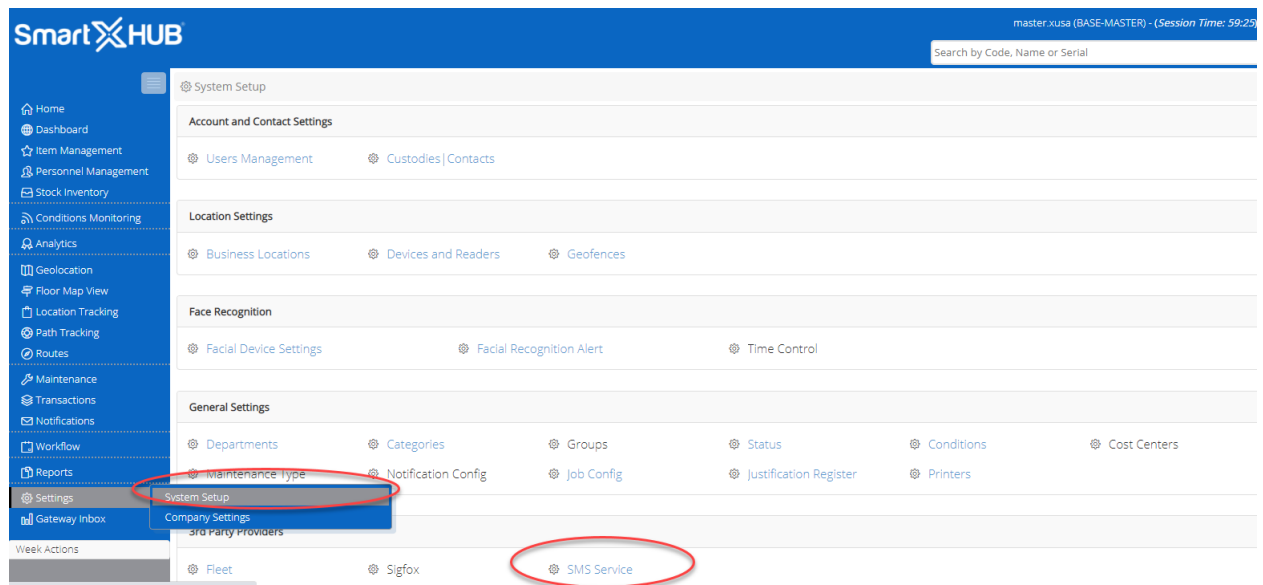
5.1   Signing up for a Twilio account

Go to **Administration** > **SMS Settings**, then Add the new SMS account and type **Twilio** to sign up for an account.
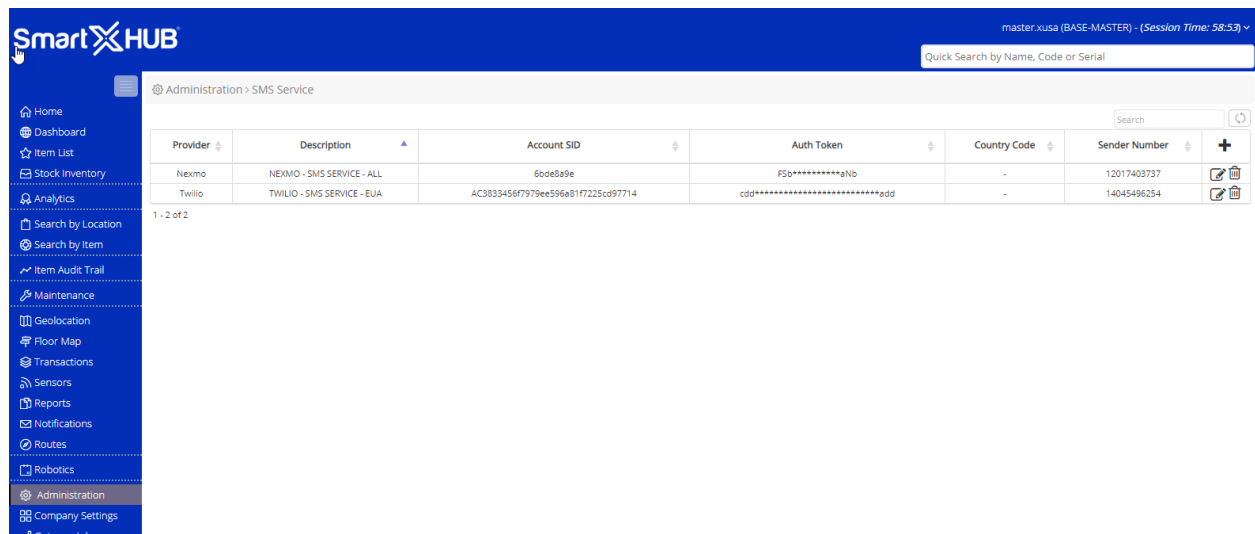
Enter your details on the signup page of Twilio.

01- June de 2022

Get started with a free Twilio account. No credit card required.

First Name		Last Name
Email		
Choose a password		Password, again

I'm not a robot — reCAPTCHA Privacy - Terms

Get Started   By clicking the button, you agree to our legal policies .

Already have an account? Login

To setup text messaging (SMS) using Twilio, go to **Settings** > **Notifications** > **Text / SMS Settings**.

Select Twilio in the Text / SMS Provider field.

Then click on the link. **Sign up for an account with Twilio** and follow the steps below:

1. Enter your details on the signup page
2. Click **Get Started**
3. Click on the flag to choose the country of your phone number
4. Enter your phone number
5. A verification code will be sent to you
6. Enter the verification code that you have received in the box provided. If your verification code has expired, click **try again**
7. Click on the red button and **Get your Twilio number**
8. Select a Twilio number (this need not be a number from your country – just select a United States number if your country is not available) and click on the red button. **Choose this number**
9. Click on **Show API credentials** on top of the right-hand corner

10. Copy the **ACCOUNT SID** and **AUTH TOKEN** from Twilio and paste them into SmartX HUB's **Text / SMS Settings** section, and click **Save**

> **Tips:** You can replace your Twilio number with any alphanumeric name in the **Twilio number** field, e.g., SmartX HUB, and your text message will show sender name as SmartX HUB instead of your Twilio number. However, you can only use this feature if you have upgraded your Twilio account.

> **Note:** If you are using your alphanumeric name, the recipients will not be able to reply SMS or call your Twilio number. To get started, upgrade your Twilio account, and you will also need to contact Customer Support to enable your account to use alphanumeric sender IDs.

Your Twilio account is now connected to SmartX HUB.

Click on the flag to choose the country of your phone number. Then enter your phone number.

Verify Your Identity

Enter the verification code you received in the box provided and click on **Submit**.

Verify Your Identity

Verify Phone Number	^

Please enter the verification code we sent to <96941499>

Verification Code		**Submit**

Want to verify with a Call instead of SMS?

Didn't receive a code?

Resend Code (49)

Click on the red button **Get a Trial Number**.

Click on the red button. **Choose this number**.

Tip: this need not be a number from your country – just select any United States number if your country is not available.

Copy the **ACCOUNT SID** and **AUTH TOKEN.**

Paste them into SmartX HUB's **Text / SMS Settings** section.

Upgrading your Twilio account (SMS)

Please note that it will be a trial account when you first sign up. To be able to send phone numbers without verification from the receiver, you will need to upgrade your Twilio account to a paid account.

Follow the steps below to upgrade your Twilio account:

1. Click on the **Upgrade your account** button
2. Fill in the **Upgrade Account** form with billing details with either credit card or Paypal and click the **Upgrade Account** button.
3. Done!

You can now send text / SMS to your customers and company staff mobile numbers.

Click on the **Upgrade Account** button.
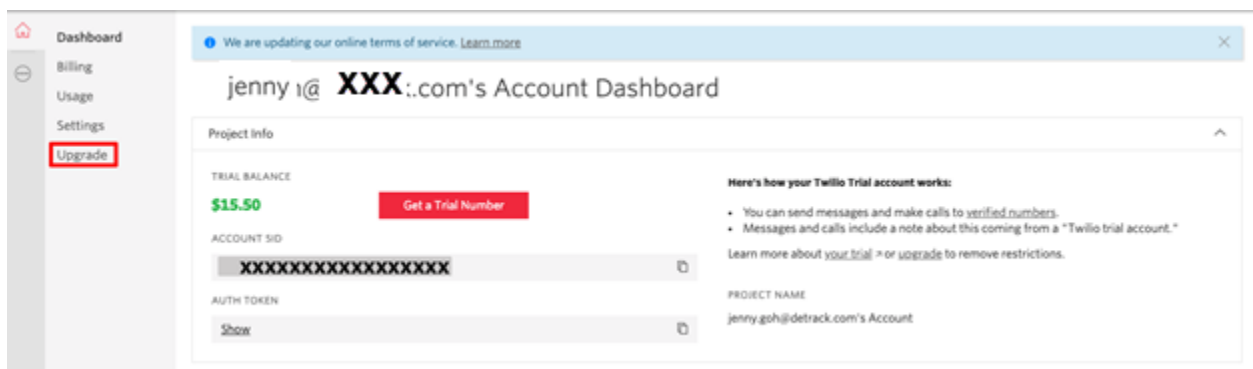
Fill in the credit card billing details and click the **Upgrade Account** button.

SmartX HUB® Administrator version: 7.0

Or click **PayPal** to make payment

5.2   Signing up for a Nexmo account (SMS)

To register for Nexmo, go to www.nexmo.com

1.   Click on "Try It Free."

SmartX HUB® Administrator version: 7.0

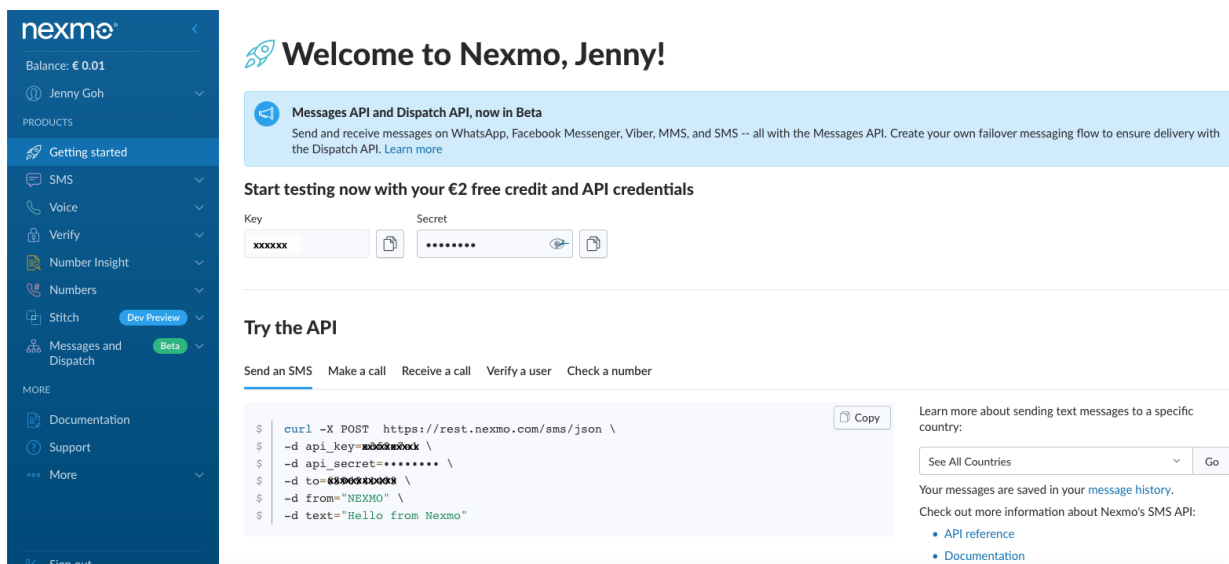01- June de 2022
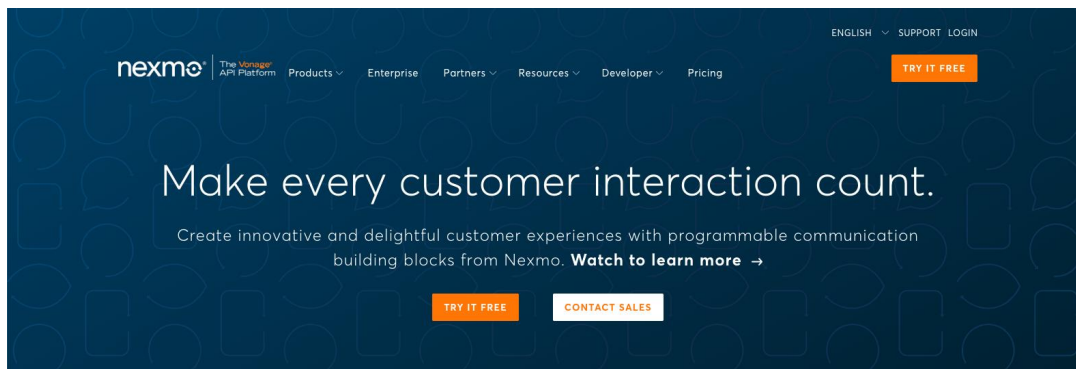
2. Fill in your details and Sign up.

3. An SMS verification code will be sent to your mobile no. You will key in the verification code provided.

We need to verify your phone number

Please enter the verification code that we have sent you in the form below.

If you didn't receive a code, you can request a new one.

4. Copy the **Key** and **Secret** under Getting Started

5. Order one Number for your company.

6. Paste the key and secret code to the SmartX HUB notification settings box. Click **Save**.

6.   Printer per Users

Users must go to "Settings" at the main menu, then System Set-up, and select the option "Printers."

The first step is to create the printer name and add the users.

Rules: If no user is selected, all users will be able to select this specific printer.

Once a single user is selected, the printer only will be an option for this user.

You can add a user list per Printer and delete any time you want the user or the printer.

It is important to use the name that you did the printer set-up on the printer module. Please check the Link HUB manual to set up the printers.