

LAYS OS

Everything the platform does today, section by section, with screenshots straight from the live system. Built for reps on their phones, at the counter and on site, running on the same live figures as SAP.

616 CLIENT ACCOUNTS	26,144 INVOICES MIRRORED	\$8.96M REVENUE ON RECORD	70,659 INVOICE LINES
8,921 STOCKED PRODUCTS	44,561 PRICES · 5 TIERS	3 BRANCHES STOCKED	27 PLAYBOOK PAGES

Real SAP data since Feb 2024, refreshed from one saved SAP export. Figures excl GST, matching SAP's own sales reports.

TODAY

The first thing a rep sees every morning. Not a menu, a **work list**: who to call, how the month is tracking, and one-tap starts for the jobs reps do most.

CALL THESE FIRST

The pace engine

Every client is measured against their own last three months. A client spending under 60% of their usual pace for this point in the month, with a book worth chasing (over \$200/month), surfaces at the top with a **Call** button, sorted by dollars behind. Right now that is 144 accounts the team would otherwise only notice at month end.

TARGET BAR

Month progress at a glance

Each rep sees their month against their target, live, excl GST. Management sees the full leaderboard: every rep's month, book size and all-time figures, ranked.

TOP MOVERS

What is selling this month

The five products carrying the month, computed from actual invoice lines, with a link through to the full Trends view.

BRANCH PULSE

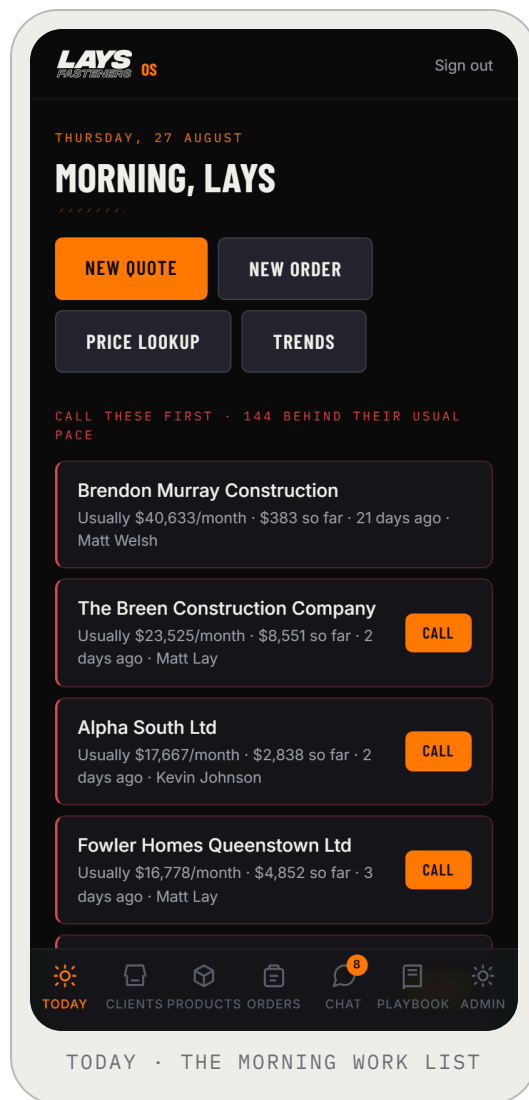
Wanaka • Queenstown • Cromwell

Six months of revenue per branch as a chart plus the exact figures underneath, with a note showing when SAP data was last loaded.

QUICK ACTIONS

New quote • New order • Price lookup • Trends

The four most common jobs, one tap from the landing screen.



Why it matters: the platform decides what deserves attention before anyone has had their first coffee. The call list alone turns quiet accounts into a daily routine instead of a quarterly surprise.

CLIENTS

Every account, searchable instantly, with the full trading story behind each one. Reps see **only their own book**; that boundary is enforced on the server, not just hidden in the app.

DIRECTORY

Instant search and smart sorting

Search by name, account code or town as you type. Sort the book by total spend, this month's spend, gone-quiet-longest or name, so "who do I visit today" takes seconds.

ACCOUNT PAGE

The whole relationship on one screen

Spend this month, all time, last order recency and a 12-month trend line. Contact details with tap-to-call, their price tier, and their Hot Points balance where they have one.

WHAT THEY BUY

Top products, last six months

Their actual purchasing pattern: top items by spend with quantities and when they last bought each. A rep walking on site already knows what to ask about.

INVOICE DRILL-DOWN

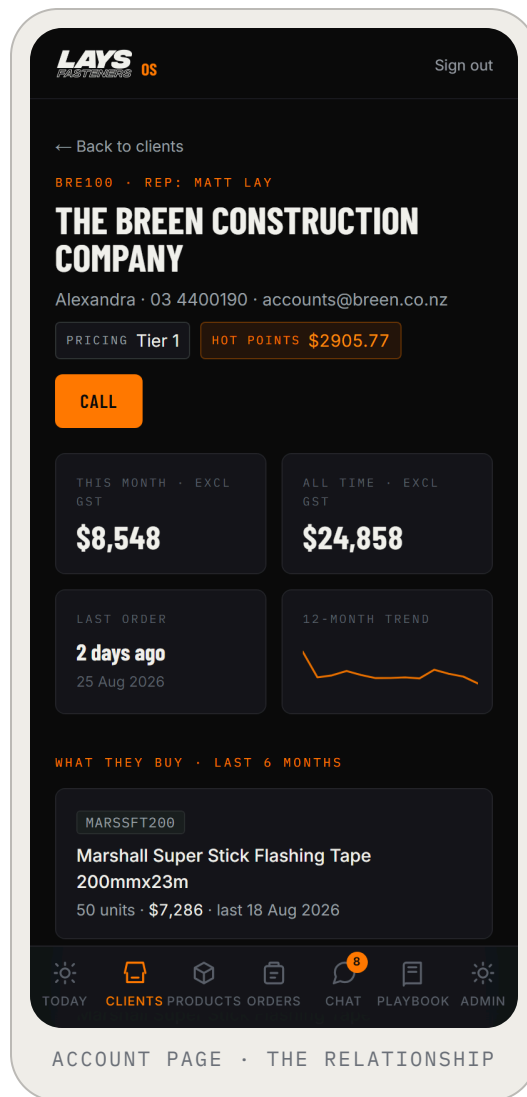
Tap any invoice for its lines

The last 100 documents on the account, credit notes labelled and netted correctly. Tap one and every line opens: product code, description, quantity, line total. "What did we charge you for those screwbolts in June" is answered on the spot.

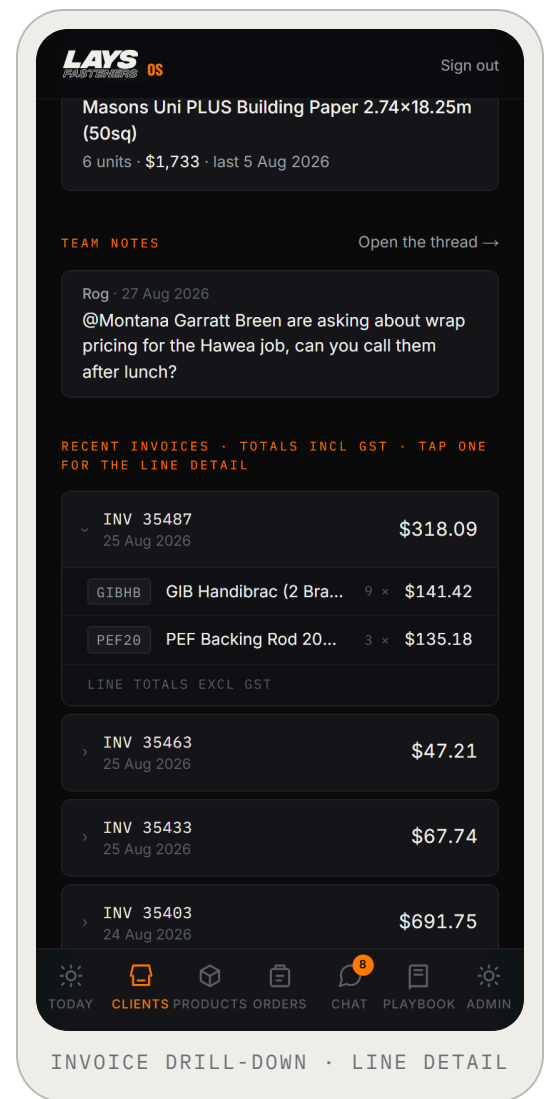
TEAM NOTES

Chat pinned to the account

Any chat message tagged to a client shows on that client's page as a running note thread, so context



("they are waiting on a price for wrap") survives handovers and days off.



Why it matters: this is the institutional memory of the sales team, made portable. A new rep inherits a book they can actually read.

PRODUCTS

All 8,921 stocked codes with live branch stock and all five price tiers. The search speaks **trade**, not SAP.

SEARCH Any words, any order, trade language

"m12 galv bolt", "3 × 6 ss button", "tek screw": the search normalises dimensions, knows gal means galvanised, ss means stainless, csk means countersunk, and that SAP calls a tek screw a Self Driller. Reps find the code the way they say it out loud.

STOCK BY BRANCH

Wanaka • Queenstown • Cromwell counts

Each result shows on-hand quantities per branch, so "can I get 200 today and where from" is answered without ringing anyone.

FIVE TIERS Every price list, one row

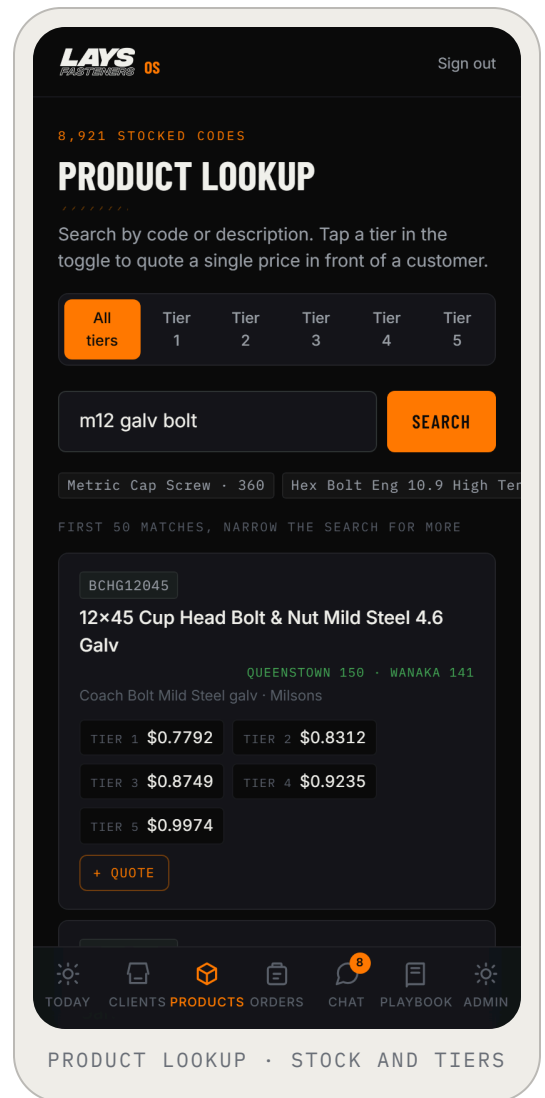
All five SAP price tiers (Sales A through E) on every product, with sub-dollar fastener prices shown to the fraction of a cent.

QUOTE MODE Customer-safe pricing on screen

One tap locks the screen to a single tier, so a rep can price up in front of a customer without exposing what other customers pay.

+ QUOTE From lookup to document

Any product can be queued straight onto a quote while browsing. A floating chip keeps the running list until the rep opens the builder.



Why it matters: the counter experience travels. Anyone on the team can price the whole range, correctly, from a ute.

ORDERS & QUOTES

A rep on site can price a job and put a **professional document in the builder's hand** before they leave. That is the moment orders are won.

BUILDER Quote or order in under a minute

Customer lookup auto-selects the account's price tier. Live product search adds lines, totals and GST update as you go. Orders capture branch (Wanaka or Queenstown), collect or delivery, and the delivery address.

HONEST PRICING Re-priced on the server at save

Every line is re-checked against the real price list when the document is saved, so a stale screen can never produce a wrong quote.

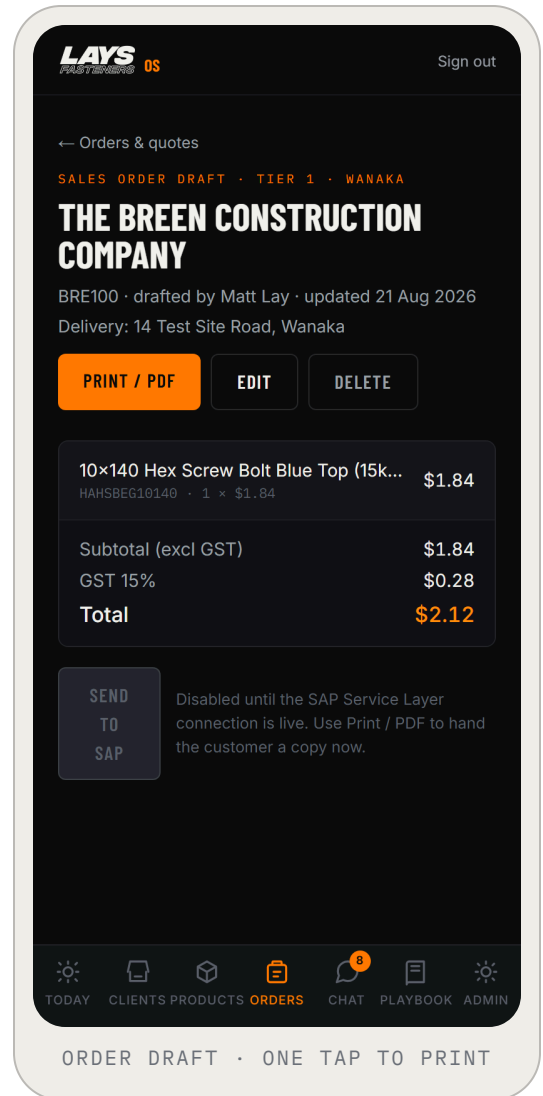
PRINT / PDF

A branded quote sheet, not a screenshot

One tap renders an A4 document: Lays logo, quote number, date, 30-day validity, the customer's pricing tier, line-by-line detail, GST breakdown, terms and the company GST number. Print it, or save to PDF and text it to the builder on the spot.

SEND TO SAP Wired, waiting on one switch

The button exists and the plumbing behind it is designed. It activates the day the SAP hosting partner grants Service Layer access, at which point quotes and orders drafted in Lays OS land directly in SAP.





Lays Fasteners Limited
17-19 Reece Crescent, Wanaka 9305

SALES ORDER

SO-0001

PREPARED FOR

The Breen Construction Company

Account BRE100 · Alexandra

Delivery: 14 Test Site Road, Wanaka · Wanaka

DATE

21 August 2026

VALID UNTIL

20 September 2026

PREPARED BY

Matt Lay

PRICING

Tier 1

ITEM CODE	DESCRIPTION	QTY	UNIT	TOTAL
HAHSBEG10140	10×140 Hex Screw Bolt Blue Top (15kn) Galv	1	\$1.84	\$1.84

Subtotal (excl GST) \$1.84

GST 15% \$0.28

Total NZD \$2.12

Prices are in New Zealand dollars and valid until 20 September 2026. Supply is subject to stock availability at time of order. This order is confirmed on acceptance by Lays Fasteners. E&OE.

THE CUSTOMER-FACING SHEET · NUMBERED, DATED, VALID 30 DAYS, GST ITEMISED

Why it matters: at an average invoice of roughly \$340, two extra orders a day captured because quoting became effortless is close to a quarter of a million dollars a year.

TRENDS

Charts computed from real invoice lines, not gut feel. Reps get their own book; management gets the whole business. The numbers reconcile with the leaderboard everywhere.

FOR REPS**Your book, visualised**

Twelve months of your own sales as a chart, the top products in your book this month with month-on-month movement (up, down, new), and which item groups carry your revenue over six months.

FOR MANAGEMENT**Branch split and product mix**

Revenue per branch per month, whole-business top movers, and item-group trends across the trailing six months, chart plus full table.

TARGET ATTAINMENT**Six months of rep-vs-target history**

Every rep's monthly revenue against their standing target, month by month, with attainment percentages. Reviews stop being arguments about memory.

BUILT PROPERLY**Colour-checked charts**

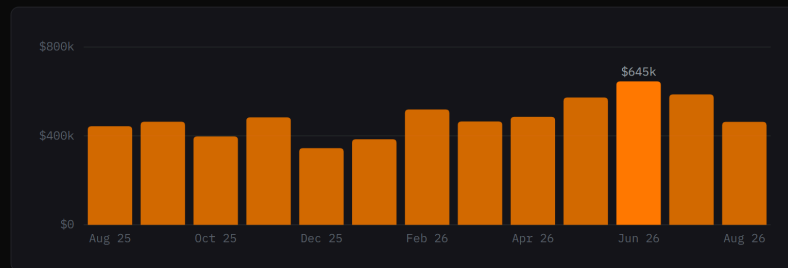
Chart colours are validated for colour-blind readers and every chart is backed by the exact figures in a table beside it.

WHOLE BUSINESS

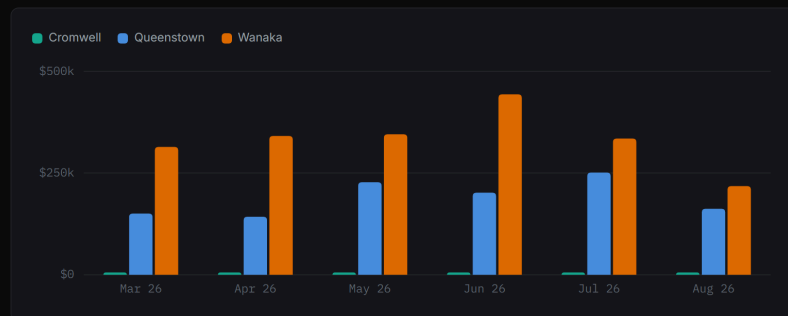
TRENDS

Where the revenue is coming from: branches, products and item groups, plus rep targets over time.

REVENUE BY MONTH · ALL BRANCHES



BRANCH SPLIT · LAST 6 MONTHS



TOP PRODUCTS · THIS MONTH

TRENDS · WHOLE-BUSINESS VIEW ON DESKTOP

Why it matters: this is reporting SAP does not give the team without exporting spreadsheets, delivered to every phone, scoped to what each person is responsible for.

CHAT

Work talk out of personal group chats and into the tool that knows the clients and the stock. **Five channels** keep counter traffic, transfers and branch chatter separated.

CHANNELS

Team • Orders • Stock Transfer • Wanaka • Queenstown

Each channel keeps its own feed and its own unread badge, so an order query never buries a stock transfer request. The chat icon shows one total across everything.

@MENTIONS

Phone notifications that name the channel

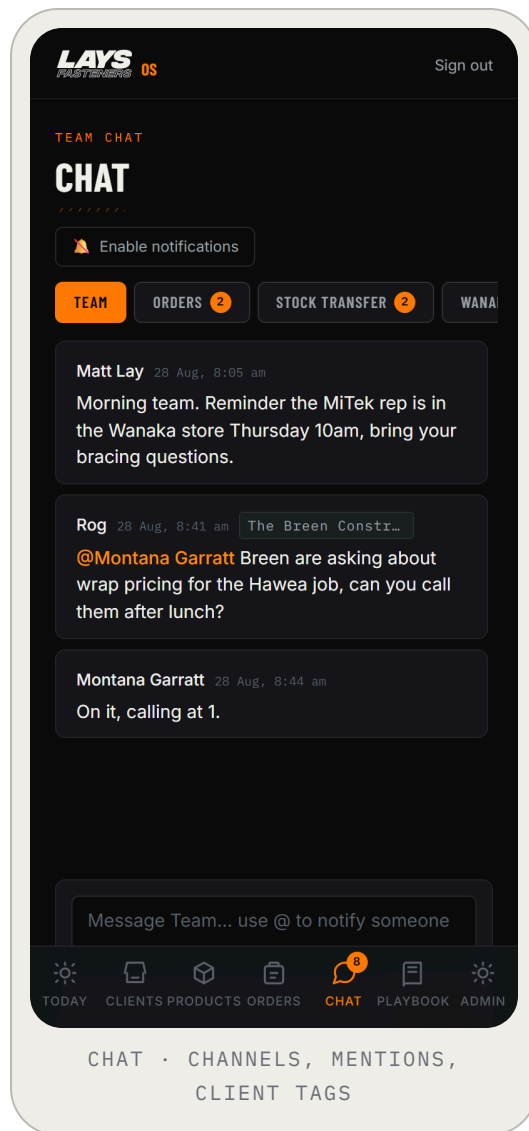
Mention someone and their phone gets a push notification, even with the app closed, deep-linking straight into the right channel. Mentions of "@Matt" require the full name when two Matts could match, so the wrong Matt is never pinged.

CLIENT TAGS Messages that attach to accounts

Tag a client on any message and it also appears on that client's page as a team note. The client thread view collects every tagged message across all channels in one place.

KEPT TIDY Sensible controls

Authors and admins can delete messages, posting is rate-limited, and only active logins can read or be mentioned.



Why it matters: "WAN to QTN: 40 boxes of 10×50 teks on the next run" now lives

where stock levels, accounts and order drafts already are.

PLAYBOOK

Twenty-seven pages of selling knowledge, structured around **how houses actually get built**, with every recommended product checked against what Lays stocks.

15 BUILD STAGES

Setting up site through to fit-out

Each residential build stage lists what the builder needs from Lays at that moment, grouped by job, researched against GIB, James Hardie, BRANZ, MiTek and Ecoply documentation.

6 WRAP SYSTEMS

Brand-by-brand system pages

The wall wrap and rigid air barrier systems the region builds with, each with its matching tapes and fasteners so reps sell the system, not just a roll.

6 JOB TYPES

Decks, fences, retaining, anchoring and more

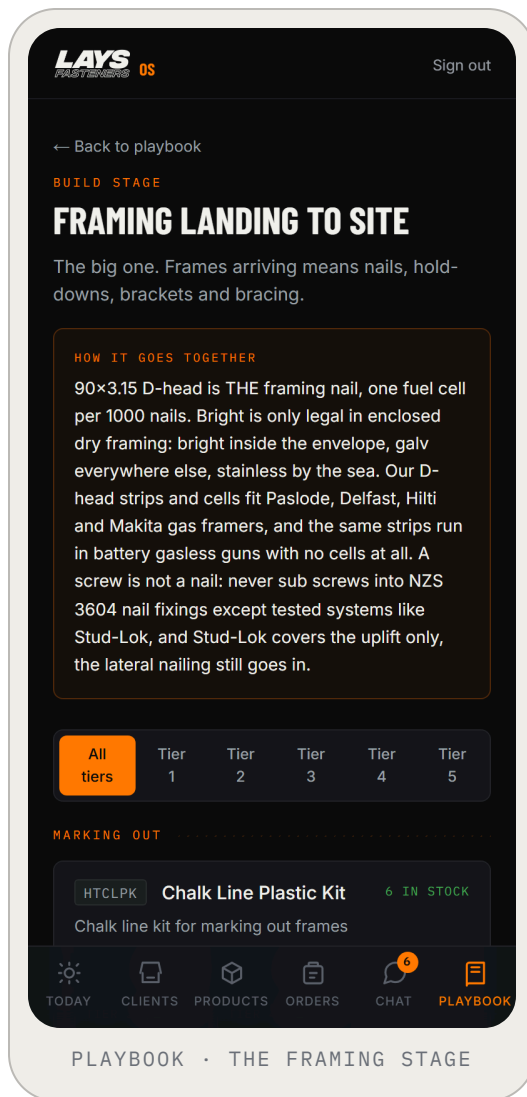
The jobs that come over the counter outside the main build sequence, with the same product-checklist treatment.

ASK THE BUILDER

Questions that open orders

Each stage carries prompts a rep can ask ("who is doing your bracing schedule?") that surface the next sale naturally. 371 items are validated against live stock codes, and every page is searchable. Content is staged for Matt and Montana's sign-off before reps lean on it.

Why it matters: the best rep's product knowledge, written down and priced. New starters sell like they have five years on the counter.



ADMIN

Management runs the whole platform from inside the platform. No developer needed for the day-to-day.

LOGINS**Create, deactivate, reset**

Rep and admin accounts managed in-app. Deactivating a login locks them out immediately, everywhere.

ASSIGNMENTS**Who owns which account**

Client-to-rep assignment in bulk, driving what every rep sees across the entire platform.

TARGETS & PRICING**The levers**

Monthly targets per rep feed the target bars, leaderboard and attainment history. The pricing manager covers every tier of every product.

DATA LOADS**One SAP export, one import**

A single saved query in SAP exports the lot: clients, invoices, lines, products, prices, stock, reps. One import updates everything, safe to re-run, with a visible log of every load. Refreshing the whole platform takes minutes.

Why it matters: the platform is operable by the business, not dependent on a developer being in the room.

UNDER THE HOOD

Boring where it should be boring: fast, locked down, and built to be handed a phone in a yard.

EDGE HOSTED**Fast from Wanaka to anywhere**

Runs on Cloudflare's global network with the database alongside it. Pages are served from close to the user, and the platform scales without anyone managing a server.

INSTALLS LIKE AN APP**Home screen, push, full screen**

Add it to a phone's home screen and it opens full screen with its own icon and push notifications. No app store, no updates to install.

LOCKED DOWN**Rep isolation and hardened sign-in**

Reps can only reach their own book; every query is filtered on the server. Passwords are properly hashed, sessions are stored hashed, and sign-in throttles after repeated failures per account and per address.

FAILS GRACEFULLY**No raw error screens**

Every screen has proper loading states and a branded recovery page if anything hiccups. Slow rural connections get skeletons, not blank stares.

TESTED**90 automated tests on the logic that matters**

Pricing, search, GST arithmetic, chat and imports are covered by an automated test suite that runs before every release.

READY NEXT

The platform was built with the next steps already plumbed in, and there is **no ceiling** after them.

SAP LIVE LINK Request already lodged

A formal request for SAP Service Layer access is with the hosting partner. When granted, manual exports retire: data syncs itself, and Send to SAP switches on for quotes and orders.

CUSTOMER ORDERING The platform is the foundation

The same product, pricing and account engine that powers reps today is the base for letting trade customers browse their pricing and place orders themselves.

NO CEILING If the business needs it, it can be built

Lays OS is not an off-the-shelf product with a vendor roadmap and per-user licences. It is a platform that already knows our products, prices, stock, clients and sales history, so almost anything can be built on top: driver run sheets with proof of delivery, barcode scanning at the counter, stocktake tools, automated quote follow-ups, dead stock and margin reports, Hot Points management, a weekly trading digest in the owner's inbox. If it would help sell more fasteners, it can go in.

The point: most businesses rent their software and wait in a vendor's feature queue. Lays OS bends to how this business actually works, and new ideas ship in days, not financial years.