BASIC INVENTORY TRACKER MANUAL AND USER GUIDE For Version 3.0

Version 1.0

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Quick Start Guide

The software is intended to be used as basic stock level tracking system; the main features of the system are.

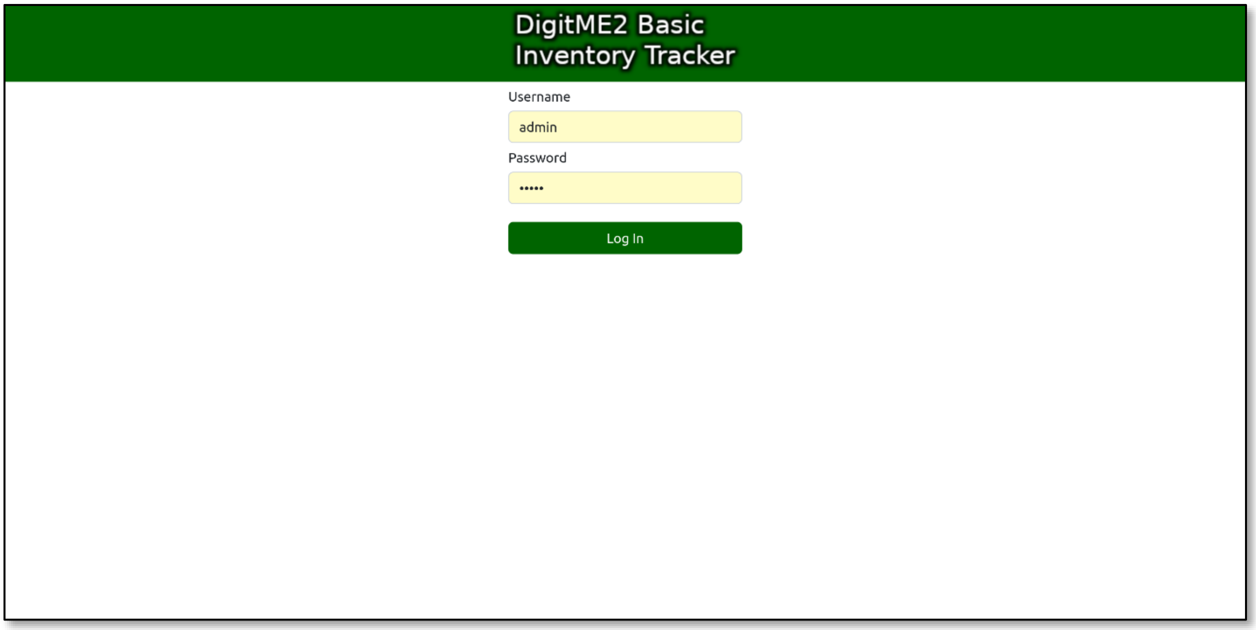
- Tracks stock levels
- Monitors expiry dates of products
- Capable of producing a basic picking list and records stock and cost of items used on orders
- Saves time on manual stock checks and highlights replenishment stock levels
- Uses email notifications to indicate low stock or expired products

This solution is intended for a small site with a single stock controller who is responsible for the movement of stock. The system is split into web browser and tablet interface.

How to install

Click on the link and follow the instructions for installation

https://github.com/DigitME2/inventory_tracker/releases/latest



Main Login Screen

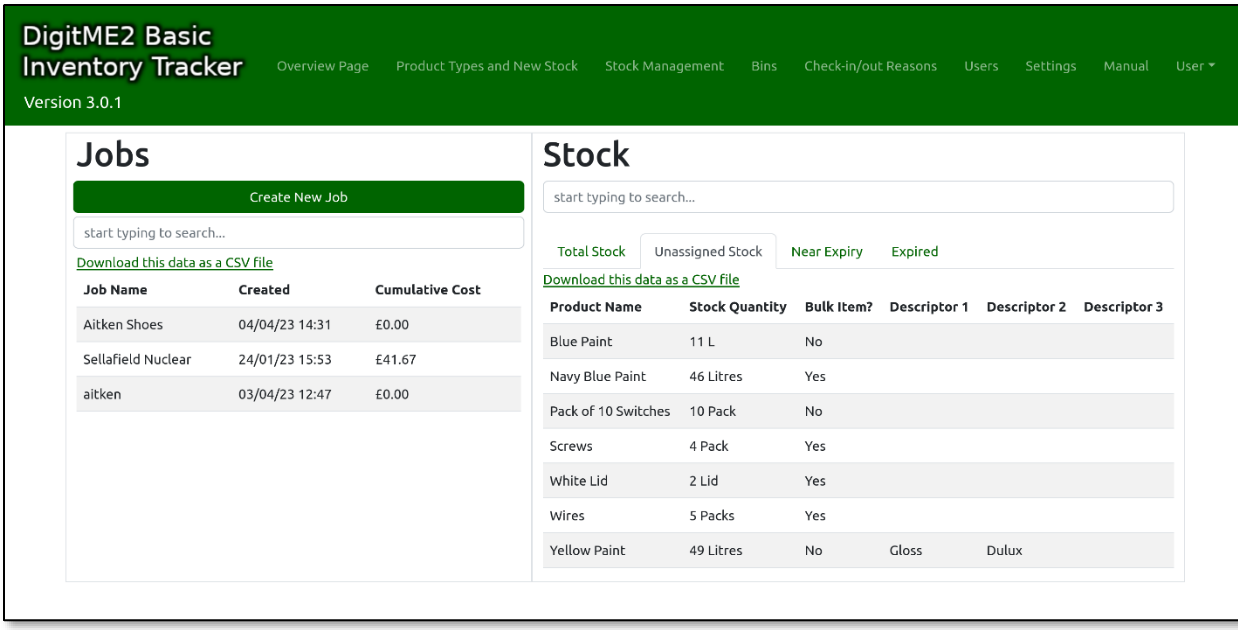
Default Login details (case sensitive)

Username admin

Password admin

Overview Page

This page allows you to view stock items and create jobs. Jobs can be created to pre-allocate quantities of stock to jobs, produce pick list and to track the total running cost of jobs.



DigitME2 Basic Inventory Tracker
Version 3.0.1

Overview Page | Product Types and New Stock | Stock Management | Bins | Check-in/out Reasons | Users | Settings | Manual | User

Jobs

Create New Job

start typing to search...

Download this data as a CSV file

Job Name	Created	Cumulative Cost
Aitken Shoes	04/04/23 14:31	£0.00
Sellafield Nuclear	24/01/23 15:53	£41.67
aitken	03/04/23 12:47	£0.00

Stock

start typing to search...

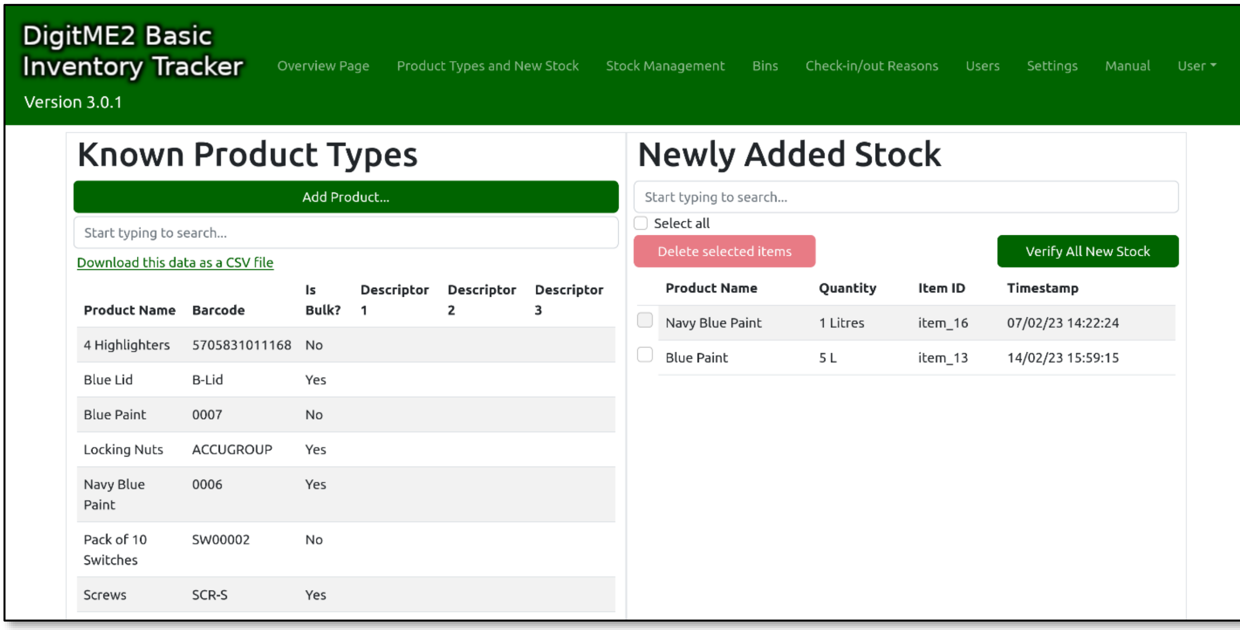
Total Stock | Unassigned Stock | Near Expiry | Expired

Download this data as a CSV file

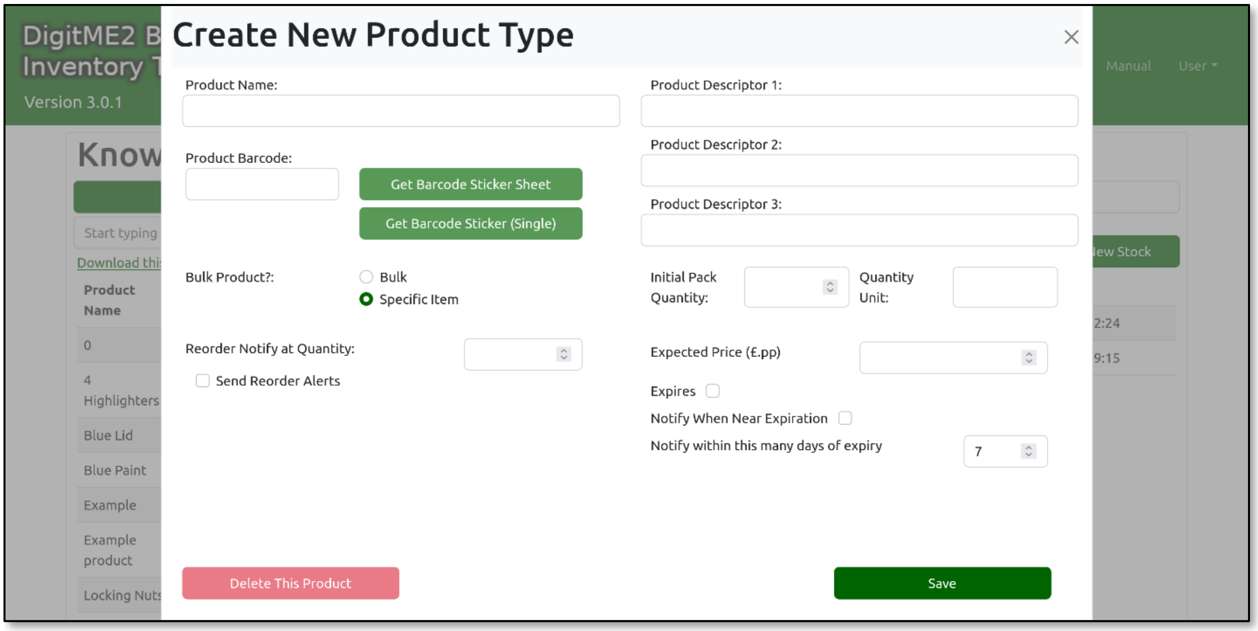
Product Name	Stock Quantity	Bulk Item?	Descriptor 1	Descriptor 2	Descriptor 3
Blue Paint	11 L	No			
Navy Blue Paint	46 Litres	Yes			
Pack of 10 Switches	10 Pack	No			
Screws	4 Pack	Yes			
White Lid	2 Lid	Yes			
Wires	5 Packs	Yes			
Yellow Paint	49 Litres	No	Gloss	Dulux	

Adding New Product Types

To add products to the system, select the product and new stock tab at the top of the screen, then select the add product underneath the heading of known products.



A new screen will open so you can create a new product type.



Enter the product name of the product you are adding to the system.

Product barcode if the barcode produced by the manufacturer on the item. If no barcode is available on the product, you can create your own. A barcode is mandatory for the system to identify the product.

Bulk product? Bulk is for large quantities not divided into separate units. Bulk does not track the item, price, or expiry date of the product.

Specific items can track price and expiry date.

Reorder notify at Quantity, you can set the limit to a number, so it notifies you to re-order stock.

You can also receive alert for items which are due to re-order, by ticking the box Send Reorder Alerts.

Product descriptors is where you can add keywords which will helps you find items in the search tools.

Initial pack quantity is the number of items of you adding and the quantity unit is the measurements such as packet, box, litres. Examples 1 box, 5 litres. In the product name you could add the number of items in the quantity unit, for example you could say 6 screws in the product name and add 1 pack in the initial pack and unit.

Complete the expected price, expires fields if required.

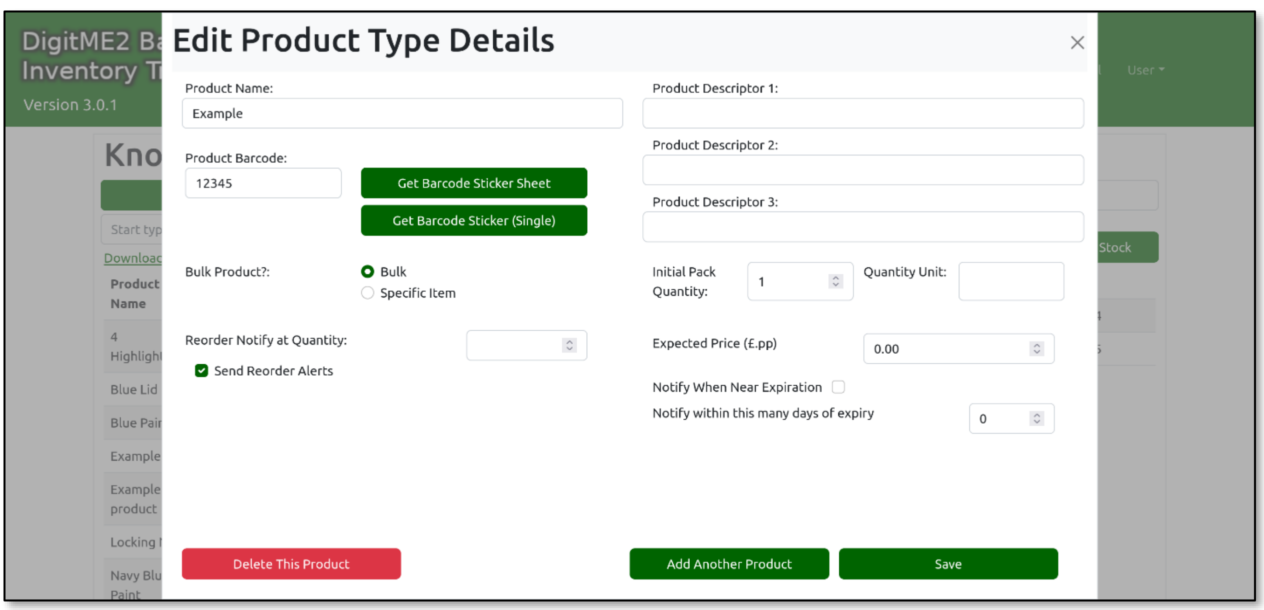
Click save, you will notice at the top of the screen that the heading changes from Create to Edit Product Type. From this page you can add another product if you wish.

You have the option of a sheet of barcode labels if you have several products to add to the system or you can select single barcode sticker if you just have the one item.

If you are tracking bulk items, the item tracker sticker can be added directly next to the location sticker. If you want to individual track a specific item, then you need to add the item sticker directly to the product.

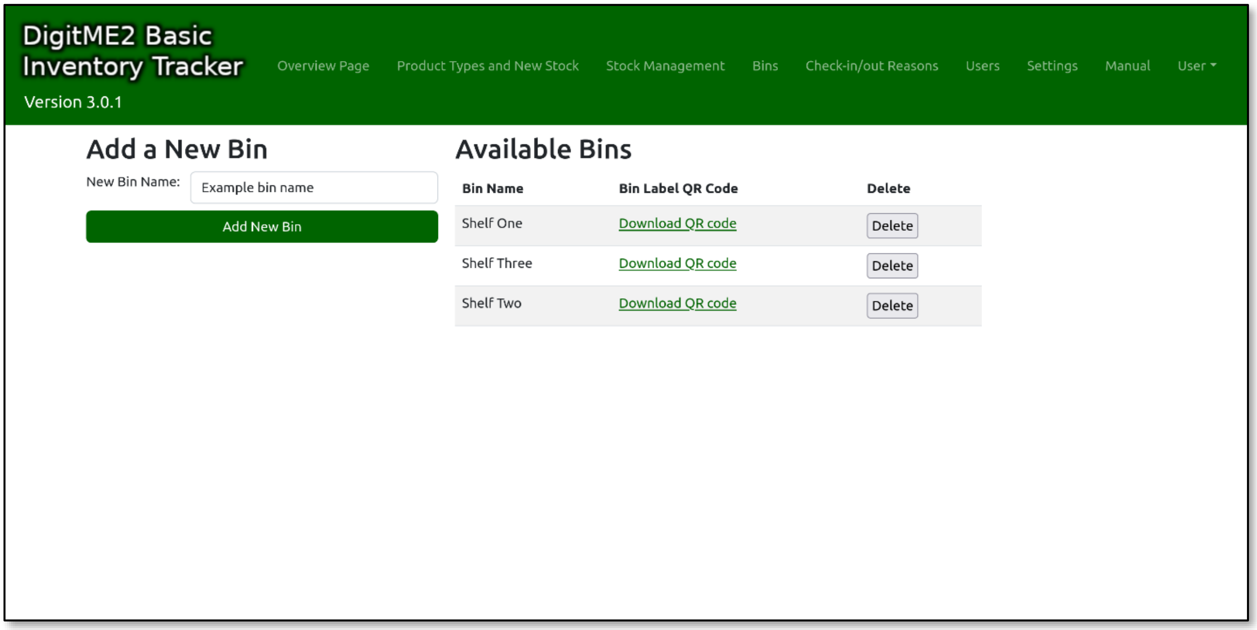
Attach the barcode to the product/location.

You can add further products from the screen by selecting the Add Another product button. The product name and barcode number will still show in the fields from the previous item you have added, this is so you do not have to keep typing in the same details if you are adding a similar description of product. If the product type is completely different, then you can just delete the details in the fields.



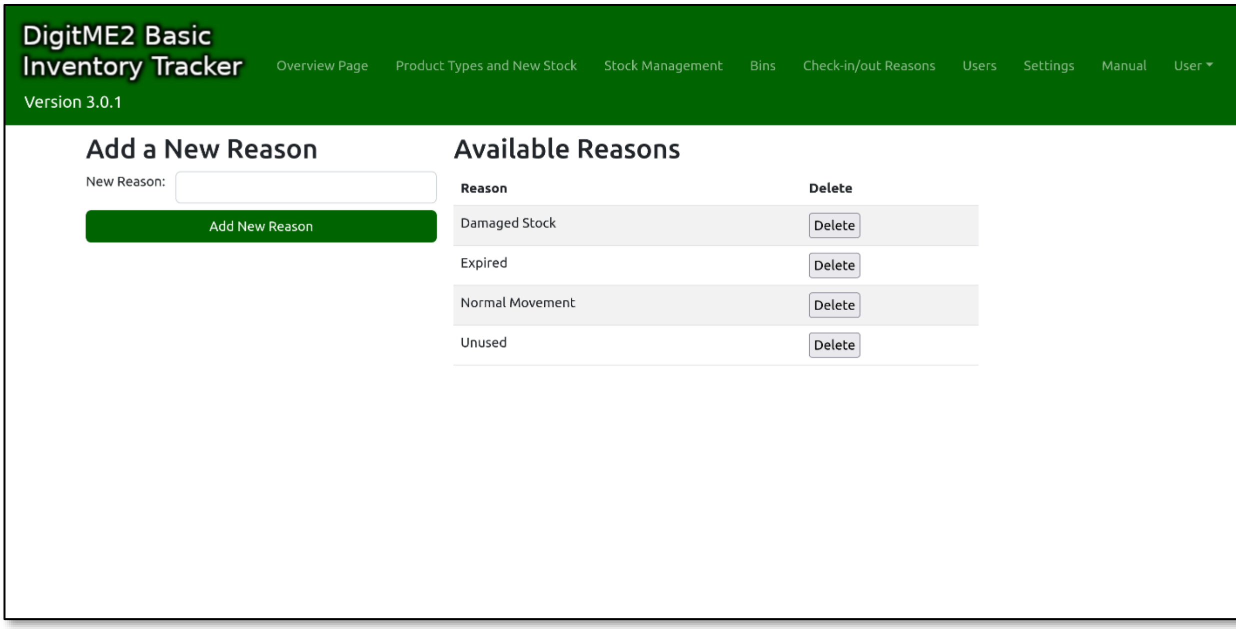
Adding Bins

Click the bins tab on the tool bar



The bins where the items are located. Type the name of the new bin name and click add bin. The system will produce a label which you can download and stick on the physical location.

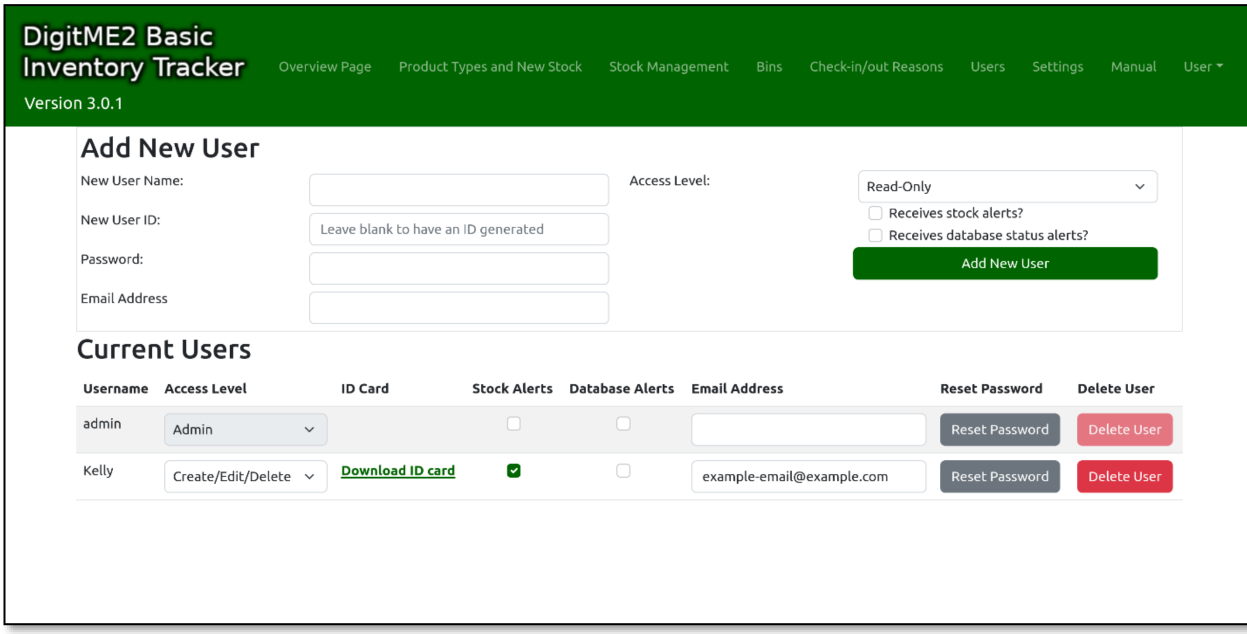
Adding Checking In/Out Reasons



You can tell the system reasons for goods being checked in or out. Type in the reason in the new reason box and click add new reason. This is not essential but will provide details of reasons for stock movement.

Adding Users

The next stage is to add users to the system, this is for members of staff who are going to use the system.



To add a new user, complete the relevant fields, you can change the access level to read only, create/edit/delete or administrator which gives full access. Leave the new user ID blank unless you have been advised not to.

Read Only-you can look but you cannot change anything.

Create/Edit/Delete allows you access to all areas apart from removing users or accessing the settings tab.

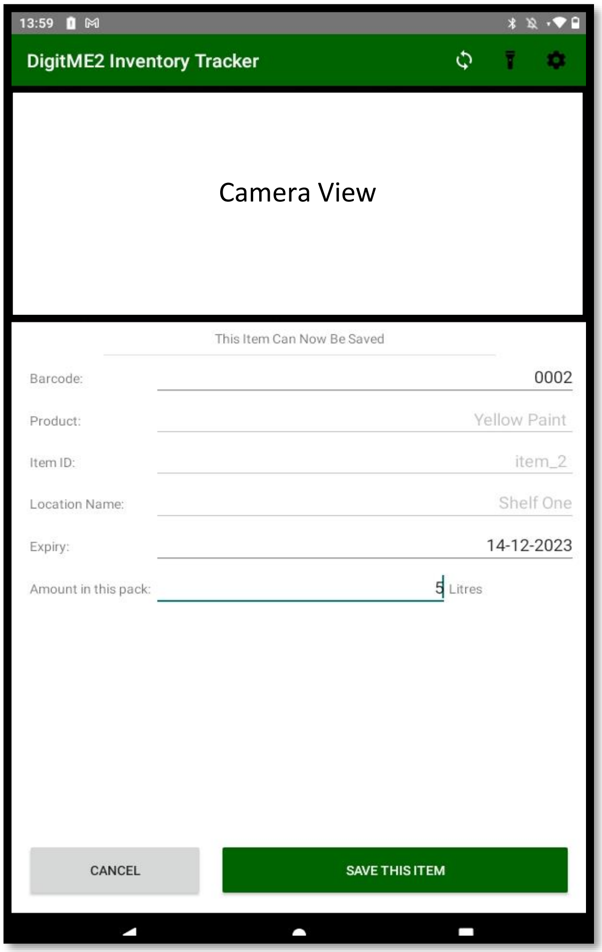
Once the ID Cards are downloaded, these can be issued to staff.

You are now ready to add product to the system. The products are adding by using a tablet.

Before you begin, check the tablet and the PC is connected to the same WIFI. The tablet should automatically find the server if you switch on automatic server discovery in the setting in the app.

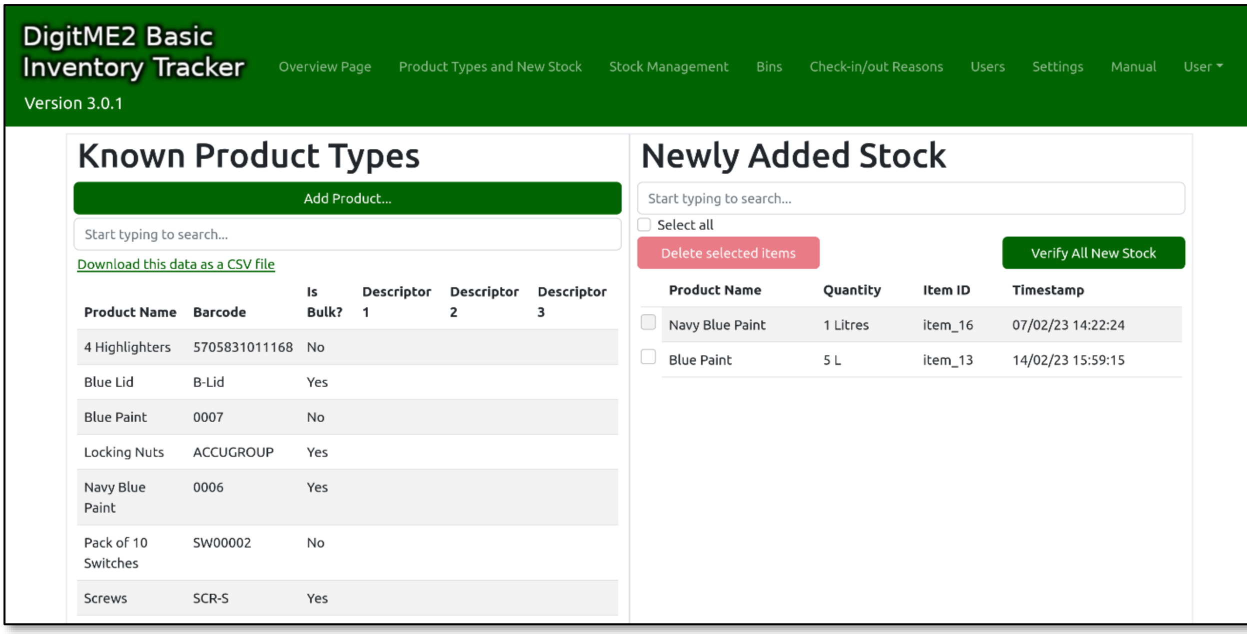
Adding New Stock

To add new stock



- To add new stock, you need to scan the product barcode, if the camera does not scan the barcode, then you can manually enter the number into the tablet.
- You then need to give the item an ID sticker so you can track the item in the system, scan this using the tablet.
- Once this is in the system you can scan the location of where the item will be stored. If you are adding to a current bulk item, you will need to use the existing ID sticker to replenish stock in that bin.
- If you want to track the product for expiry, the date can be manually added on the screen. You can also specify how many items are in a packet.

Once items have been added to the system, they will appear in the newly added stock on the product types and new stock page. Newly added stock items can be verified at this point, you can also delete items in this section. Items will still appear in the stock management system even if you forget to verify them. The verification page is there for you to check which items have recently been added to the system or to delete items added incorrectly.



Once a stock check has been completed, the system will highlight if any products have dropped to re-order levels. These will be highlighted in orange to alert you. An email notification will follow. Once the product has been re-ordered, the product will change from orange to green, so you know its on its way.

When the item has been added to the system and a stock check has been performed, the green highlighted item will change from green to white to show the item has been replenished if there is enough stock added over the minimal level.

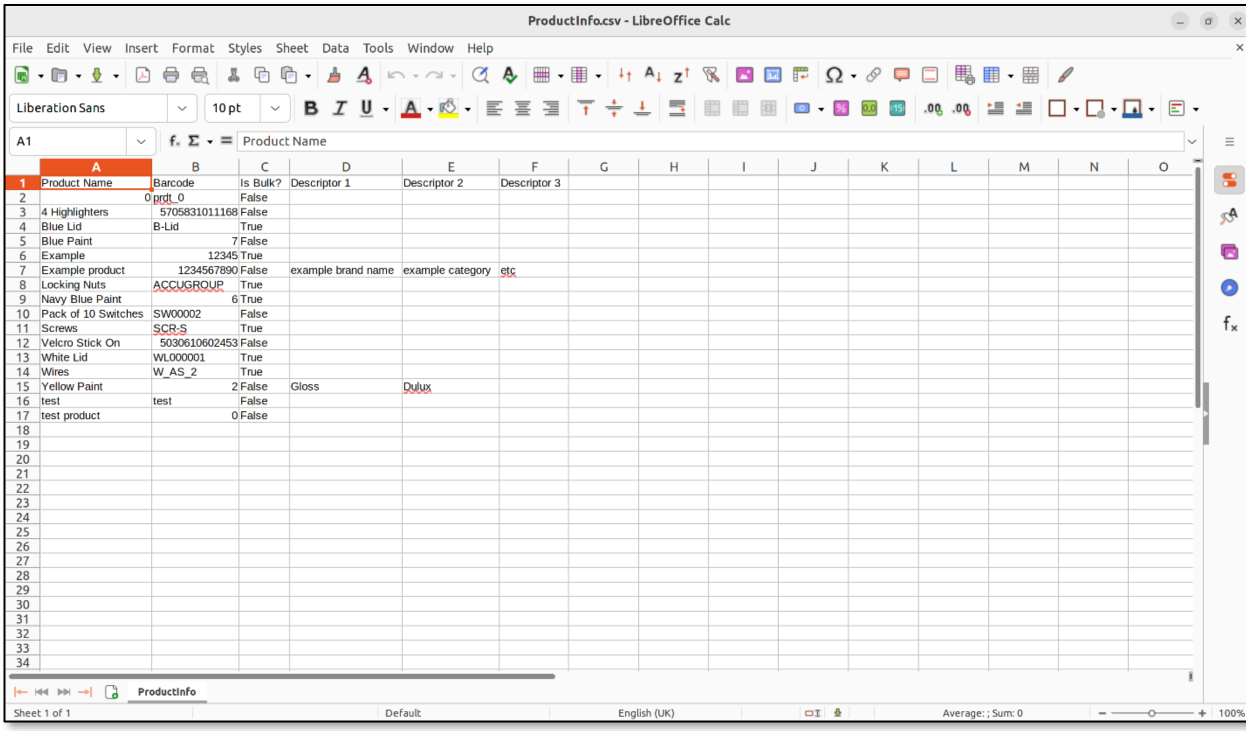
Known Product Types

Add Product...

Start typing to search...

[Download this data as a CSV file]

Product Name	Barcode	Is Bulk?	Descriptor 1	Descriptor 2	Descriptor 3
4 Highlighters	5705831011168	No			
Blue Lid	B-Lid	Yes			
Blue Paint	0007	No			
Locking Nuts	ACCUGROUP	Yes			
Navy Blue Paint	0006	Yes			
Pack of 10 Switches	SW00002	No			
Screws	SCR-S	Yes			
Velcro Stick On	5030610602453	No			
White Lid	WL000001	Yes			
Wires	W_AS_2	Yes			
Yellow Paint	0002	No	Gloss	Dulux	
test	test	No			
test product	0000	No			

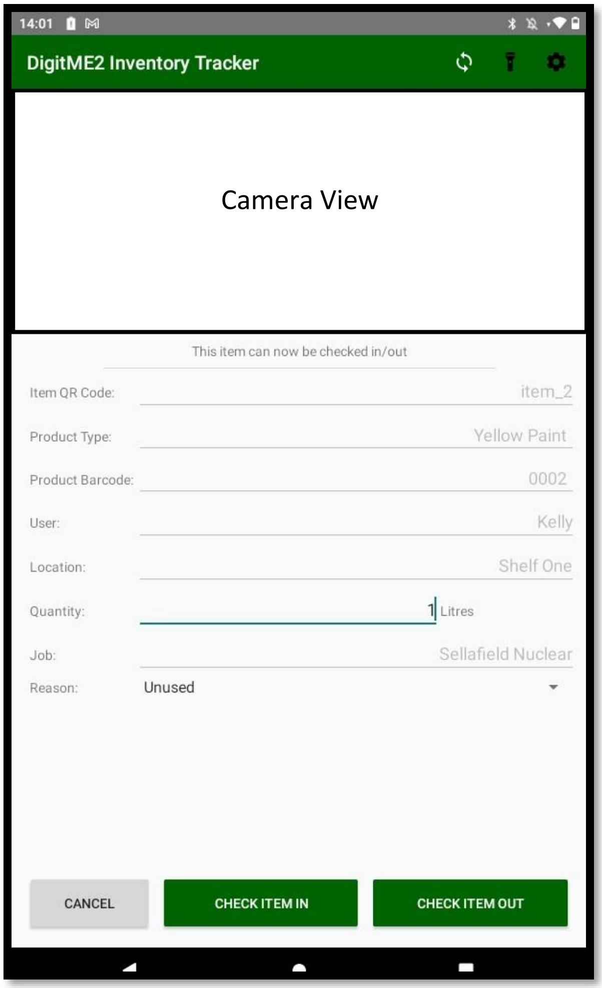


Product Name	Barcode	Is Bulk?	Descriptor 1	Descriptor 2	Descriptor 3
0	prdt_0	False			
4 Highlighters	5705831011168	False			
Blue Lid	B-Lid	True			
Blue Paint	7	False			
Example	12345	True			
Example product	1234567890	False	example brand name	example category	etc
Locking Nuts	ACCUGROUP	True			
Navy Blue Paint	6	True			
Pack of 10 Switches	SW00002	False			
Screws	SCR-S	True			
Velcro Stick On	5030610602453	False			
White Lid	WL000001	True			
Wires	W_AS_2	True			
Yellow Paint	2	False	Gloss	Dulux	
test	test	False			
test product	0	False			

You can download a list of known products if you wish as a CSV file that can then be opened in Excel, see image above.

Checking Items of Stock In and Out

To check items out, the essential fields required are Item QR code, product type, product barcode, the remaining fields are optional on check out.



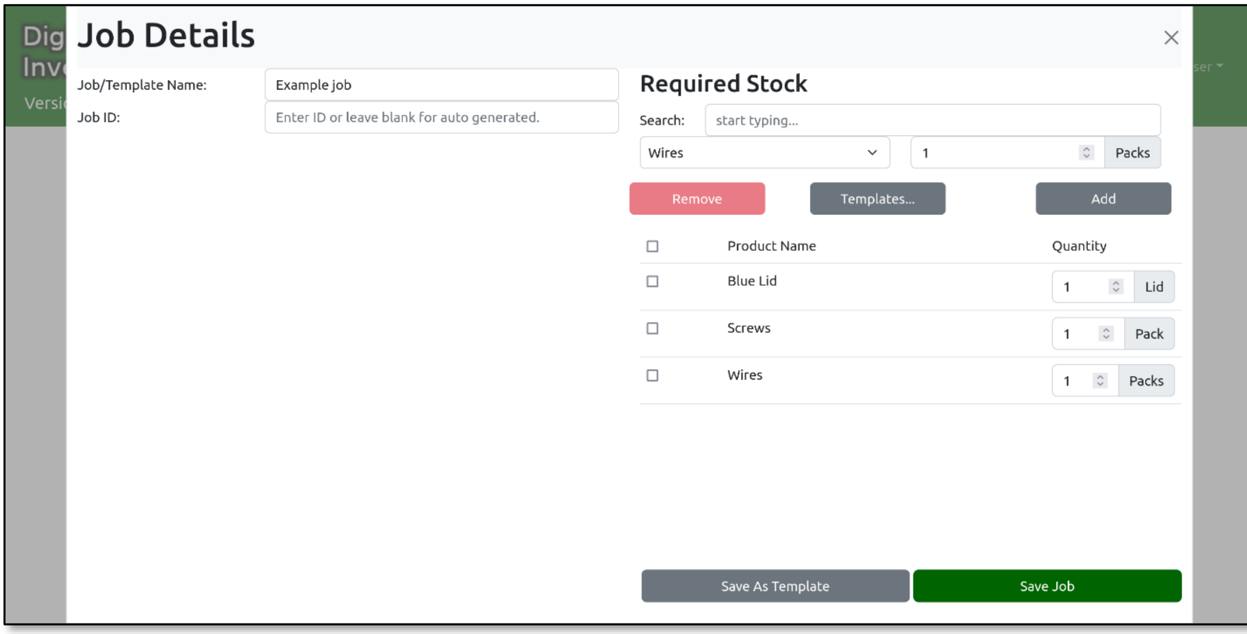
To check items in unused items

You can check used products back into stock, the essential fields required are Item QR code, product type, product barcode, the remaining fields are optional on check out.

Once you have added stock to the system, you have the option to create new jobs which can help track materials used on jobs and keeps a track of what items you have in stock.

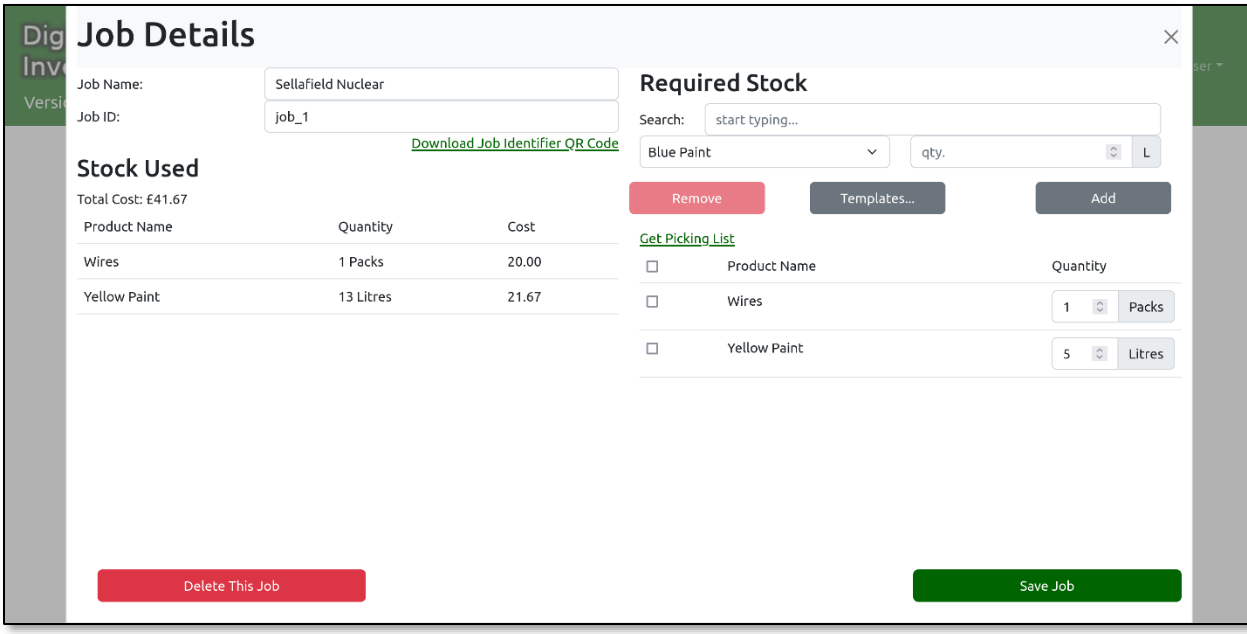
Creating Jobs

Select the overview tab and click create new job.



Add job details and select the amount or what materials are required using the stock system on the right-hand side of the screen.

Job templates can also be created in the system to save time if you are making the same items repeatedly. You add the required stock and then save it as a template. This will then allow you to select this template in the future for the same job, to automatically fill in the required stock list.

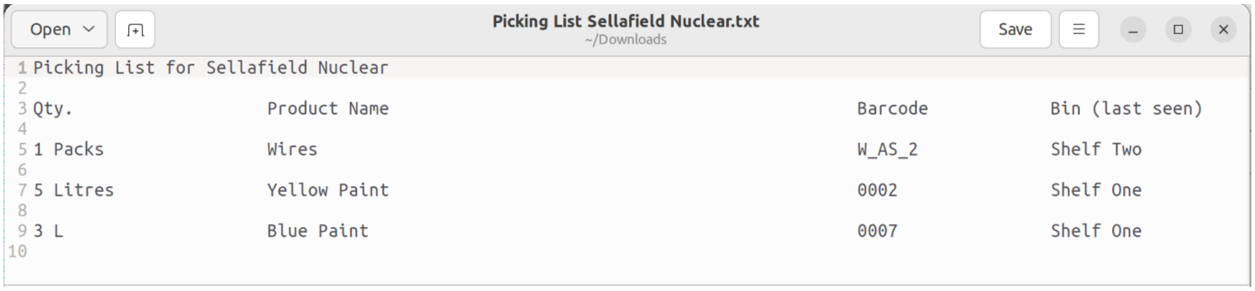


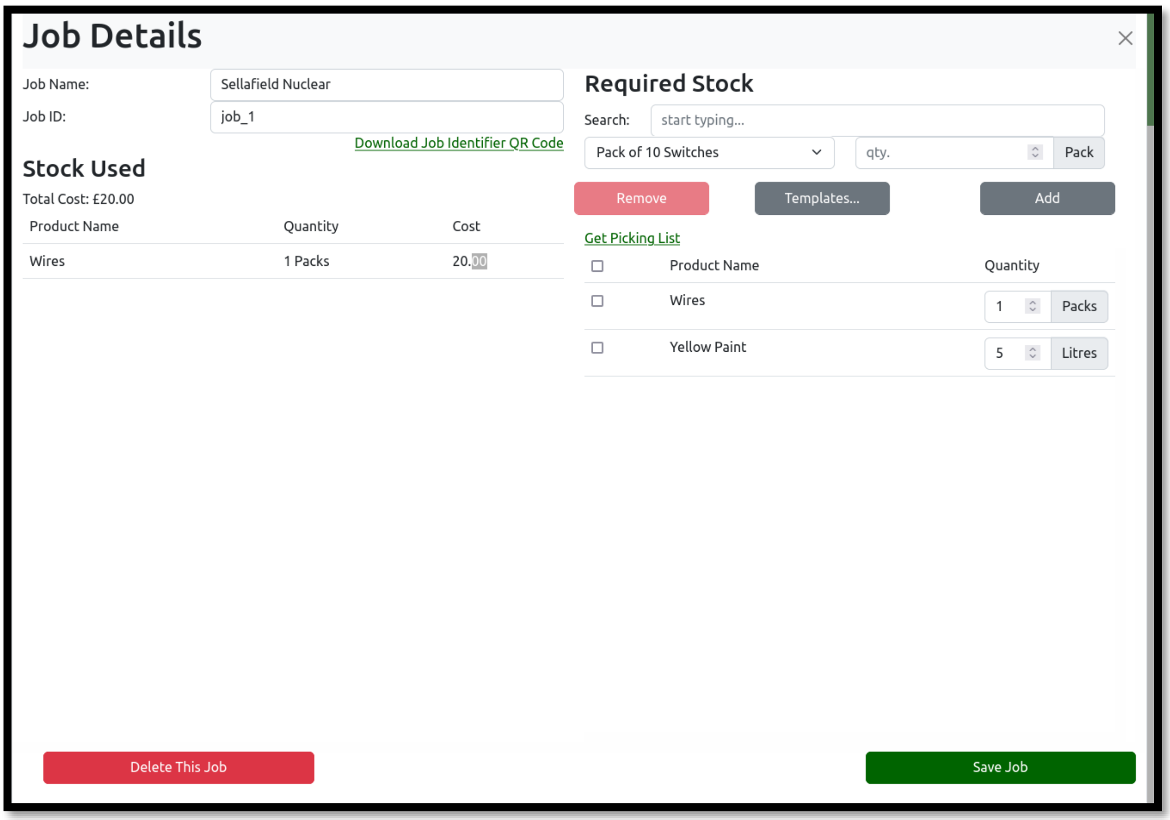
Once the job has been added, the system will automatically create a job ID number as shown above. The stock used cost will set at £0.00 until the stock has been checked out of the warehouse using the tablet.

Download the job ID by clicking on the download job QR Code. A QR code will appear as shown on the screen. Print off the QR code and this can be clipped to the original order or could copied and pasted if you are using a word document. You are now ready to print off your picking list using the tab above. This will give you a view of what is required to be picked for the job.

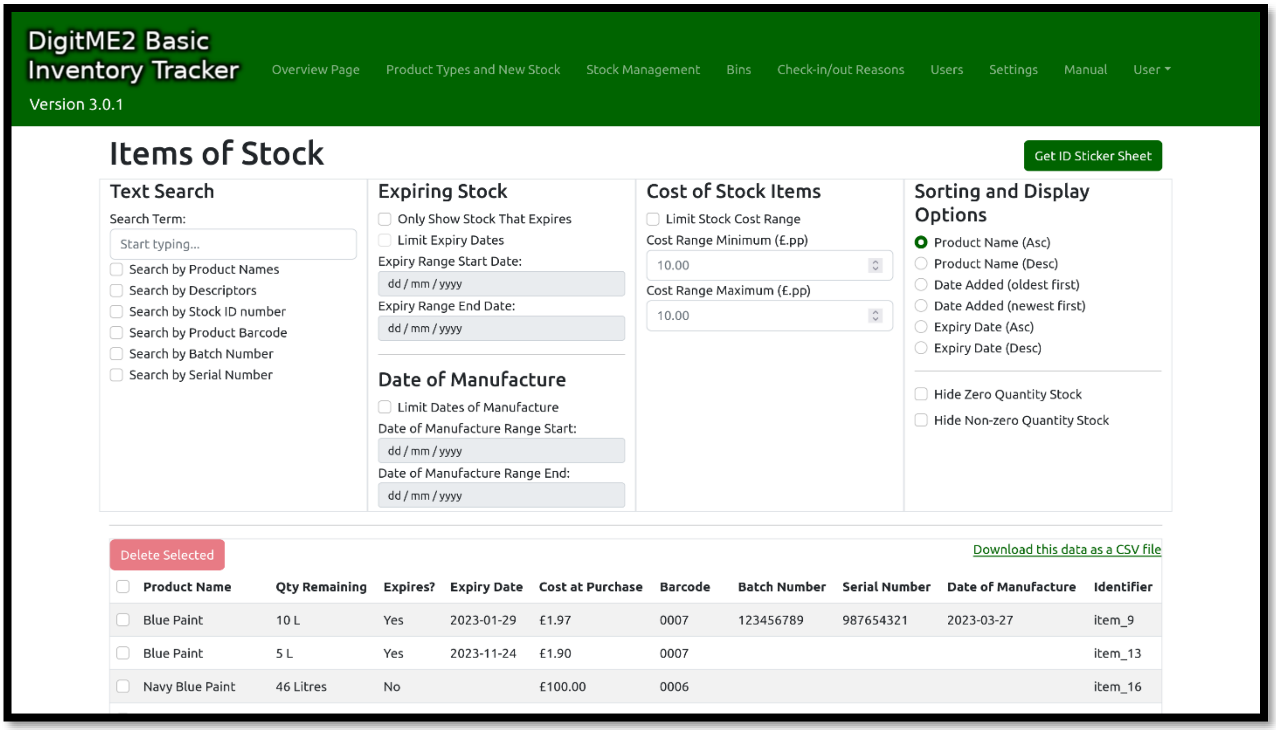
Example Job

Save job and then a pick list can be generated.





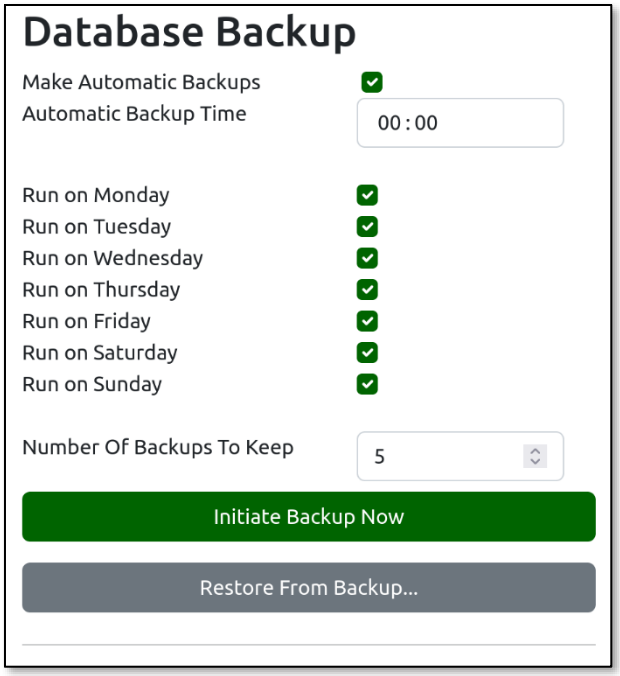
Once the stock has been checked out, the system will provide a running cost for materials for that specific job. A true calculation will be given when the job is complete and any unused stock for this job is checked back in. Once you have checked in any unused stock, the system will take a few mins to update, then it will show the replenished stock.



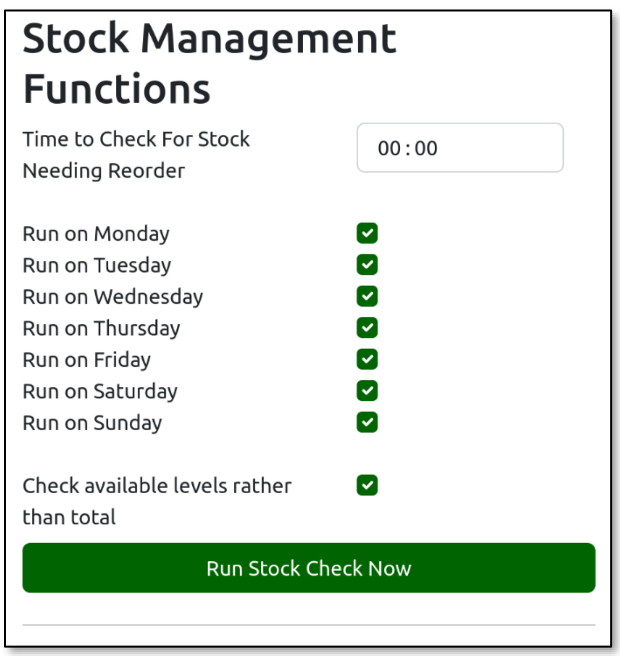
The stock management page allows you to view all recorded stock in the system. We advise you do not delete any product types or items of stock, even though they may never be used in the future, as this will delete anything in the system that refers to it.

On this page you can also search items of stock, you can also download item ID's which are used to track items in the system. If you click on any row on the stock management page, you can view or change the details of that stock item. This will also include a list of where it has been checked in and out.

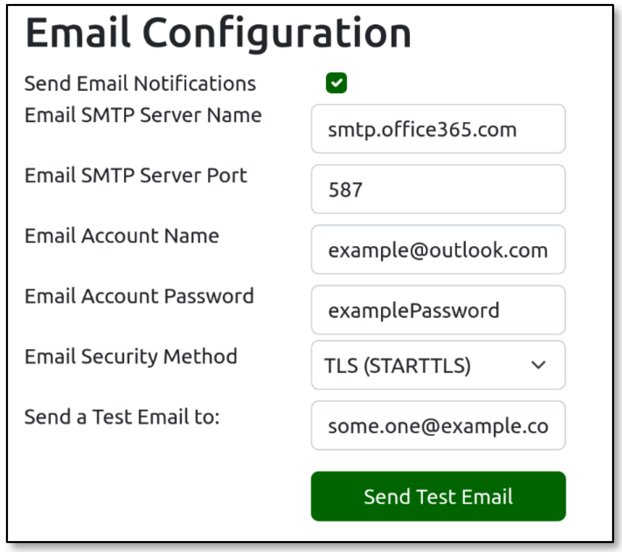
System Settings



In the settings tab you can set the database to back up, normally you would have it set like shown above with a specific time allocated for backup. Set a time when no one is using the system, e.g. middle of the night.



The database checks when items are due to expiry or need re-ordering, set a time to check for stock needing re-order. This function can also be run manually.



We will show you how to set up this information if you are unsure about how to complete the fields above. See the reference section for more details.

Reference

This section provides detailed information about how to use the system, in terms of the functionality offered on each page and on the app.

For information on getting started with the system, see Quick Start Guide.

The server software should be installed on a Linux Ubuntu 22.04 system, which can then run unattended and be accessed through the browser interface.

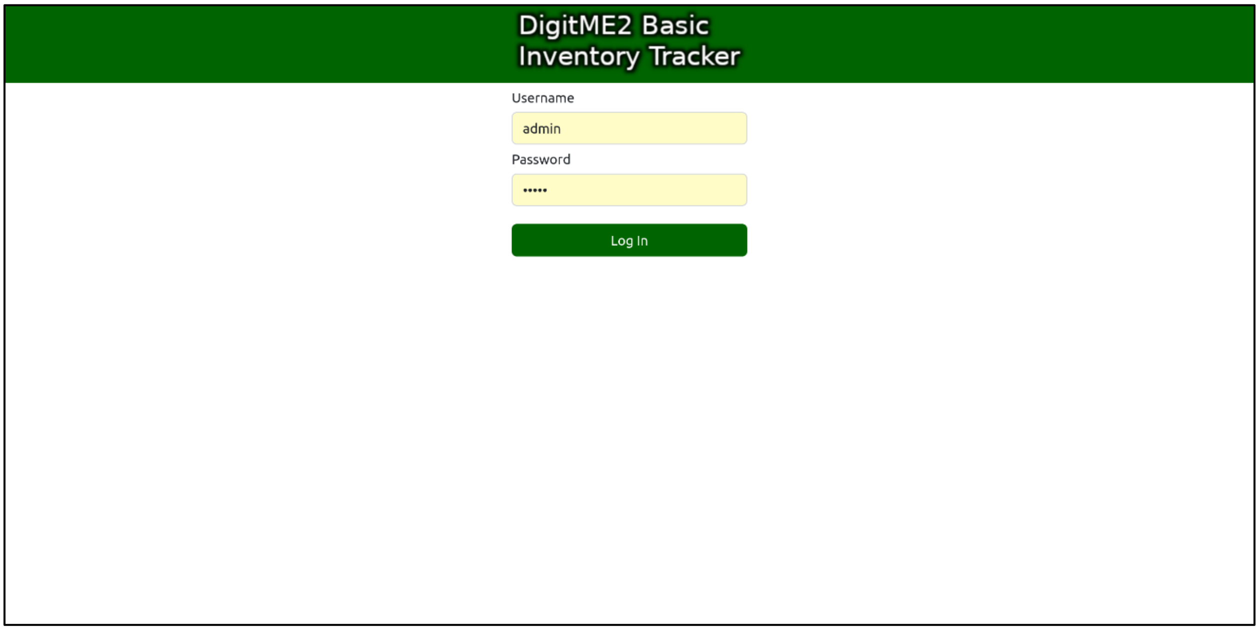
This system is split into a browser-based user interface for setup and administration, and an app for adding and moving stock. The app periodically syncs to the server, and as such can tolerate an intermittent Wi-Fi connection.

In order to prevent data being lost, this system should have a single user responsible for using the tablet app.

The server and the tablet must be on the same Wi-Fi network for the system to work, although it can tolerate an intermittent connection.

Browser Interface

Login Page

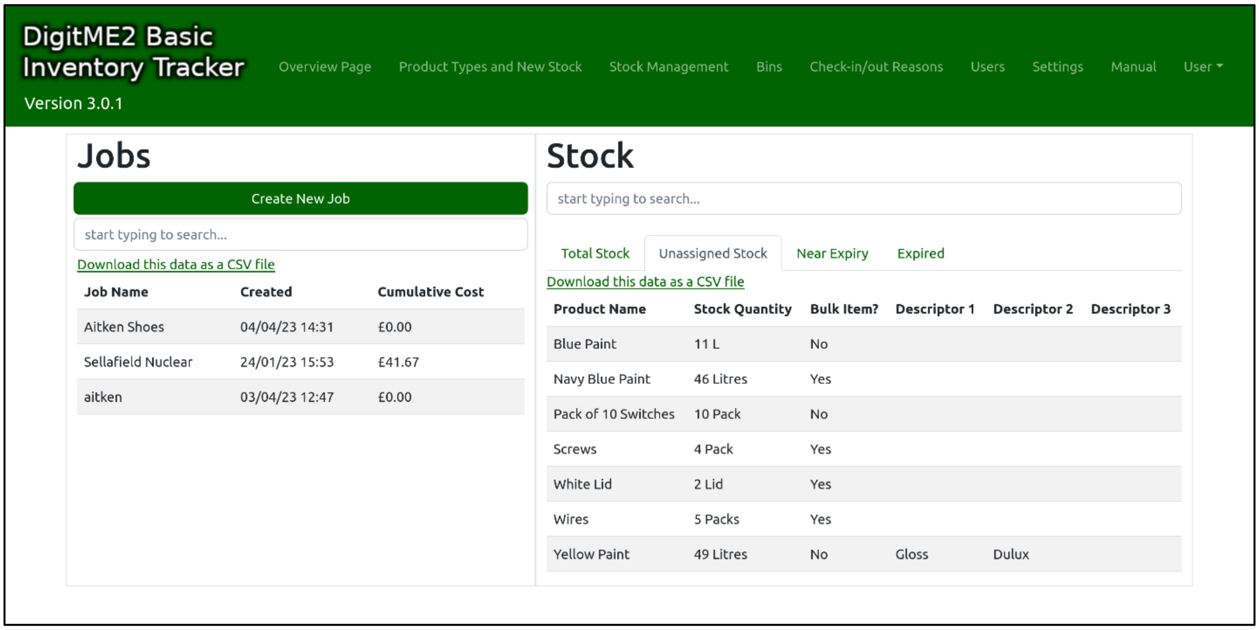


The login page is the first page of the interface that a user will see. To log in, the user must have had a user account created for them (see Users).

The default admin account created when the system is logged in has the username “admin” and the password “admin”. Both are case sensitive.

If a user has forgotten their password, it may be reset by an admin level user (see Users).

Overview Page – Jobs and Stock Overview

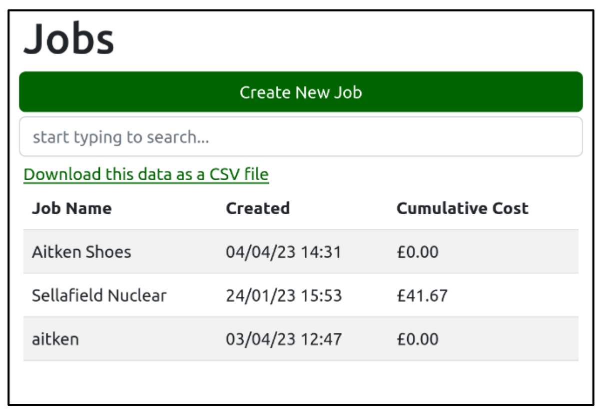


The overview page provides a high-level view of the current state of the system and allows new jobs and job templates to be added.

Jobs

The jobs overview provides a table, which by default shows all jobs in the system. The search box can be used to search for jobs. This field will search on job names.

The table shows matching job names, when the job was created, and the running total cost of the job. This running total is calculated based on stock currently checked out for a job, and so if unused stock if checked back in, the cumulative cost may decrease.

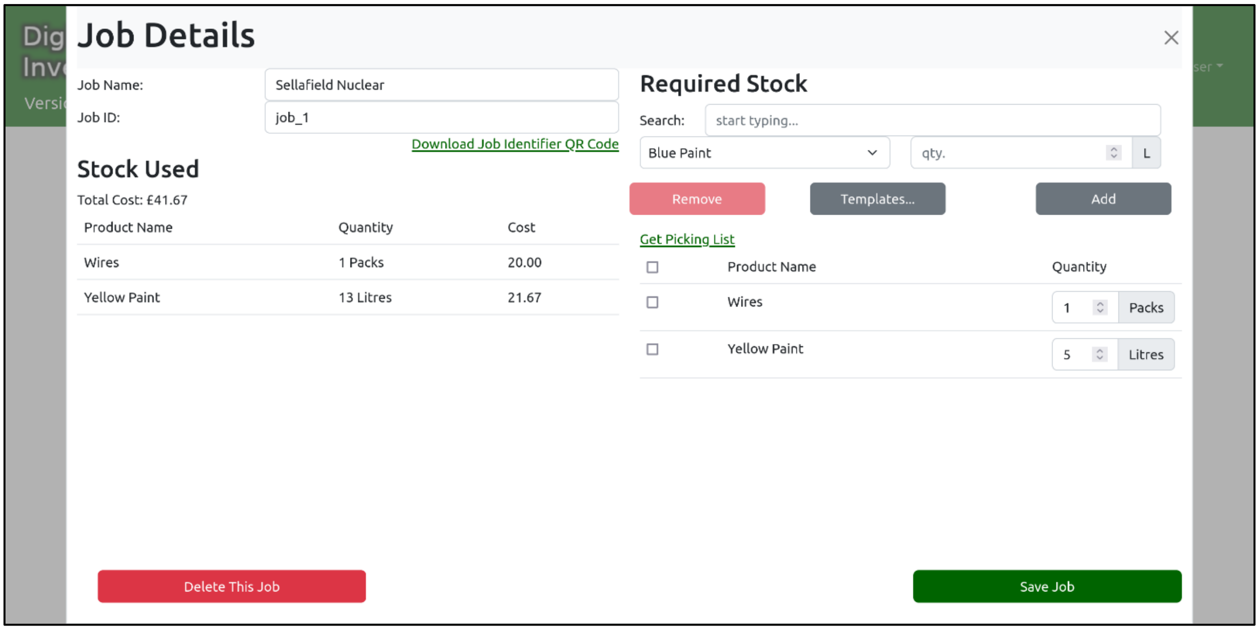


The currently displayed list of jobs can be downloaded as a CSV file with the link, allowing it to be imported into a spreadsheet for further processing.

Clicking on a row in this table will open the job details panel for that job.

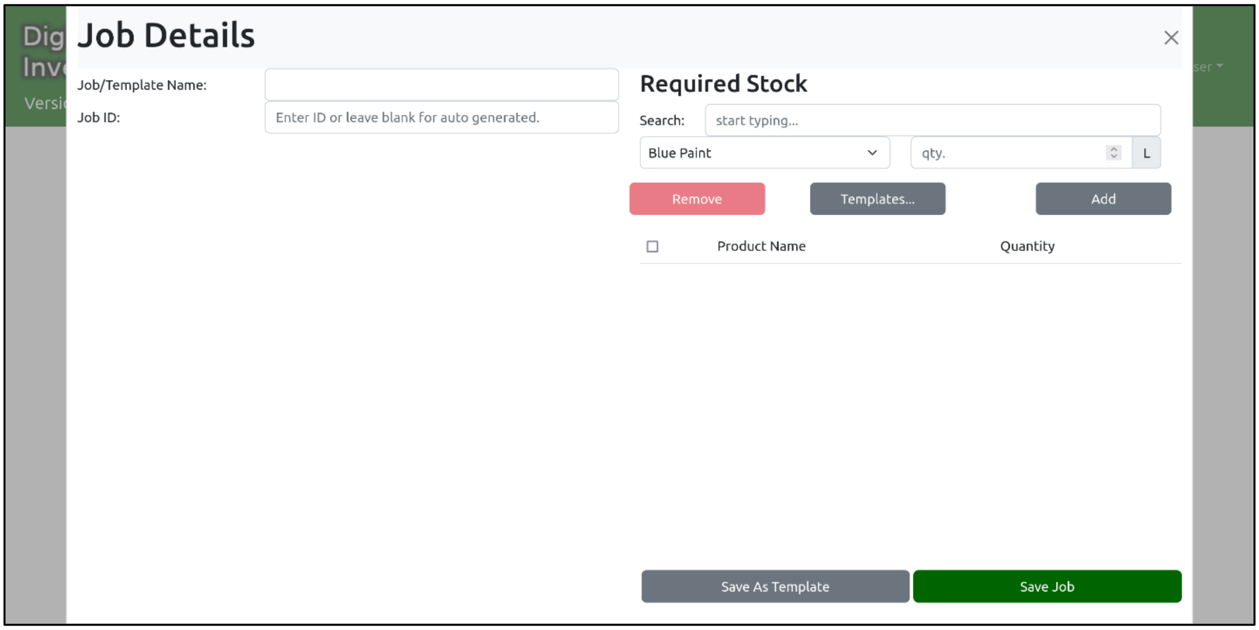
Job Details Panel

The job details panel can be used to create new jobs or templates, or to view and edit the details of an existing job. It can be opened for an existing job by clicking a row the jobs overview table, or for adding a new job by clicking the Create New Job button on the overview page. The panel appears as shown below, in this case for an ongoing job.



Creating Jobs

When creating a new job or template, the panel will appear as shown below:

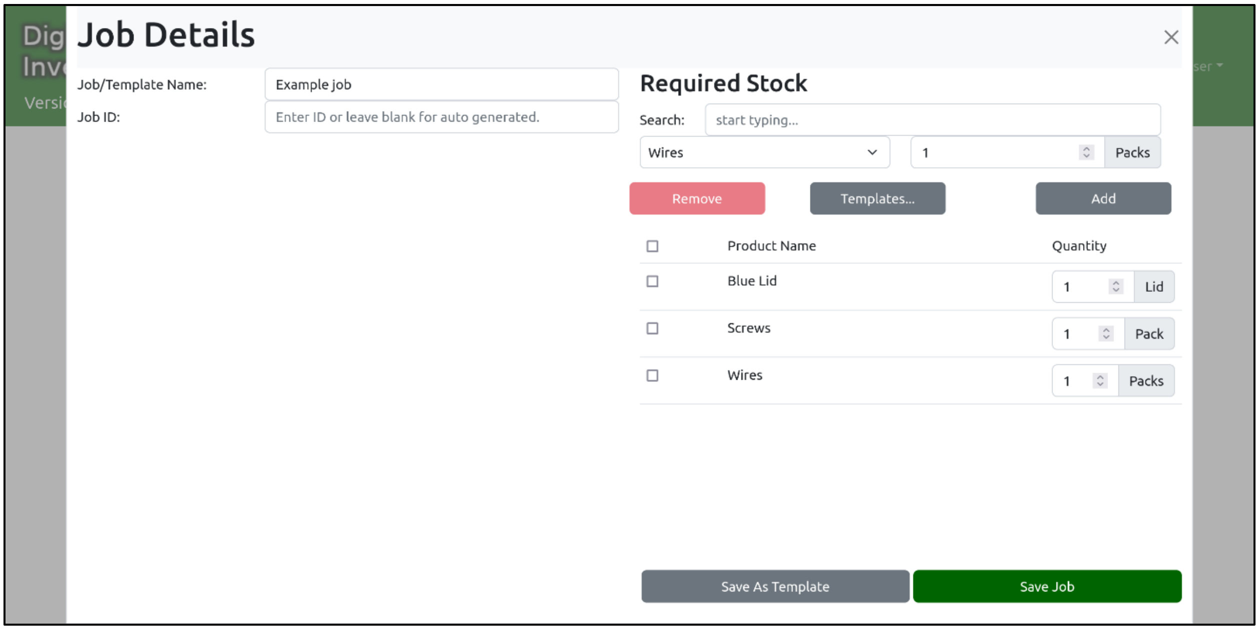


This panel can be used to create both jobs and job templates. When a job is created, the required stock may by added to it. This will be used to calculate the available unassigned stock on the overview page (see REF).

Alternatively, when the stock required is entered, this may be saved as a template by clicking the Save As Template button. This will record the stock assignment currently listed, which will be saved under the name in the Job/Template Name box. In future, this can then be used to easily fill the assigned stock list of a new job without having to enter the individual items manually.

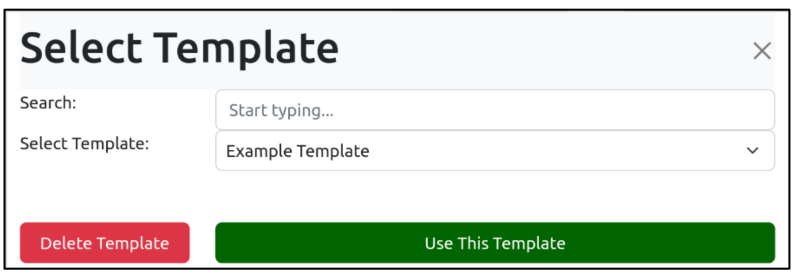
To create a job, first enter a name into the Job/Template Name box. This is the name that the job or template will be saved under. The job ID should be left blank, and the system allowed to generate a job Id automatically. This option is present for use in future developments.

Next, optionally add required stock. To do this, select the required product type (see REF for more information on product types) from the dropdown menu, and enter the required quantity. The options in the dropdown menu can be filtered by entering a search term, which will search on product names. Click the add button, and a row will be added to the required stock table.



Quantities of required stock can be changed using the number inputs on the right of the required stock table. Required stock entries may be removed by ticking the relevant checkbox and then clicking the remove button.

Alternatively, required stock may be added using a template. To do this, click the Templates… button to open the template panel, then select the required template. Note that this must be done **before** any required stock assignments are added manually, as a template will overwrite these.



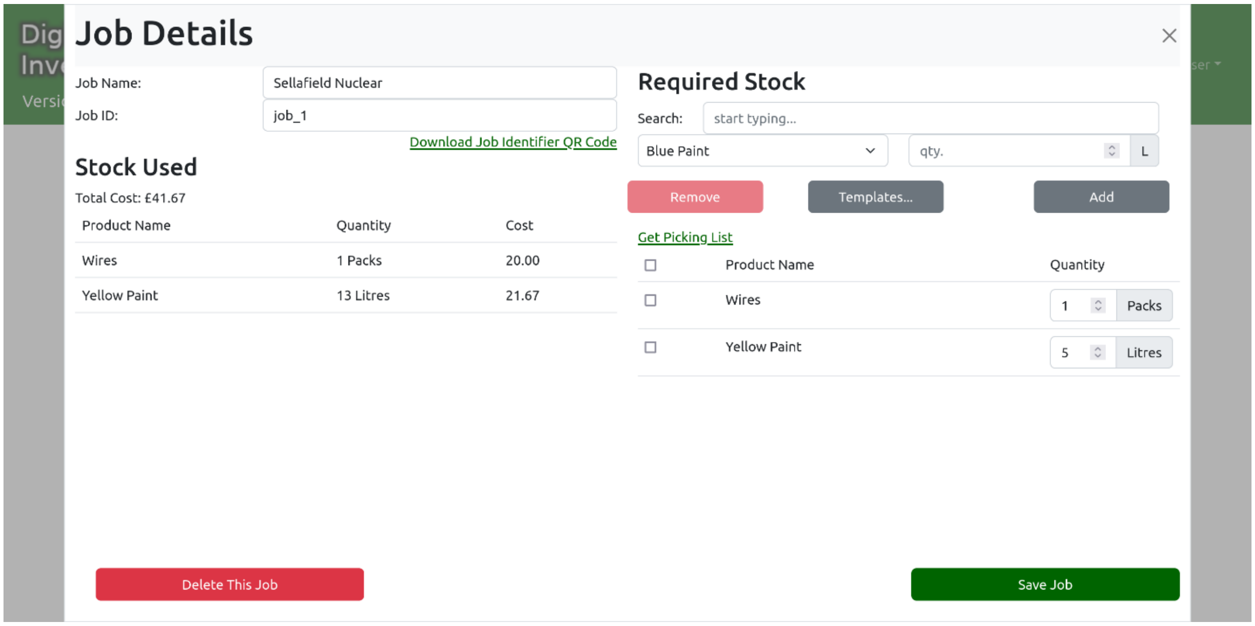
Simply select the required template from the Select Template dropdown and click Use This Template. The system will then fill in the required stock list.

To save the job, click the Save Job button. The panel will then change to display the details of the newly created job.

To save the selected stock requirements as a template, click the Save as Template button. The required stock list will be stored as a template under the name in the Job/Template name box. Note that templates are identified by their names. Saving a new template that shares the name of an existing one will overwrite the existing template.

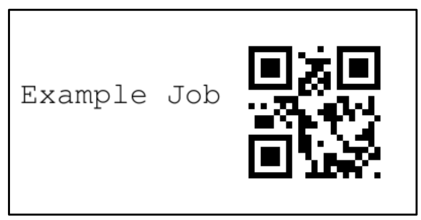
Existing Jobs

For an existing job, the job details panel will look similar to the one shown below.



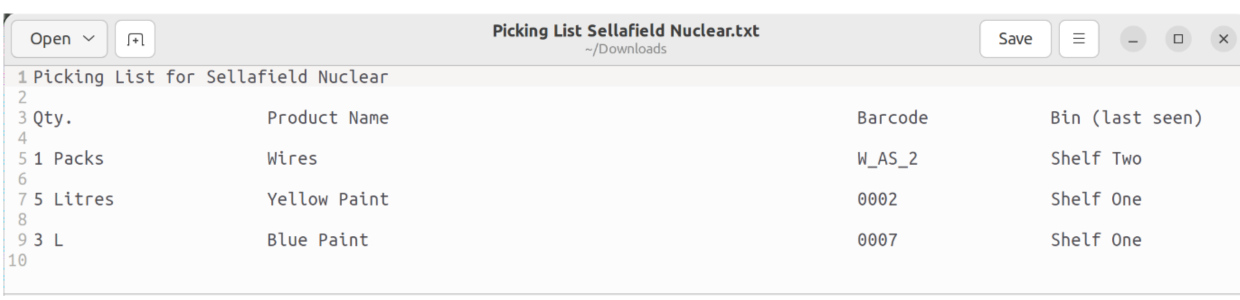
The job name may be changed by changing the entry in the Job Name textbox. The job ID, however, should not be changed without good reason, as this is how the system identifies the job.

The job has a QR code label associated with it (example shown here), which can be scanned by the app. See REF for more information. To download this identifier, click the Download Job Identifier QR Code link. This label can be integrated into paperwork for a job or printed off and stapled to it.



The Stock Used section shows a running total cost, and the total quantities of each product type used on the job so far. Note that if unused stock is checked back in, the quantities and costs may go down.

The required stock section behaves as described in Creating Jobs, but also allows a picking list to be downloaded. This is a simple text file, describing the required stock. If the required stock assignment has been changed, the Get Picking List link will disappear, and the job must be saved before it becomes available again.



Stock overview

The stock overview shows the total stock in the system. This will include all items which have been added to the system, rather than all known product types. As such, product types which have never had an item of stock checked in will not appear in these lists.

For all stock overview tables, clicking on a row will lead to the Stock Management page with the appropriate search options filled in automatically (see Bulk items are simpler. The entire collection of stock for a bulk product type is treated as a single item of stock, with a single stock item ID label. Adding new stock, or checking in or out existing stock, simply changes the remaining quantity available. Typically, this would be used for consumables and sundries for which only the total quantity available is important.

Reorder Notification at Quantity allow the users to specify the minimum total stock level. When a stock check is performed (see REF), if the total stock is at or below this quantity, the product type will be highlighted as needing reordering, and will turn orange on the Known Product Types table (see Known Product Types). If the Send Reorder Alerts checkbox is checked, this product type will be included in the email notification produced by the stock check (see REF).

Descriptors are simply text labels that can be used to categorise product types. These descriptors are included in text searches.

The Expected Price field allows the expected cost of this product type to be recorded. For specific items, this price will be copied to the item when it is added to the system, so that the cost of materials used on jobs may be accurately recorded. For bulk products, the cost of material is calculated using the expected price listed here, and will change if the price is updated. If recording this cost is important, items should be tracked individually and Specific Item should be selected here.

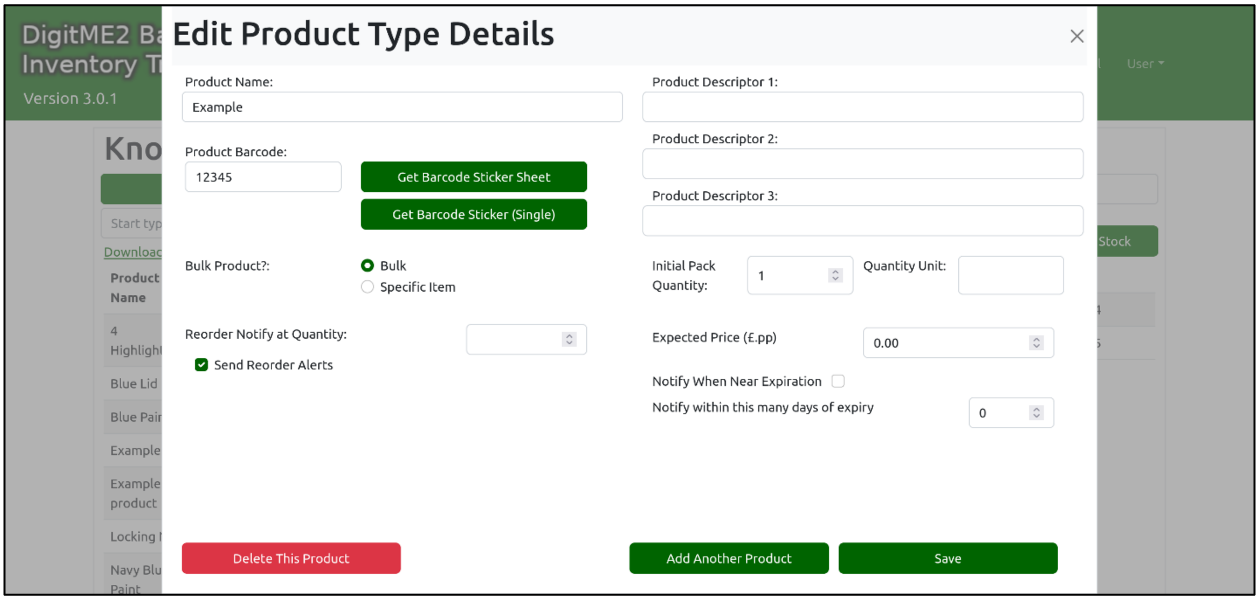
The expiry settings are only available if Specific Item is selected. The Expires checkbox simply specifies whether this product type can expire. If it can, if the Notify When Near Expiration checkbox is ticked, this items of this product type within the number of days specified will be included in the email notification produced by a stock check.

Once the required information has been entered, click Save to add the new Product Type to the system. At this point, the panel will change to the Edit Product Type panel (shown under

Editing Product Types), to allow further changes to be made. Note that the title of the panel changes to reflect this. If a product type has just been added, the Add Another Product button will become available. Clicking this will change the Edit Product Type Details panel back to the Create New Product Type panel.

Editing Product Types

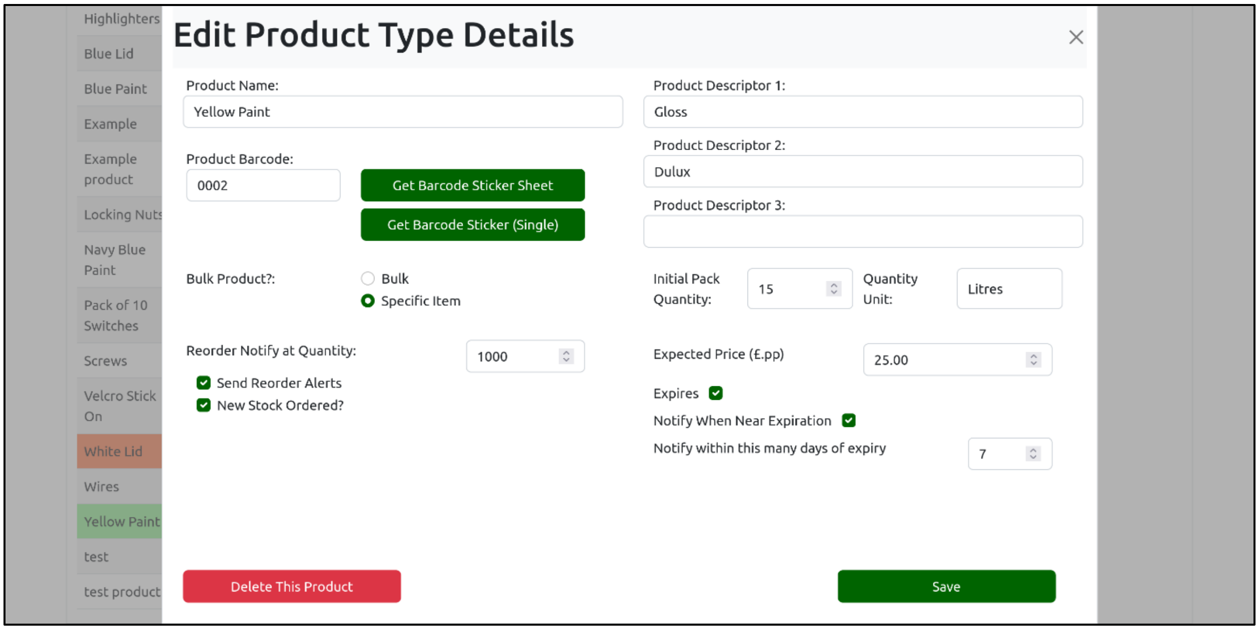
The Edit Product Type Details panel (shown below) works the same way as the Create New Product Types panel (see Adding New Product Types).



If this panel was reached by adding a new product, the Add Another New Product button will be available. This leads back to the Create New Product Type panel, but will not clear the inputs on screen. This is to allow multiple products with similar details to be added with a minimum of repetition.

While the system does allow a product type to be changed from bulk to specific or vice versa, this should only be done before any stock of this type has been added to the system. Doing so after that point is likely to result in the loss of data.

The Product Type may be deleted. **Note that doing so will delete all references to this product type, including stock items and records of stock being used on jobs.**



If the Product Type has been identified as being below the reorder level, the New Stock Ordered checkbox will become available. This allows the user to indicate when new stock has been ordered, at which point the relevant row in the Known Product Types table will turn green.

Once enough new stock has been added to the system and a stock check performed, this checkbox will disappear.

Newly Added Stock

The Newly Added Stock section shows items of stock that have been recently added to the system.

The purpose of this is to offer a second chance to check what was added, and to delete or amend any mistakes. Stock may be searched by name using the search bar.

To delete any items, select their checkbox and then click Delete selected items. All references to those items of stock will be immediately removed from the system. **This includes any references to stock being used on jobs.**

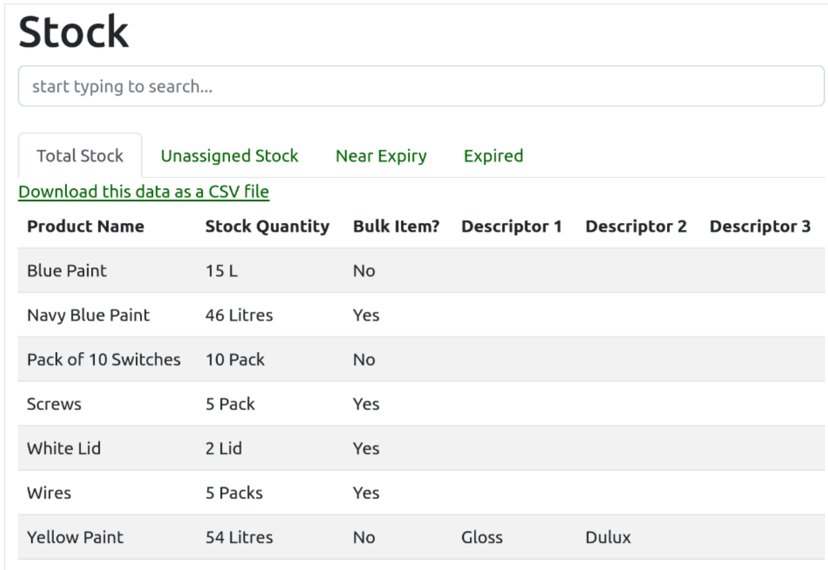
To confirm that the stock added is correct, click the Verify All New Stock button. This will remove the items from this list.

Clicking on a row will bring up the Stock Item Details panel for that item (see REF).

Note that this feature is entirely optional and will not impact the way the rest of the system works. It simply exists to help with error correction.

Stock Management). The search bar will search product names and descriptors and will filter all four tabs simultaneously.

The Total Stock tab (below) shows the total quantity of each product type currently checked in.


Stock

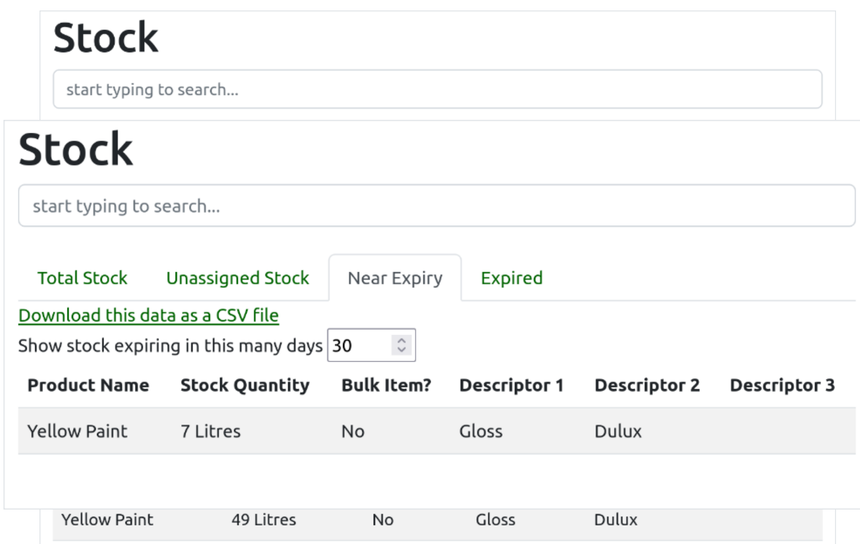
start typing to search...

Total Stock | Unassigned Stock | Near Expiry | Expired

Download this data as a CSV file

Product Name	Stock Quantity	Bulk Item?	Descriptor 1	Descriptor 2	Descriptor 3
Blue Paint	15 L	No			
Navy Blue Paint	46 Litres	Yes			
Pack of 10 Switches	10 Pack	No			
Screws	5 Pack	Yes			
White Lid	2 Lid	Yes			
Wires	5 Packs	Yes			
Yellow Paint	54 Litres	No	Gloss	Dulux	

The Unassigned Stock tab (below) shows the same information as the Total Stock tab, except the stock quantities are calculated as the total quantity of each stock type minus the total amount still required for jobs. Note that a negative quantity here implies that more stock is required than is currently available.


Stock

start typing to search...

Stock

start typing to search...

Total Stock | Unassigned Stock | Near Expiry | Expired

Download this data as a CSV file

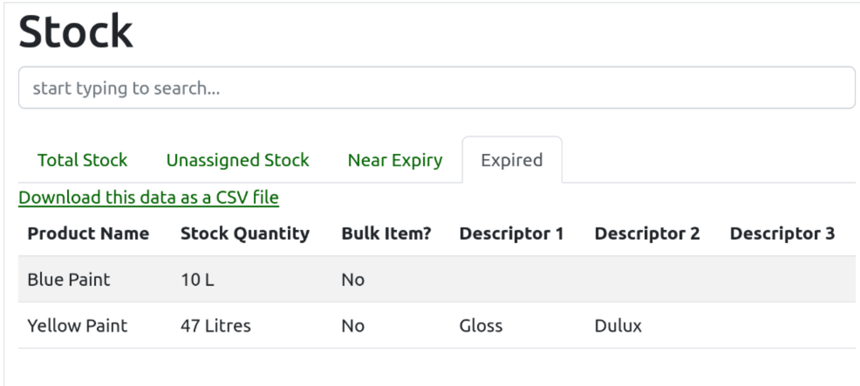
Show stock expiring in this many days 30

Product Name	Stock Quantity	Bulk Item?	Descriptor 1	Descriptor 2	Descriptor 3
Yellow Paint	7 Litres	No	Gloss	Dulux	

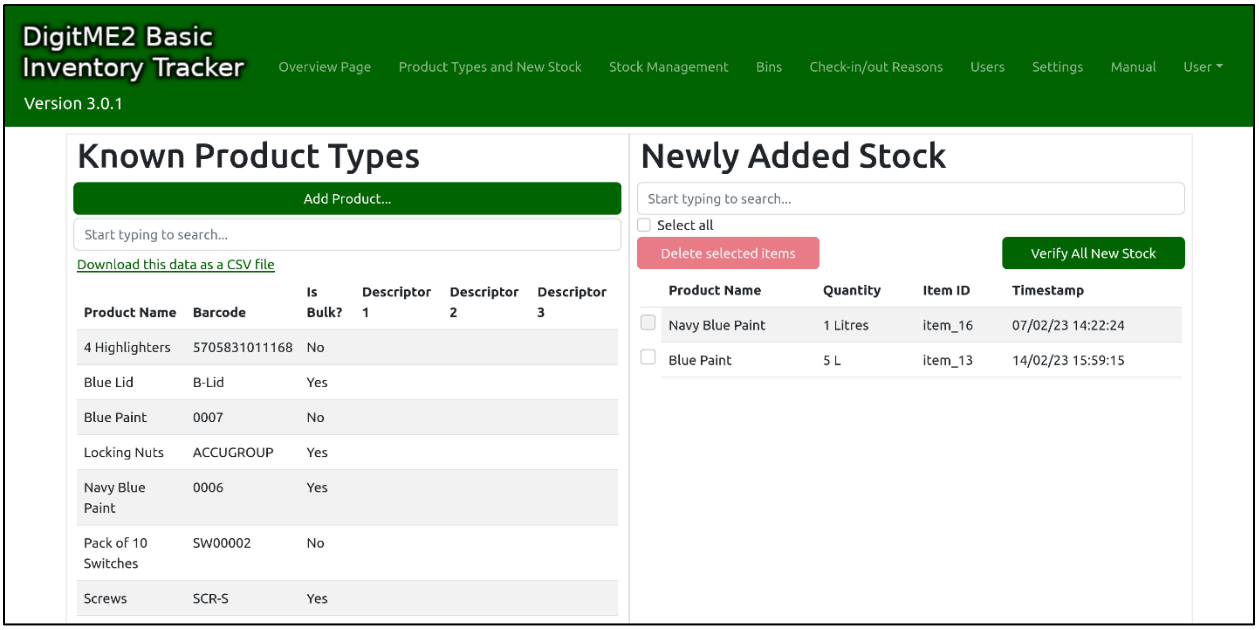
Yellow Paint	49 Litres	No	Gloss	Dulux	

The Near Expiry tab will show stock that expires within the selected number of days of the current date. This works on specific items, so the quantity shown is the total quantity across all expiring items of a given product type

The Expired tab shows the total quantity of checked-in stock which has expired. As with the Near Expiry tab, this is the total quantity per product type across all expired stock items.



Product Types and New Stock



The product Types and New Stock page allows Product Types to be created and edited, and recently added stock to be viewed and either confirmed or deleted.

Product Types

The system uses the concept of types of products to enable to keep track of different types of stock.

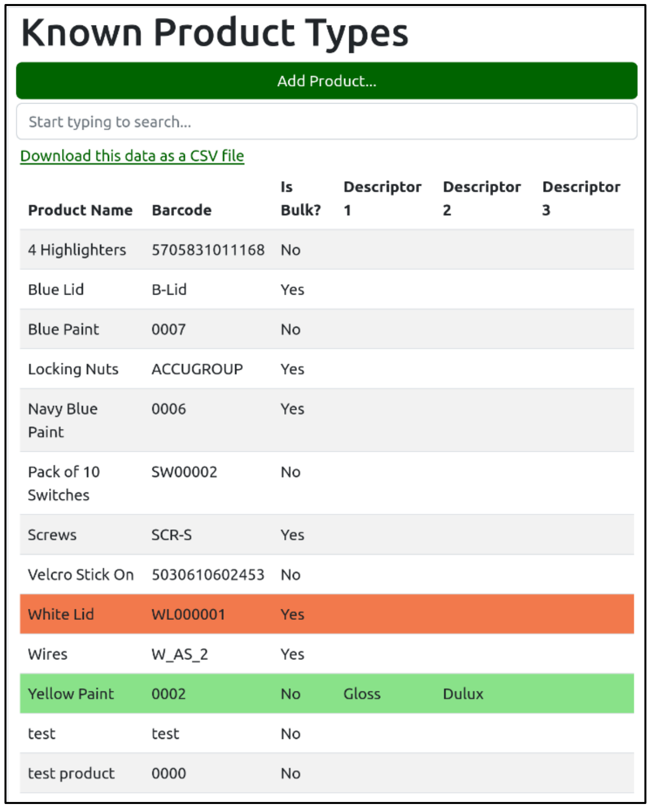
A product type is intended to be identified by a unique product name and a barcode. The barcode is generally expected to be the barcode on the packaging of the item itself, put there by the manufacturer. This would be the sort of barcodes normally seen on items in shops.

If such a barcode is not available, the user can enter a code of their choosing on the product information panel (see REF).

This barcode is used by the Inventory Tracker app to quickly identify what type of product a new item of stock is, which then allows the app to present the relevant fields.

Known Product Types

The Known Product Types table shows a list of all product types that the system is aware of. This list can be filtered using the search bar, which will search on product name, barcode, and descriptors.



Known Product Types

Add Product...

Start typing to search...

Download this data as a CSV file

Product Name	Barcode	Is Bulk?	Descriptor 1	Descriptor 2	Descriptor 3
4 Highlighters	5705831011168	No			
Blue Lid	B-Lid	Yes			
Blue Paint	0007	No			
Locking Nuts	ACCUGROUP	Yes			
Navy Blue Paint	0006	Yes			
Pack of 10 Switches	SW00002	No			
Screws	SCR-S	Yes			
Velcro Stick On	5030610602453	No			
White Lid	WL000001	Yes			
Wires	W_AS_2	Yes			
Yellow Paint	0002	No	Gloss	Dulux	
test	test	No			
test product	0000	No			

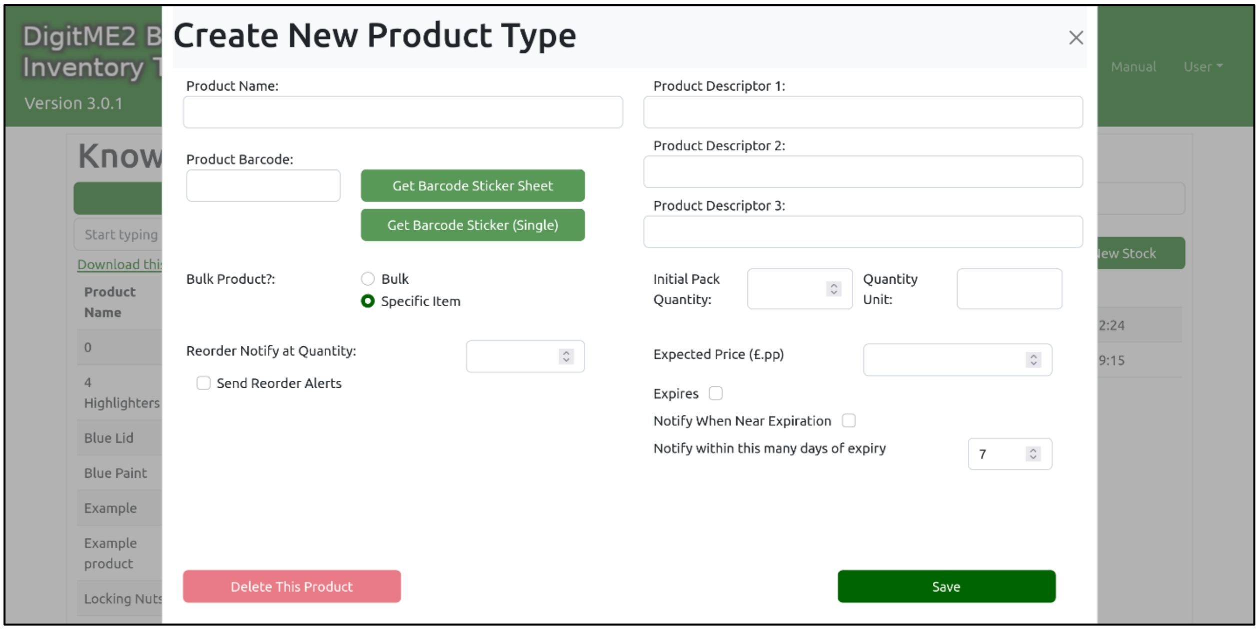
Product types may have a reorder level specified (see Adding New Product Types). When the system performs a stock check (see REF), product types that have less than the specified quantity of stock checked in will be highlighted orange on this table. If the product type has been marked as having been reordered, the row will turn green.

The information currently displayed in this table may be downloaded as a CSV file, for further processing in a spreadsheet or similar.

To add a new product type, click on the Add Product... button. To view and edit an existing product type, click on the row for that product.

Adding New Product Types

Clicking the Add New Product… button will open the Create New Product Type panel. This allows the details of a product type to be entered. Note the name of the panel is Create New Product Type. This is important, as the panel for editing an existing product type looks very similar but will make changes to an existing item.



Details of a new product type may be entered on this screen. At minimum, a product type must specify its product name, product barcode, and initial pack quantity.

The product name is simple a convenient name for the product type, to identify it to users.

The barcode should be either the barcode found on the product packaging, or the user may enter a product type identifier or SKU code of their choosing. Once the product type has been saved, a label or sheet of stickers encoding this may be downloaded with the Get Barcode Sticker Sheet and Get Barcode Sticker (Single) buttons. See REF for more information on sticker sheets.

The initial pack quantity is how many of the item are in a pack. For example, a box of screws could be recorded as 1 box, or as 500 screws, and a type of paint might have an initial quantity of 10 Litres. When stock is being added, items with less than this quantity can have their quantity remaining specified. A quantity unit may be specified, but this is optional.

Bulk Product specifies whether a product type is treated as specific items or a bulk item.

Specific items are individually tracked, with each stock item having its own ID label. They may expire and can accurately record the cost of the material used on a job, as each specific item will record the price that its product type was set to when it was added to the system.

Bulk items are simpler. The entire collection of stock for a bulk product type is treated as a single item of stock, with a single stock item ID label. Adding new stock, or checking in or out existing stock, simply changes the remaining quantity available. Typically, this would be used for consumables and sundries for which only the total quantity available is important.

Reorder Notification at Quantity allow the users to specify the minimum total stock level. When a stock check is performed (see REF), if the total stock is at or below this quantity, the product type will be highlighted as needing reordering, and will turn orange on the Known Product Types table (see Known Product Types). If the Send Reorder Alerts checkbox is checked, this product type will be included in the email notification produced by the stock check (see REF).

Descriptors are simply text labels that can be used to categorise product types. These descriptors are included in text searches.

The Expected Price field allows the expected cost of this product type to be recorded. For specific items, this price will be copied to the item when it is added to the system, so that the cost of materials used on jobs may be accurately recorded. For bulk products, the cost of material is calculated using the expected price listed here, and will change if the price is updated. If recording this cost is important, items should be tracked individually and Specific Item should be selected here.

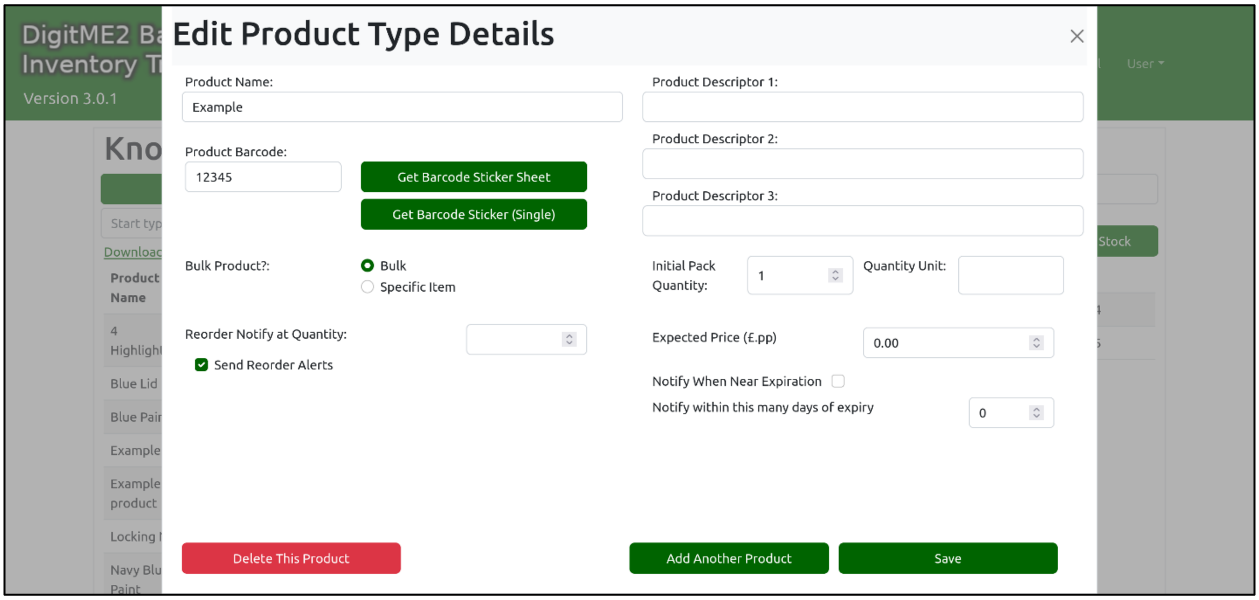
The expiry settings are only available if Specific Item is selected. The Expires checkbox simply specifies whether this product type can expire. If it can, if the Notify When Near Expiration checkbox is ticked, this items of this product type within the number of days specified will be included in the email notification produced by a stock check.

Once the required information has been entered, click Save to add the new Product Type to the system. At this point, the panel will change to the Edit Product Type panel (shown under

Editing Product Types), to allow further changes to be made. Note that the title of the panel changes to reflect this. If a product type has just been added, the Add Another Product button will become available. Clicking this will change the Edit Product Type Details panel back to the Create New Product Type panel.

Editing Product Types

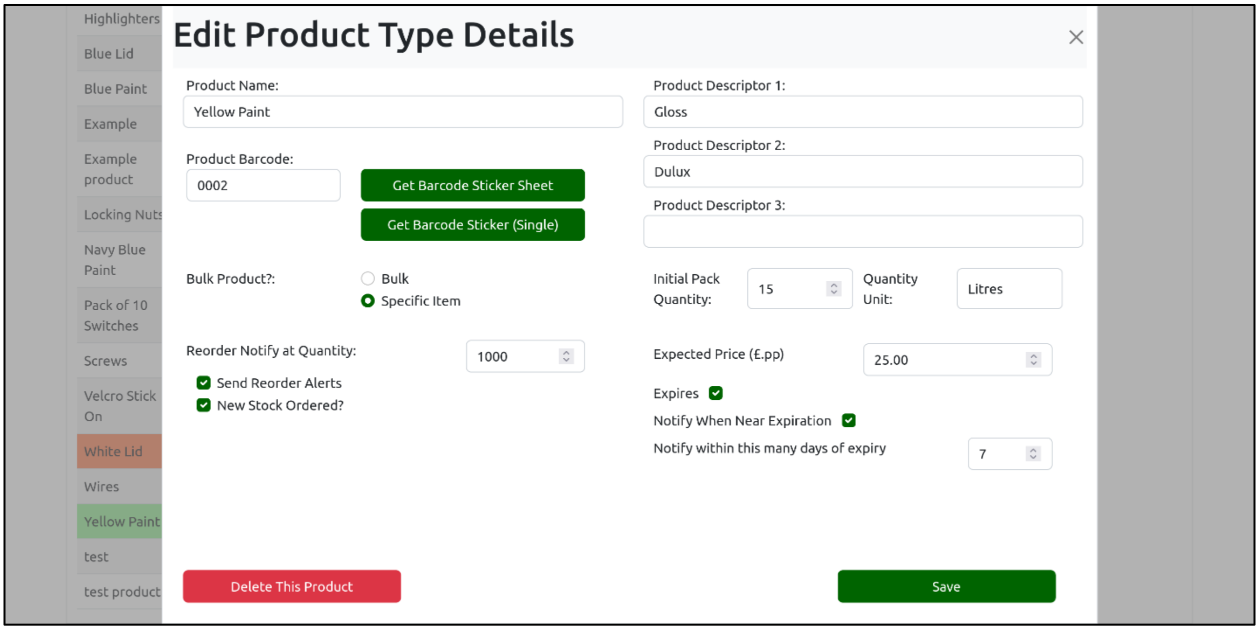
The Edit Product Type Details panel (shown below) works the same way as the Create New Product Types panel (see Adding New Product Types).



If this panel was reached by adding a new product, the Add Another New Product button will be available. This leads back to the Create New Product Type panel, but will not clear the inputs on screen. This is to allow multiple products with similar details to be added with a minimum of repetition.

While the system does allow a product type to be changed from bulk to specific or vice versa, this should only be done before any stock of this type has been added to the system. Doing so after that point is likely to result in the loss of data.

The Product Type may be deleted. **Note that doing so will delete all references to this product type, including stock items and records of stock being used on jobs.**

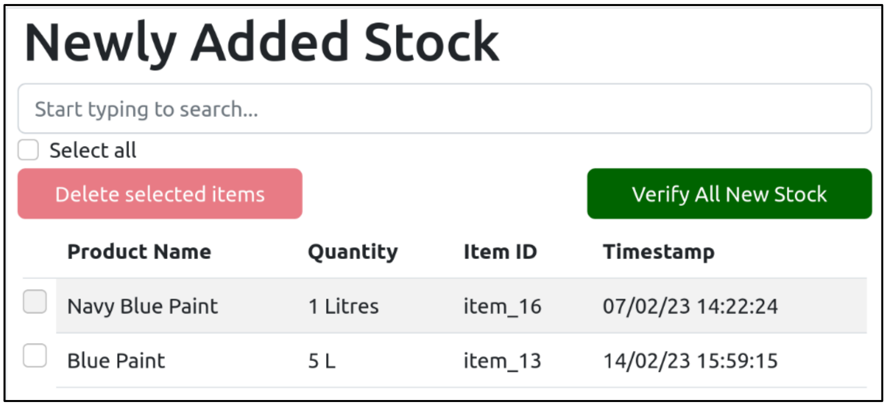


If the Product Type has been identified as being below the reorder level, the New Stock Ordered checkbox will become available. This allows the user to indicate when new stock has been ordered, at which point the relevant row in the Known Product Types table will turn green.

Once enough new stock has been added to the system and a stock check performed, this checkbox will disappear.

Newly Added Stock

The Newly Added Stock section shows items of stock that have been recently added to the system.



The purpose of this is to offer a second chance to check what was added, and to delete or amend any mistakes. Stock may be searched by name using the search bar.

To delete any items, select their checkbox and then click Delete selected items. All references to those items of stock will be immediately removed from the system. **This includes any references to stock being used on jobs.**

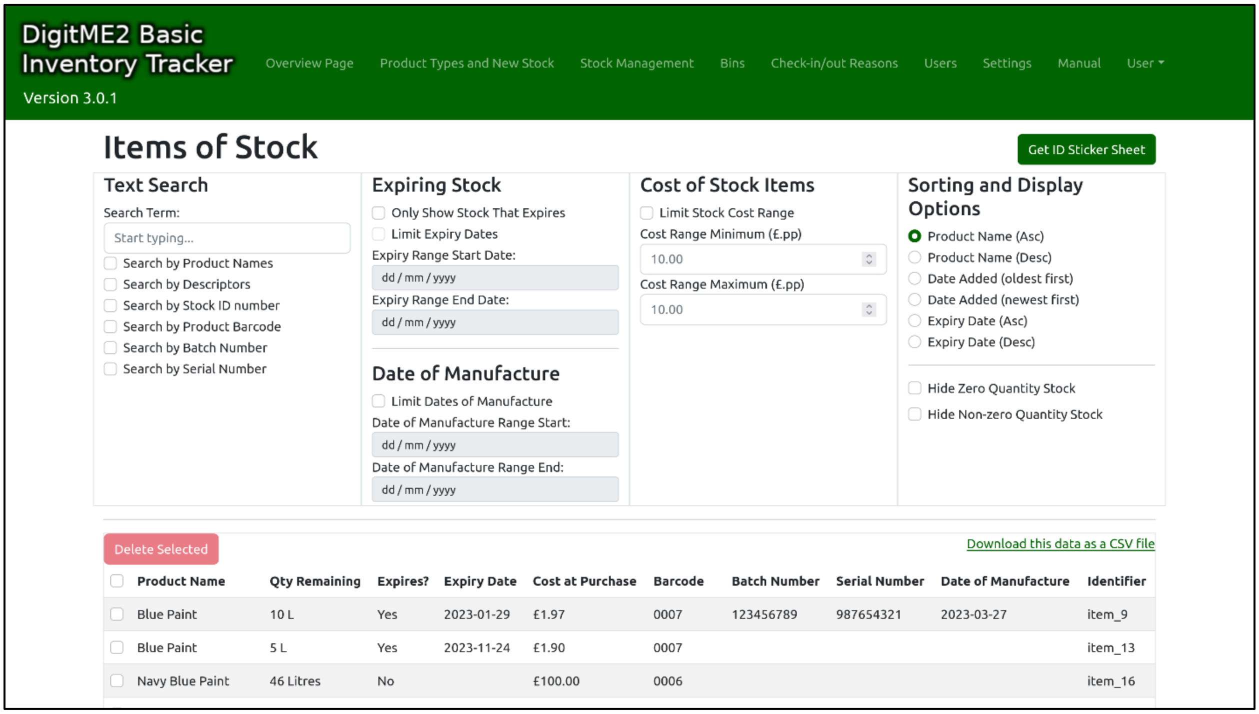
To confirm that the stock added is correct, click the Verify All New Stock button. This will remove the items from this list.

Clicking on a row will bring up the Stock Item Details panel for that item (see REF).

Note that this feature is entirely optional and will not impact the way the rest of the system works. It simply exists to help with error correction.

Stock Management

The Stock Management page shows every item of stock recorded by the system, regardless of whether it is currently checked in. Note that bulk product types are always listed as checked in. ID sticker sheets can be downloaded from this page by clicking on the Get ID Sticker Sheet button (see REF for more information).



Item ID Stickers

The ID stickers used for individual items of stock need to be produced before stock can be added to the system. These stickers (example shown here) are intended to be printed onto sticker sheets, and then stuck onto items. The app can then read these to identify the item of stock. See Sticker Sheet Panels for more information.

Searching for Stock Items

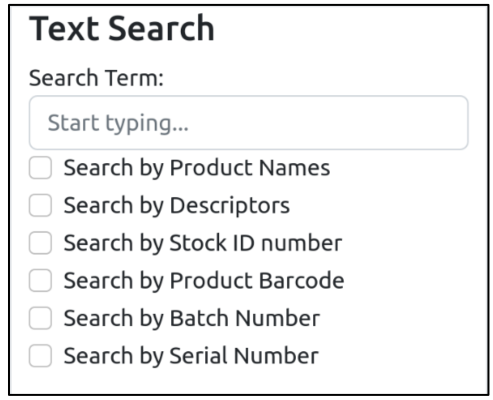
This page offers a collection of searching and sorting options to help with finding specific items of stock. Some of these may sometimes be set automatically to highlight a particular item or items of stock.

Note that search conditions stack, so only items of stock that meet all of the specified conditions will be shown.

Text Search

The Text Search options allow stock to be searched by Product Type name, descriptors, stock ID number, product type barcode, and batch and serial numbers. The search results will update as more text is entered.

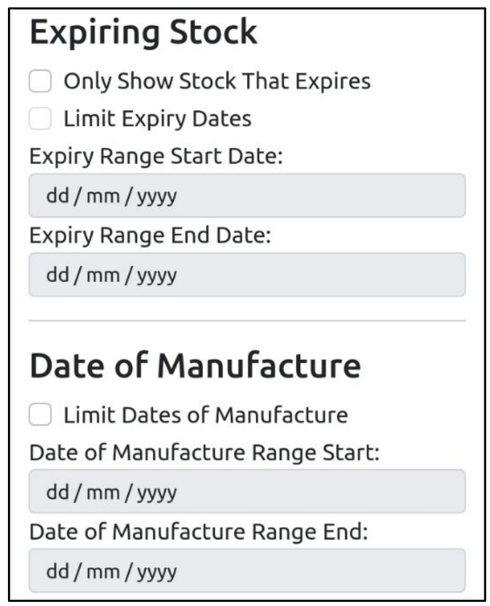
To search, enter a search term (for instance, part of a product name, or an item ID) and select the relevant checkboxes. Note that if none are selected, the search results will return all items.



Filtering by Dates

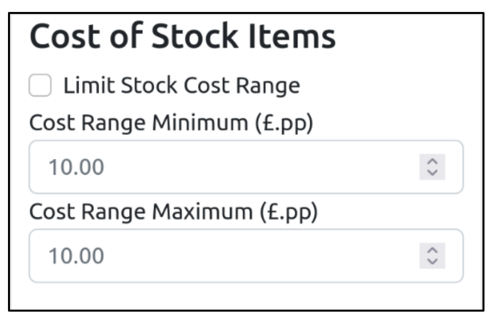
Stock items can be searched by their date of expiry and date of manufacture. In both cases, the relevant checkbox (Limit Expiry Dates or Limit Dates of manufacture) must be checked. For expiry dates, the search must only be showing stock that can expire.

Checking either of the limit checkboxes enables the date input fields. The search results will update as dates are entered. The search may use the start date, end date, or both.



Filtering by Cost

Stock items may be filtered by how much they cost to purchase. This cost is copied from the Product Type to the stock item for specific items (see Adding New Product Types) but may be subsequently updated. For bulk items, the cost considered will be the price listed on the product details panel.



Sorting and Display Options

The results of a search may be ordered alphabetically be product name (ascending or descending), by date added or by expiry date. Simply select the appropriate radio button and the results will update immediately.

Items of stock with a quantity remaining of zero can be hidden. Typically, items would be in this state either because the full amount was used up or because unused stock has not yet been checked back in.

Items of stock which have a non-zero quantity remaining can also be hidden. Typically, this would be used to find items which have been fully used up.

Note that ticking both the Hide Zero Quantity Stock and Hide Non-zero Quantity Stock options will hide all results.

Sorting and Display Options

- (●) Product Name (Asc)
- ( ) Product Name (Desc)
- ( ) Date Added (oldest first)
- ( ) Date Added (newest first)
- ( ) Expiry Date (Asc)
- ( ) Expiry Date (Desc)

- [ ] Hide Zero Quantity Stock
- [ ] Hide Non-zero Quantity Stock

For more information on quantities of stock items remaining, see REF.

Search Results

Search results are displayed in a table below the search controls. The data in the table may be downloaded as a CSV file for further processing in a spreadsheet.

Delete Selected

Download this data as a CSV file

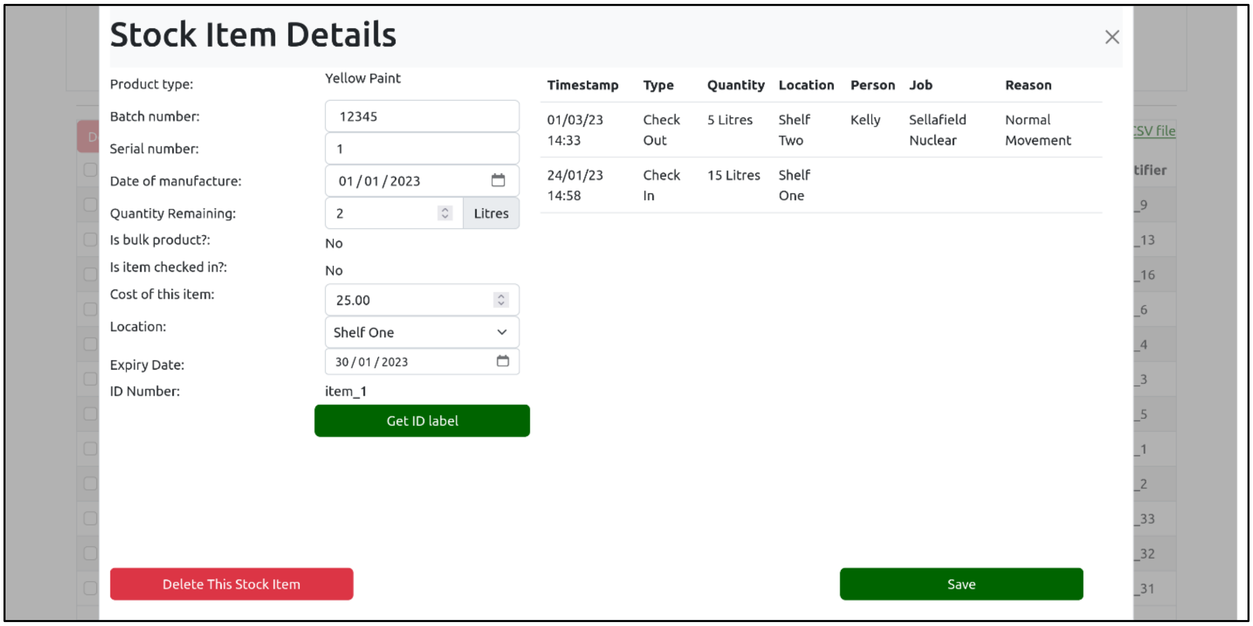
Product Name	Qty Remaining	Expires?	Expiry Date	Cost at Purchase	Barcode	Batch Number	Serial Number	Date of Manufacture	Identifier
Blue Paint	10 L	Yes	2023-01-29	£1.97	0007	123456789	987654321	2023-03-27	item_9
Blue Paint	5 L	Yes	2023-11-24	£1.90	0007				item_13
Navy Blue Paint	46 Litres	No		£100.00	0006				item_16
Pack of 10 Switches	10 Pack	No		£12.00	SW00002				item_6
Screws	5 Pack	No		£2.50	SCR-S				item_4
White Lid	2 Lid	No		£1.50	WL000001				item_3
Wires	5 Packs	No		£20.00	W_AS_2				item_5
Yellow Paint	2 Litres	Yes	2023-01-30	£25.00	0002	12345	1	2023-01-01	item_1
Yellow Paint	7 Litres	Yes	2023-04-19	£25.00	0002				item_2
Yellow Paint	15 Litres	Yes	2023-01-29	£25.00	0002				item_33
Yellow Paint	15 Litres	Yes	2023-01-31	£25.00	0002				item_32
Yellow Paint	15 Litres	Yes	2023-01-06	£25.00	0002				item_31

This table shows an overview of the stock in the system that matches the search conditions. Clicking on a row will open the Stock item Details panel for that item (see REF for more information).

Stock items may be deleted by selecting the check box on their row and then clicking the Delete Selected button. **Note that deleting an item of stock will also remove all references to it, including it being checked in and out on jobs.** This will affect job cost calculations.

Stock Item Details Panel

The details of a particular item of stock can be seen on the Stock Items Details Panel.



This panel shows the full details of a particular item of stock. Most parameters can be edited.

The product type name is determined by the product type this stock item is associated with. If the name of that product type changes, it will be updated here too. See Product Types and New Stock for more details.

The batch number and serial number are text fields and can be set to any text. These are only used for reference. They can be initially set when adding stock using the app.

The date of manufacture is also used as a search filter and can be set when adding stock or through this panel.

The quantity remaining shows the quantity of this particular item of stock. This will be reduced to zero when the item is checked out, unless a quantity to check out is specified. See REF for more information, and will be set or updated when an item is checked in, or when new stock is added on bulk products.

Is Bulk Product? This simply indicates whether this is a bulk item or a specific item. See Adding New Product Types for more information.

Is Checked In? This shows whether the item of stock is currently checked in. Note that bulk items are always considered to be checked in.

Cost of this Item is copied from the Product Type when the item of stock is added. For specific items, it may be changed after the item has been added without affecting other items.

Location is the last seen location of the item. This can be updated, and a new check-in record created to reflect this.

The Expiry Date field is only shown for product types that can expire. For these stock items, the expiry date must be initially set when the item is added using the app. It can be updated here.

ID Number is the item of stock's ID. This is encoded in the item ID label. A copy of this can be obtained by clicking the Get ID Label button.

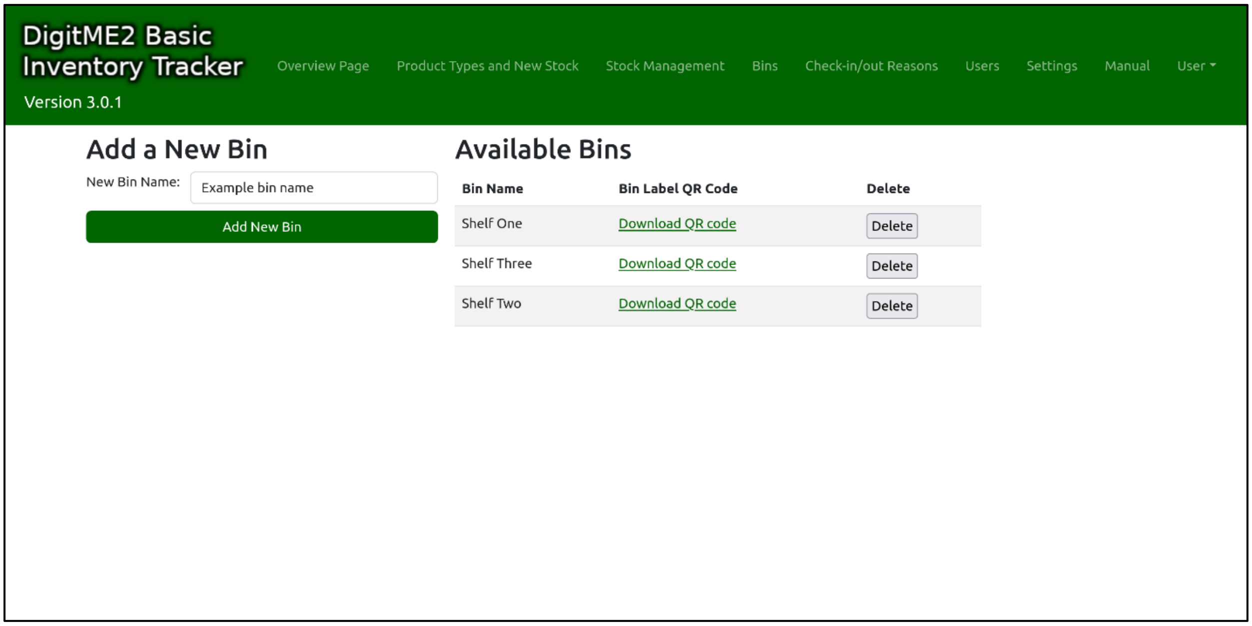
The table on the right shows a list of where the item has been checked in and out of stock. This includes the timestamp and event type (check-in or check-out), and quantity. Rows may also optionally include the location, person items were checked out by or on behalf of, the associated job, and the reason for moving stock. Most of this information is entered into the app during normal use.

Changes to the information about the item ill be saved when the save button is clicked, with the exception of updating the location, which is saved immediately.

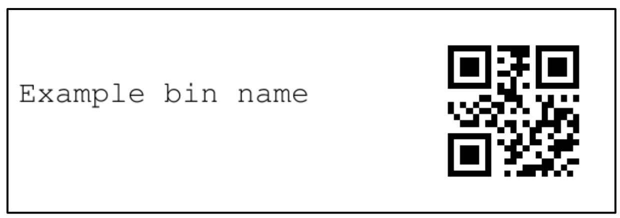
The stock item may be deleted by clicking the Delete This Stock Item button. **Note that deleting an item of stock will also remove all references to it, including it being checked in and out on jobs.** This will affect job cost calculations.

Bins

The Bins page allows new bin locations to be added and displays the current list of bins.



The system allows bins to be defined. These are locations where items of stock may be checked in and out. A bin is identified by a QR code label. This can be printed out and affixed to the bin. For example, the label might be placed on a shelf in a warehouse.



This QR code can then be read by the app to specify the location that stock is being checked in or out at. See Add New Stock and Check Items In/Out for more information.

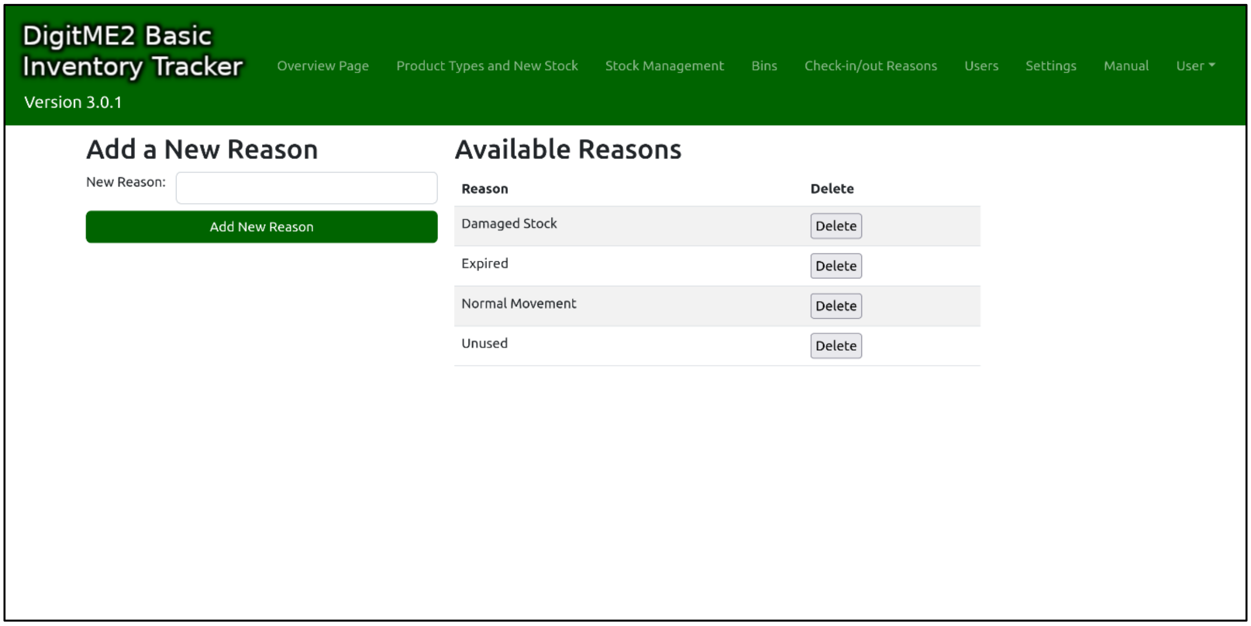
To add a new bin location, enter a name in the New Bin Name text box and click Add New Bin. A confirmation message or an error message will be displayed under the button.

The list of Available Bins shows all bins that the system is aware of. The Bin QR Code Label can be downloaded with the Download QR Code link.

A bin may be deleted with the Delete button. Each bin has a new ID in the system, so if a bin with a given name is deleted, and then a new bin with the same name added, the two will be considered different bins by the system.

Check-in/out Reasons

The Check-in/out Reasons page allows reasons for moving items in and out of stock to be set up.



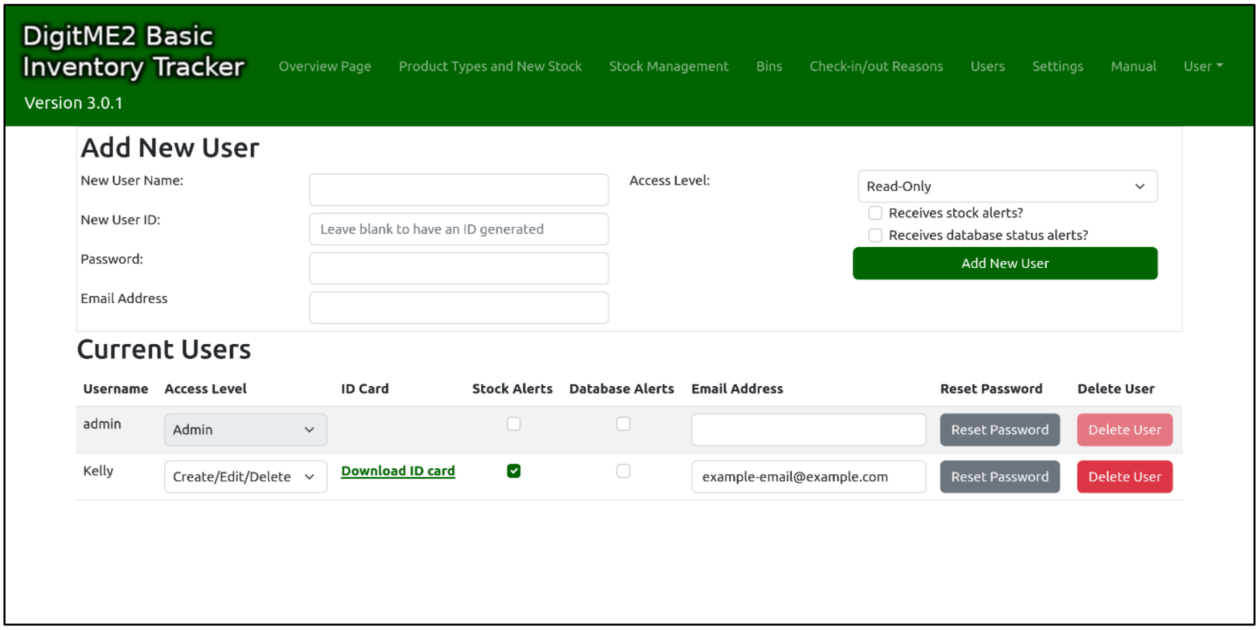
To add a new reason for moving stock, enter the name of the reason in the New Reason text box, and click Add New Reason. A confirmation message or an error message will be shown below the Add New Reason button.

Reasons may be deleted using the Delete button. Any check-in/out record with the reason will simply show a blank under the movement log Reason column on the Stock Item Details panel.

A check-in/out reason may be selected using the app. See Check Items In/Out for more information.

Users

The Users page allows new users to be added and existing users to be managed.



When the system is first installed, it will create a default administrator user account. The login for this is:

Username: admin

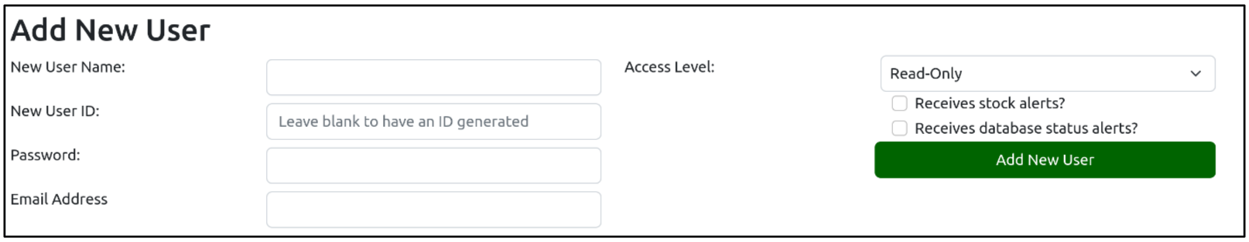
Password: admin

Both usernames and passwords are case sensitive. Note that the administrator account cannot be deleted or have its access level changed, but it can have the password changed.

Adding Users

A user may be added using the Add New User controls (below). Note that “users” includes both people using the browser interface, and employees who stock can be checked in or out for.

This page can generate email notifications for adding new users and resetting passwords. The email configuration must have been set up for this to work. See Email Configuration for more information.



The minimum information required to add a new user is a username and a password. The access level defaults to read-only.

To add a new user, first enter their username in the New User Name text box. Usernames are case sensitive and must be unique.

The user ID box should be left blank. This is present for future development. The system will generate an appropriate user ID.

The password for the new user should be entered in the Password text box. This password is case sensitive.

Optionally enter a user email address. If an address is entered, the user will be able to receive email notification. The user will receive a notification that they have been added to the system.

The user may also receive email notifications with the results of stock checks, if the receives stock alerts checkbox is checked, and database backup notifications if the receives database status alerts checkbox is checked. See Database Backup and

Stock Check Configuration for more information.

The access level of the user specifies how much control they have over the browser interface. There are three levels:

- Read-Only access allows the users to log in and view data in the system but prevents them making any changes.
- Create/Edit/Delete allows them to create, make changes to, and delete jobs, product types, etc, but does not allow them to access the users page or the settings page.
- Administrator access grants full control of the system, including access to the user and settings pages.

Note that these access levels do not affect use of the app.

Once information has been entered, click the Add New User button to add the user to the system. A confirmation message will be shown below the button, and the user will appear in the Current Users table.

Current Users

All current users of the system are listed in this table.

Current Users

Username	Access Level	ID Card	Stock Alerts	Database Alerts	Email Address	Reset Password	Delete User
admin	Admin		☐	☐		Reset Password	Delete User
Kelly	Create/Edit/Delete	Download ID card	☑	☐	example-email@example.com	Reset Password	Delete User

Any changes made here will be saved immediately.

The access level of any user (apart from the admin user) may be changed, with immediate effect. The admin user is locked to prevent accidentally locking out administrator access to the system.

The user's ID card may be downloaded by clicking the Download ID card link. This produces a simple ID card with a QR code that the app can read. This can be used to attach stock movement to a particular user. An example is shown here.

ID cards should be printed out. They may be laminated.

If the checkbox in the Stock Alerts column is checked, this user will receive email notifications with the results of stock checks performed by the system.

If the checkbox in the Database Alerts column is checked, this user will receive email notifications when the database is backed up.

The user's email address may be updated and will be saved immediately.

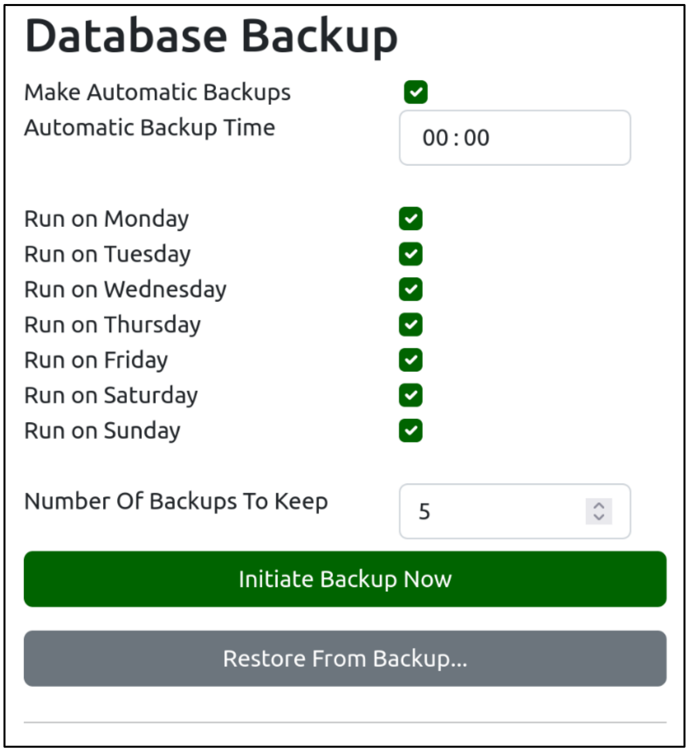
The Reset Password button can be used to reset a user's password if they forget it. The system will change their password to "password" and email them a notification.

A user may be deleted from the system with the Delete User button. Any records of stock movements with a user attached to them will simply show a blank user name.

Settings

The settings page allows for system configuration, including database backups, stock check setup, email setup for notifications.

Database Backup

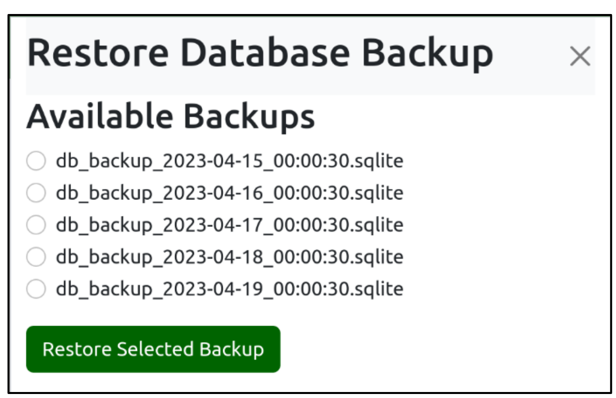


The system can create backup copies of its database automatically. This produces a full copy of the database in a specific directory. The default directory to store backups in is:

/home/<username>/digitme2_inventory_tracker/instance/dbBackupFiles

If the Make Automatic Backups checkbox is checked, the system will attempt to make a copy of the database at the time set in Automatic Backup Time, on the Run On … days checked. The system will keep a limited number of copies, up to the Number of Backups to Keep setting. Older files will be deleted.

A backup may be created at any time by clicking the Initiate Backup Now button. This will count towards the total number of backups retained, and so may lead to an older copy being deleted.

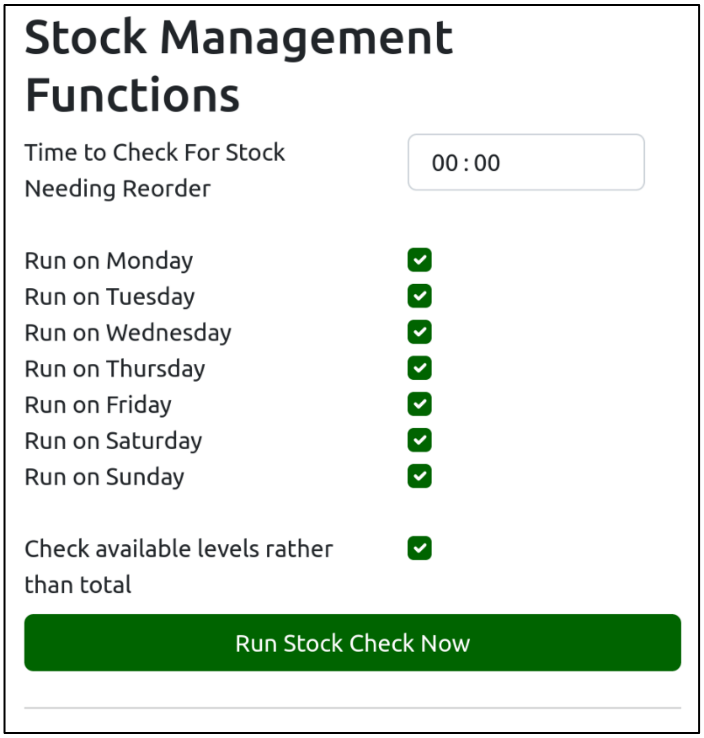


To restore a backup, click the Restore From Backup… button. This will open the Restore Database Backup panel (right). Select the required backup and click Restore Selected Backup. The existing database will be overwritten immediately.

Backups names include the time that they were made, for ease of identification.

Stock Check Configuration

The system is capable of periodically performing an automatic stock check.



When a stock check is performed, the system will check for stock levels and expiry dates.

The stock level check involves finding the total amount of stock of each product type, and if the total amount is below the reorder level, marking that product type as needing reordering. If the "check available levels rather than total" checkbox is ticked, the total unassigned stock will be considered, rather than everything currently checked in. See Product Types and New Stock for more information about reorder levels. Product types needing reordering are compiled into a list.

The expiry dates check first looks for stock which is close to expiring. This is considered individually for each item of stock. An item will be identified as close to expiring if they expire within the notification day count set on the Product Details panel. Items near expiry will be included in a list if Notify When Near Expiration is checked on the product details panel. See Product Types and New Stock for more information about expiry notifications.

Expired stock items will also be compiled into a list. Items are never excluded from this list as long as they have a quantity remaining (of the individual stock item) of more than zero.

An email notification with the results of the stock check will be created and send to users who are set to receive stock alerts (see Users).

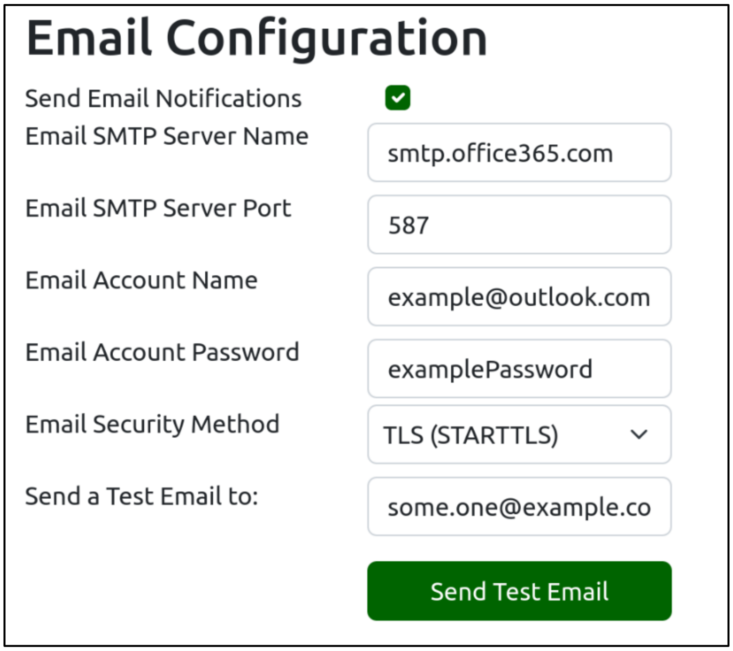
A stock check may be performed at any time by clicking the Run Stock Check Now button.

Email Configuration

The system can send email notifications to users. These can be sent for the following events:

- When a user is first added to the system
- When a user's password is reset
- When a database backup is created, or when an error occurred while creating a backup.
- When a stock check has been completed. The results of this will be emailed to selected users.

To do this, the system requires an email account to use. At time of writing, an Outlook account works well, and allows sending emails through SMTP.



The email configuration is set through the settings panel, shown above.

The "Send Email Notifications" checkbox acts as a switch to enable or disable all email notifications. They will only be sent if this checkbox is checked.

The email SMTP server name, port, and security method (either "SSL" or "TLS (STARTTLS)") can be found in the settings of the email provider, usually under a section for "POP, IMAP, and SMTP" or "POP and IMAP".

Create an email account with a provider (such as Outlook) for the system to use. The Email Account Name and password fields need to be set to the email address and password for this account.

Changes to any of the inputs in the email configuration are saved automatically.

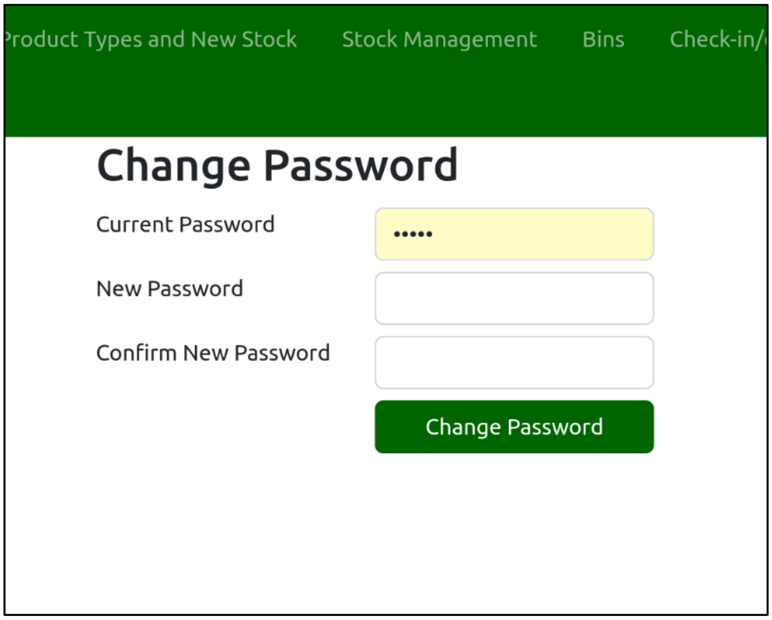
Once settings have been entered, a test email can be sent. Enter the recipient's email address in the textbox next to "Send a Test Email To:" and click the Send Test Email button. If everything is correct, a confirmation email should arrive at the specified address.

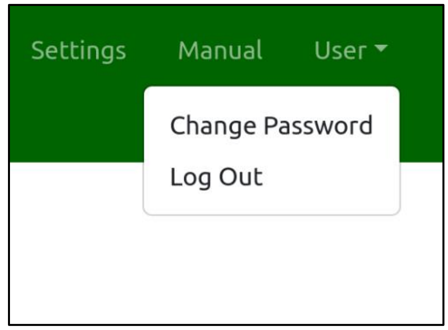
Note that the Inventory Tracker can occasionally trigger email providers' anti-spam filters, since it tends to send very similar messages repeatedly. If emails are not arriving, it is worth logging into the email account that the system is using to check that emails it sends appear in the sent folder, to also to check that emails from the system haven't been sent to the recipient's spam folder.

Also, note that while the rest of the system may be used with only a closed Wi-Fi network, sending notification emails will require an active, unblocked internet connection.

Change Password

Any user may change their password through the change password page (below left). This is accessed through the User dropdown menu (below right).

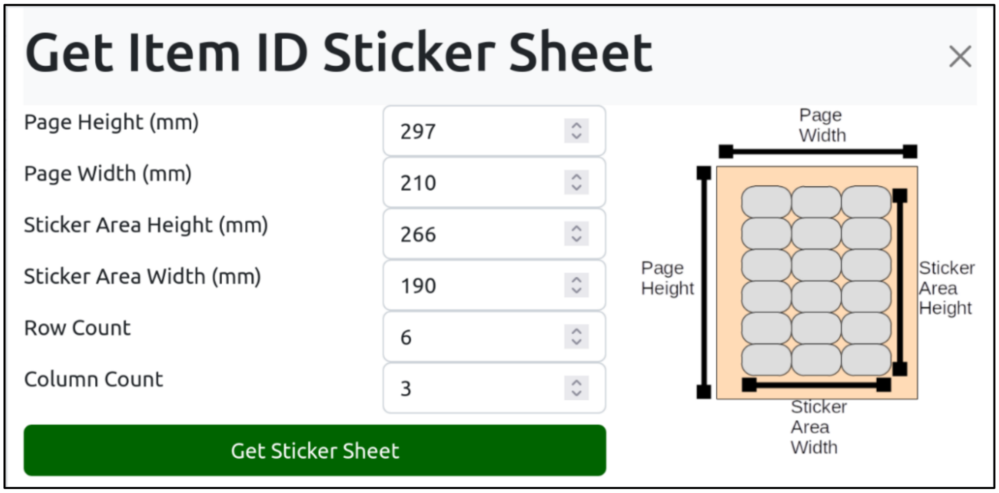


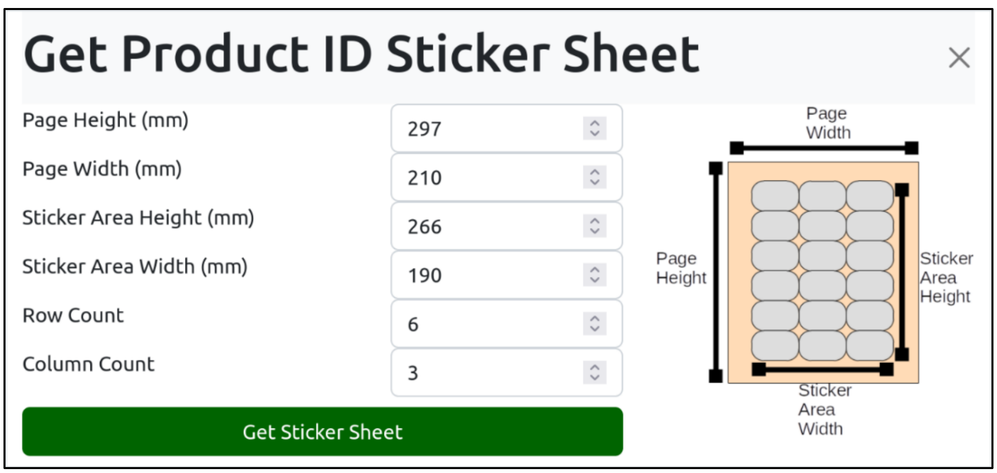


To change your password, go to this page, and enter your current password in the Current Password textbox. Enter your new password in the New Password and Confirm New Password text boxes, and click Change Password.

Sticker Sheet Panels

The system can produce sheets of ID stickers. These are mostly expected to be used for item IDs, as they create a convenient way to identify items to the system. The sticker sheet panels are shown below.





Both panels work the same way. Page height and page width specify the total height and width of the paper. The sticker area height and width set the total height and width of the stickers on the sheet. Row and column count set how many ID labels will be made.

When Get Sticker Sheet is clicked, the system will generate a .pdf sheet of ID labels, spaced to fit the specified dimensions. An example is shown on the next page. Note that this page is intended to be the full size of the paper, and may need some slight adjustments to the settings of your printer to get everything lined up correctly.

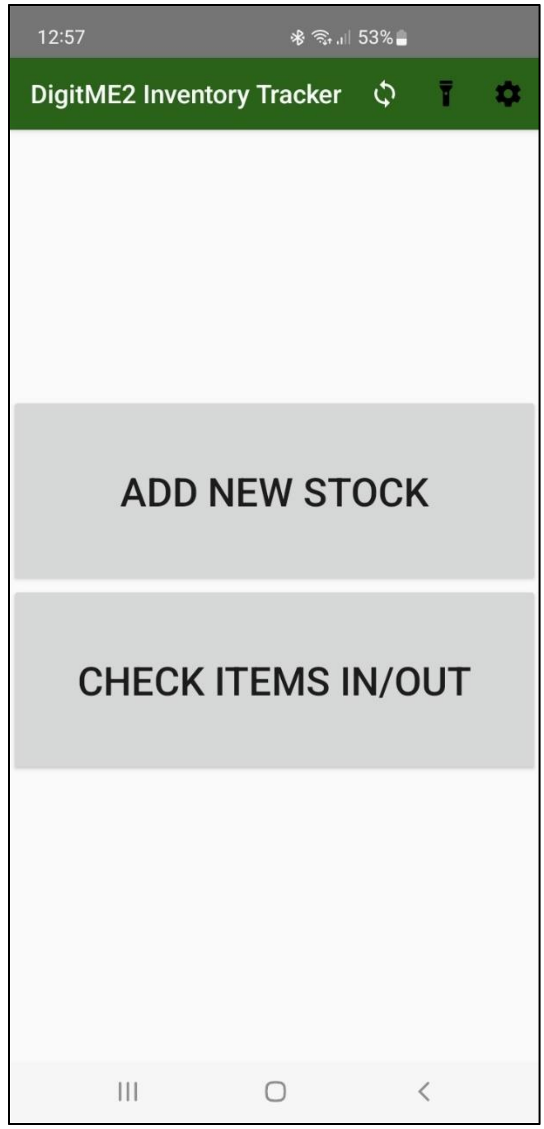
App

The system uses an Android app to handle adding stock to the system and checking stock in and out.

The app is designed to tolerate an intermittent network connection and will periodically sync with the server when it has a connection. Both the server and the Android device must be on the same Wi-Fi network for this to work.

Front Screen

The app initially opens to the screen shown here.



There are three buttons on the green bar, left to right, are the sync button (two arrows), the torch, and the settings button.

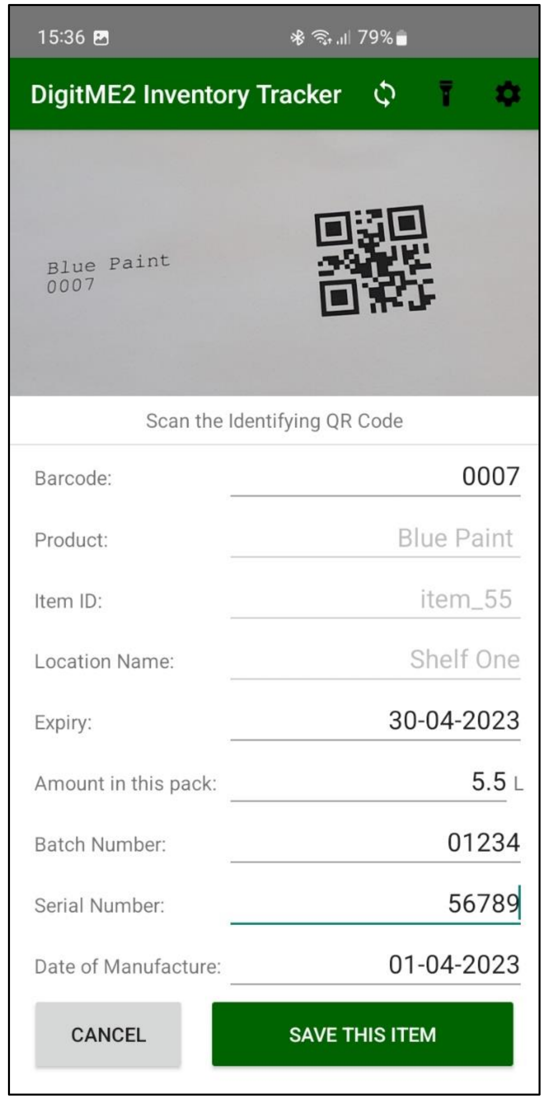
Sync will make the app immediately attempt to synchronise to the server. If the server is available, any stock additions or movements will be processed, and will appear in the browser interface. The app and the server must be on the same Wi-Fi network for this to work.

The torch button applies to the Add New Stock screen and the Check Items In/Out screen. On either of these screens, if the Android device running the app has a camera flash that can work as a torch, the torch button will toggle it. This is to help with scanning QR codes if the ambient lighting is insufficient.

The settings button (the gear wheel) leads to the password-protected settings page. See App Settings.

The Add New Stock button leads to the Add New Stock screen. See Add New Stock.

Add New Stock



The Add New Stock screen is shown on the right. The buttons in the green action top bar at described in Front Screen.

The Add New Stock screen uses the camera on the Android device to read QR codes that encode various barcodes and ID codes. The camera view is shown at the top of the screen, here displaying a bin ID card.

Scanning a barcode or QR code simply involves bringing it into view of the camera. The camera view will briefly flash white when a barcode or QR code has been accepted. The device may also vibrate.

Below the camera view is a single line prompt. This will indicate what needs to be scanned next to get the minimum required information.

The table of text fields below this allow the details of the item to be entered. Most of these update as QR codes are scanned and cannot be typed into directly.

The Save This Item button is used to save the item, which will then be added to the system. The cancel button will clear the current inputs. To go back to the front screen, use the back button or gesture on the device.

Adding New Items of Stock

To add a new item of stock, the product type describing that item must have been previously added to the system through the browser interface.

First scan the barcode on the item. This is either the barcode on the product packaging, or a suitable user-defined identifier. See Adding New Product Types for more information. The product barcode may also be typed into the Barcode text field. When a known barcode is entered, the app will look up the name of the product and fill in the Product field.

Next, attach an Item ID sticker (see Item ID Stickers for more information), then scan that sticker with the app. The Item ID on the sticker will appear in the Item ID field. This is the ID that the system uses to keep track of the item of stock.

For expiring items, tap the Expiry field (showing 30-04-2023 in the image). This will bring up a date selector, which can be used to enter the expiry date.

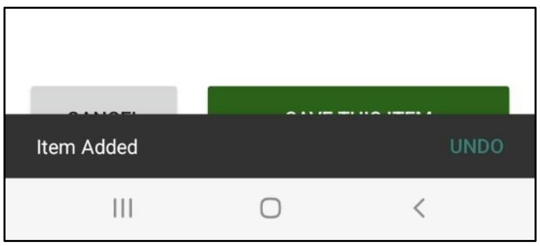
At this point, more information can be added, or the item of stock can be saved by clicking the Save This Item button. Note that if something is missing, the Save This Item button will be disabled. It will be enabled when enough information has been added.

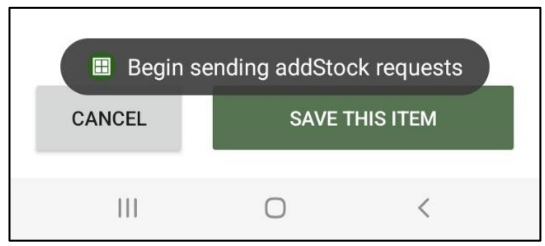
The location name can be set by scanning a Bin Location ID label (see Bins). This will appear as the item's last-seen location (see Stock Item Details Panel) until the item is checked out. This field is optional.

The Amount in this pack field allows the quantity of the stock item to be entered. This may be left blank and will default to the Initial Pack Quantity for the Product Type (see Adding New Product Types). For example, if the product type is a 10 Litre tin of paint, and is new, the quantity remaining will be 10 Litres. This will be listed as the Initial Pack Quantity. However, if the tin has been opened and some of the paint used, hen the Amount in this Pack field should be filled in. If 4.5 Litres of paint remain in the tin, then the amount in the pack should be set to 4.5.

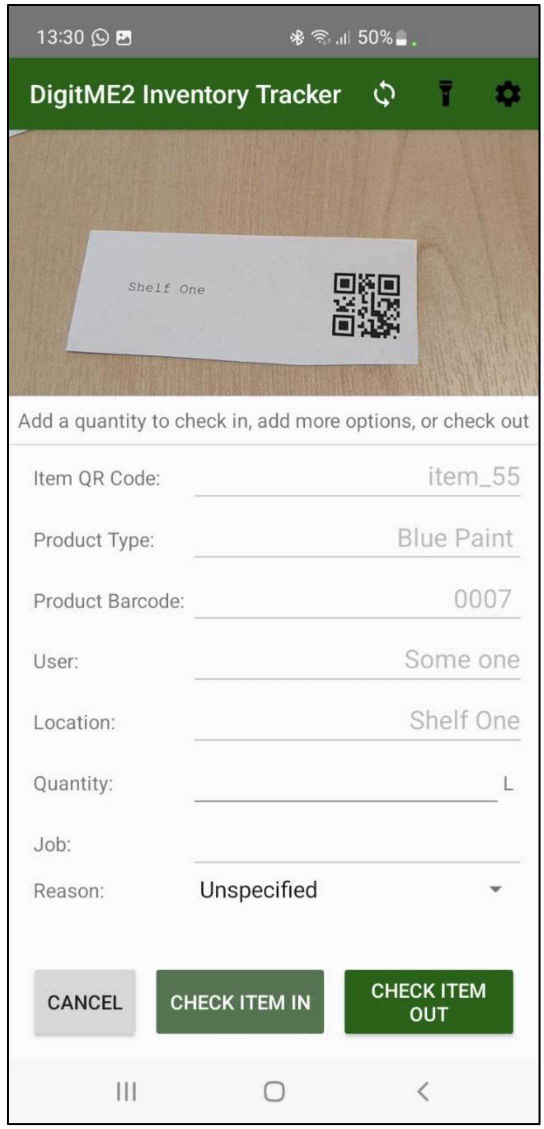
Batch Number and Serial Number are simply text labels that can be saved by the system. They appear on the Stock Management page and can be searched for (see Searching for Stock Items).

When Save This Item is tapped, a confirmation message will appear at the bottom of the screen (shown below, left). If debug messages are turned on (see App Settings), then when the app syncs to the server, confirmation messages will appear to indicate that the items have been added (shown below, right).





Check Items In/Out



The Check Items In/Out screen is shown on the right. The buttons in the green action top bar at described in Front Screen.

The Check Items In/Out screen uses the camera on the Android device to read QR codes that encode various barcodes and ID codes. The camera view is shown at the top of the screen, here displaying a bin ID card.

Scanning a barcode or QR code simply involves bringing it into view of the camera. The camera view will briefly flash white when a barcode or QR code has been accepted. The device may also vibrate.

Below the camera view is a single line prompt. This will indicate what needs to be scanned next to get the minimum required information.

The table of text fields below this allow the details of the item to be entered. Most of these update as QR codes are scanned and cannot be typed into directly.

The Check Item In button is disabled until enough information (Item ID and Quantity) have been entered. Tap this button to check the item back into stock.

The Check Item Out button is disabled until an Item ID has been entered. Tap this button to check the item out of stock.

The cancel button will clear the current inputs. To go back to the front screen, use the back button or gesture on the device.

Checking Items In and Out of Stock

To check an item in or out, it must first have been added to the system (see Adding New Items of Stock).

First scan the item's ID (see Item ID Stickers). This will appear in the Item QR Code field, and the Product Type name and barcode will appear in the Product Type field and Product Barcode field.

The item may be checked out at this point. By default, the entire quantity remaining will be checked out. The quantity must be specified for checking items back into stock.

To enter a user, scan the QR code on a user ID card. They app will look up their name and fill in the User field appropriately. See Current Users for more information on ID cards. This field is optional.

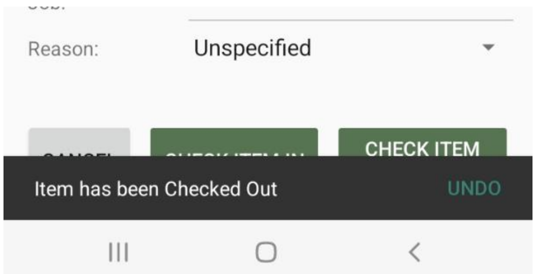
To enter a quantity of the product to be checked in or out, tap the Quantity field and type in a number. This field is optional for checking out stock, and required for checking it in.

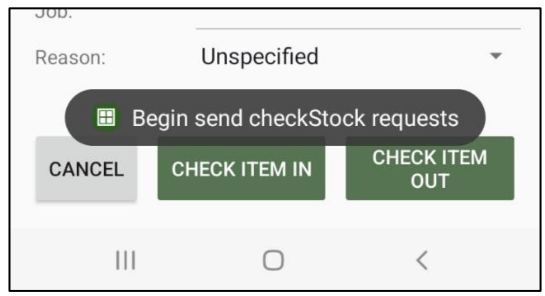
A job may be entered by scanning a job ID QR code. See Existing Jobs for more information on job QR codes. This field is optional.

A reason for moving stock may be selected from the dropdown menu. The list of reasons is set through the browser interface. See Check-in/out Reasons for more information.

Once enough information has been entered, the Check Item In and Check Item Out buttons will become available. The prompt under the camera view will indicate what information is still needed.

When Check Item In or Check Item out are tapped, a confirmation message will appear at the bottom of the screen (shown below, left). If debug messages are turned on (see App Settings), then when the app syncs to the server, confirmation messages will appear to indicate that the items have been checked in or out (shown below, right).



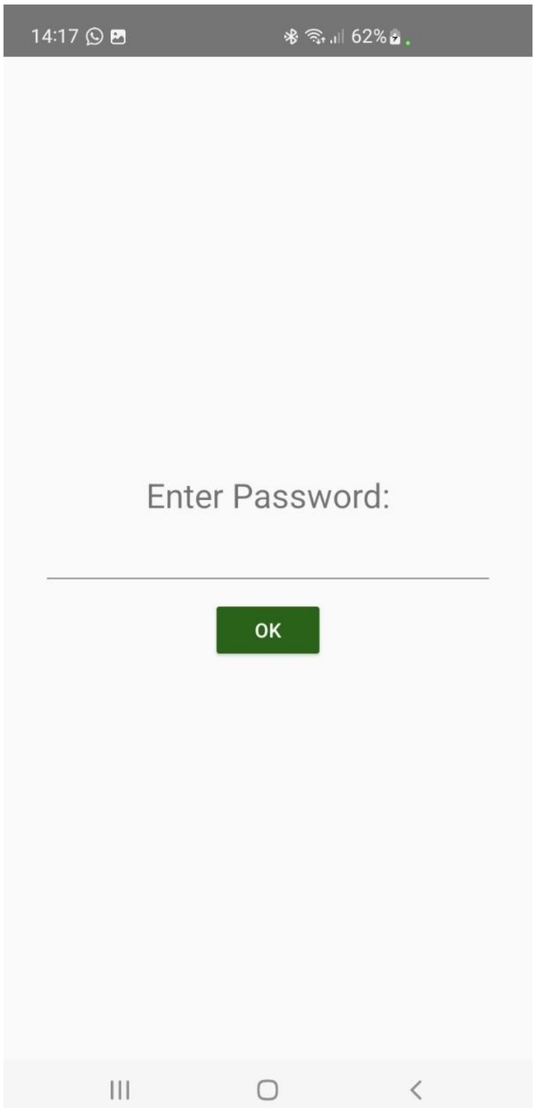


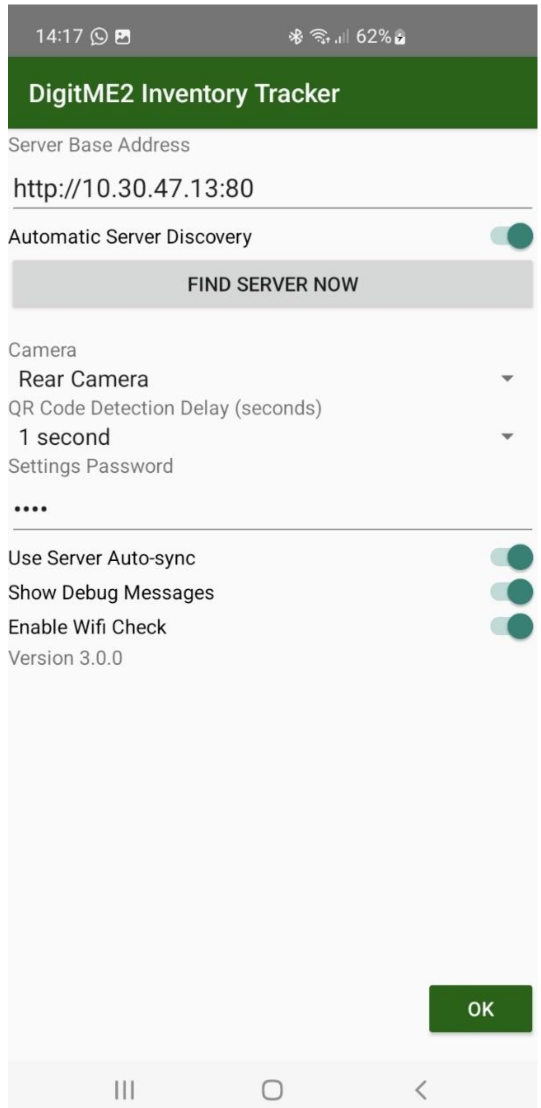
App Settings

The settings page is accessed from the gear icon in the green action bar at the top of the Front Screen, Add New Stock screen, and Check Items In/Out screen.

The settings page is password protected. The password screen (below left) is shown first. Enter the settings password and tap OK to proceed. The default password is 1234.

The settings page is shown below right. Each setting is described on the next page.





The server base address must be defined for the Android device to be able to communicate with the server. This will always be in the form

<protocol><server IP address><port>

Protocol will always be either “http://” or “https://”. The server IP address is the network address of the computer running the server software. Port is generally 80, unless this has been intentionally changed.

Server discovery can be used to automatically set the server base address and keep it updated. To do this, set the Automatic Server Discovery switch to on. Tap Find Server Now to have the app perform server discovery immediately. For this to work, the server and the android device must be on the same network.

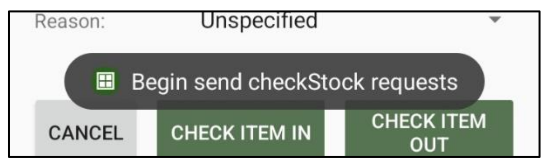
If Automatic Server Discovery is enabled, the app will periodically check to see if the server address has changed and update itself accordingly.

The Camera dropdown menu allows the Front Camera or the Rear Camera to be selected. This sets which camera view will be shown in the Add New Stock and Check Items In/Out screens. In general, the front camera is better if the device is wall mounted, and the rear camera is better if it is handheld.

The QR Code Detection Delay (seconds) dropdown menu allows the delay between the camera first seeing a QR code and accepting it to be set. This is useful to prevent the app reading other QR codes If the camera is moved and happens to briefly see another ID card unintentionally. The delay may be set to No Delay, 0.5, 1, 2, or 3 seconds.

The Settings Password is the password used to access the settings page on this device. By default, this is “1234”. This may be changed to any number or text or may be left blank.

The Use Server Auto-sync toggle enabled or disables the app automatically syncing to the server. If this is disabled, data in the app will not be able to be processed by the server until the sync button (see Front Screen) is pressed. Sync updates information on the app from the server too, so if auto-sync is turned off the app will not be aware of recently added information until a manual sync is performed.



The Show Debug Messages toggle enables or disables debug messages that pop up when certain events occur (example shown right).

The Enable Wi-Fi Check toggle enables or disables the app’s Wi-Fi check feature. By default, the app will check if it has a Wi-Fi connection periodically and displays a warning If the Wi-Fi is not connected. It will also check this before attempting to sync with the server, both automatically and manually. On some devices, especially where the device has a mobile data connection as well, this can cause problems. As such, the Wi-Fi check can be disabled. This is only recommended where the sever auto-sync is also disabled.

Note that the app is designed to tolerate an intermittent connection to the server. Adding and moving stock is saved by the app, and then processed by the server when a connection is available.

The software version of the app is shown below the settings options.

To save changes to the settings, tap OK. This will save changes, close the settings page, and return to the previous screen.

Frequently Asked Questions

What is a product type and why is it necessary?

A product type defined a particular type of stock that the system knows about. This includes information about the name of the product type, reorder level, whether the product can expire, etc. This is a general description for all items of that type. For example, a product type of Red Paint would describe all tins of Red Paint that the system might track, rather than information about a particular tin of paint. See Product Types and New Stock.

What are product type barcodes used for?

Product type barcodes are used to quickly identify the product type when adding new items of stock. This is to reduce the amount of typing required and to streamline adding new stock to the system. See Adding New Product Types and Adding New Items of Stock

What are Item IDs used for?

Item IDs are used to identify individual items of stock or bulk items of stock to the system.

For Specific Items, where tracking the expiry date or cost of the item is important, each item will have its own ID, in the form of a sticker with a QR code attached it. For bulk items, the total bulk stock of that product type is treated as a single large item, and only the available quantity changes. As such, all of a bulk item shares the same item ID.

How are product types different to item IDs?

A product type describes the general characteristics of an item, such as its name and whether it can expire. Item IDs are used to identify individual items to the system, but do not directly contain any information other than an identifier label.

Why are items I added not appearing in the browser interface?

This is generally caused by the app not having synced to the server. In order to sync data, the app needs to be running (either on screen or in the background) and have a network connection to the server. If the Server Auto-sync option (see App Settings) is turned off, the app and server must be synced manually. Tap the sync button (the two white arrows, shown right) to do this.