## **📦 OOX Warehouse Dashboard – Client Input Questionnaire**

**Purpose:**This detailed questionnaire is designed to gather all the specific operational, material, and workflow inputs needed to build a tailored, efficient warehouse management dashboard for your production environment. It covers structure, inventory, materials, staff interaction, and order lifecycle.

### **🧱 1. Warehouse Structure & Visibility**

**1.1 Where are your materials and finished products stored?**

* ~~☐ Single warehouse (materials + finished goods)~~
* ☐ Separate storage for raw materials and finished goods
* ☐ Multiple warehouse/storage locations
* ☐ Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1.2 Do you have designated areas for different material types?**

* ☐ Yes

Please describe how they are separated (e.g., Fabric types, tools, accessories, foam):

* ~~☐ No – materials are stored together or mixed~~

**1.3 Who manages stock levels and movement currently?**

* ~~☐ Warehouse Manager~~
* ☐ Production Supervisor
* ☐ Multiple team members
* ☐ No specific person
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1.4 How is stock movement (in/out) currently tracked?**

* ☐ Manual on paper
* ☐ Excel/spreadsheets
* ~~☐ Verbal or WhatsApp communication~~
* ☐ Not formally tracked
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **📋 2. Stock & Inventory Management**

**2.1 What types of raw materials do you currently store? (Tick all that apply and specify where needed)**

* ~~☐ Foam (specify sizes/densities): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_~~
* ~~☐ Wood/Boards (specify types): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_~~
* ~~☐ Fabric rolls~~
  + Common fabric types used (tick and name):  
    - ☐ Canvas: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - ☐ Suede: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - ☐ Leatherette: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - ☐ Vinyl: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* ~~☐ Accessories (buttons, zips, glue, staples, etc.)~~
* ~~☐ Packaging materials (boxes, wraps)~~
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2.2 Do you keep a record of material color variations (e.g., Navy Blue Canvas vs. Grey Suede)?**

* ~~☐ Yes – color-specific tracking is important~~
* ☐ No – only general material tracking
* ☐ Sometimes – only for premium or custom items

**2.3 What unit of measurement do you use per material type?**

* Foam:  
  ☐ other: \_\_\_\_\_\_inches\_\_\_\_
* Fabric:   
   meters  
   rolls
* Wood:

boards (board - Messonite)

pieces(Wood -Structure)

* Packaging: units
* Other materials (specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2.4 What are your current stock level ranges for common materials? Not Answered Yet** *(Example: Suede - 10m minimum, 40m ideal)*

* Material: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ / Minimum Stock: \_\_\_\_\_\_ / Ideal Stock: \_\_\_\_\_\_
* Material: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ / Minimum Stock: \_\_\_\_\_\_ / Ideal Stock: \_\_\_\_\_\_
* Material: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ / Minimum Stock: \_\_\_\_\_\_ / Ideal Stock: \_\_\_\_\_\_  
   (Attach Excel or stock template if available)

**2.5 How do you know when stock is low?**

* ~~☐ Manual visual check~~
* ☐ Alerts from spreadsheet
* ☐ Based on production orders
* ☐ No alert – reorder when out
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2.6 Would you like the system to give you automatic alerts or reports for:**

* ☐ Low stock warnings
* ☐ Daily/weekly material usage reports
* ☐ Real-time material levels
* ☐ Incoming deliveries
* ☐ Expiry/damage flagging
* ~~☐ All of the above~~
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **👷 3. Employee Task Assignment & Tracking**

**3.1 Who typically assigns tasks (cutting, sewing, assembling)?**

* ~~☐ Warehouse Manager~~
* ☐ Production Supervisor
* ☐ Team Leaders
* ☐ Workers choose their own
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3.2 How do employees currently receive tasks?**

* ~~☐ Verbally (in person)~~
* ~~☐ WhatsApp or SMS~~
* ~~☐ Whiteboard or printed schedule~~
* ☐ No formal method – based on habit
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3.3 Would you prefer a task queue where workers log in and select the next task themselves (self-assign)?**

* ☐ Yes – more flexible
* ~~☐ No – strict assignment needed~~
* ☐ Maybe – explain more

**3.4 Should workers be able to:**

* ☐ Mark tasks as completed themselves

Yess log it as complete and have the Manager get a notification to Review it and deem it “order ready”

* ~~☐ Add notes or flag issues during tasks~~
* ~~☐ Pause a task and explain reason~~
* ~~☐ See time spent on each task~~
* ~~☐ View their own task history~~

**3.5 Should supervisors be notified when tasks are:**

* ~~☐ Started~~
* ~~☐ Completed~~
* ~~☐ Delayed~~
* ~~☐ Flagged for review~~

### **🚚 4. Order Lifecycle & Production Stages**

**4.1 What production/order stages should the system track? (Tick all that apply)**

* ~~☐ Order Received~~
* ☐ Materials Pulled
* ☐ Cutting in Progress
* ☐ Sewing in Progress
* ~~☐ Upholstery in Progress~~
* ~~☐ Assembly in Progress~~
* ~~☐ Quality Check~~
* ~~☐ Ready for Delivery~~
* ~~☐ Out for Delivery~~
* ~~☐ Delivered~~

**4.2 Where are these stages currently tracked or written down?**

* ☐ WhatsApp messages
* ☐ Whiteboard or clipboard
* ☐ Spreadsheet
* ~~☐ No central tracking~~
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4.3 What’s your biggest challenge with order tracking?**

* ☐ Workers don’t update
* ~~☐ No real-time system~~
* ☐ Lost messages or papers
* ~~☐ Orders delayed without notice~~
* ☐ No clear stages/process
* ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4.4 Do you have repeat/copy orders (e.g., same couch monthly)?**

* ~~☐ Yes – often~~
* ☐ Sometimes – for regular clients
* ☐ No – mostly custom jobs

### **🔐 5. Dashboard Access & Control**

**5.1 Who should have access to the system? (Tick all that apply)**

* ☐ Owner/Manager – full access
* ☐ Warehouse Manager – stock + task control
* ☐ Production Supervisor – task management
* ☐ Admin staff – view + assign
* ☐ Workers – view their own tasks only
* ☐ External clients – view order status (read-only)
* ~~☐ Other: HIERIARCHIAL (already implemented)~~

**5.2 Should people have different access levels?**

* ☐ Yes – strict access by role
* ☐ No – same access for everyone
* ☐ Not sure yet
* ~~☐ Other: HIERIARCHIAL (already implemented)~~

**5.3 Should actions be logged (who did what and when)?**

* ~~☐ Yes – full accountability~~
* ☐ No – not needed
* ☐ Maybe – depends on detail

### **💬 Final Notes**

**6.1 Are there any reports or insights you’d want regularly emailed or downloadable from the dashboard? TO BE ANSWERED** *(E.g., Weekly material usage, Staff task times, Delayed orders, Top materials used)*

**Extended Stock & Inventory Questionnaire**

### **📋 Section 2: Stock & Inventory Management (Extended)**

This section gathers **specific information** about your materials, fabrics, stock levels, pricing, supplier details, and how you manage inputs and restocks.

🔹 **4. What types of materials or inputs do you use most frequently in production?TO BE ANSWERED** *(Please list at least 5 to 10 materials with the following details as best as you can)*

For each item, try to fill in:

1. **Material Name** (e.g., *Brown PU Leather*)
2. **Material Type** (e.g., *Fabric*, *Foam*, *Hardware*, *Thread*, etc.)
3. **Typical Unit Used** (e.g., *Meters*, *Rolls*, *Pieces*, *Kg*)

✅ *Example Entry:*

* Material Name: **Brown PU Leather** Material Type: **Fabric** Typical Unit: **Meters**

✍️ *Your List:* (You can list one below the other like the example)

* Material Name:  
   Material Type:  
   Typical Unit:
* Material Name:  
   Material Type:  
   Typical Unit:
* Material Name:  
   Material Type:  
   Typical Unit:
* Material Name:  
   Material Type:  
   Typical Unit:
* Material Name:  
   Material Type:  
   Typical Unit:

🔹 **5. For each material you listed, please try to provide the following details:TO BE ANSWERED** *(If you don’t have all the info, fill in what you can — one material at a time)*

✅ *Example Entry:*

* **Material Name**: Brown PU Leather
* **Color Variants Used**: Black, Brown
* **Minimum Stock Level**: 20 meters
* **Ideal Stock Level**: 100 meters
* **Current Quantity in Stock**: 45 meters
* **Price per Unit**: R45 per meter
* **Preferred Supplier**: ABC Leather Distributors
* **Supplier Contact Info**: 012 345 6789 / sales@abcleather.co.za

## **✍️ *Now your turn — repeat the format for each material you use:***

* **Material Name**:
* **Color Variants Used**:
* **Minimum Stock Level**:
* **Ideal Stock Level**:
* **Current Quantity in Stock**:
* **Price per Unit**:
* **Preferred Supplier**:
* **Supplier Contact Info**:

#### 

#### **🔹 6. How do you decide when to restock each item?**

* ~~☐ Based on usage rate~~
* ~~Based on order size~~
* ~~Weekly restock schedule~~
* ~~Only when stock is visibly low~~
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### **🔹 7. Do you store different grades or quality levels of the same material?**

* ~~Yes~~
* No  
   If yes, please explain how they are labeled or stored differently:   
  Stored based on the types fabrics used

#### **🔹 8. Are there any materials that are custom ordered or made-to-order?**

* ~~Yes~~
* No  
   If yes, which ones?   
  Certain custom measurements

How long do they take to arrive once ordered?   
 7-21 days, more than 21 should be flagged

#### **🔹 9. How often are new materials or colors introduced into your stock?**

* Weekly
* Monthly
* ~~Seasonally~~
* Rarely – stable material base
* Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### **🔹 10. Do materials ever expire or degrade in storage?**

* Yes – we have expiry/shelf life to consider
* ~~No – most materials are non-perishable~~

If yes, which ones and how is expiry tracked?

#### **🔹 11. Do you track batch numbers or lot codes for traceability?**

* Yes
* ~~No~~
* Only for some materials  
   Please describe how batch tracking is done (if applicable):

#### **🔹 12. Do you currently label shelves or bins with QR/barcodes for faster stock lookup?**

* ☐ Yes – QR codes or barcode system in place
* ~~Not yet – but planning to~~
* No – stock is manually located

#### **🔹 13. Would you like to be able to:**

* 🔔 Receive **automatic low stock alerts** by email ?  
   ☐ Yes
* 📈 View **historical usage trends** by material?  
   ☐ Yes
* 📊 Generate **monthly material cost reports**?  
   ☐ Yes

#### **🔹 14. Would you benefit from a visual stock dashboard with:**

* ~~Color-coded stock levels (green = healthy, orange = low, red = critical)~~
* Pie charts showing material types used per month
* ~~Real-time cost tracking based on purchases and consumption~~

#### **🔹 15. Do you handle returns or defective material tracking?**

* Yes – there is a returns bin and tracking process
* ~~Yes – but no tracking system in place~~
* No – returns are rare  
   Please explain your process for returned materials or defective stock:

#### **🔹 16. Would you like to manage supplier pricing changes and cost forecasting inside the dashboard?**

* ~~Yes – we need this for budgeting~~
* Maybe – depends on simplicity
* No – we handle this elsewhere