

Inventory Management System – User Guide Report

1. Introduction

This report explains how to use the Inventory Management System efficiently. It is written for **end users**, including store managers, warehouse staff, and administrators. The guide covers system navigation, core inventory workflows, reporting, user management, and best practices to ensure accurate stock control and smooth operations.

2. Getting Started

2.1 Login

- Open the application in your browser.
- Enter your **username and password** on the login page.
- Click **Login** to access the system.

2.2 Theme Selection

- Use the **theme toggle** (Light/Dark mode) for visual comfort.
- Your preference is saved automatically.

2.3 Navigation Overview

The **sidebar menu** groups system features logically:

- **Dashboard** – High-level summary and KPIs
 - **Inventory** – Products, stock, adjustments, movements
 - **Purchases** – Purchase orders and stock receiving
 - **Sales** – Sales orders and deliveries
 - **Warehouses** – Warehouse and location management
 - **Reports** – Business and inventory reports
 - **Settings** – System configuration
 - **User Management** – Users, roles, and permissions
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3. Inventory Basics

3.1 Products

Products are the foundation of inventory tracking.

Each product includes:

- SKU (unique identifier)
- Product name
- Category
- Supplier
- Unit of measure
- Reorder level
- Optional image for quick identification

How to add/edit products:

- Go to **Inventory** → **Products**
- Use the **Add / Edit** modal form
- Save changes to update the system

3.2 Categories

Categories help organize products and improve reporting.

- Create meaningful category names
- Assign every product to a category
- Use categories for filtering and analysis

3.3 Stock View

- View stock levels by **warehouse**
- Use search and filters to find products quickly
- Status badges indicate:
 - Low stock
 - Medium stock
 - High stock

This helps users act before stock runs out.

4. Receiving Stock (Procurement)

4.1 Create a Purchase Order (PO)

1. Go to **Purchases** → **Orders**
2. Select a supplier
3. Add products and quantities
4. Submit the purchase order

4.2 Approve and Receive Stock

1. Approve the PO (if approval is required)
2. Go to **Purchases** → **GRN (Goods Received Note)**
3. Enter received quantities
4. Select the destination warehouse

4.3 Automatic Stock Update

- Once GRN is saved, stock levels are **automatically increased**
 - Inventory reflects the correct on-hand quantity
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5. Selling & Fulfillment

5.1 Create a Sales Order

1. Go to **Sales** → **Orders**
2. Select customer
3. Add products and quantities
4. Save the sales order

5.2 Allocate and Deliver

- System checks stock availability
- Go to **Sales** → **Deliveries**
- Schedule delivery
- Mark as **Delivered** when completed

5.3 Inventory Deduction

- Completing a delivery **reduces stock automatically**
 - Ensures real-time inventory accuracy
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6. Stock Control

6.1 Transfers Between Warehouses

Use this when moving stock internally.

Steps:

1. Go to **Warehouses** → **Transfer**
2. Select source warehouse
3. Select destination warehouse
4. Enter quantities and confirm

6.2 Stock Adjustments

Used after audits, damage, or shrinkage.

- Go to **Inventory** → **Adjustments**
- Increase or decrease stock
- Provide a **reason** (mandatory)
- Optional approval depending on role

6.3 Movements Log

- Access via **Inventory** → **Movements**
 - Shows all stock changes:
 - Purchases
 - Sales
 - Transfers
 - Adjustments
 - Ensures full traceability and accountability
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7. Warehouses

7.1 Manage Warehouses

- Add or edit warehouse details
- Define capacity and physical location
- Monitor utilization bars to avoid overstocking

7.2 Locations (Bins / Shelves)

- Create internal locations within warehouses
- Helps faster picking and organized storage

8. Reports

Available report types:

- **Sales Reports**
- **Purchase Reports**
- **Stock Reports**
- **Finance Reports**
- **Performance Reports**

Common features:

- Date range filters
- KPI cards
- Charts and summaries
- CSV export

8.1 Low Stock & Reorder

- Identify items below reorder level
- Plan purchase orders in advance

8.2 Performance Monitoring

Track:

- Order cycle time
- Fulfillment rate
- System uptime

Helps identify operational bottlenecks.

9. Settings

9.1 Notifications

- Enable Email / SMS / Push alerts
- Common alerts:
 - Low stock
 - Order approvals
- Preview notifications before enabling

9.2 System Configuration

- Set company name
- Upload logo
- Choose default theme

9.3 Backup & Restore

- Create system backups
 - Download backup files
 - Restore data when required
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10. User Management

10.1 Users

- Add or invite users
- Edit user profiles
- Activate or deactivate accounts

10.2 Roles & Permissions

Control access by role:

- Inventory management
- Order approvals
- Report viewing
- Admin access

10.3 Audit Logs

- Track all user actions
 - View updates, approvals, and adjustments
 - Ensures accountability and security
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11. Best Practices

- Maintain accurate **reorder levels** and review monthly
- Always receive stock using **GRN**, not manual updates
- Check **low stock and pending deliveries daily**
- Use **transfers** to balance warehouses before stockouts

- Add **clear reasons** for stock adjustments
 - Perform **regular backups**
 - Apply **least-privilege access** to users
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12. Conclusion

By following this guide, users can manage inventory accurately, reduce stockouts, maintain traceability, and improve overall operational efficiency. Consistent use of workflows, reports, and best practices ensures reliable and scalable inventory control.