"Inventory Management plugin for RISE CRM"

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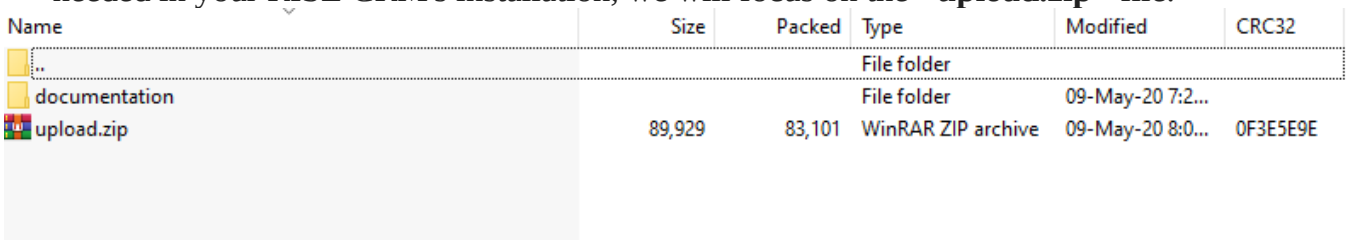
Thank you for choosing Inventory Management plugin for RISE CRM. If you have any questions that are beyond the scope of this help file, please feel free to email us via the support item on Codecanyon.

A) Upload & activate the plugin

* Prior to starting the installation, please make sure that no open_basedir restriction is applied to your PHP configuration and that shell_exec is enabled. Whereas 95% of the hosting providers around got a proper config that includes the above guides, you may need to adjust your PHP configuration settings if your provider offers these settings disabled by default.

- Steps of Installation:

1. Extract your downloaded file content. You will notice a folder called **"documentation"** and a new zip file called **"upload.zip"**. Since the **"documentation"** folder contains documentation files and helpful instructions that are not needed in your RISE CRM's installation, we will focus on the **"upload.zip"** file.

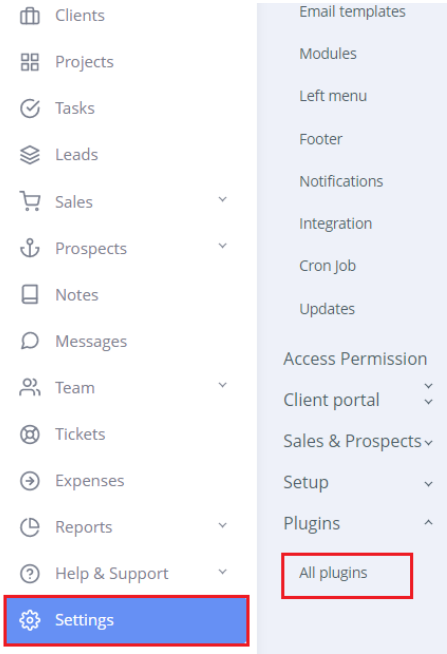


Name	Size	Packed	Type	Modified	CRC32
..			File folder		
documentation			File folder	09-May-20 7:2...	
upload.zip	89,929	83,101	WinRAR ZIP archive	09-May-20 8:0...	0F3E5E9E

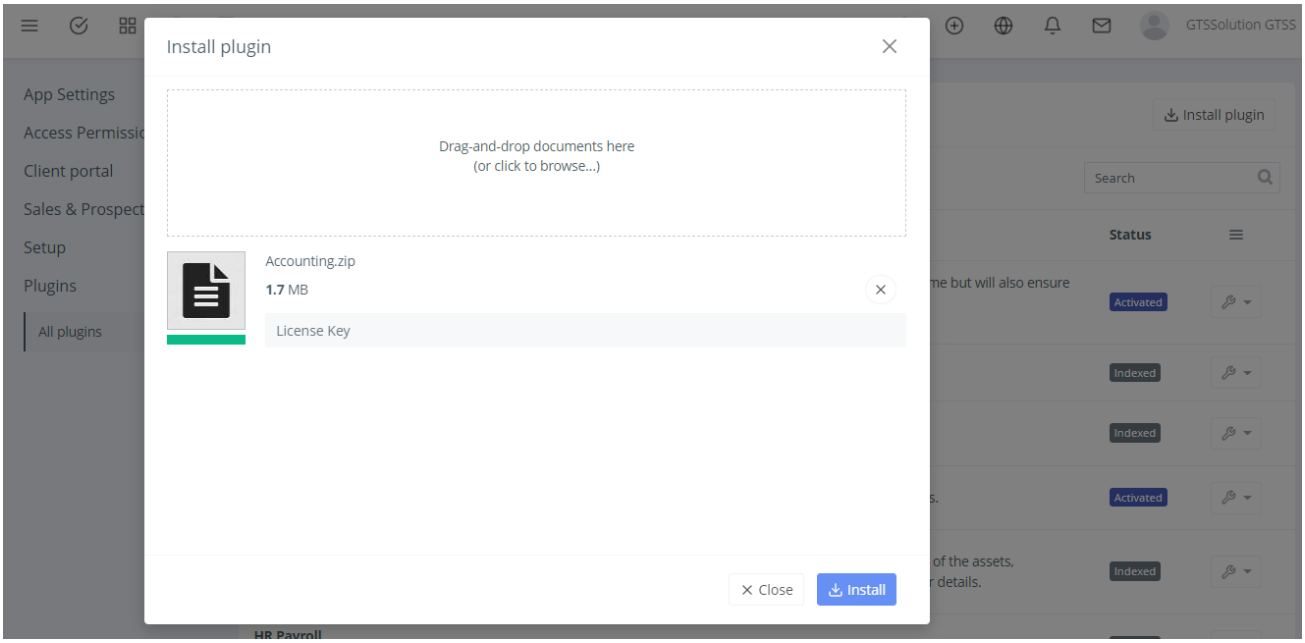
2. **"upload.zip"** contains the plugin files (in a plugin format) that you upload in RISE CRM's Plugin installation section.

Name	Size	Packed	Type	Modif
..			File folder	
documentation			File folder	09-M
upload.zip	89,929	83,101	WinRAR ZIP archive	09-M

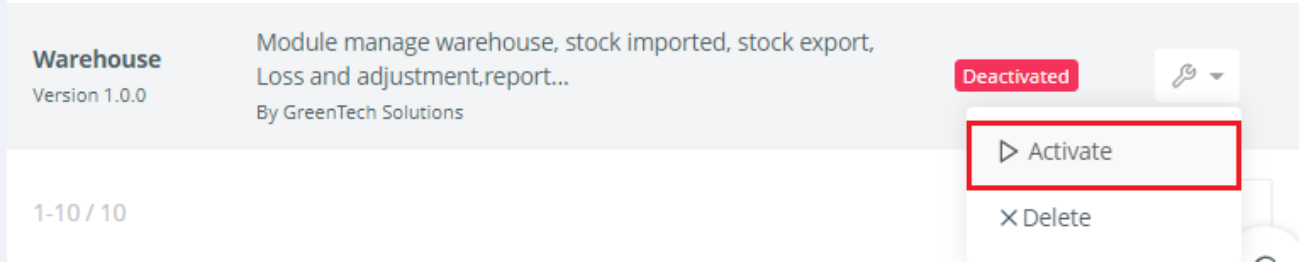
3. Go to your RISE CRM's Admin area and select the following menu item: **SETTINGS > PLUGINS**.



4. Select the extracted **upload.zip** at the Plugin installation selection prompt and press **INSTALL**.



5. Find the newly installed plugin and press **ACTIVATE**.



6. You will be told that the plugin is successfully activated.

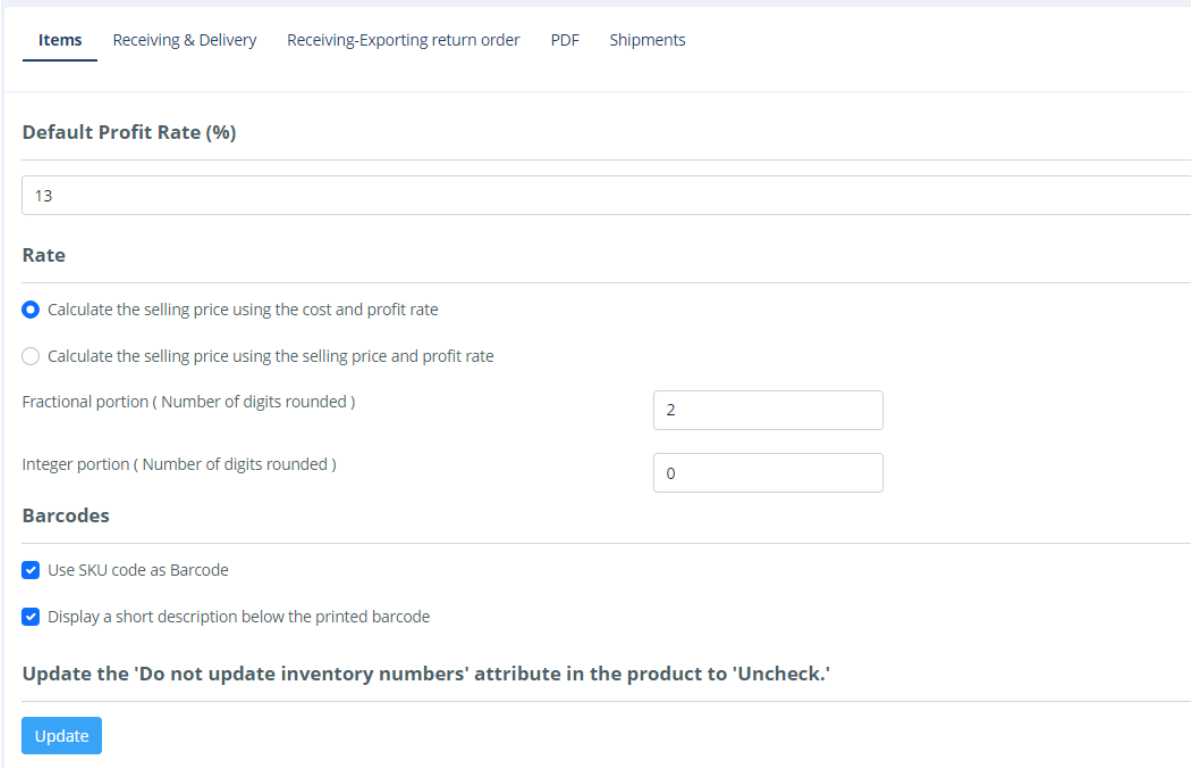
B) How to use the Inventory Management plugin

1.Settings

The screens in the settings menu are used to set the input data used for the inventory

1.1. General

a) Items



- Step 1: Select the inventory module -> select the settings menu -> select the general menu
- Step 2: Proceed to select the necessary data, and the system will automatically update according to the change.

* explanation of the meaning of the fields:

- Default profit rate (%): used to enter the default profit rate. This data is displayed by default in the default profit rate (%) field in the add new item
- Rate is used to select the formula to calculate the item's selling price. When creating an item, the selling price will be calculated according to the selected formula. There are two options:

+ *Calculate the selling price using the cost and profit rate*: when you choose this option, the selling price will be calculated by the formula selling price = purchase price * (1+ profit radio)

Example: if you enter default profit rate (%) = 13, purchase price=100

⇒ selling price = 100 * (1 + 0.13) = 113

+ *Calculate the selling price using the selling price and profit rate:* when you select this option, the selling price will be calculated according to the formula selling price = purchase price / (1 - profit radio)

Example: if you enter ex: default profit rate (%) = 13, purchase price = 100

⇒ selling price = 100 / (1 - 0.13) = 114.94

+ Rounding rule: there are two rules used to round the selling price (rate)
- Fractional portion (number of digits rounded: rounding the decimal part

Example :

S

Configure as shown above, if rate = 155.7471, it will round ≈ 155.75

- Integer portion (number of digits rounded): rounding the integer part

Example:

Configure as shown above; if rate = 154.59, it will round ≈160

- Barcode:

+use SKU code as a barcode: if this option is checked, then after saving the item, the commodity barcode field will automatically copy the data from the SKU code field.

Conversely, if this option is not checked, then when adding an item, entering data in the SKU code field will not change the commodity barcode

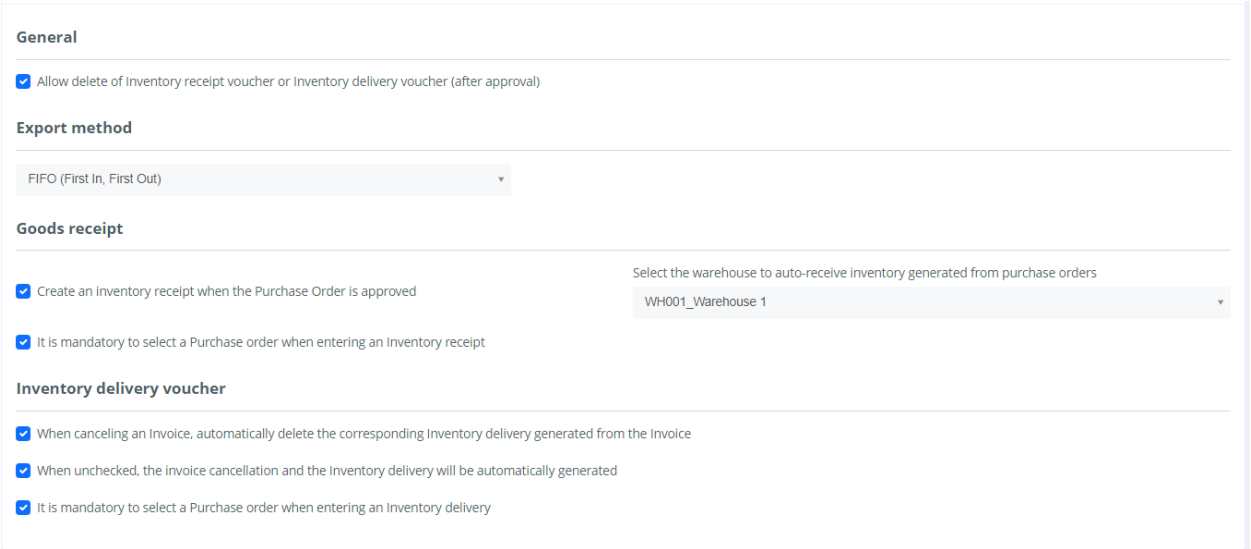
*note: the data of previously created items will not be changed when there is an update. This configuration.

+ display a short description below the printed barcode: if you enable this setting, when printing a barcode, the short description will be displayed, and only the first 30 characters of the short description will be displayed.

- Update the "do not update inventory numbers" attribute in the product to "uncheck." : when you press the update button, the items with the "do not update inventory quantity" check will be deselected.

b) Receiving & delivery

The data set in the receiving & delivery tab will be used for the stock in and out screens.



* explanation of the meaning of the fields:

- General:

Allow deletion of inventory receipt voucher or inventory delivery voucher (after approval): if you enable this setting, the approved status will display the option to allow input/output vouchers with approved status. Delete => after deletion, reduces or increase the amount of inventory and delete both the history in the inventory history menu and in the item details in the import/export slip.

Otherwise, if this setting is unchecked, the inventory receipts with the approved status will not be deleted.

● Export method: FIFO (first in, first out): the items that are in stock first will be selected to be shipped out first.

● Good receipt

+ Create an inventory receipt when the purchase order is approved: if you enable this setting, you must select a warehouse in the *select warehouse to auto-receive inventory generated from the purchase order* field when the purchase order is approved and imported into the selected warehouse.

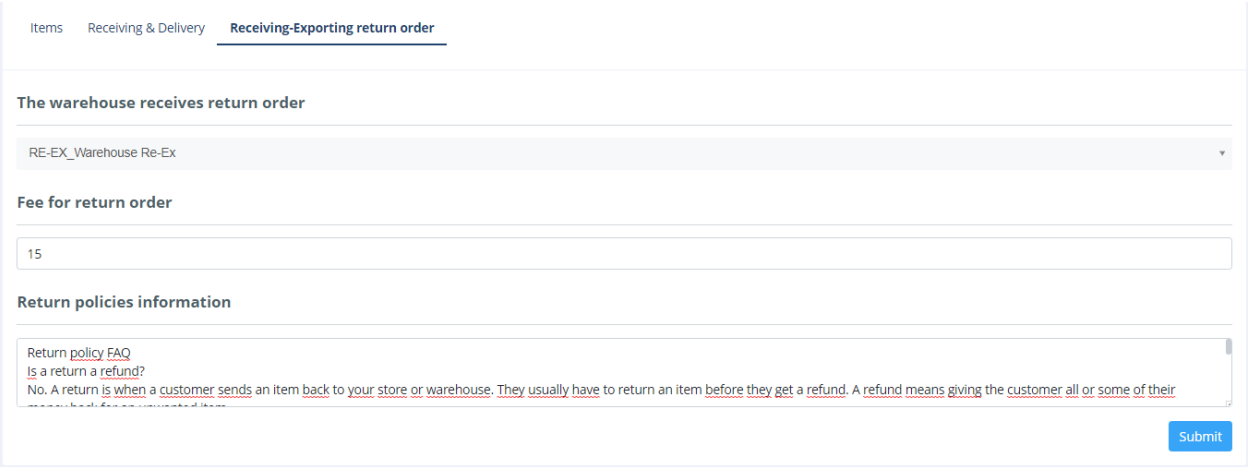
If you enable the *creation of an inventory receipt when the purchase order is approved*, but if the warehouse is not selected, the warehouse receipt is not automatically generated.

Or if you don't enable *create an inventory receipt when the purchase order is approved* but select the warehouse in the *select the warehouse to auto-receive inventory generated from purchase orders*, no receipt will be automatically generated later when the purchase order is approved.

+ It is mandatory to select a purchase order when entering an inventory

+ receipt: if you enable this setting, when creating an inventory receipt, the purchase order field is a required field to enter

c) Receiving-exporting return order



* explain the meaning of the fields:

● The warehouse receives a return order: selects the warehouse for the items from the approved return order.

● Fee for return order: when returning an order, there will be a fee; the fee will be calculated based on x percent of the total order value.

● Return policies information: allows editing the content of the return policy (used to display in the return and export receipts)

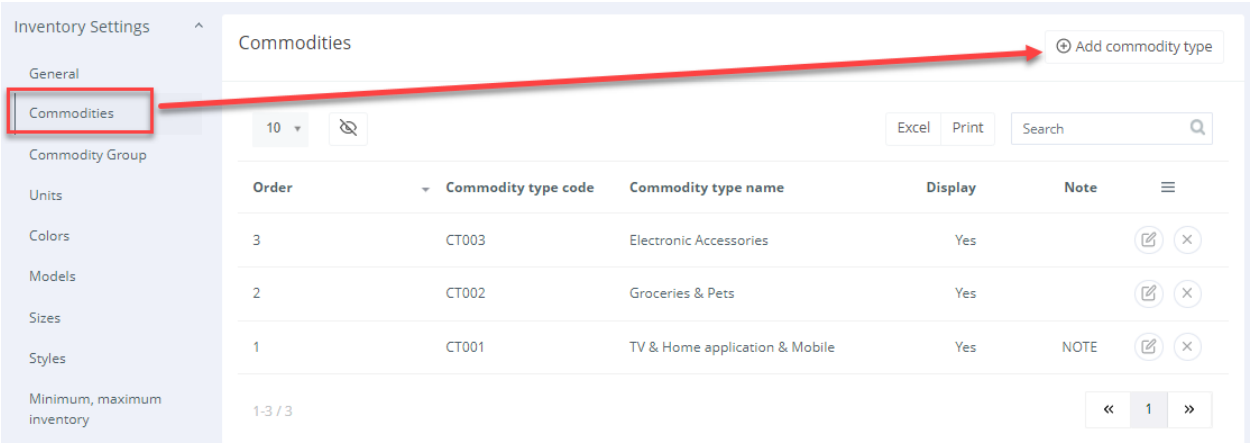
1.2. Commodity type

The data set used in the item creation screen

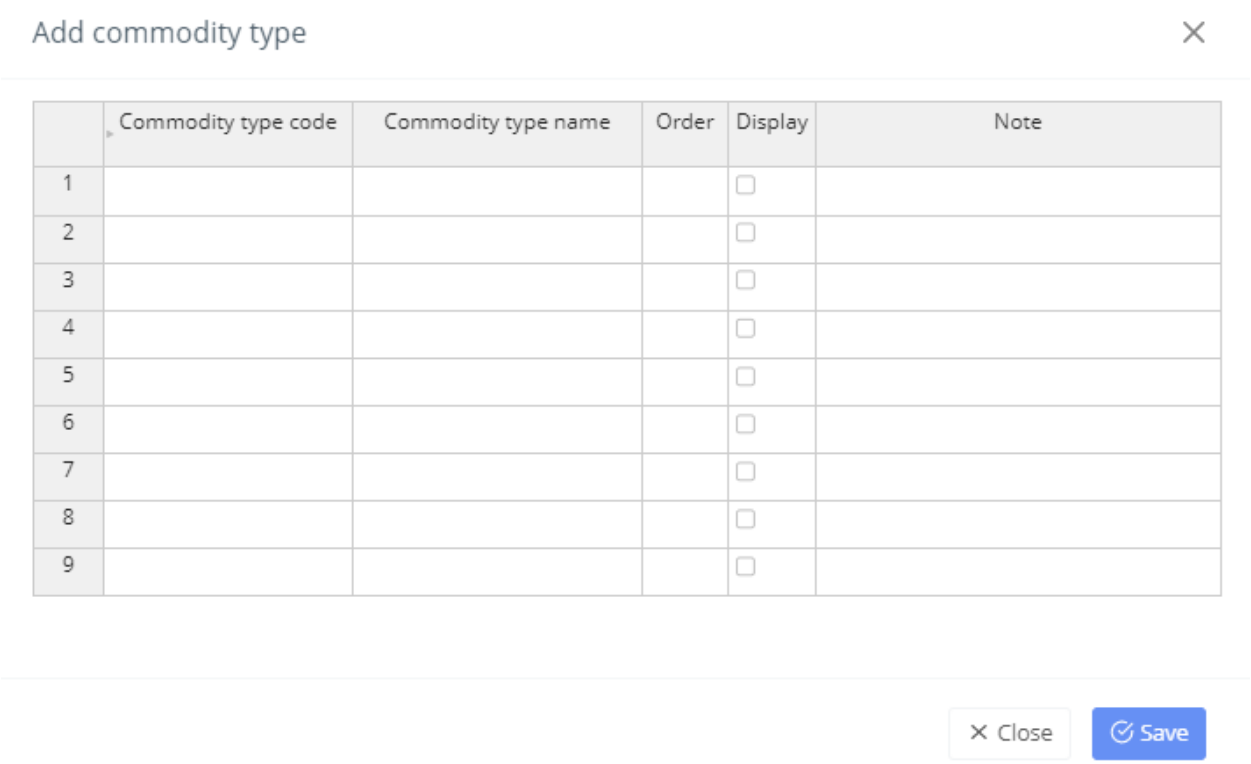
1.2.1. Add commodity type

Step 1. Select the settings menu -> select the commodities menu

Step 2. Click the add commodity type button



Step 3. Enter valid data in the columns. Then select save to save the operation you just made or select close to cancel the operation and return to the previous screen

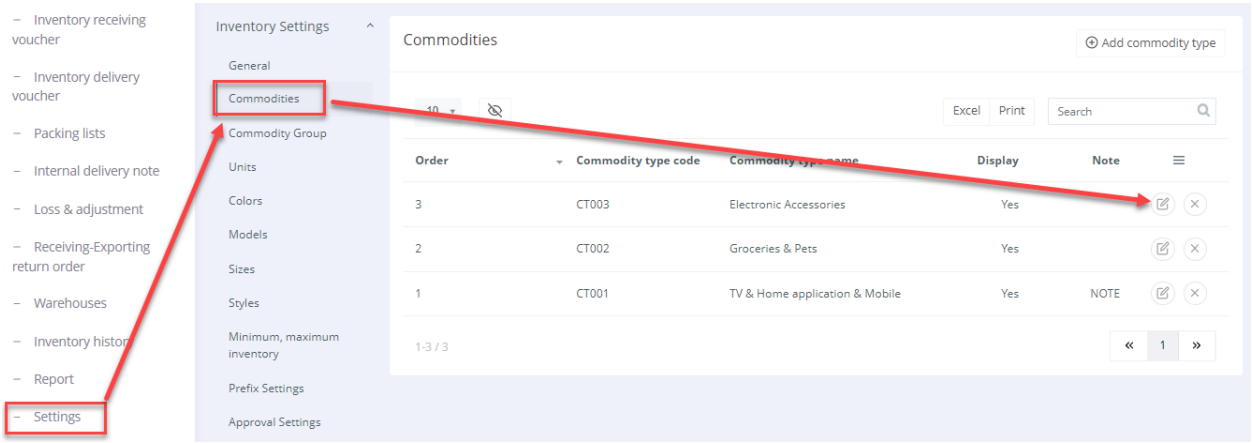


*explanation:

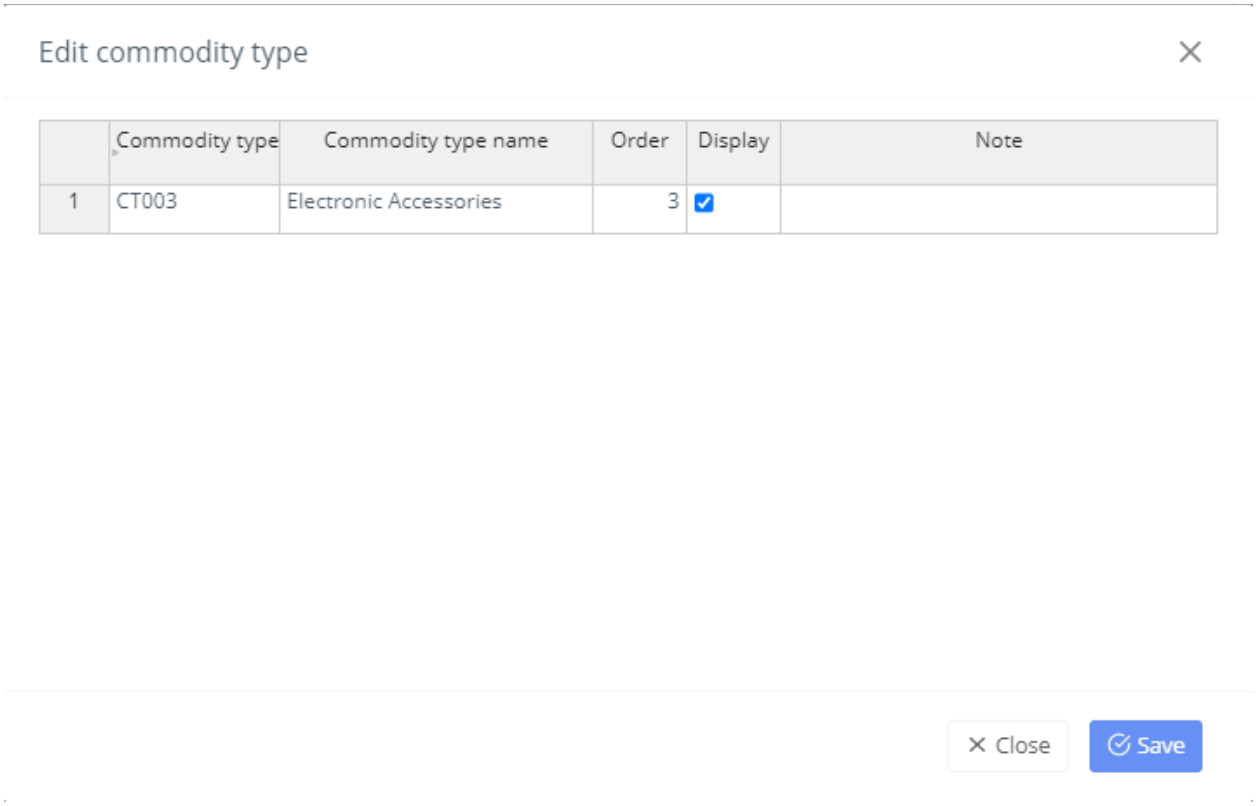
- The commodity type code field to enter the commodity type code
- The commodity type name field to enter the commodity type name
- The order field enters the order in which this commodity type displays in the commodity type combo box. Commodity type with a smaller order will show up at the top of the commodity tye list in the Combobox commodity type
- Display field if the checkbox is checked, this commodity type will show up in the Combobox commodity type
- The note field is used to enter notes (if any).

1.2.2. Edit commodity type

Step 1. Select settings -> select menu commodities -> select the edit function corresponding to the data line to be edited

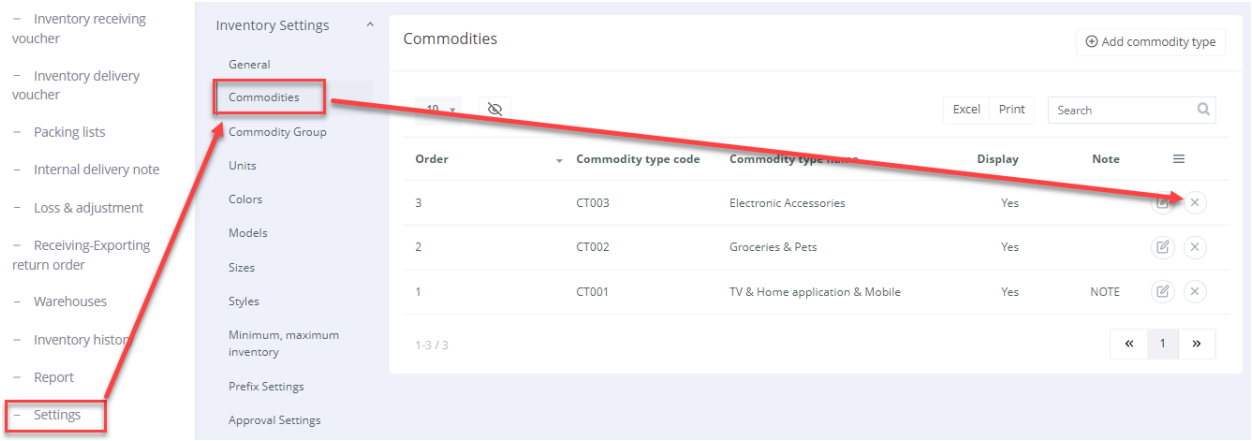


Step 2. The system will display the corresponding edit data screen -> proceed to enter the data. Necessary data to edit -> select submit to save the action you just performed or select close to cancel the operation and return to the main screen



1.2.3. Delete commodity type

➢ Select settings -> select menu commodities -> select delete function corresponding to the data line to be deleted.



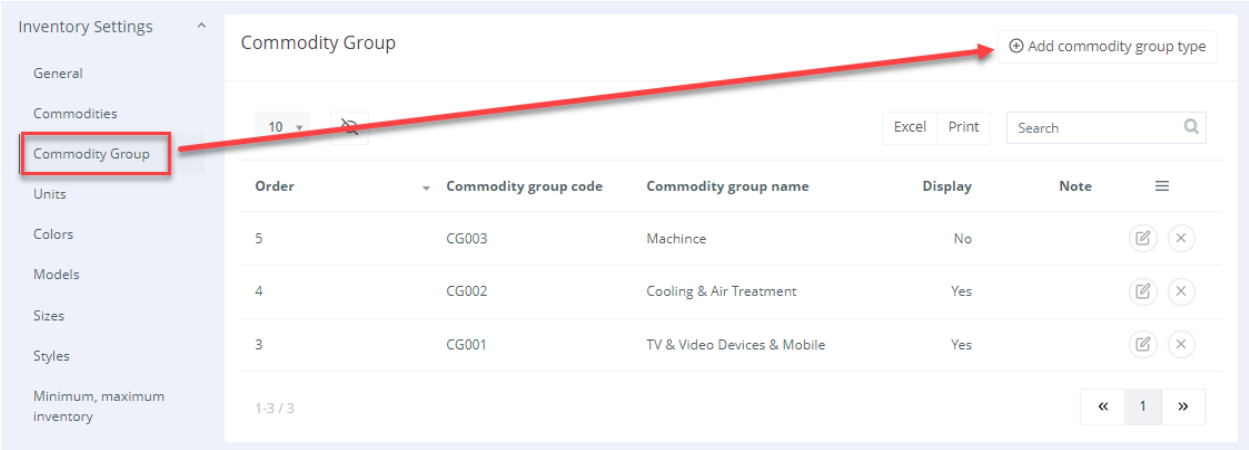
1.3. Commodity group (items categories)

The data set used in the item creation screen

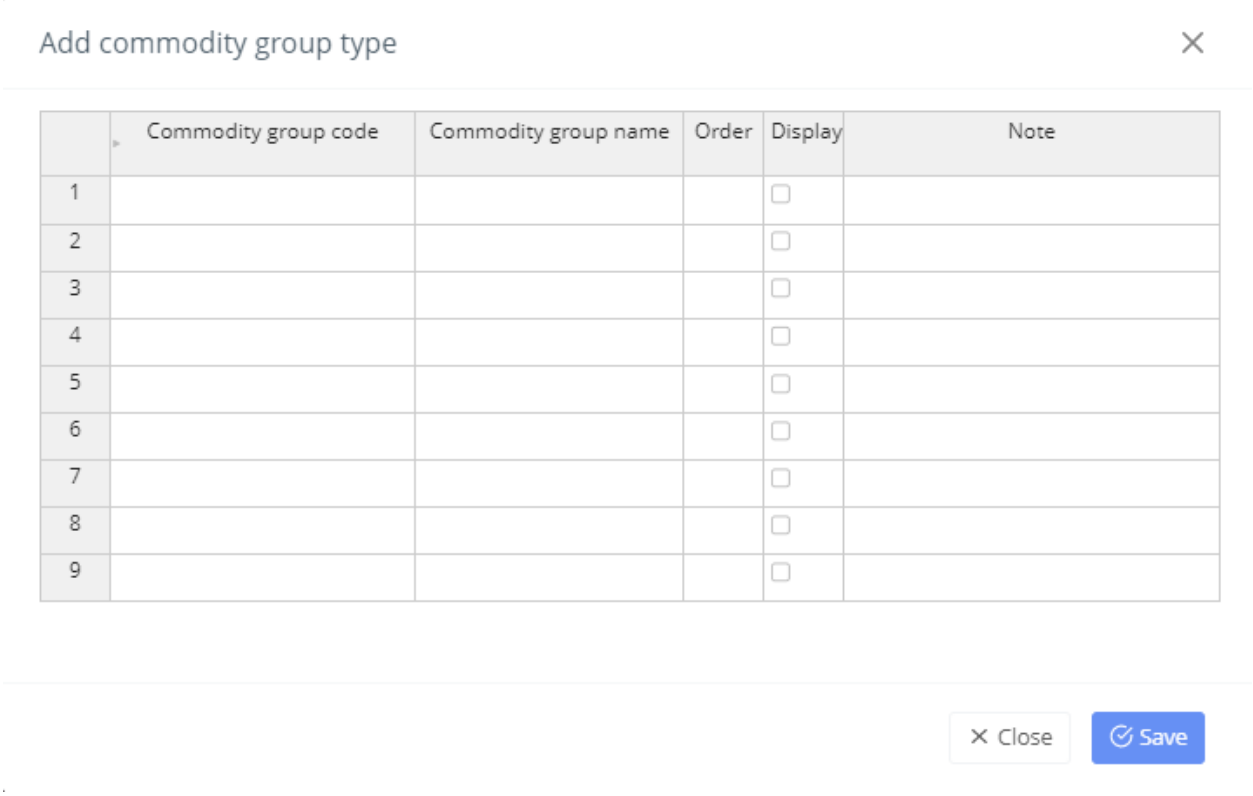
1.3.1. Add commodity groups

Step 1. Select the settings menu -> select the commodity group menu

Step 2. Click the add commodity group type button



Step 3. Enter valid data in the columns. Then select save to save the action you just made, or select close to canceling the operation and return to the previous screen

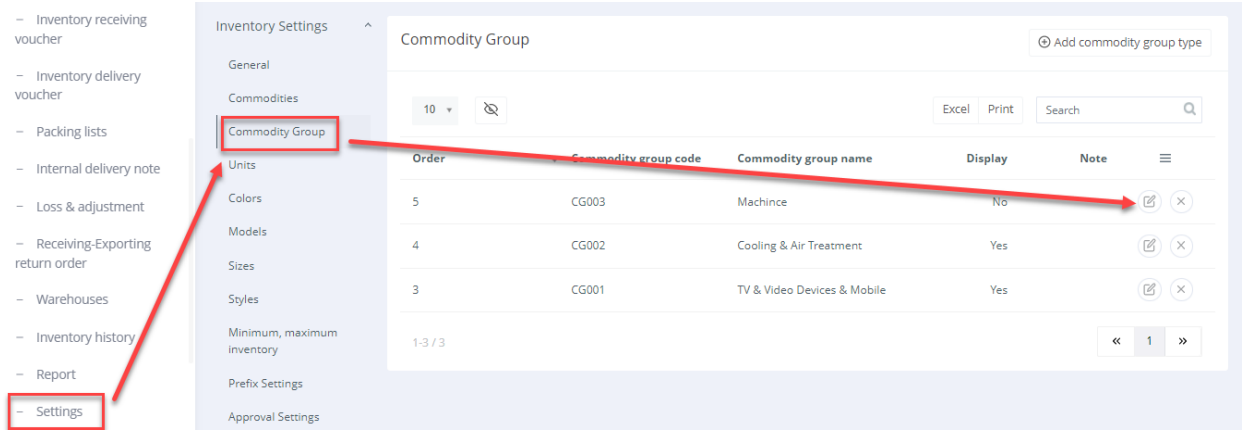


*explanation:

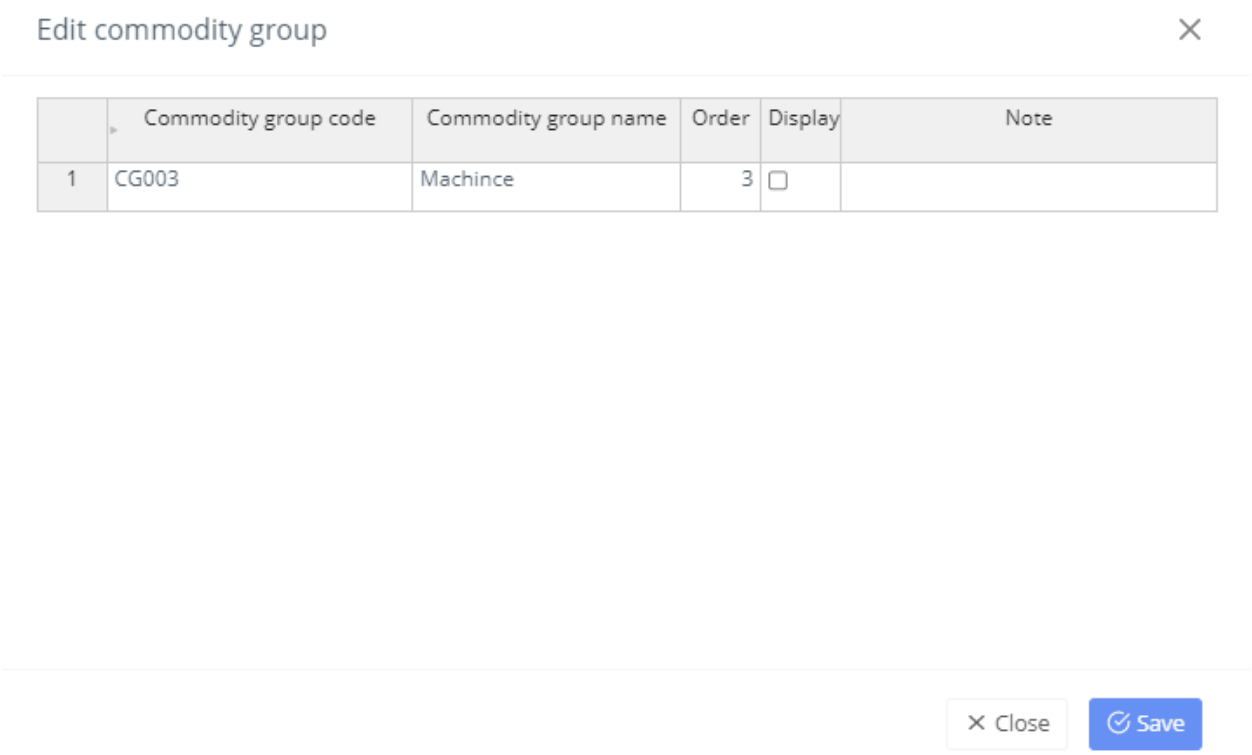
- The commodity group code field to enter the code for the commodity group
- The commodity group name field to enter the commodity group name
- The order field to enter the order in which this commodity group displays in the Combobox commodity group. The commodity group with smaller order will be displayed at the top of the commodity group list in the Combobox commodity group
- Display field if the checkbox is checked, this commodity group will show up in the Combobox commodity group
- The note field is used to enter notes (if any).

1.3.2. Edit commodity group

Step 1. Select settings -> select menu commodity group-> select the edit function corresponding to the data line to be edited

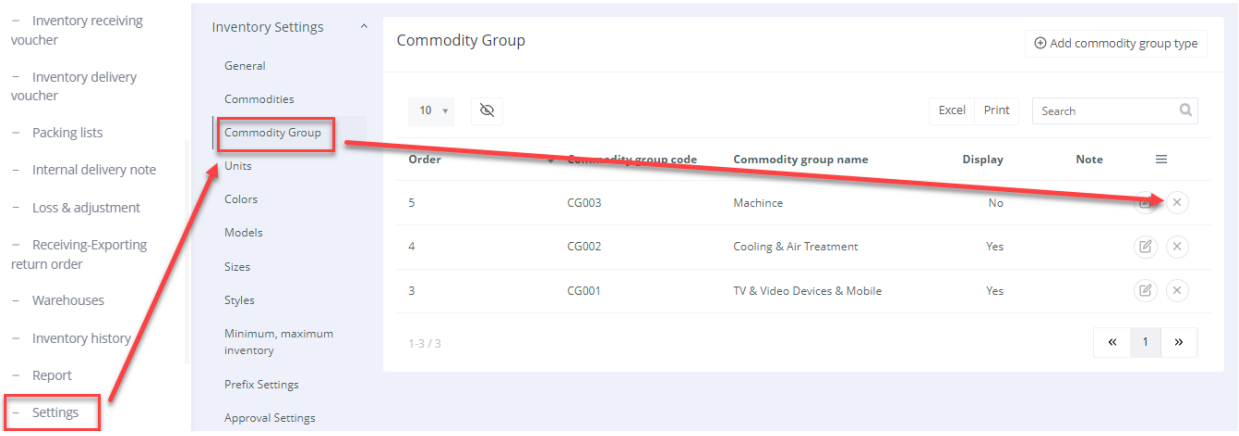


Step 2. The system will display the corresponding edit data screen -> proceed to enter necessary data to edit -> select submit to save the action you just made or select close to cancel the operation and return to the main screen



1.3.3. Delete commodity group

➢ Select settings -> select menu commodity group-> select delete function corresponding to the data line to be deleted



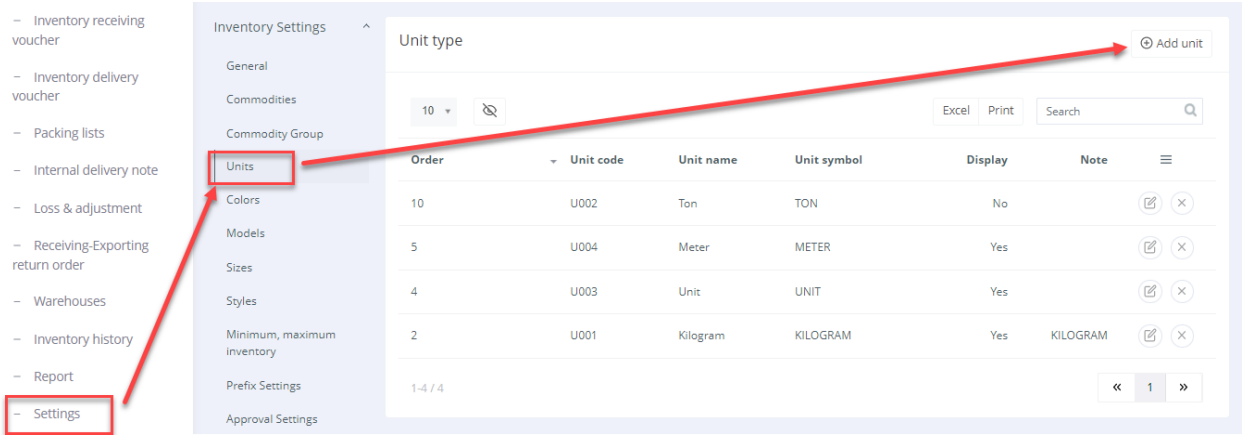
1.4.Units

The data set used in the item creation screen

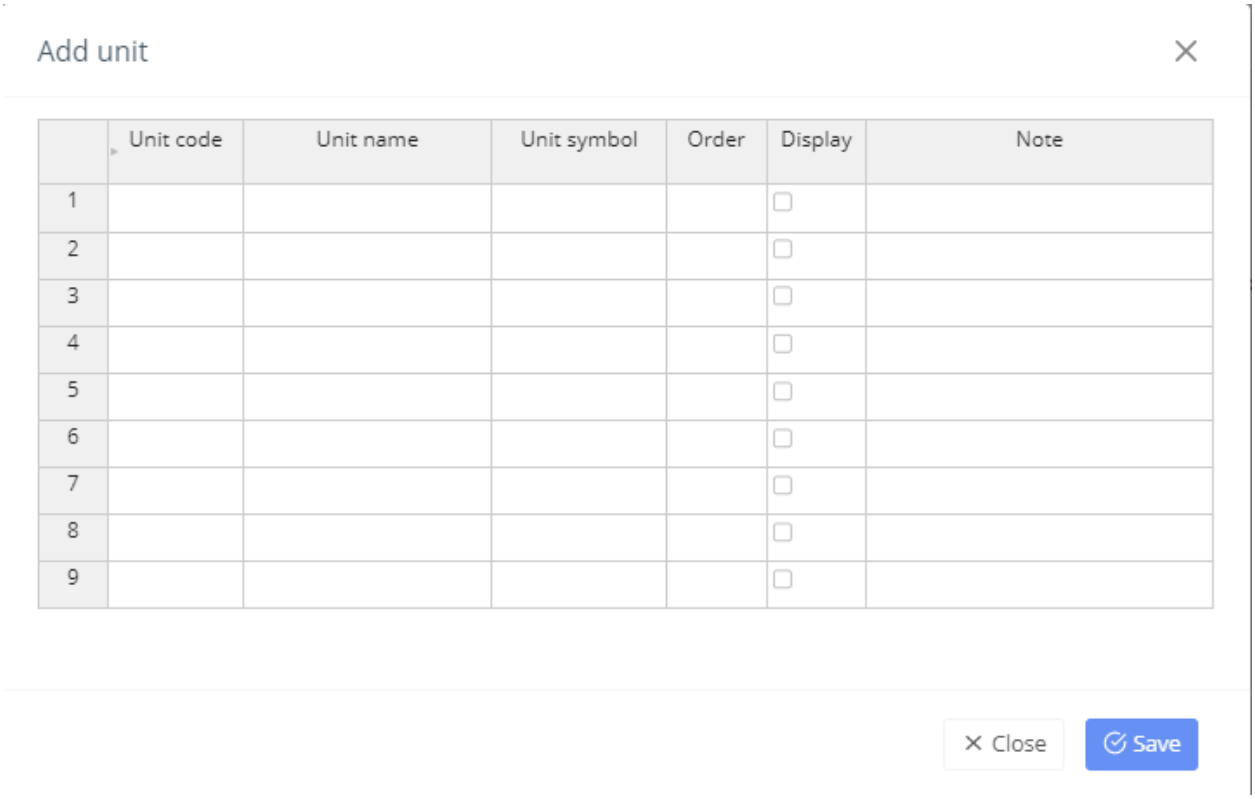
1.4.1. Add unit

Step 1. Select menu settings -> select the units menu

Step 2. Click the add unit button



Step 3. Enter valid data in the columns. Then select save to save the operation just done or select close to canceling the operation and return to the previous screen

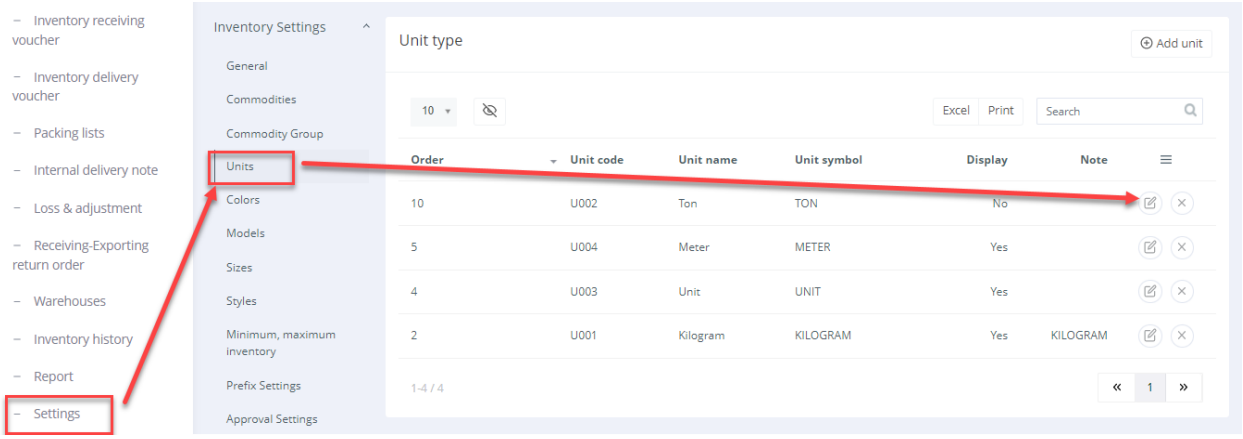


*explanation:

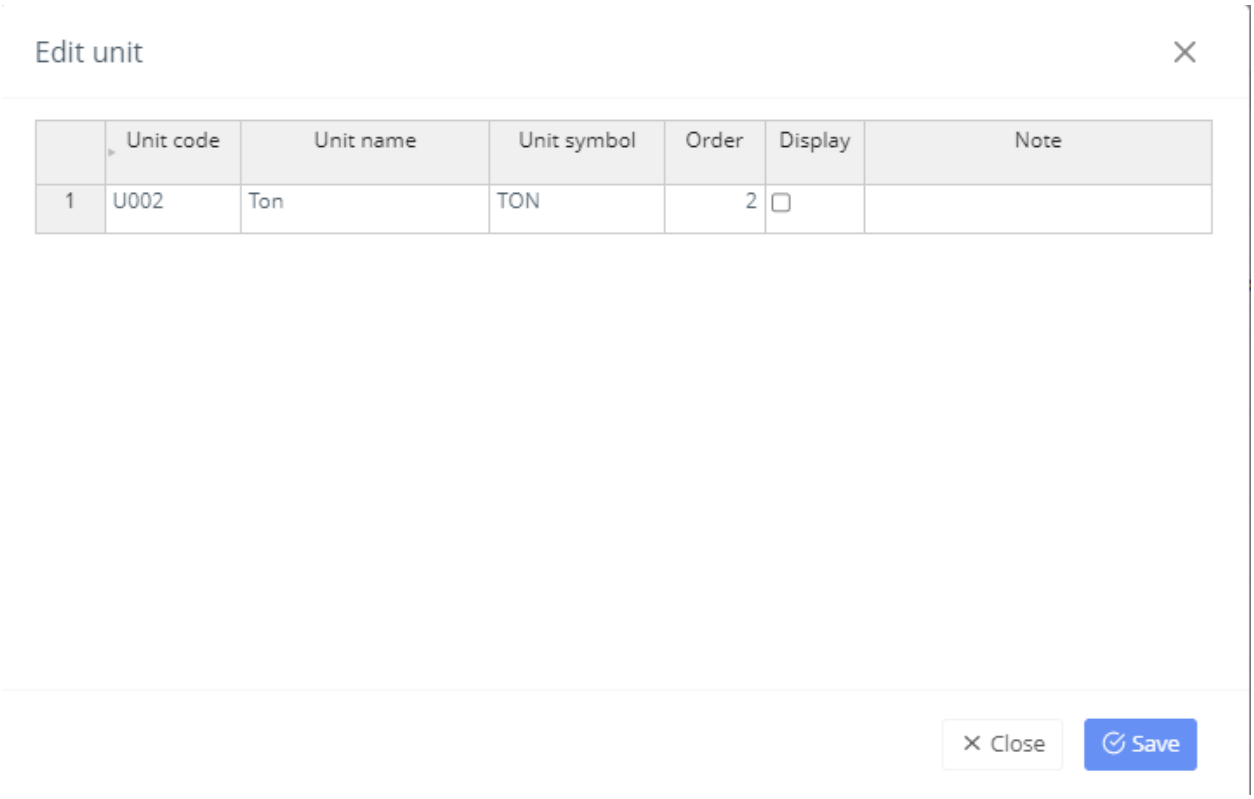
- Unit code field to enter the code for the unit of measure
- Unit name field to enter the unit name
- The unit field symbol is used to enter the symbol of the unit of measure.
- The order field is used to enter the order in which this unit displays in the unit Combobox. Units with smaller orders will display at the top of the unit list in the Combobox unit
- Display field if the checkbox is checked, this unit will display in the Combobox unit
- The note field is used to enter notes (if any).

1.4.2. Edit unit

Step 1. Select settings -> select menu units-> select edit function corresponding to the data line to be edited

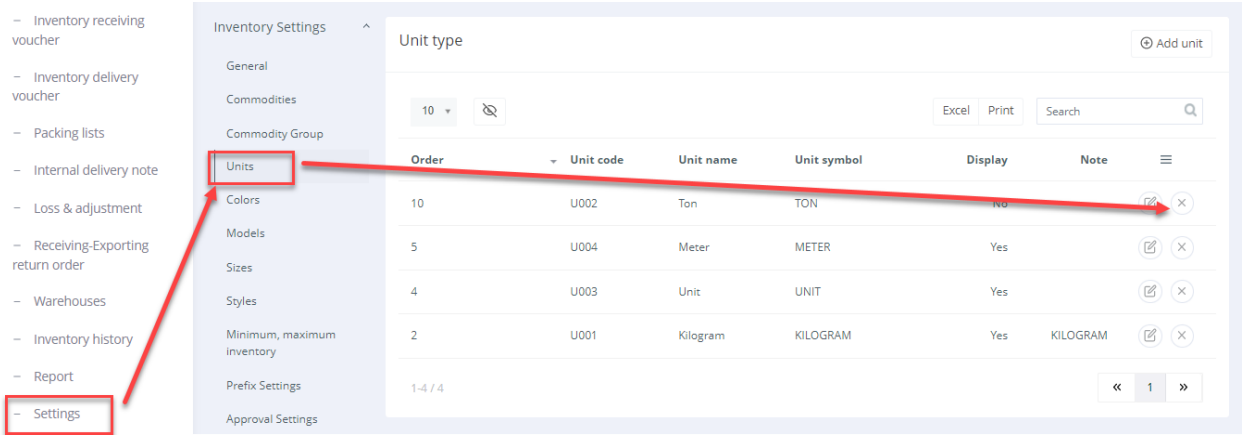


Step 2. The system will display the corresponding edit data screen -> enter the data needed to edit -> select submit to save the action you just performed or select close to cancel the operation and return to the main screen



1.4.3. Delete unit

➢ Select settings -> select menu units-> select delete function corresponding to the data line to be deleted



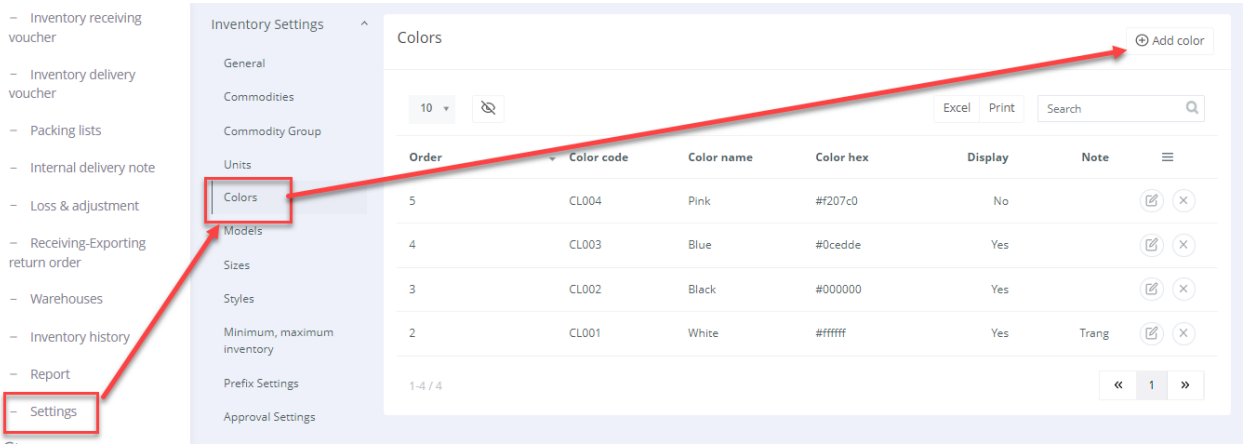
1.5.Colors

The data set used in the item creation screen

1.5.1. Add color

Step 1. Select menu settings -> select menu colors

Step 2. Click the add color button



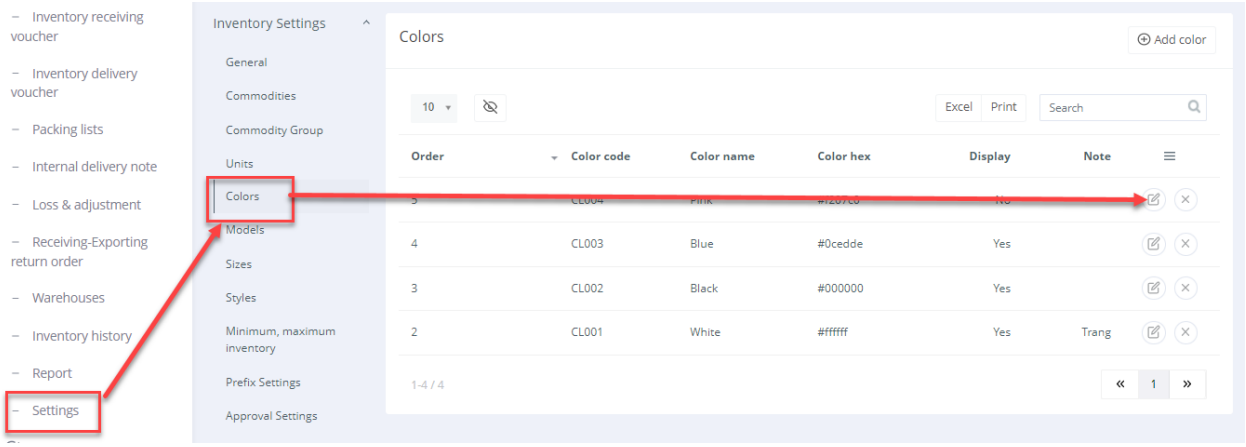
Step 3. Enter valid data in the fields. Then select save to save the action you just made or select close to cancel the operation and return to the previous screen

*explanation:

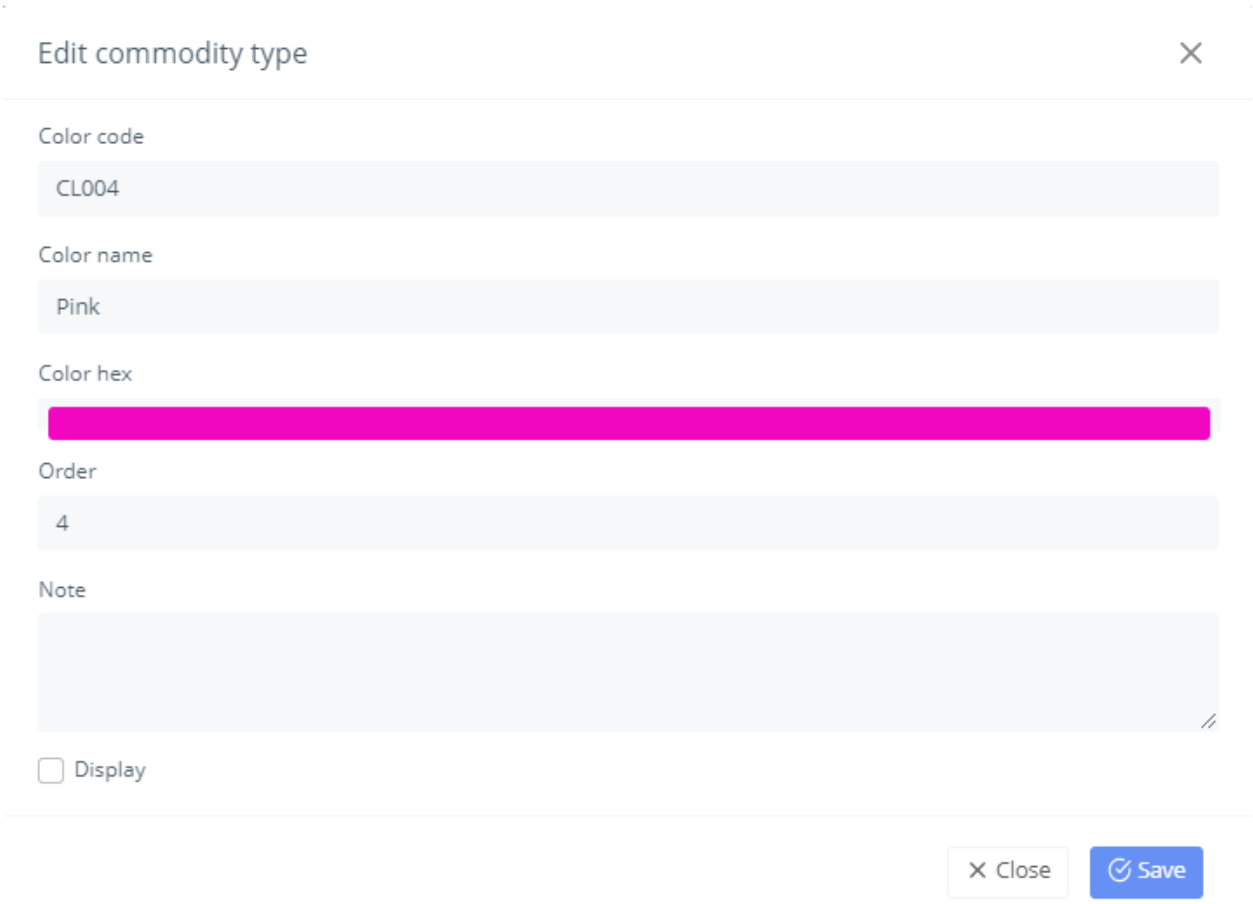
- The color code field to enter the code for the color
- The color name field to enter the color name
- The color hex field uses to select the display color corresponding to the color name
- Order field to enter the order in which this unit displays in the color combobox. Color with smaller order will display at the top of the color list in the combobox color
- Display field if the checkbox is checked, this color will display in the combobox color
- The note field is used to enter notes (if any).

1.5.2. Edit color

Step 1. Select settings -> select menu colors-> select the edit function corresponding to the data line to be edited

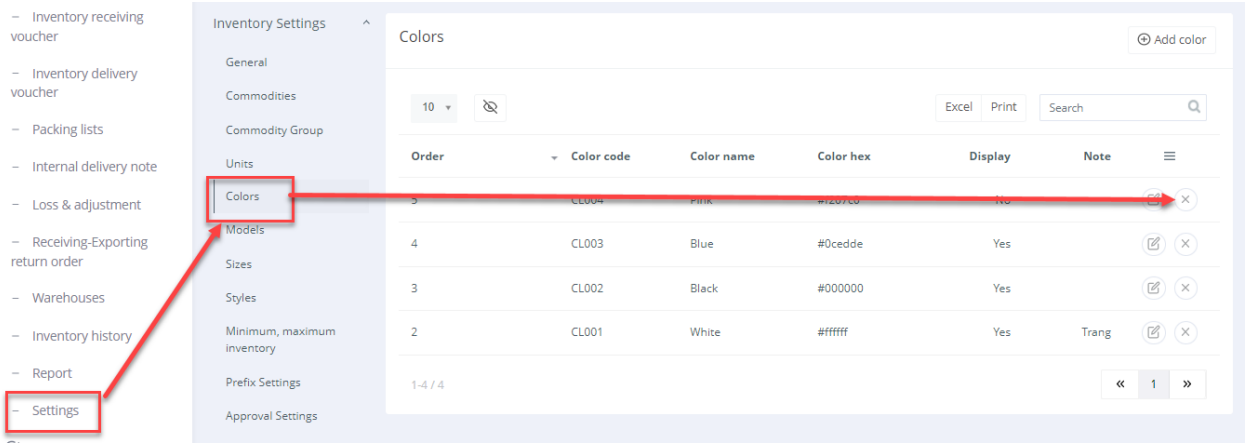


Step 2. The system will display the corresponding edit data screen -> proceed to enter the data necessary data to edit -> select submit to save the action you just made or select close to cancel the operation and return to the main screen



1.5.3. Delete color

➢ Select settings -> select menu colors-> select delete function corresponding to the data line to be deleted



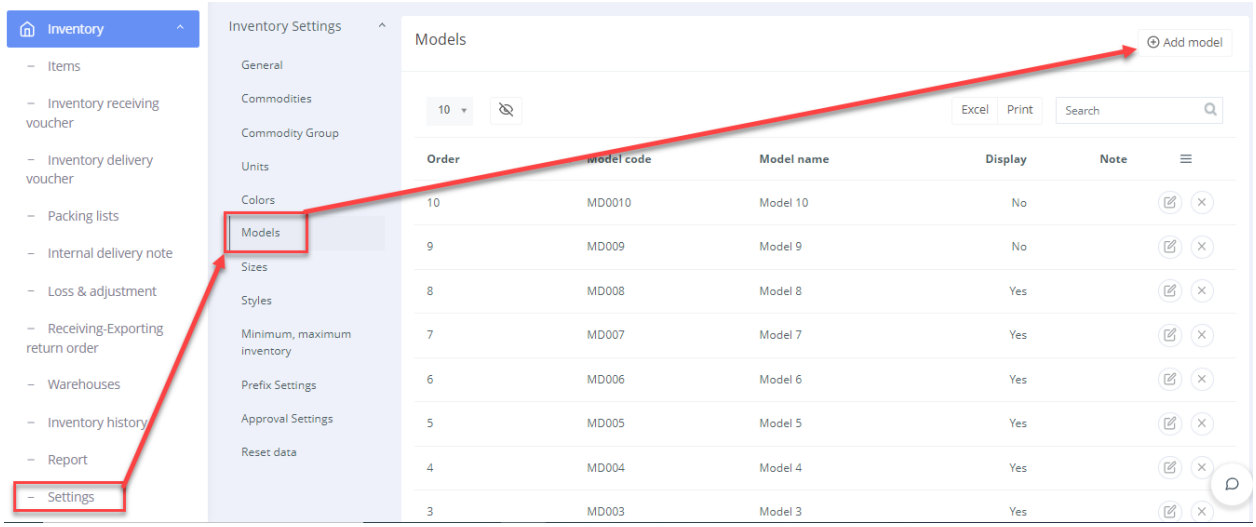
1.6.Models

The data set used in the item creation screen

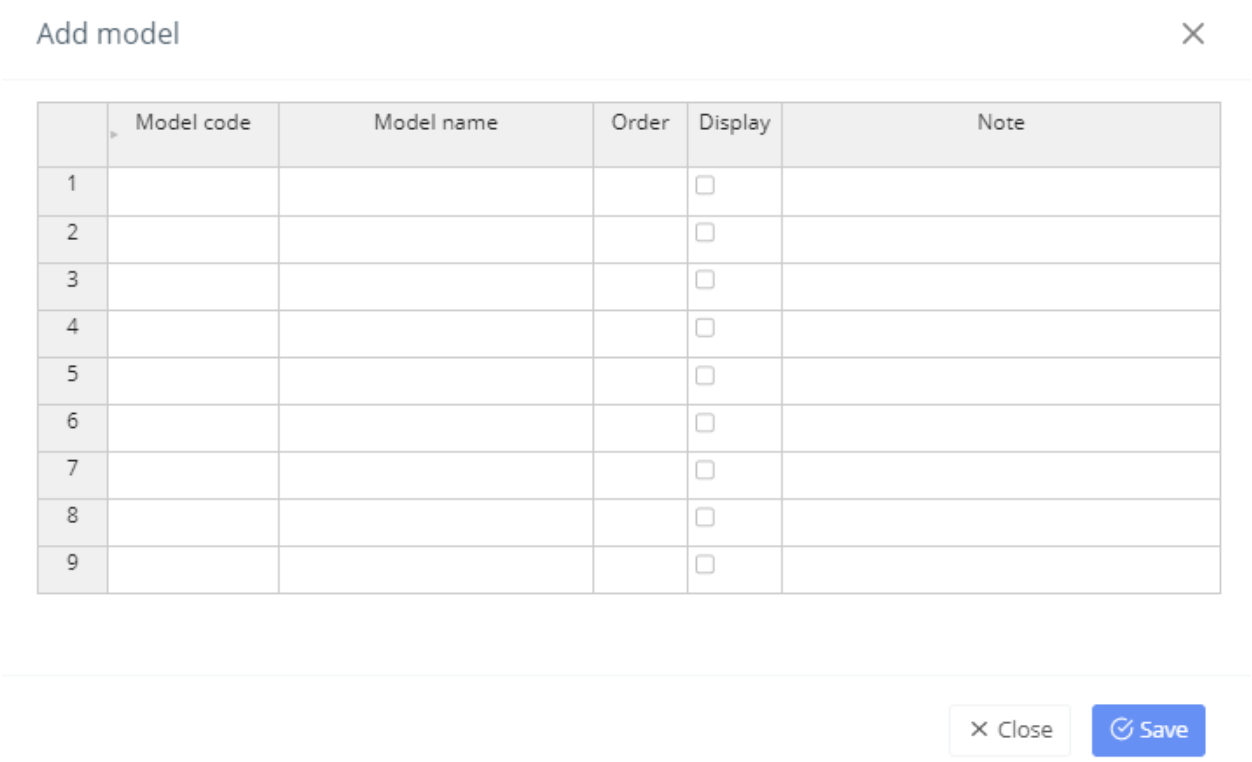
1.6.1. Add model

Step 1. Select menu settings -> select menu models

Step 2. Click the add model button



Step 3. Enter valid data in the columns. Then select save to save the operation just done or select close to canceling the operation and return to the previous screen

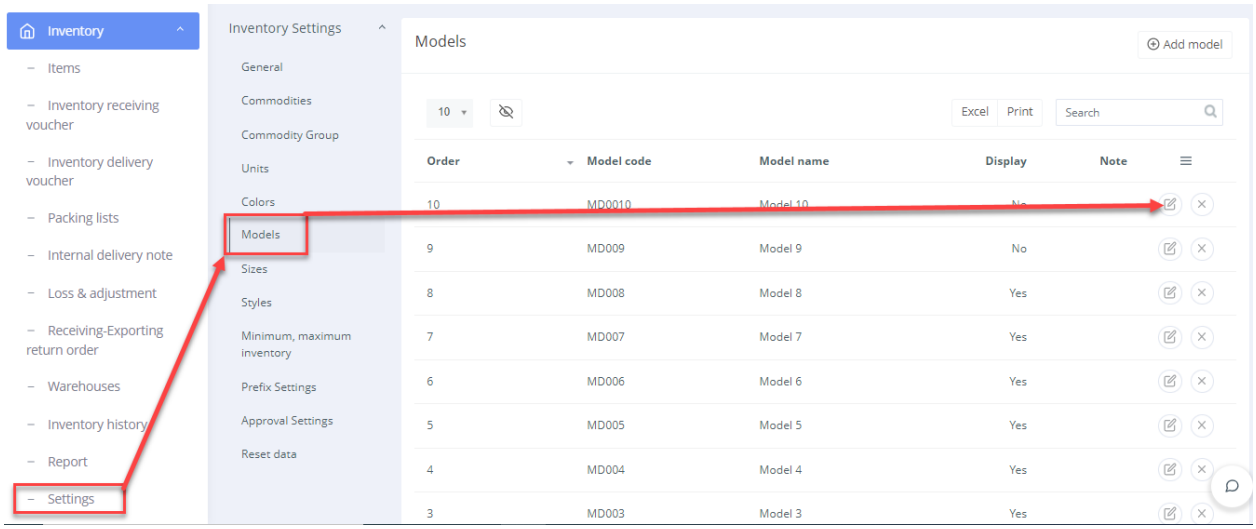


*explanation:

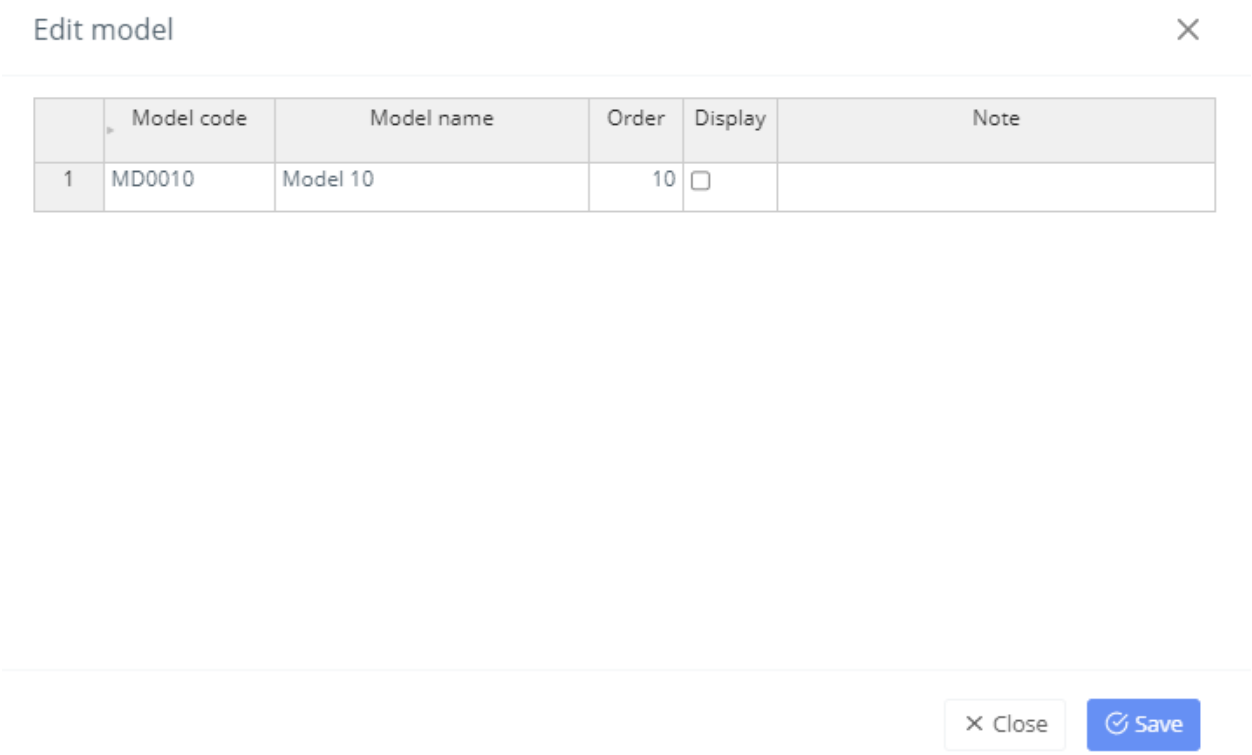
- Model code field to enter the code for the model
- Model name field to enter the model name
- Order field to enter the order that this unit displays in the model combobox. Models with smaller orders will display at the top of the model list in the combobox model
- Display field if the checkbox is checked, this model will display in the combobox model
- The note field is used to enter notes (if any).

1.6.2. Edit model

Step 1. Select settings -> select menu model -> select edit function corresponding to the data line to be edited

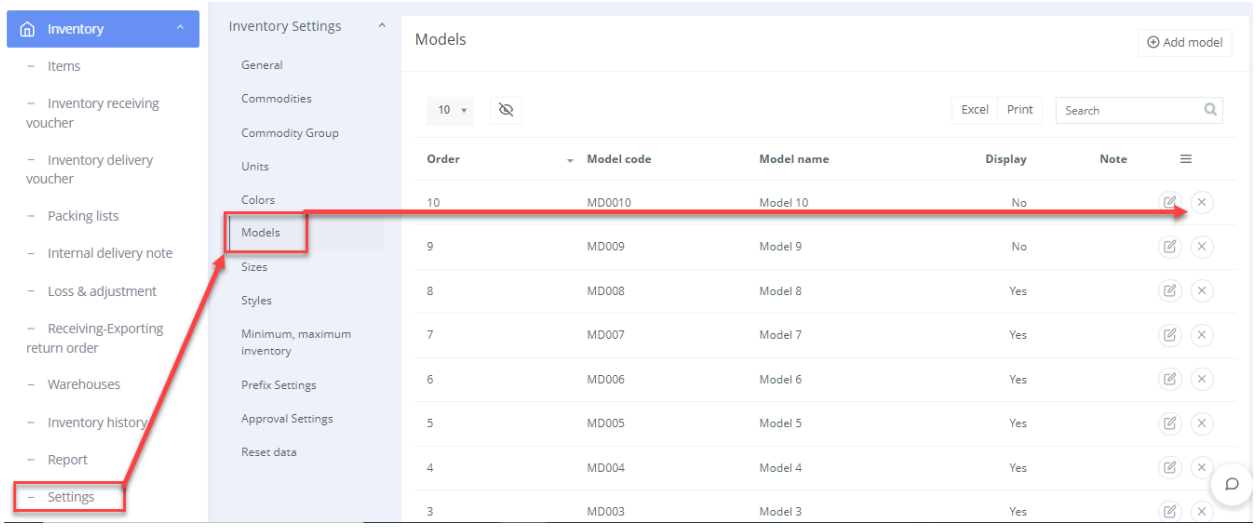


Step 2. The system will display the corresponding edit data screen -> enter the data. Data needed to edit -> select submit to save the action you just performed or select close to cancel the operation and return to the main screen



1.6.3. Delete model

➢ Select settings -> select menu models-> select delete function corresponding to the data line to be deleted



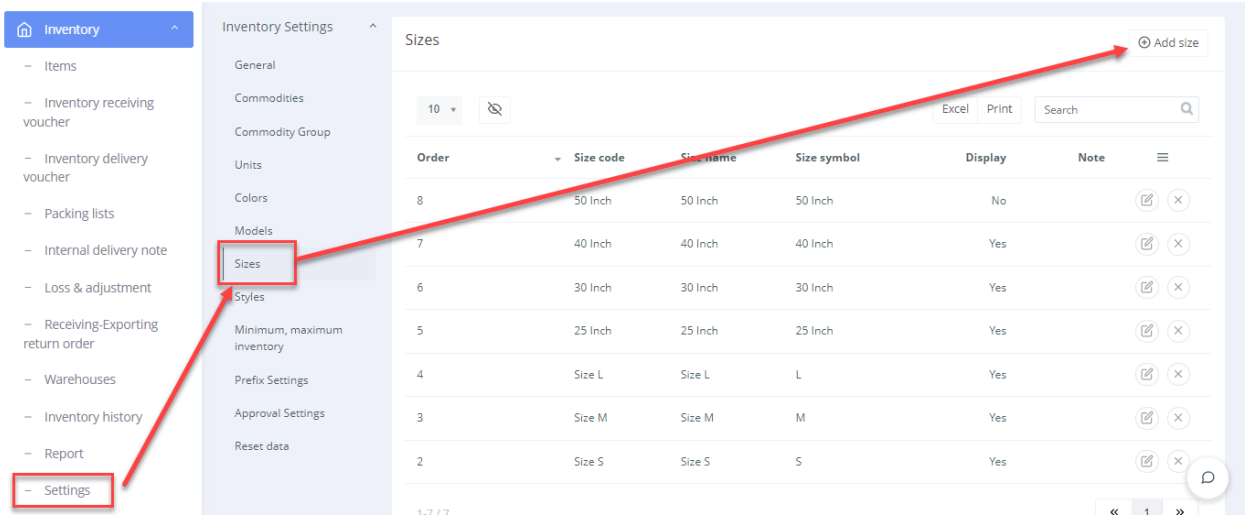
1.7.Sizes

The data set used in the item creation screen

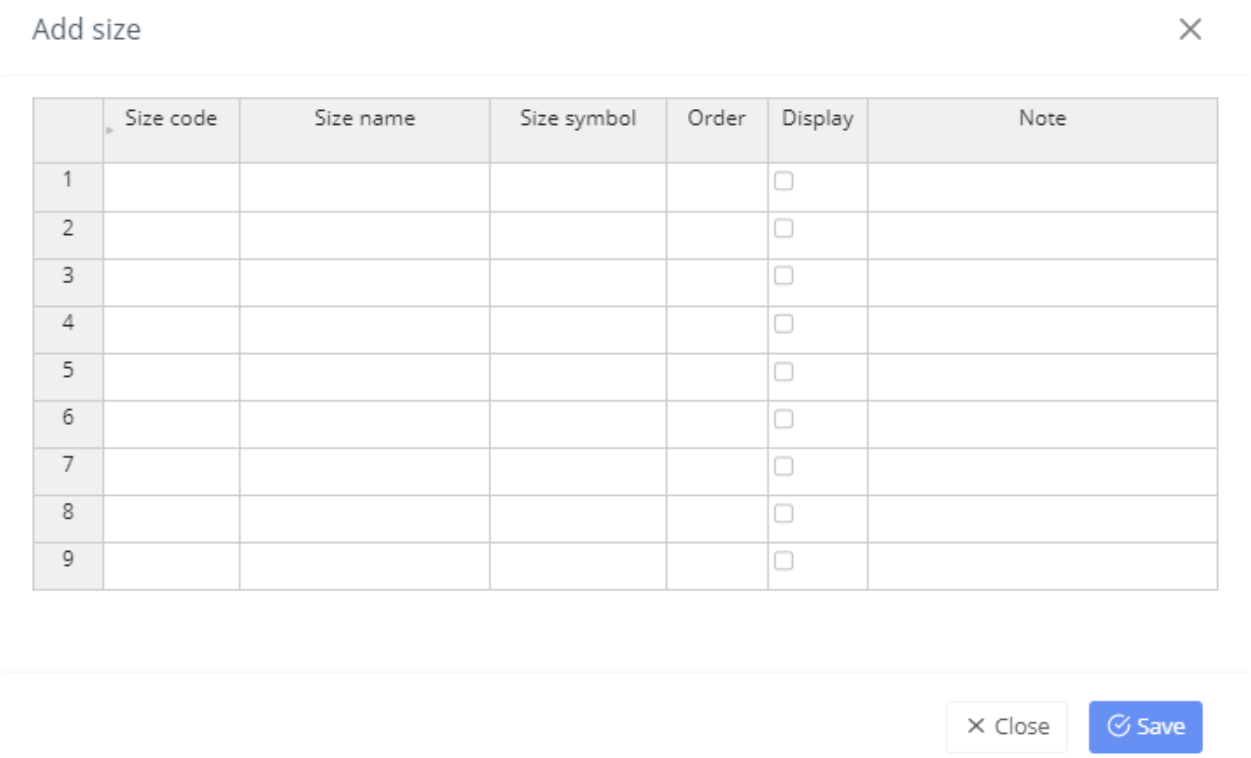
1.7.1. Add size

Step 1. Select menu settings -> select menu sizes

Step 2. Click the add size button



Step 3. Enter valid data in the columns. Then select save to save the operation you just made or select close to cancel the operation and return to the previous screen

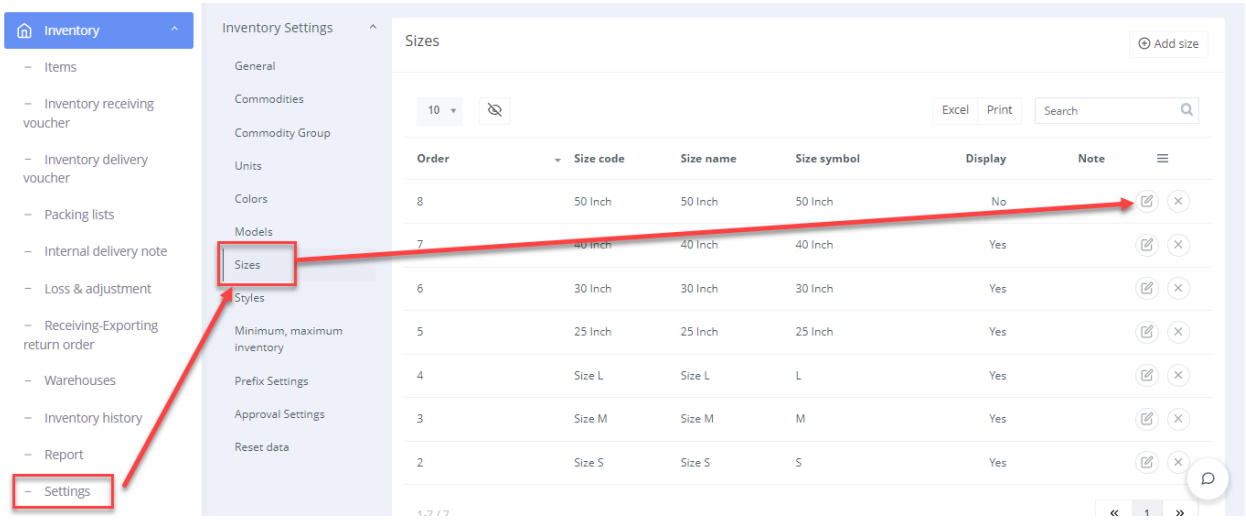


*explanation:

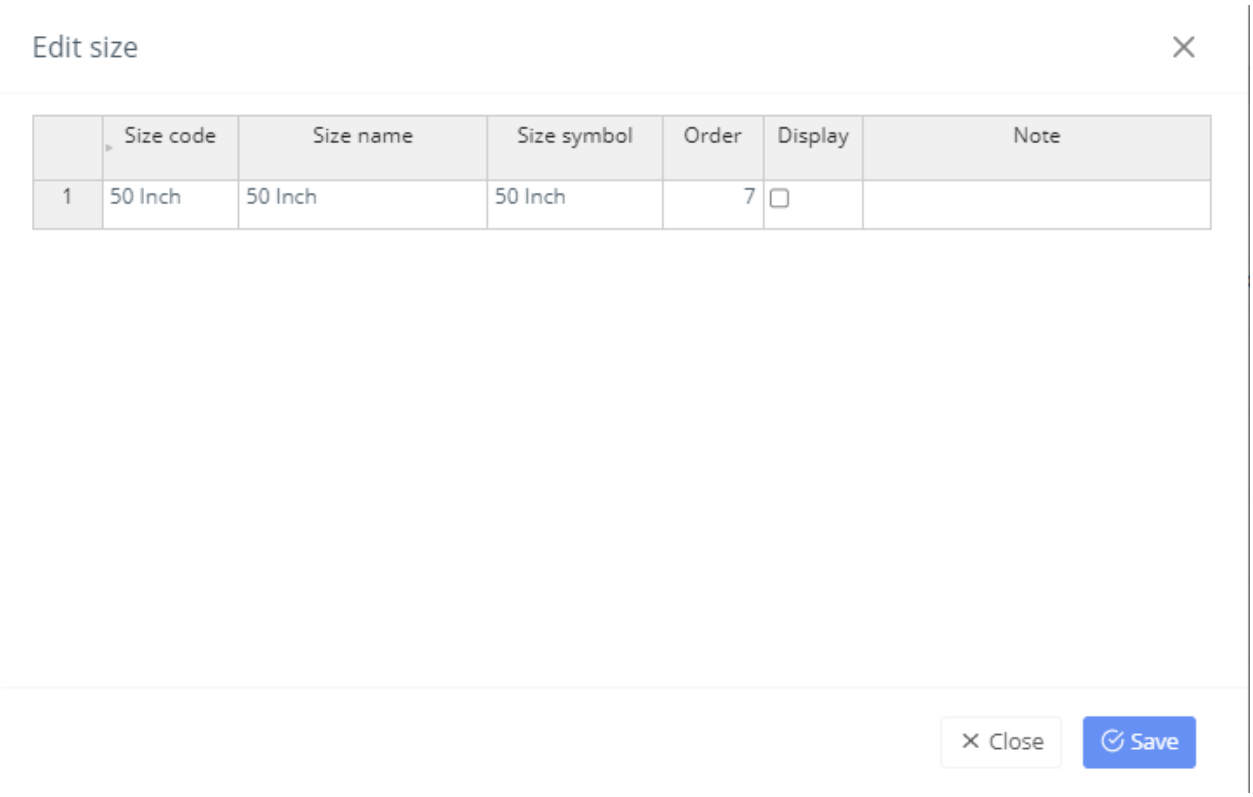
- Size code field to enter the code for size
- Size name field to enter size name
- Size symbol field to enter size symbol
- Order field to enter the order in which this size is displayed in size combobox. Sizes with smaller orders will be displayed at the top of the size list in the combobox size
- Display field if the checkbox is checked, this size will be displayed in the combobox size
- The note field is used to enter notes (if any).

1.7.2. Edit the size

Step 1. Select settings -> select the sizes menu-> select the edit function corresponding to the data line to be edited

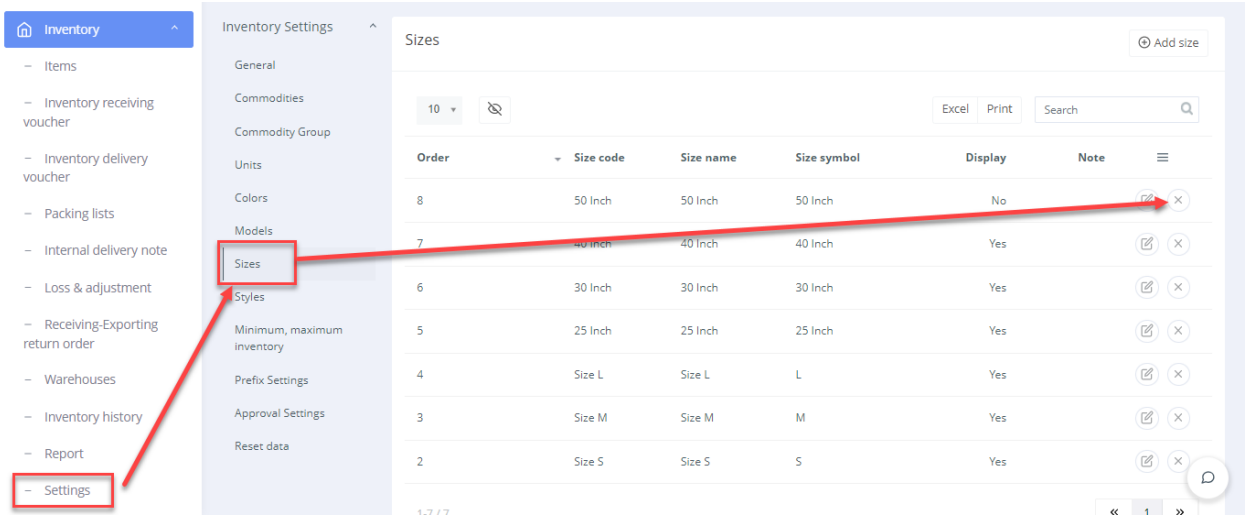


Step 2. The system will display the corresponding edit data screen -> proceed to enter the data needed to edit -> select submit to save the action you just performed or select close to cancel the operation and return to the main screen



1.4.3. Delete size

➢ Select settings -> select sizes menu-> select delete function corresponding to the data line to be deleted.



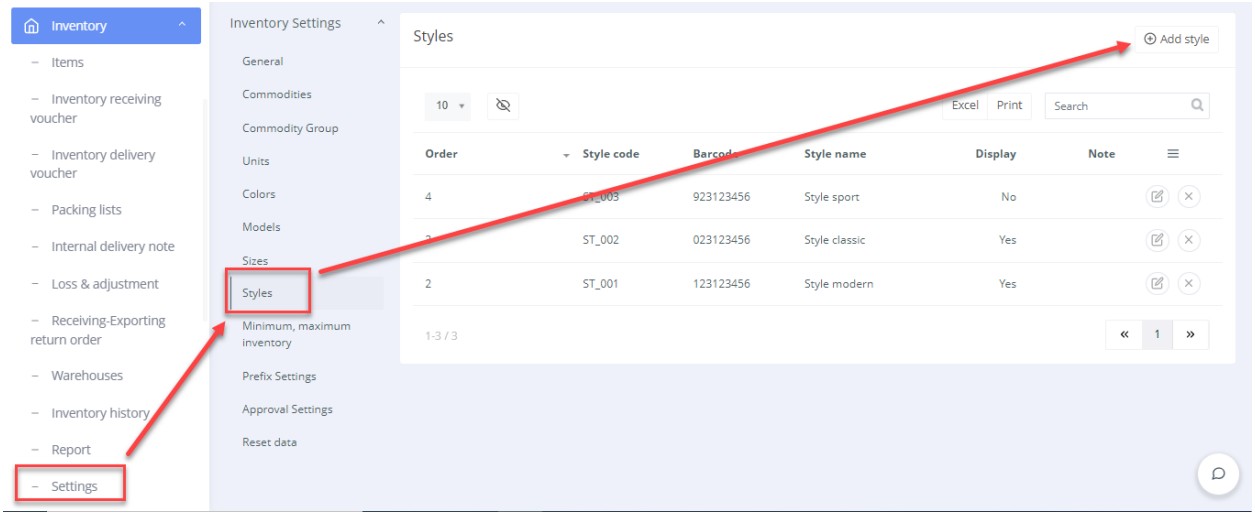
1.8.Styles

The data set used in the item creation screen

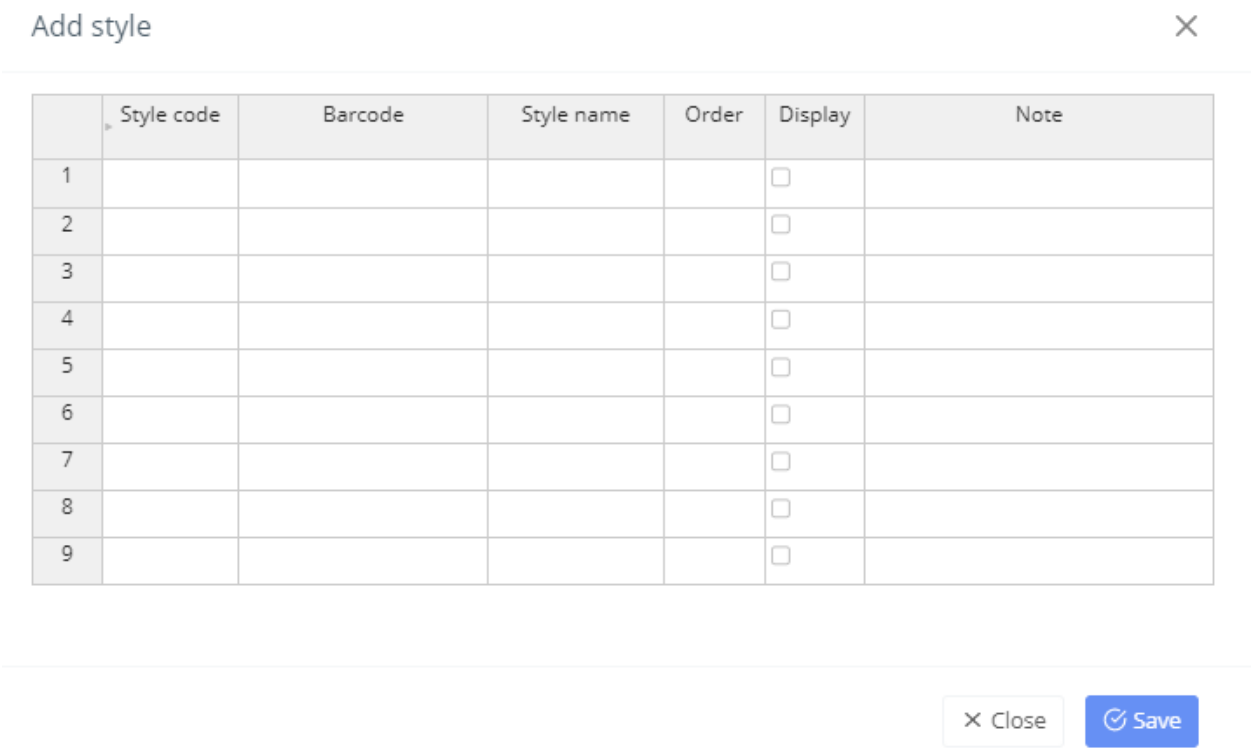
1.8.1. Add style

Step 1. Select menu settings -> select menu styles

Step 2. Click the add style button



Step 3. Enter valid data in the columns. Then select save to save the action just done or select close to canceling the operation and return to the previous screen

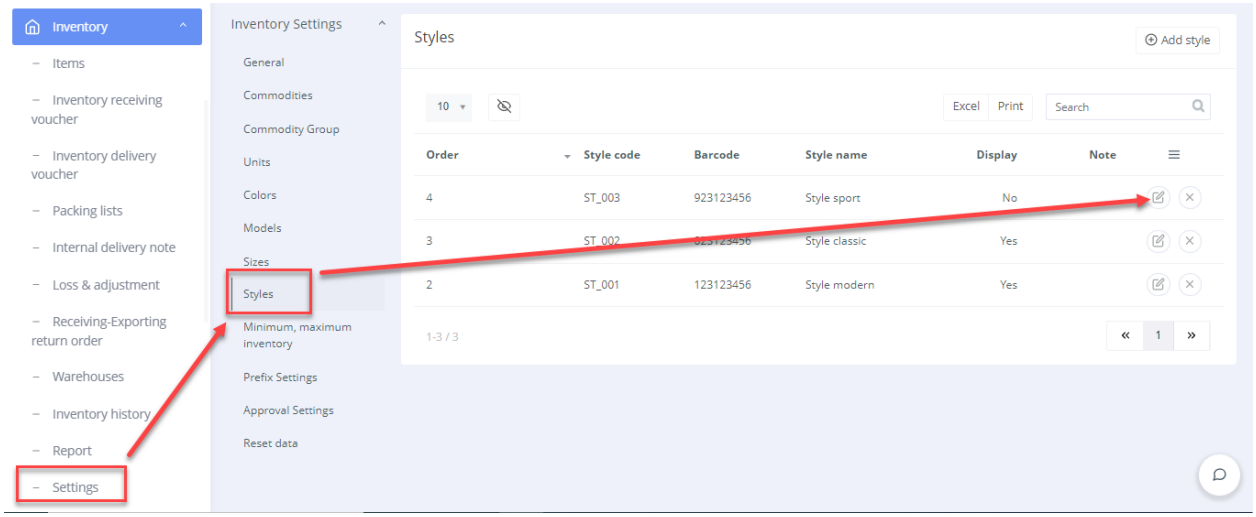


*explanation:

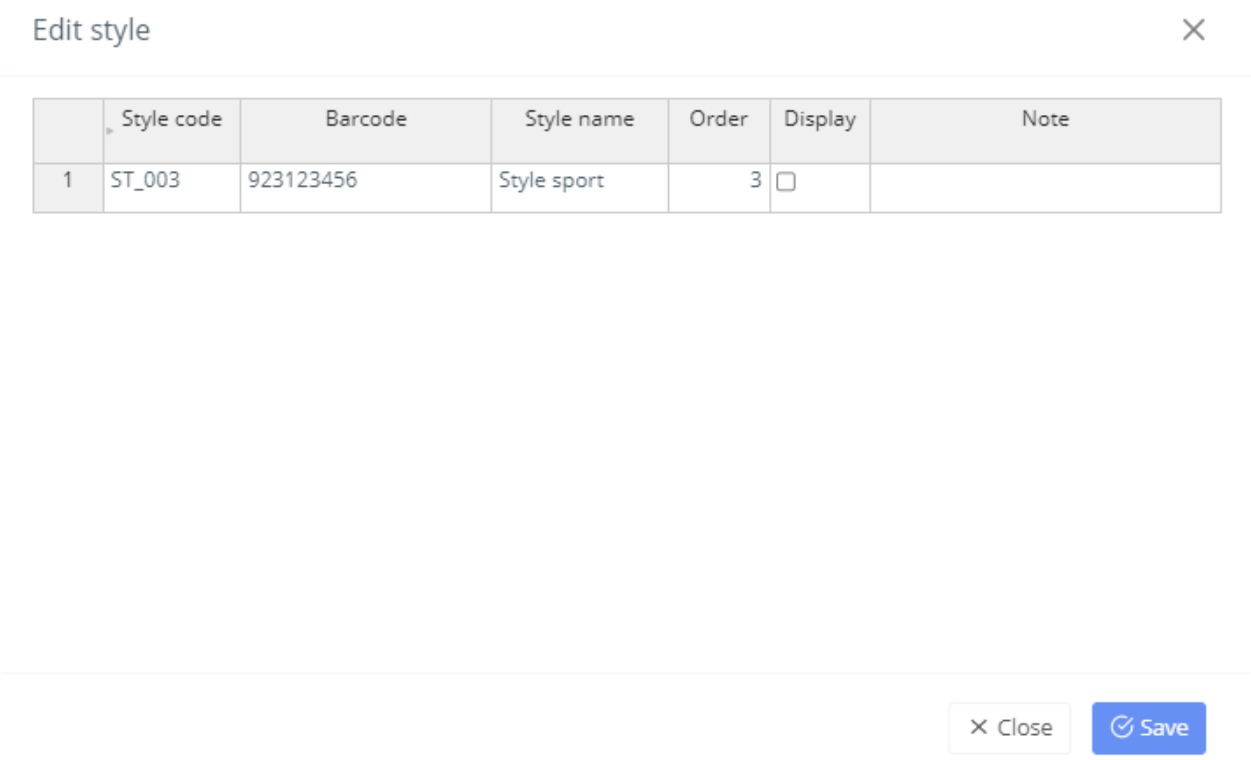
- Style code field to enter the code for the style
- Barcode
- Field style name field to enter the name of the style
- Order field to enter the order in which this style is displayed in the style combobox. Styles with smaller orders will display at the top of the style list in the combobox style
- Display field if the checkbox is checked, this style will display in the combobox style
- Note field used to enter notes (if any).

1.8.2. Edit style

Step 1. Select settings -> select styles menu -> select the edit function corresponding to the data line to be edited

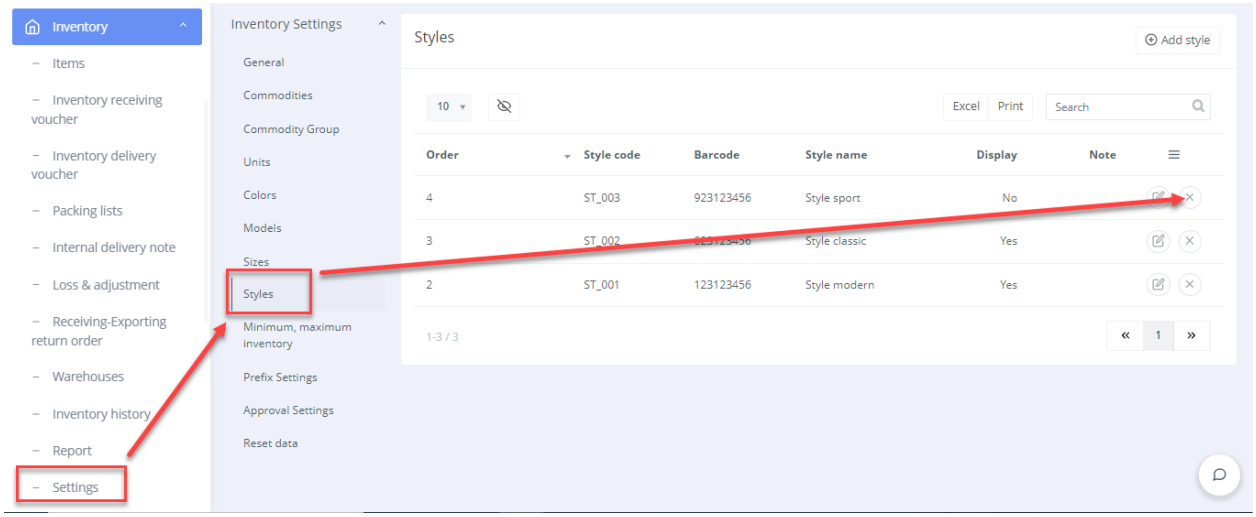


Step 2. The system will display the corresponding edit data screen -> proceed to enter the data needed to edit -> select submit to save the action just done or select close to canceling the operation and return to the main screen



1.8.3. Delete style

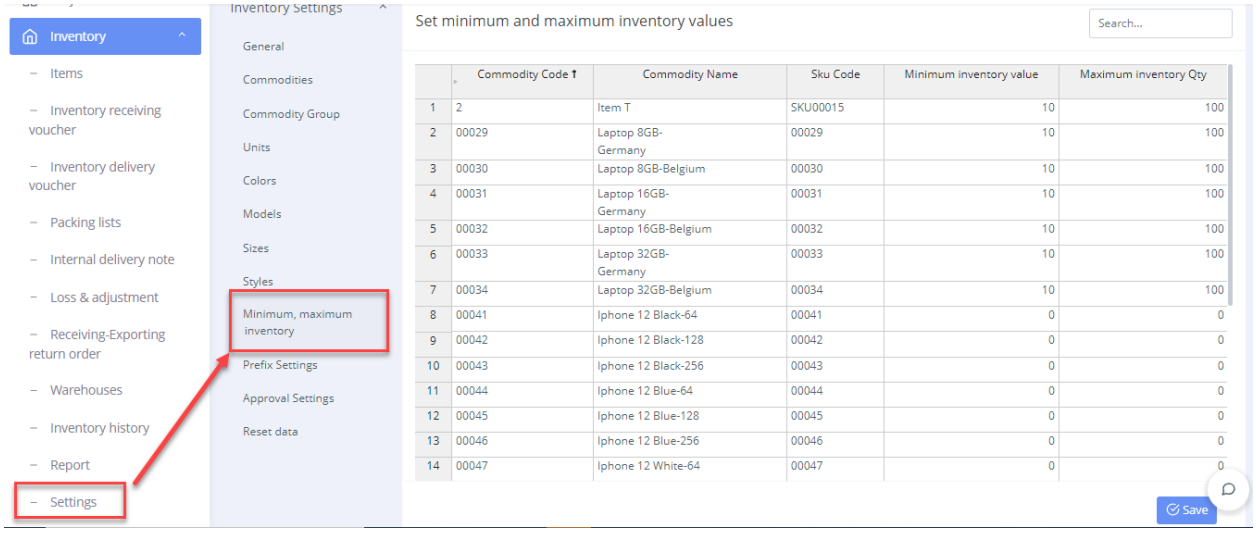
➢ Select settings -> select menu styles-> select delete function corresponding to the data line to be deleted



1.9.Minimum, maximum inventory

Used to set the minimum and maximum inventory value of each item in stock.

The table below shows a list of all items currently in the system.



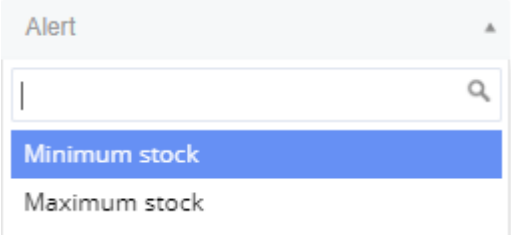
➢ Enter the minimum and maximum inventory value of each item, respectively, in the column minimum inventory value and maximum inventory qty-> then select save to save the action you just performed
*explanation:

Field commodity code and commodity name, and SKU code will get the data from the items screen.

⇒ minimum inventory value and maximum inventory qty will be displayed in the minimum stock and maximum stock columns in the item management screen.

Minimum inventory value: used to filter products with inventory count equal to or less than minimum stock quantity (according to minimum stock quantity in the item menu) and display inventory alerts on the manage item screen (red for items with a minimum inventory count)

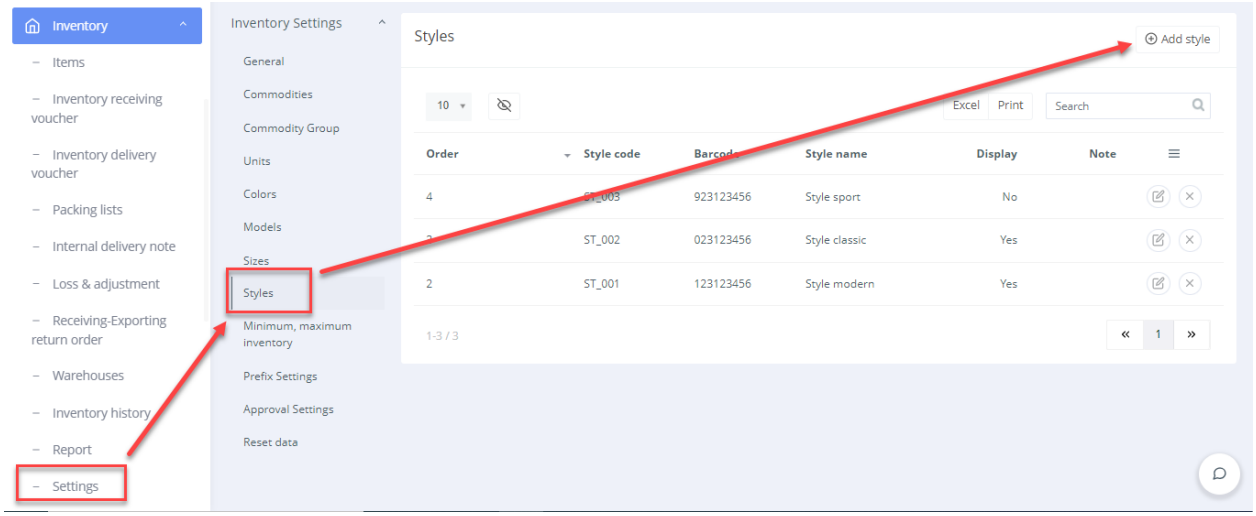
Maximum inventory: used to filter products with an inventory count equal to or more than the item quantity maximum inventory (according to maximum inventory in the item menu)



1.10.Prefix settings

Used to update the prefix configuration for the inventory received the note, inventory delivery note, internal delivery note, packing list, receiving-exporting return screens order, SKU

Step 1. Select the settings menu -> select the prefix settings menu



Step 2. Enter valid data in the fields. Then select save to save the action you just made

*explanation:

- The inventory received number prefix field is used to enter the prefix displayed in the delivery docket number field in the warehouse entry
- The field next inventory received number: set this field to 1 if you want to start from scratch, and it will automatically increment by one once an inventory is generated.
- The inventory delivery number prefix field is used to enter the prefix shown in the inventory delivery voucher code field in the delivery slip
- Next inventory delivery number field: set this field to 1 if you want to start from the beginning, and it will automatically increase by 1 unit later when a release note is created.
- The internal delivery number prefix field is used to enter the prefix displayed in the internal delivery note number field in the internal delivery note
- Next internal delivery number field: set this field to 1 if you want to start from the beginning, and it will automatically increase by one position after an internal transfer slip is created.
- The packing list number prefix field is used to enter the prefix shown in the packing list number field in the packing slip
- Next packing list number field: set this field to 1 if you want to start from scratch, and it will automatically increase by 1 unit after a packing slip is generated.
- Receipt return order prefix field: used to enter the default prefix that will be displayed in the order return number field in the return entry form
- Next receipt return order field: set this field to 1 if you want to start from scratch, and it will automatically increment by 1 unit after a pay slip is generated.
- Delivery return purchasing goods prefix field: used to enter the default prefix that will appear in the order return number field in the return slip
- Next delivery return purchasing goods: set this field to 1 if you want to start from scratch, and it will automatically increments by 1 unit after a pay slip is generated.
- SKU prefix field: is automatically added before the SKU code after the item is saved successfully.

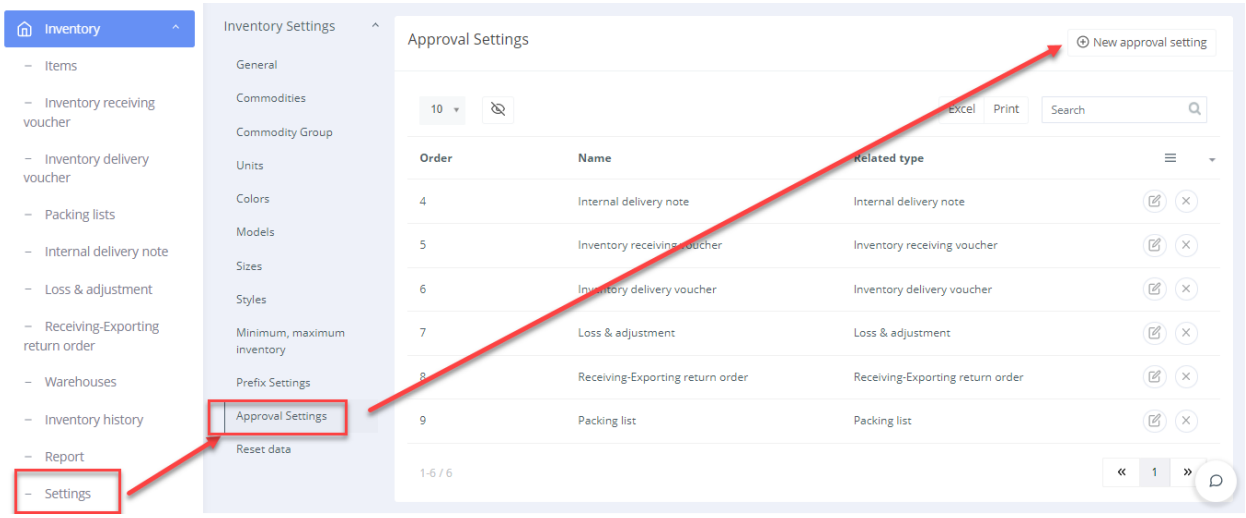
1.11. Approval settings

The approval settings screen is used to create and manage the browsing process of the inventory receiving voucher, inventory delivery voucher, packing list, internal delivery note, loss & adjustment, order return function

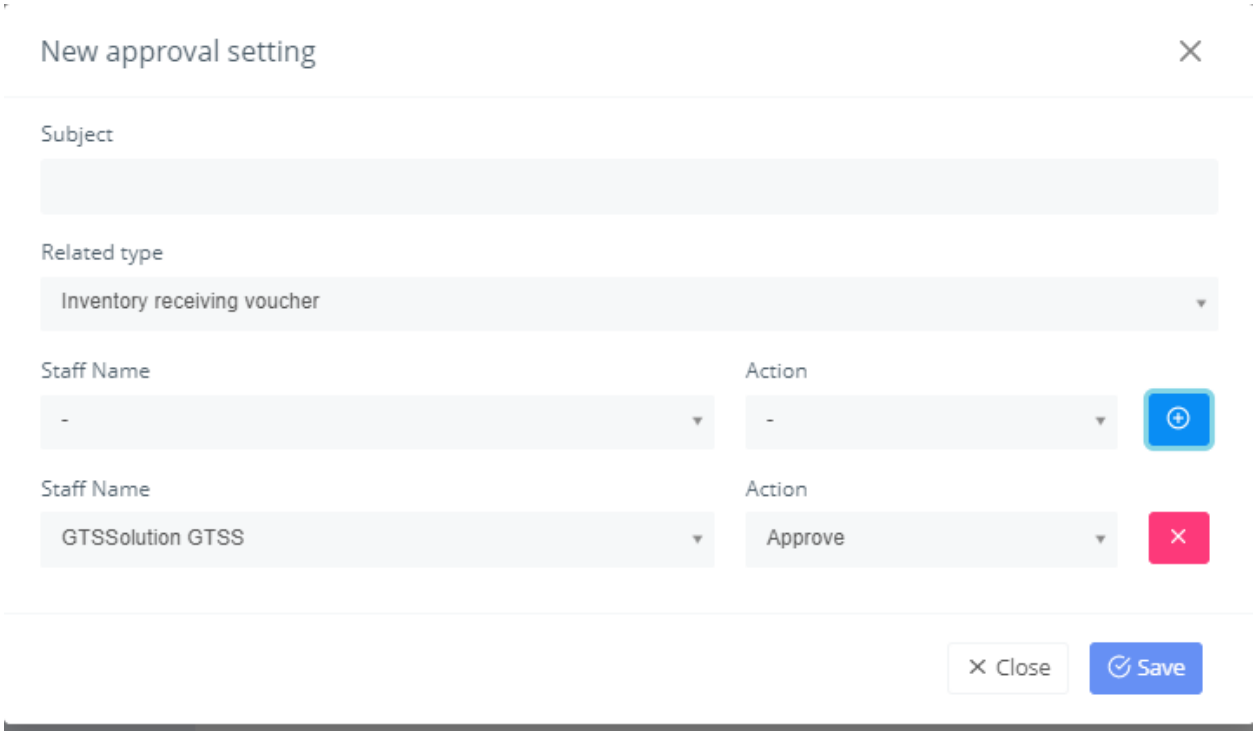
Note: the approval flow of the created vouchers was previously unaffected by the approval setting update.

1.11.1. Add a new process

- Step 1: select menu settings -> select approval settings -> select new approval setting



- Step 2: the system will display new approval settings screen -> enter required data -> then click save to save, repeat the action, or select close to close the screen and cancel the action you just performed.

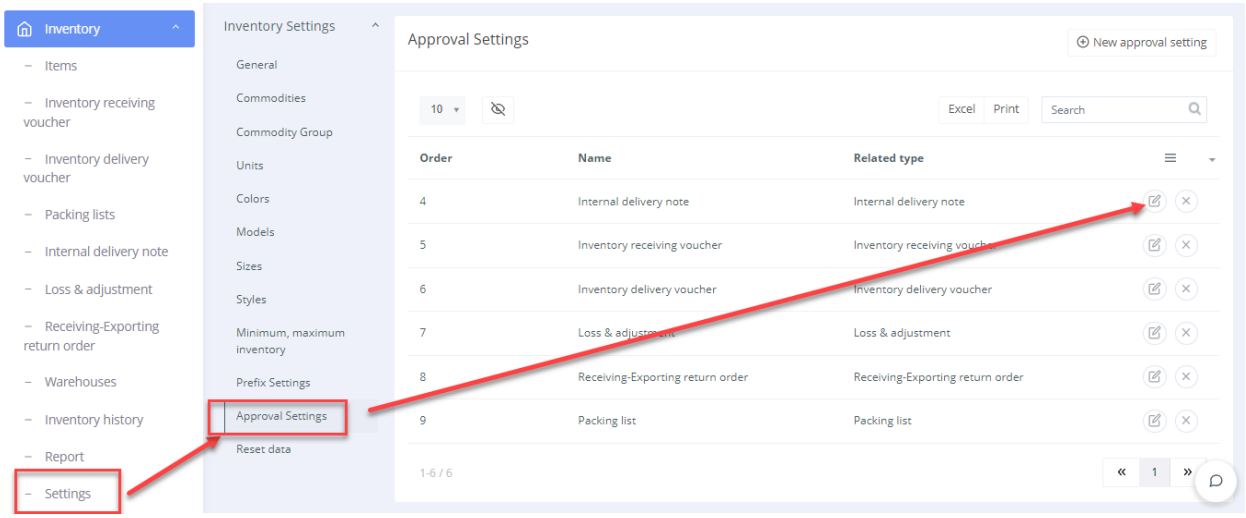


*Explanation:

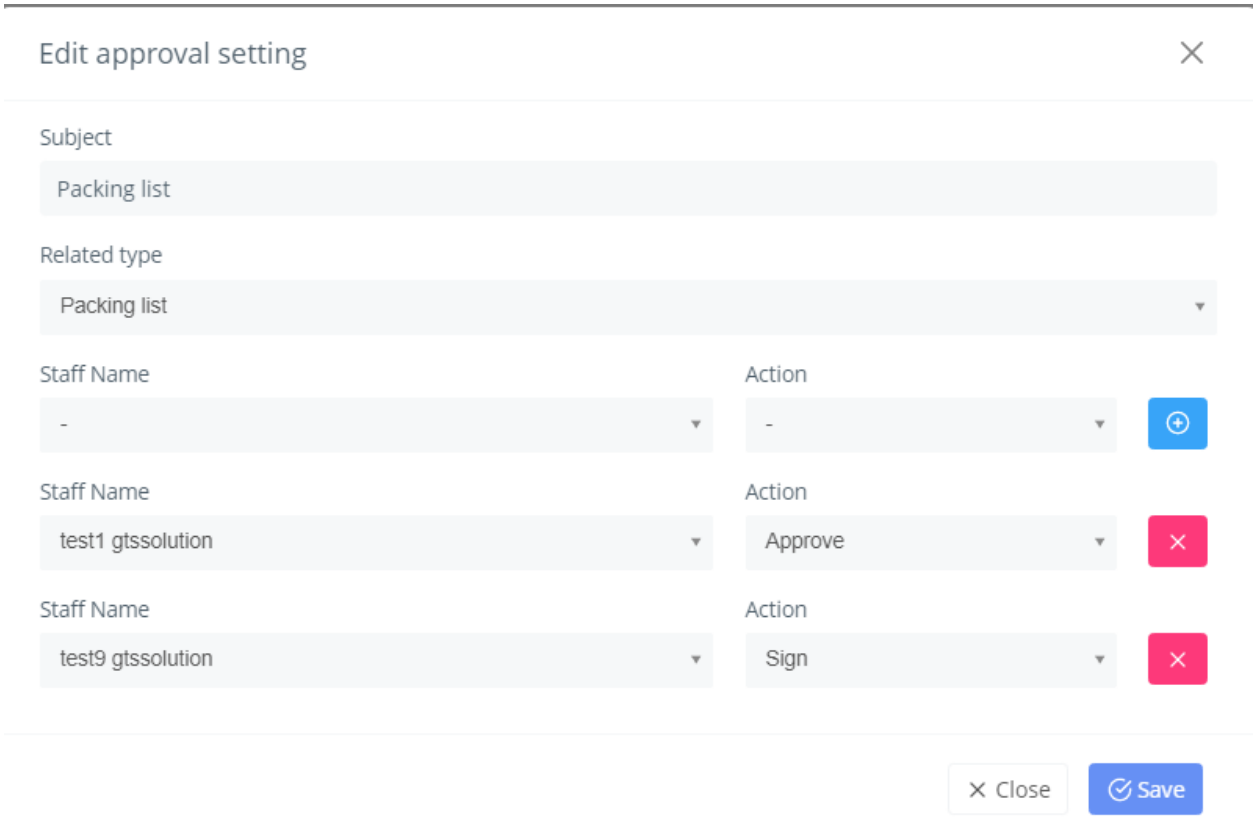
- The subject field is used to enter the name of the process
- The related field is used to select what function the process is for: the process is for warehousing or ex-warehousing, internal transfers, packing or stock adjustments, or returns. Customers
- Can select multiple people to approve a request, select the function to add or choose to remove approvers

1.11.2. Editing process

- Step 1: at the approval settings screen -> select the corresponding line you want to edit -> select the edit function

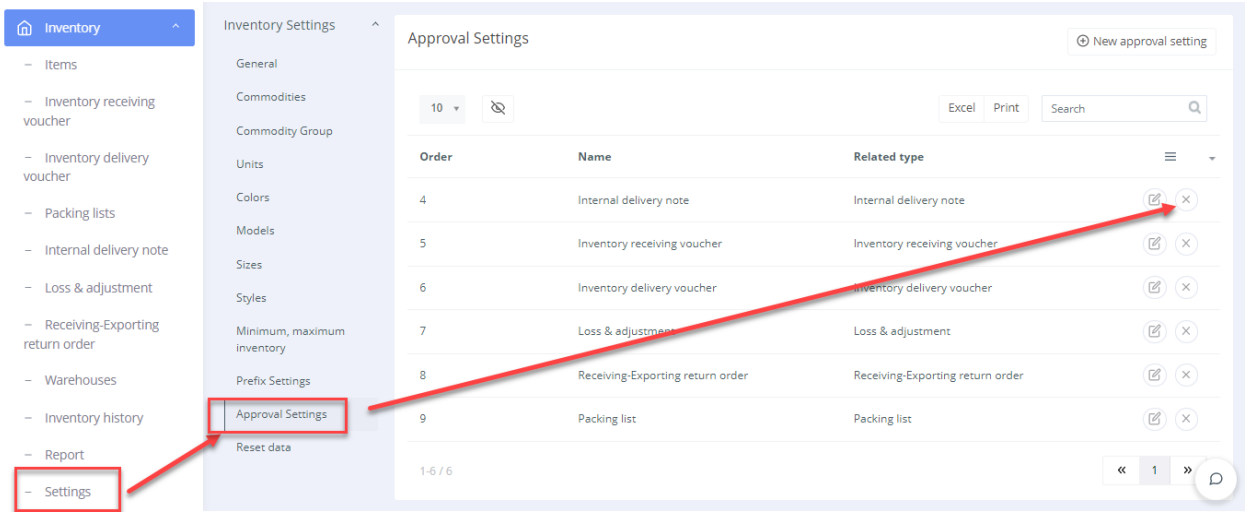


- Step 2: the system will display the corresponding edit approval settings screen -> proceed to edit the data -> select save to save the action you just made or select close to close the screen and cancel the operation.



1.11.3. Delete the process

- Step 1: at the approval settings screen -> select the corresponding line to delete -> select the function delete



1.12.Reset data

➢ Select the settings menu -> select the reset data menu -> to press the reset data button

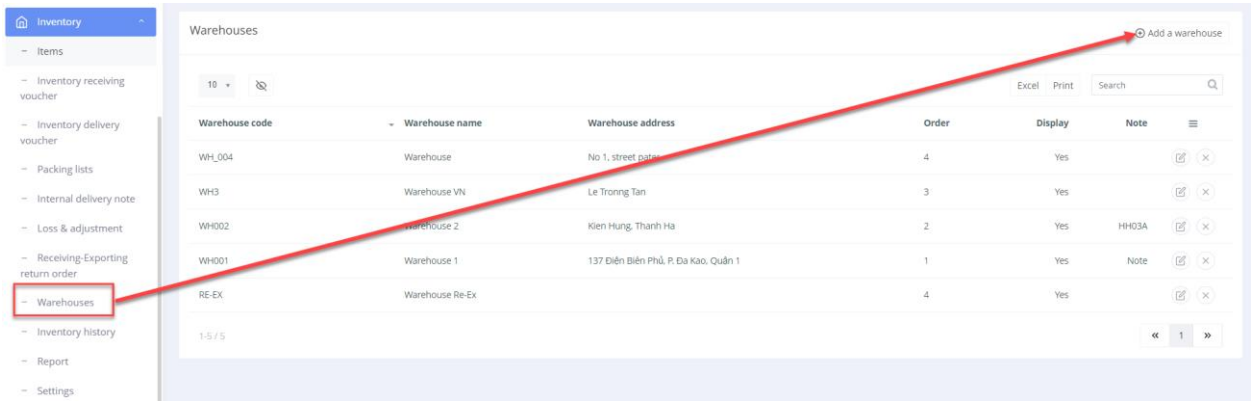
All related data: inventory receiving the voucher, inventory delivery voucher, packing list, internal delivery note, loss & adjustment, receiving-exporting return order, and inventory history will be deleted

2. Warehouses

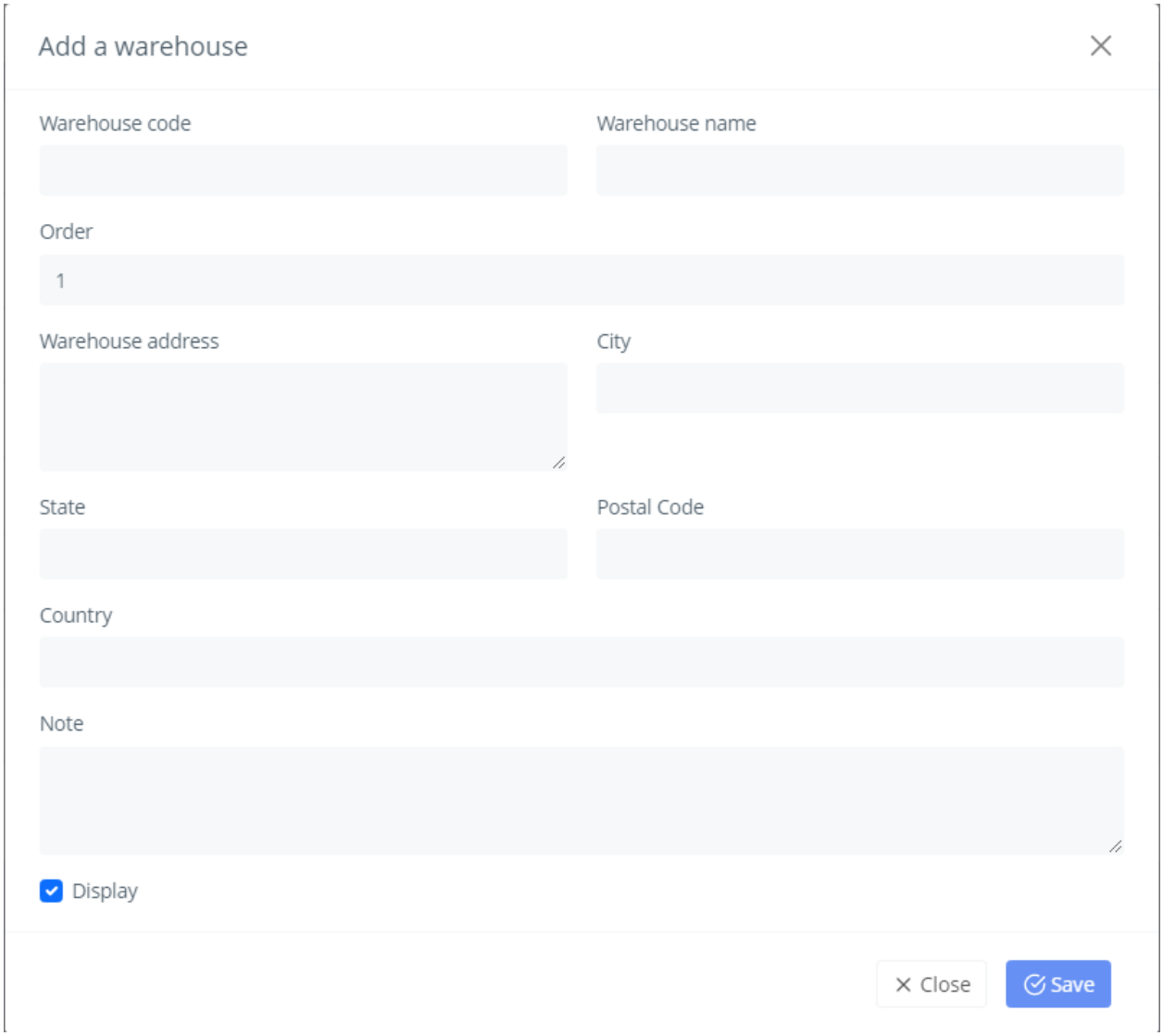
The data set in the warehouse screen is used for the inventory receiving voucher, inventory screens delivery voucher, packing list, internal delivery note, loss & adjustment, receiving-exporting return order, inventory history, report

2.1. Add a new warehouse

Step 1. Select Warehouse menu -> click add a warehouse



Step 2. Enter valid data into schools. Then select save to save the action just done or select close to canceling the operation and return to the previous screen

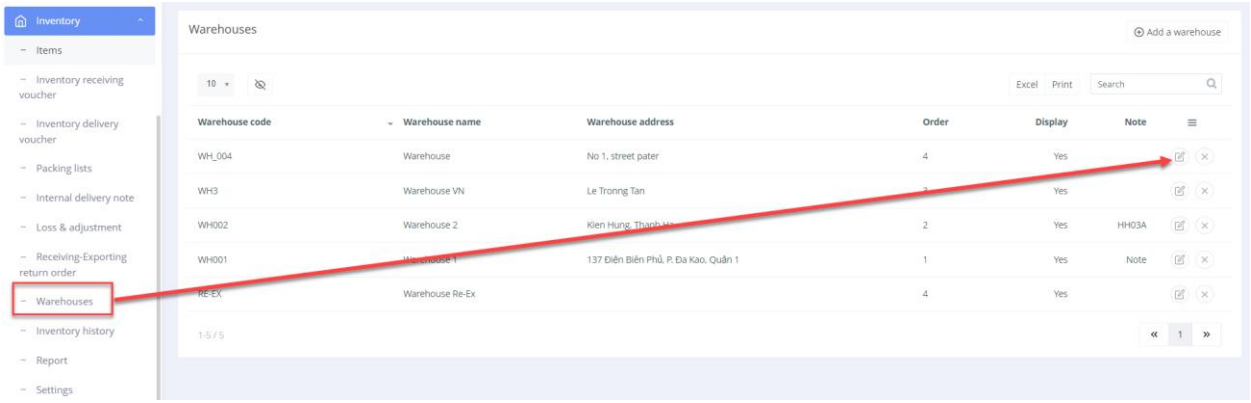


*explanation:

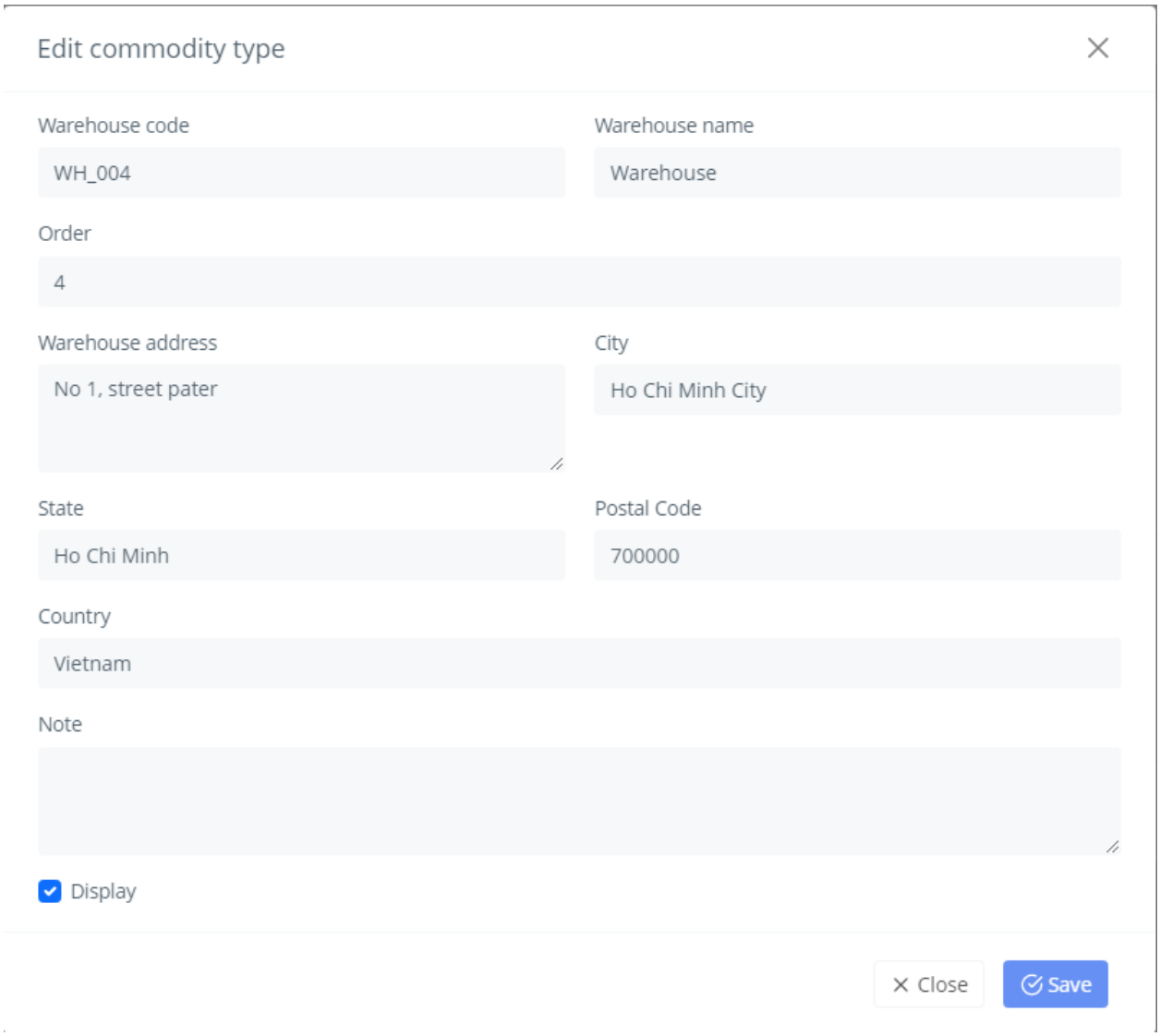
- Warehouse code field to enter the code for the warehouse
- The warehouse name field is used to enter the name of the warehouse
- Order field to enter the order in which this inventory is displayed in the warehouse combobox. Warehouses with smaller orders will display at the top of the warehouse list in the warehouse combobox.
- The warehouse address field is used to enter the warehouse address.
- The city field is used to enter the name of the city where the warehouse is located
- . Enter the name of the state where the warehouse is located
- The postal code field is used to enter the postal code
- The country field is used to enter the name of the country where the warehouse is located
- The note field is used to enter the note (if any).
- If the display field is checked, the warehouse will be displayed in combobox warehouse

2.2. Edit the warehouse

Step 1. Select the warehouses' menu -> select the edit function corresponding to the data line to be edited

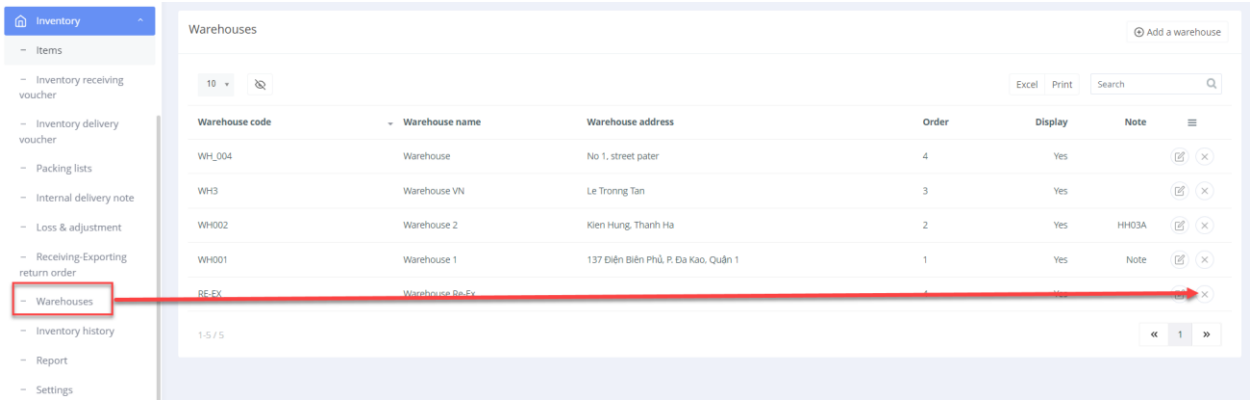


Step 2. The system will display the corresponding edit data screen -> enter the necessary data to edit -> select submit to save the action you just made or select close to cancel the operation and return to the main screen



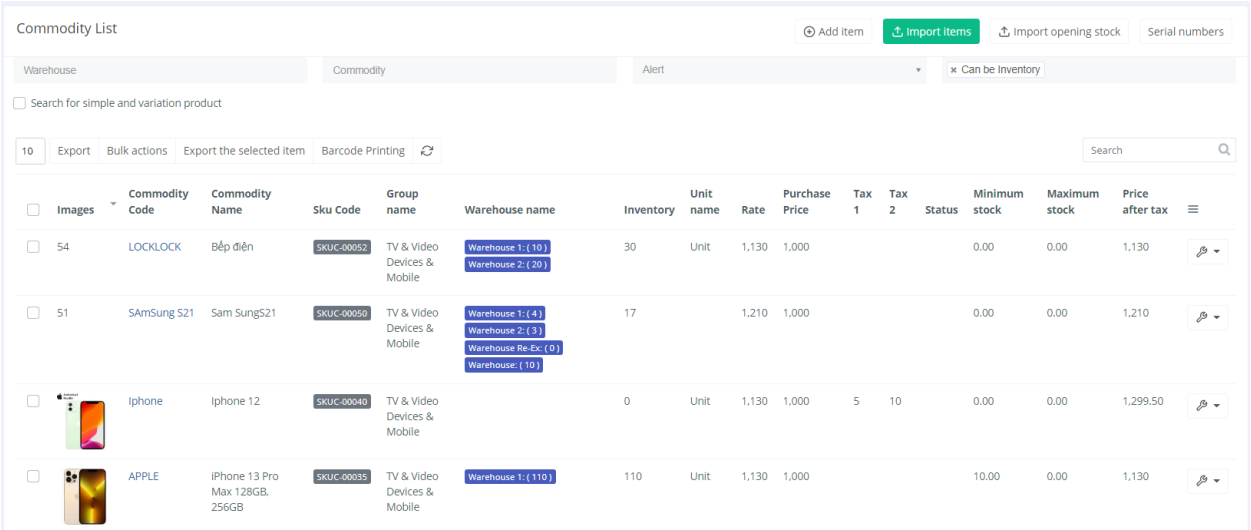
2.3. Delete the warehouse

Select the warehouses' menu -> select the delete function corresponding to the data line to be deleted



3. Items

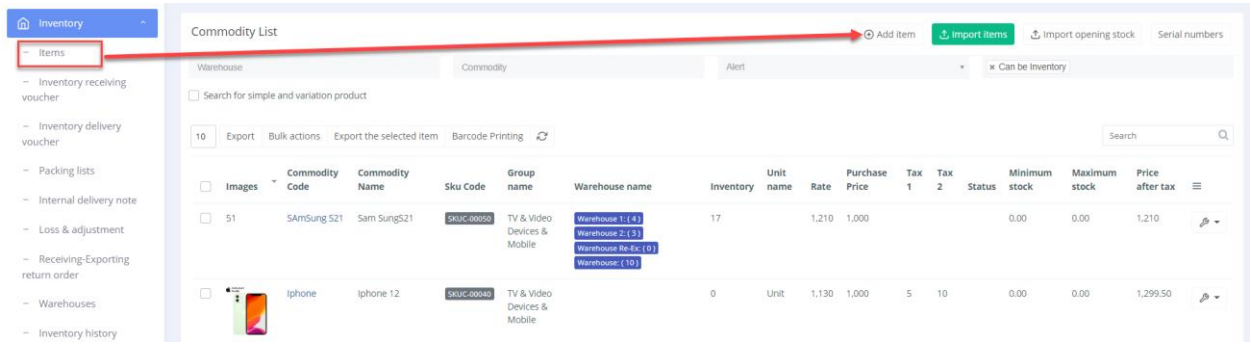
Create items using the screens inventory receiving voucher, inventory delivery voucher, packing list, internal delivery note, loss & adjustment, receiving-exporting return order; or for sales module



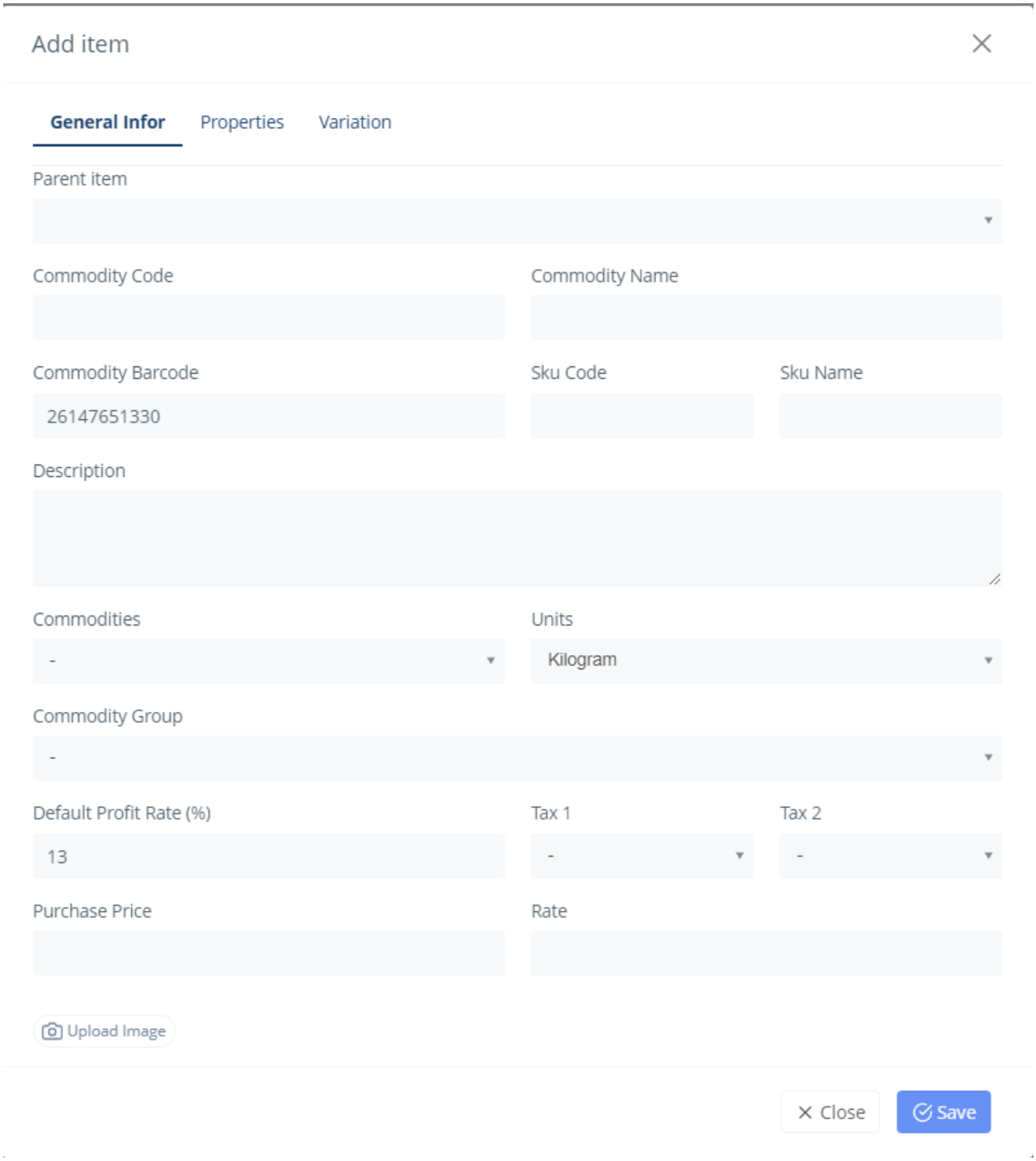
Search for simple and varied products: if this option is checked, it will display all product variations. Conversely, if not checked, the variants are hidden from the item management screen

3.1. Add new items manually

- Step 1: Select the menu items -> select the add item button



- Step 2: the system will display the add item screen -> enter the necessary data -> then click save to save the operation or select close to close the screen and cancel the action just done.



*explanation:

★ Tab general info:

○ The parent item field displays previously created items in the items screen of the inventory module. If the parent item is selected, the fields commodity name, SKU name, commodities, unit, purchase price, rate, and tax are automatically filled in according to the data of the parent item.

○ The commodity code field is used to enter the item's code

○ The commodity name field is used to enter the item name

○ The commodity barcode field is used to enter the item's code

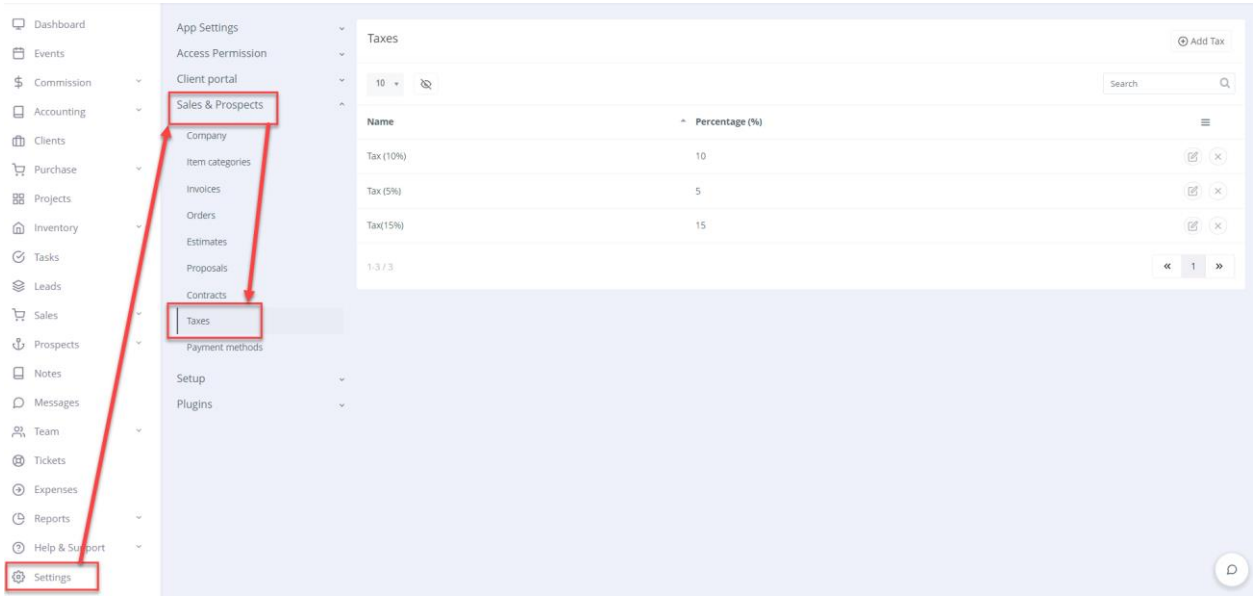
○ The SKU code field is used to enter the sku's code in case the user does not enter the SKU code; after saving the item, the SKU code will automatically generate.

○ The SKU name field is used to enter the name of the SKU. The description field is used to enter a short description of the item

○ The commodities field displays a list of commodity types with display status on the commodities setting screen

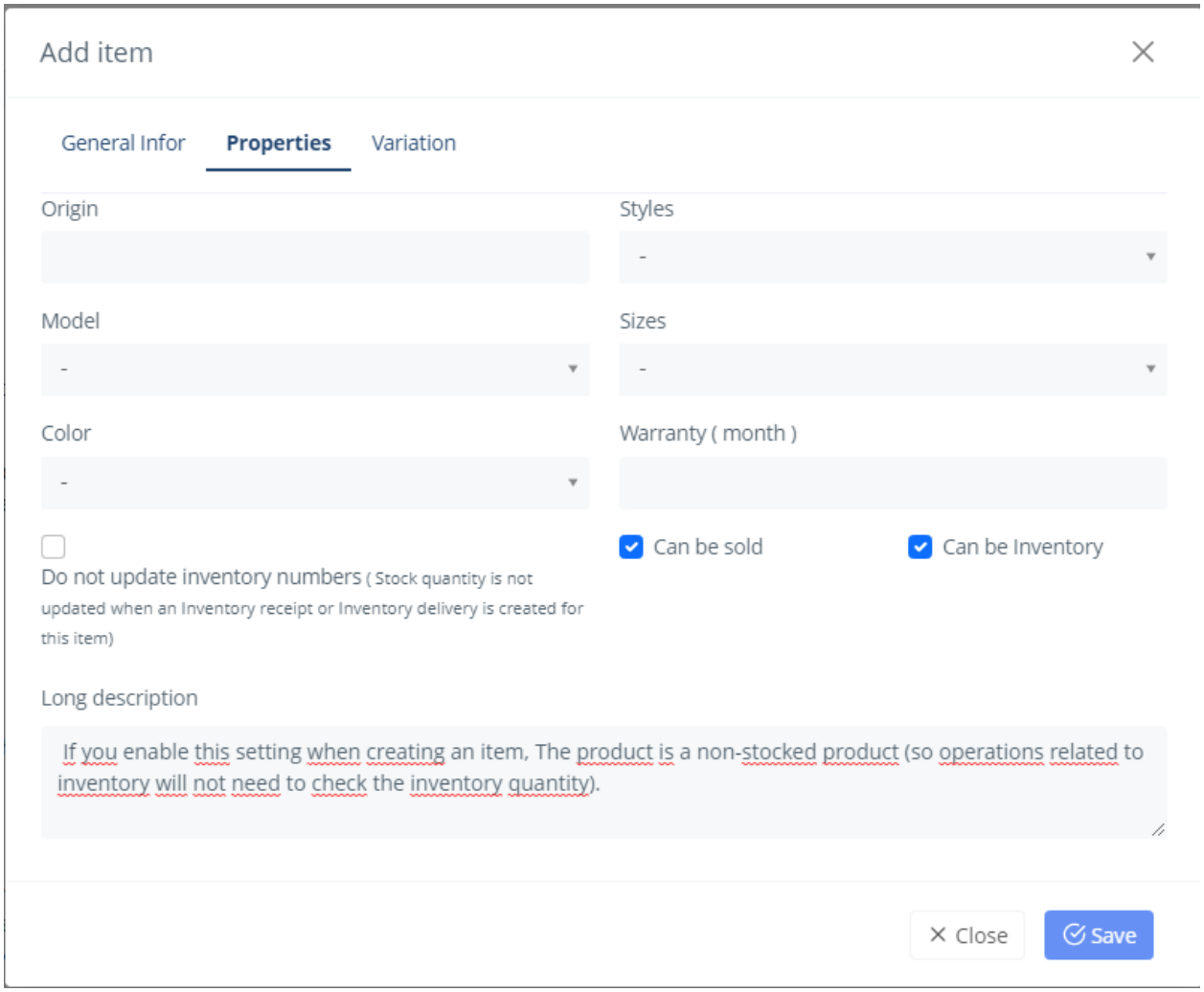
○ The units field displays a list of units with display status on the units setting screen

- The commodity group field displays the list commodity group has display status in the commodity group setting screen
- The default profit rate (%) field automatically fills in the preconfigured value in the general setting screen.
- The tax1 and tax two fields get data from the taxes screen of the core.



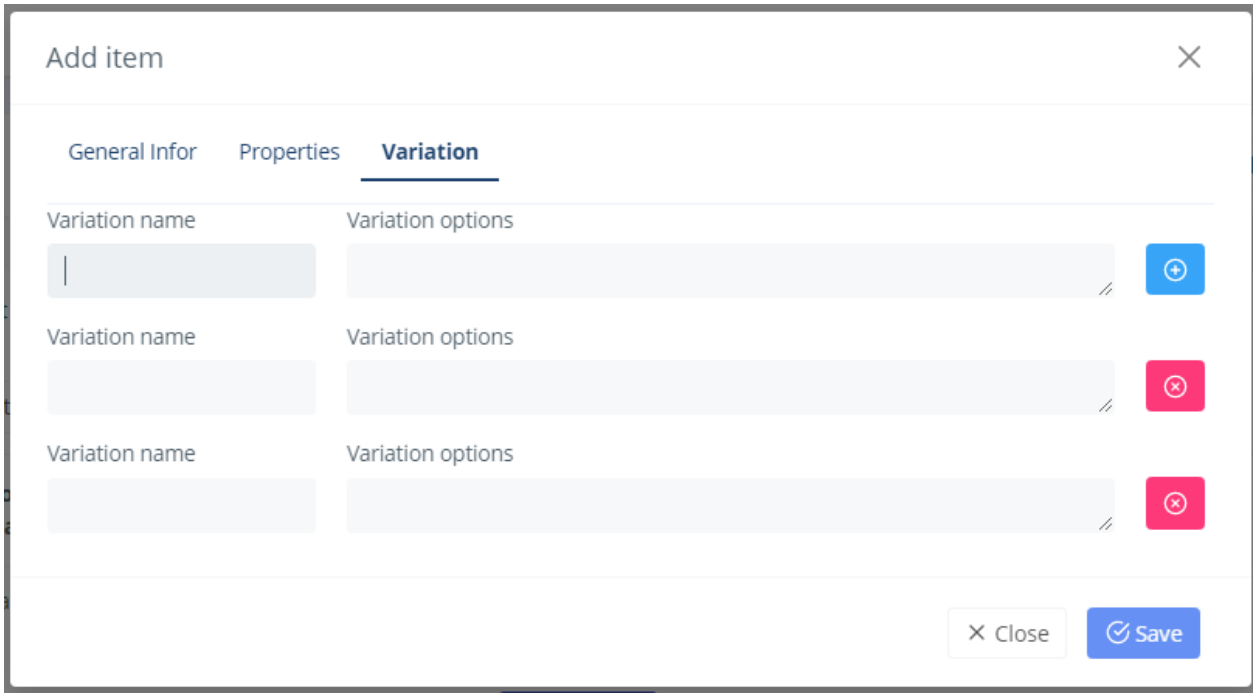
- The purchase price field is used to enter the purchase price of the item
- The rate field is used to enter the selling price of the item. In case the user enters the default profit rate (%) and purchase price first, the rate field will be automatically calculated according to the formula selected in general settings
- Upload the image used to upload the item's image. Allows adding multiple images at the same time. The first uploaded image will be selected as the item's representative image. In the item details screen, all the added shapes will be displayed at the top right

★ Tab Properties



- The origin field is used to enter the production origin of the item
- The styles field displays a list of styles with display status on the styles setting screen
- The model field displays a list of models with display status on the models setting screen
- The size field displays a size list with display status on the sizes setting screen
- The color field displays a list of colors with display status on the colors setting screen
- The warranty field (month) is used to enter the number of warranty months
- The field does not update inventory numbers (stock quantity is not updated when an inventory receipt or inventory delivery is created for this item): if you enable this setting when creating an item, the item is a product. Products are not in stock (so operations related to inventory will not need to check the inventory count).
- Can be sold field: if you turn on this setting when creating an item, then this item will be used for sales-related modules
- Can be inventory field: if you turn on this setting when creating an item, this item will be used for coupons in the inventory module.
- Long description field: used to enter a long description of the item

★ The variation tab is used to create variations of items



- Variation name field: enter the variant name
- Variation options field: enter variant options

- Multiple variations of the item can be added by selecting the function to add or choose to delete the variation

➔ For example, create a 2020 m1 MacBook air 13 product with variants

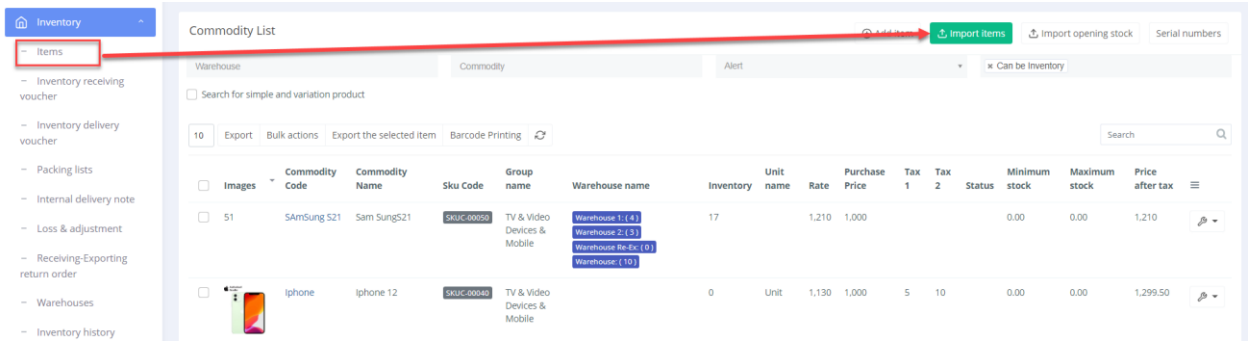
-variation name: memory area

-variation options: 256GB, 512GB

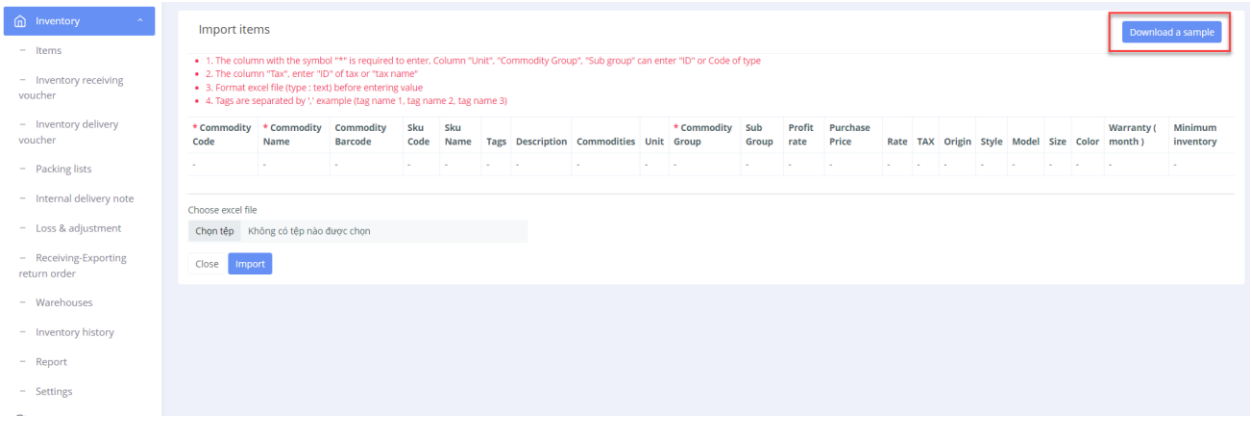
=> we get the MacBook air 13 2020 m1 with 2 variants : MacBook air 13 2020 m1 256Gb, MacBook air 13 2020 m1 512Gb

3.2. Import item

- Step 1: Select the items menu -> select the import items button



- Step 2: you should download the sample file by clicking on the download a sample button



Step 3. Enter the contents for the newly downloaded file, and then tap the select file button and upload it to -> press import

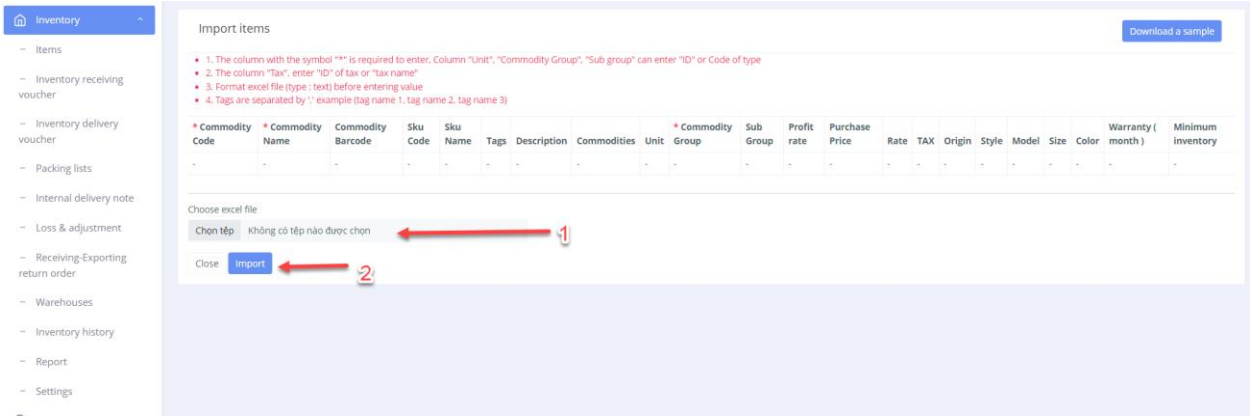
★ Considerations when entering data into the excel table:

1. The column with the symbol "*" is required to enter, column "unit", "commodity group", "subgroup" can enter "id" or code of type

2. The column "tax", enter "id" of tax or "tax name"

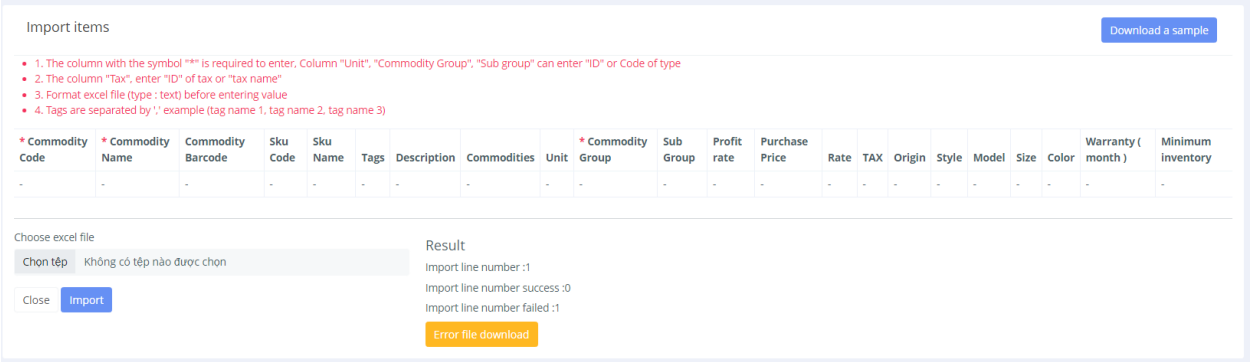
3. Format the excel file (type: text) before entering the value

4. Tags are separated by ',' example (tag name 1, tag name 2, tag name 3)



➔ Successful import results

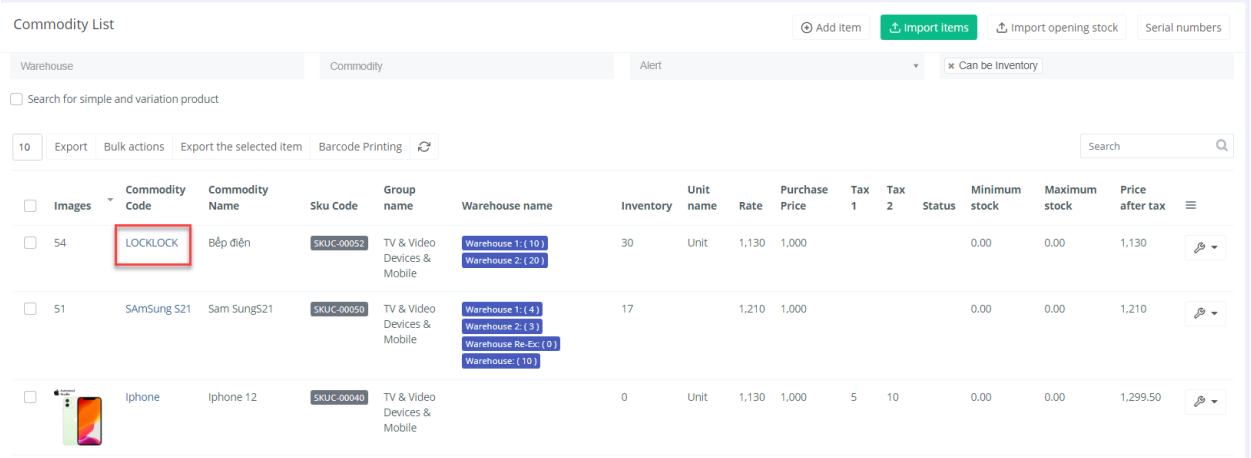
➔ Import results with error lines

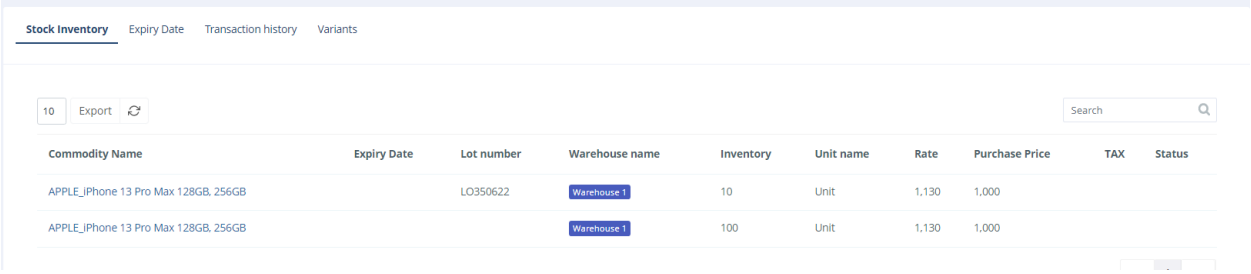


Press the error file download button to download the file and see the error details

3.3. View item details

Select the items -> screen select the corresponding line to see the details - > tap hyperlink commodity code



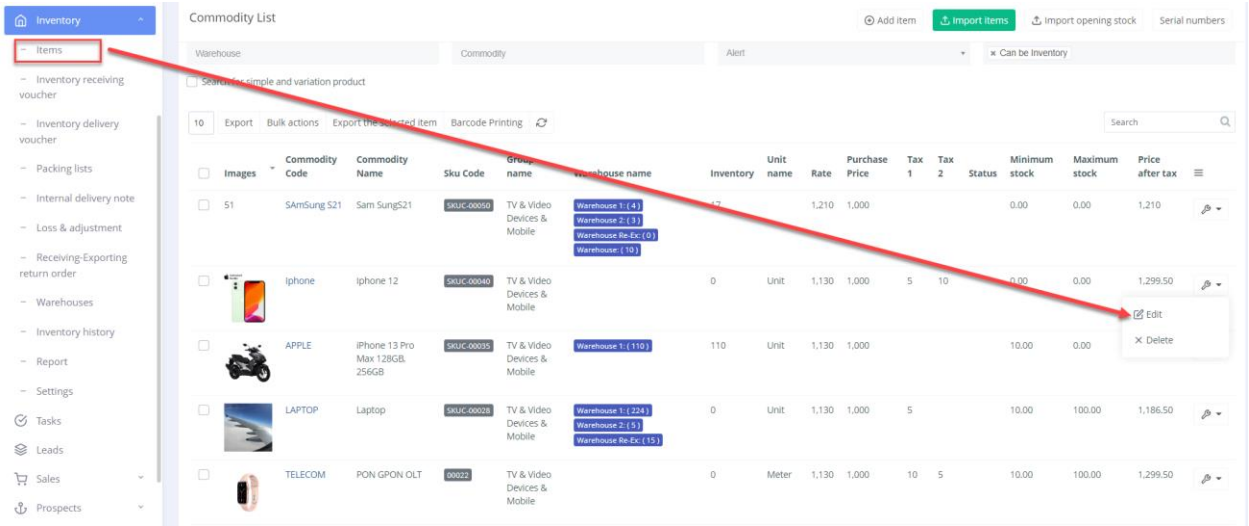


* explain the meaning of tabs

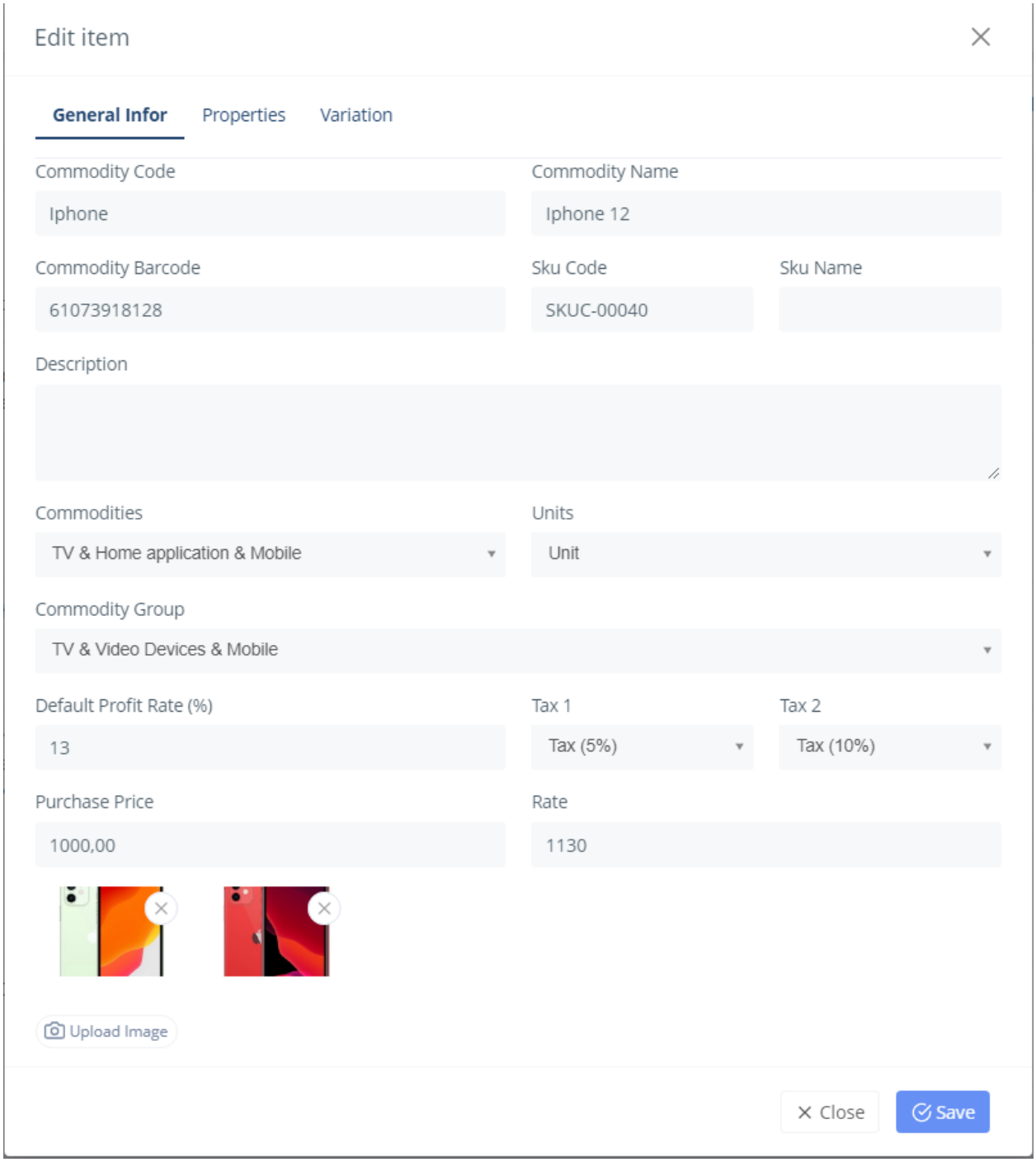
- Stock inventory tab: shows product inventory by warehouse, lot number, and expiry date.
- Expiry date tab: shows items that have expired if the time of warehousing for a product entering expiry date
- Transaction history tab: record the history of warehousing, warehousing, warehouse transfer, inventory adjustment, display of early-term inventory, and end-of-term inventory through each transaction.
- Variants tab: shows product variants

3.4. Item editing

- Step 1: at the items -> screen, select the corresponding line that wants to edit -> select edit function

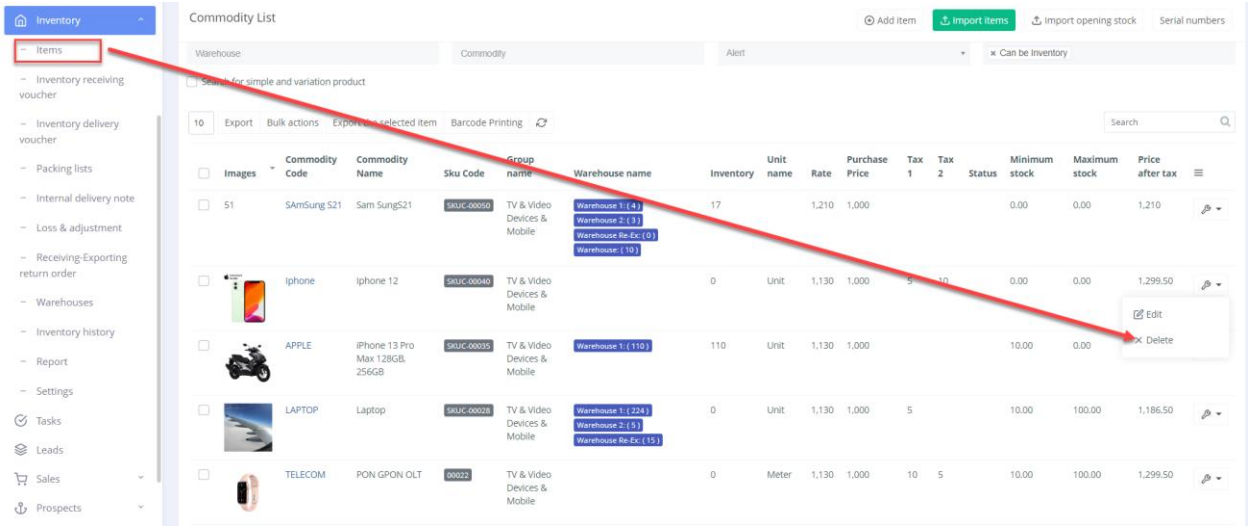


- Step 2: the system will display the corresponding edit item screen -> proceed data editing - > select save to save the operation just done or select close to close the screen and cancel the operation.



3.5. Delete items

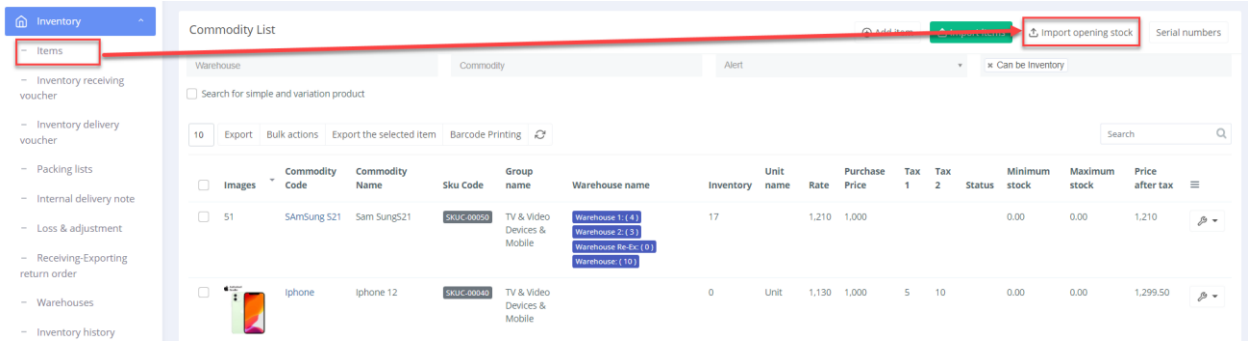
➢ At items -> select the corresponding line delete -> select delete function



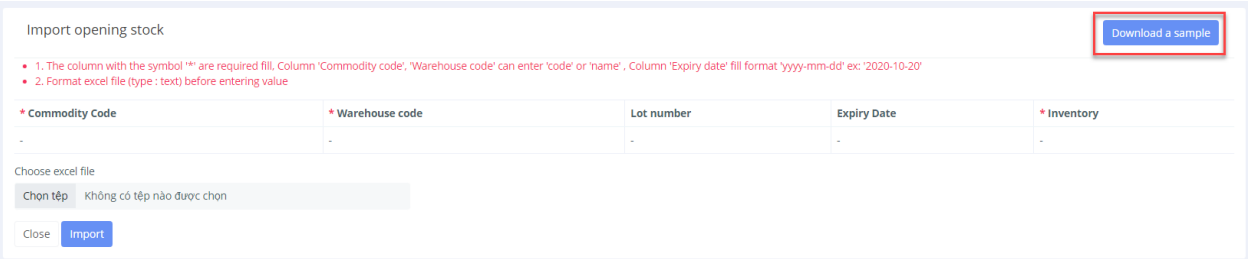
3.6. Import opening stock

Used to add inventory to items

- Step 1: Select the items menu -> select the import opening stock button



- Step 2: you should download the sample file by clicking on the download a sample button

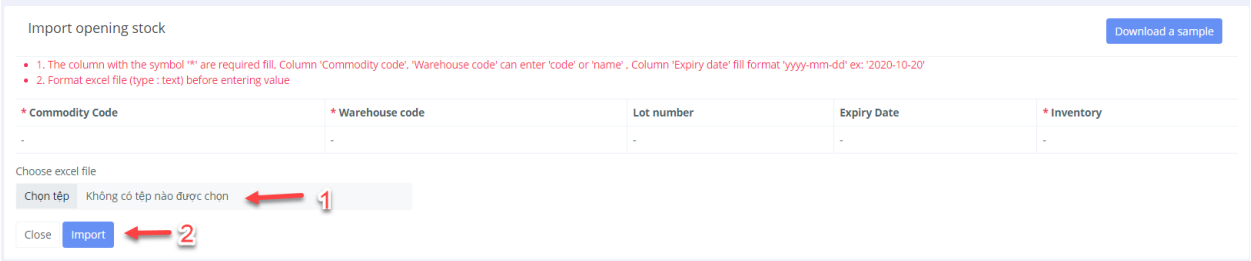


Step 3. Enter the contents for the newly downloaded file, and then tap the select file button and upload it to -> press import

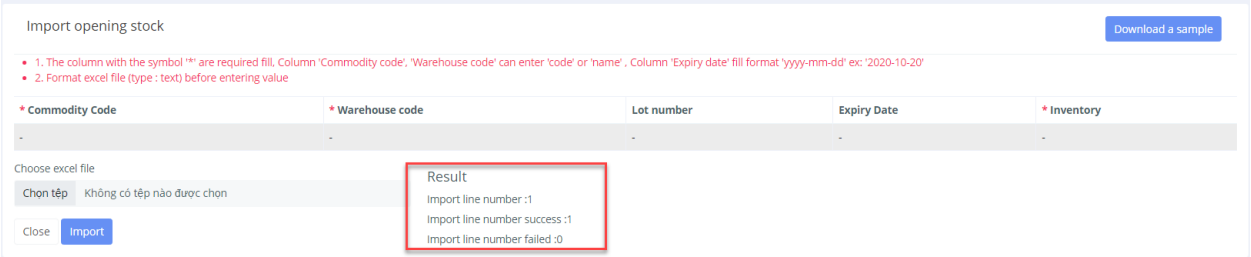
★ Considerations when entering data into the excel table:

1. The column with the symbol '*' are required fill, column 'commodity code', 'warehouse code' can enter 'code' or 'name' , column 'expiry date' fill format 'yyyy-mm-dd' ex: '2020-10-20'

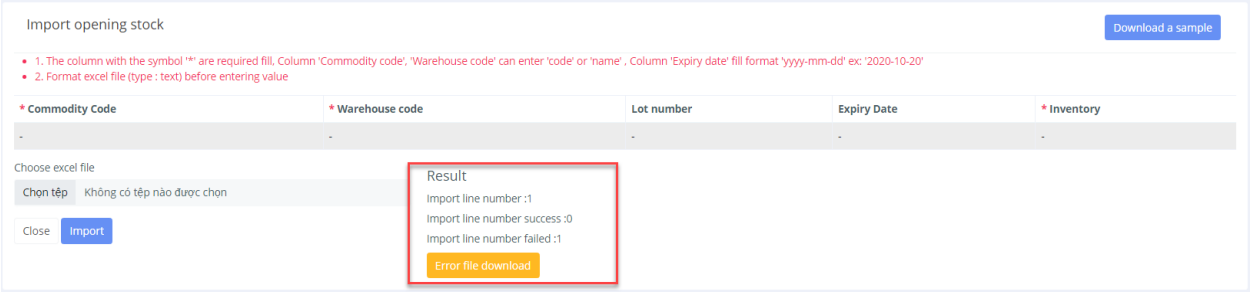
2. Format the excel file (type: text) before entering the value



➔ Successful import results



➔ Import results with error lines



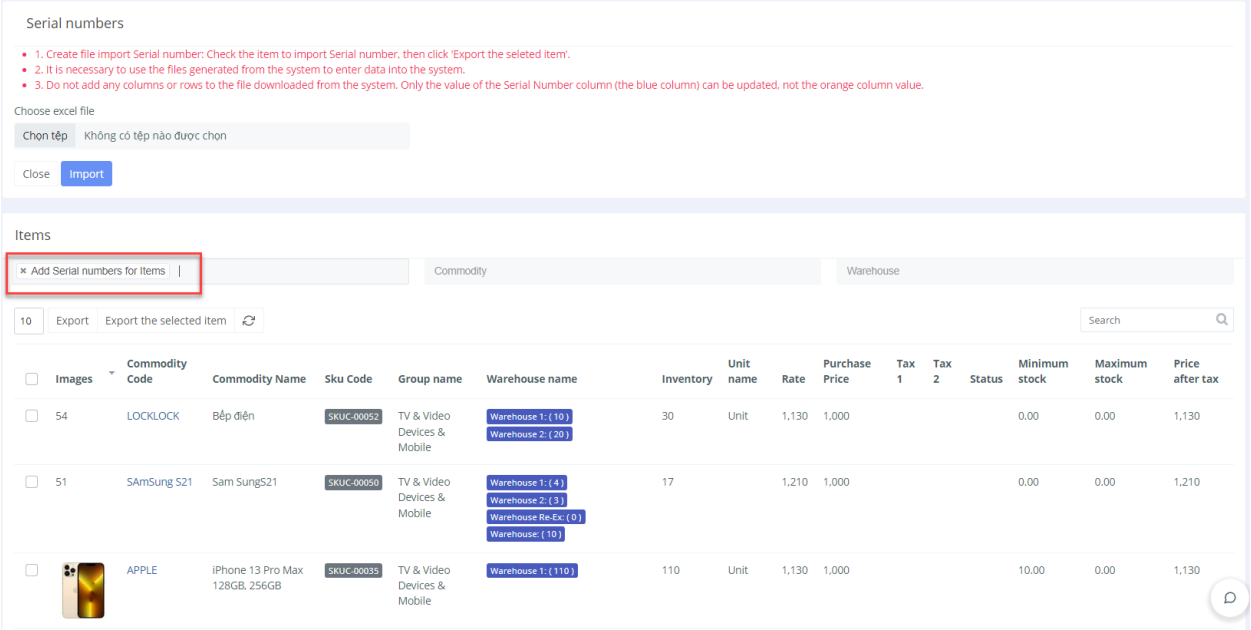
Press the error file download button to download the file and see the error details

3.7. Serial number

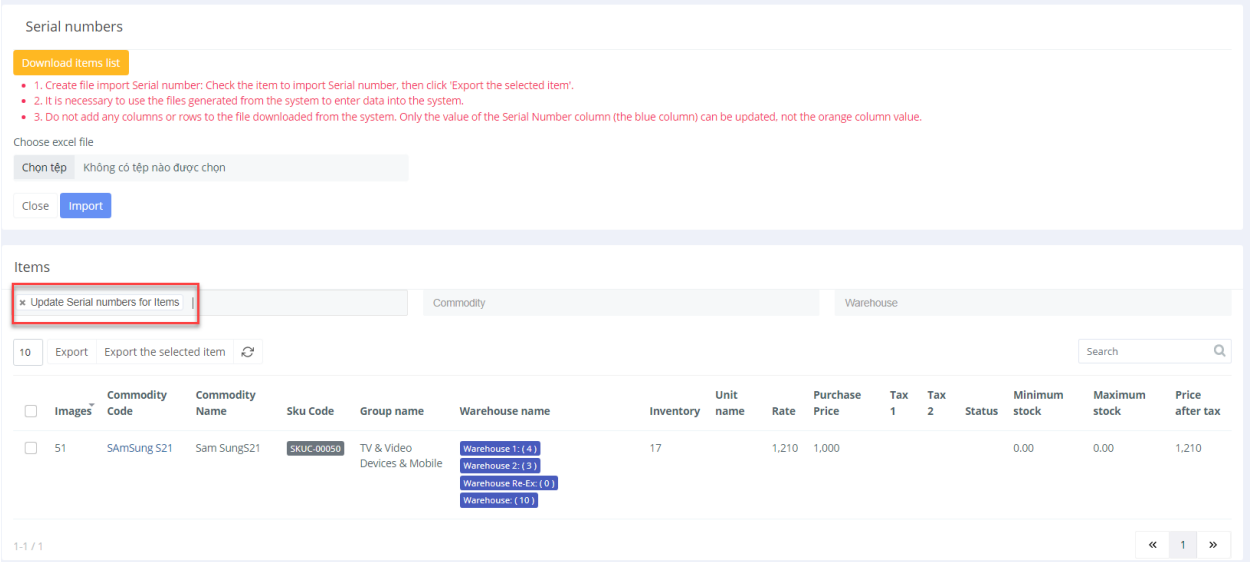
Used to add or update serial numbers for items with inventory

- In the case of filtering items by type "add serial numbers for items,": it displays items with an inventory of > 0 but not enough serial numbers (inventory = 1 will have one serial number). Allows selecting these items

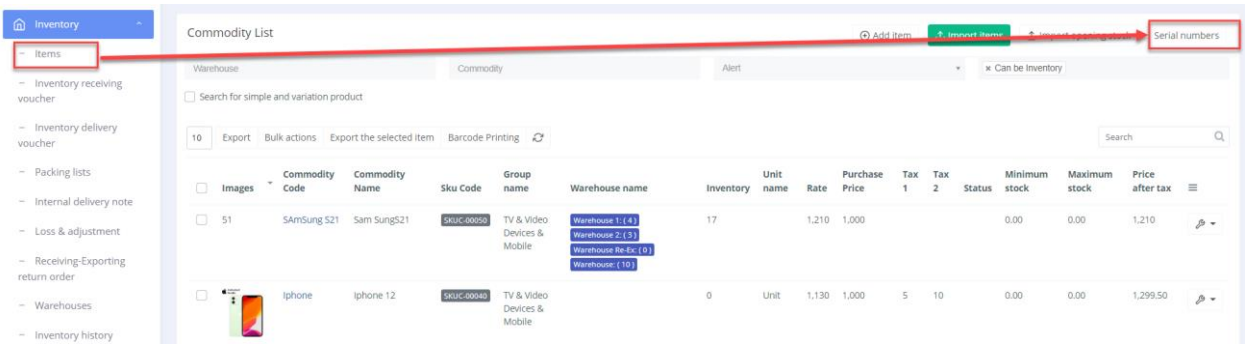
to add serial numbers or update serial numbers



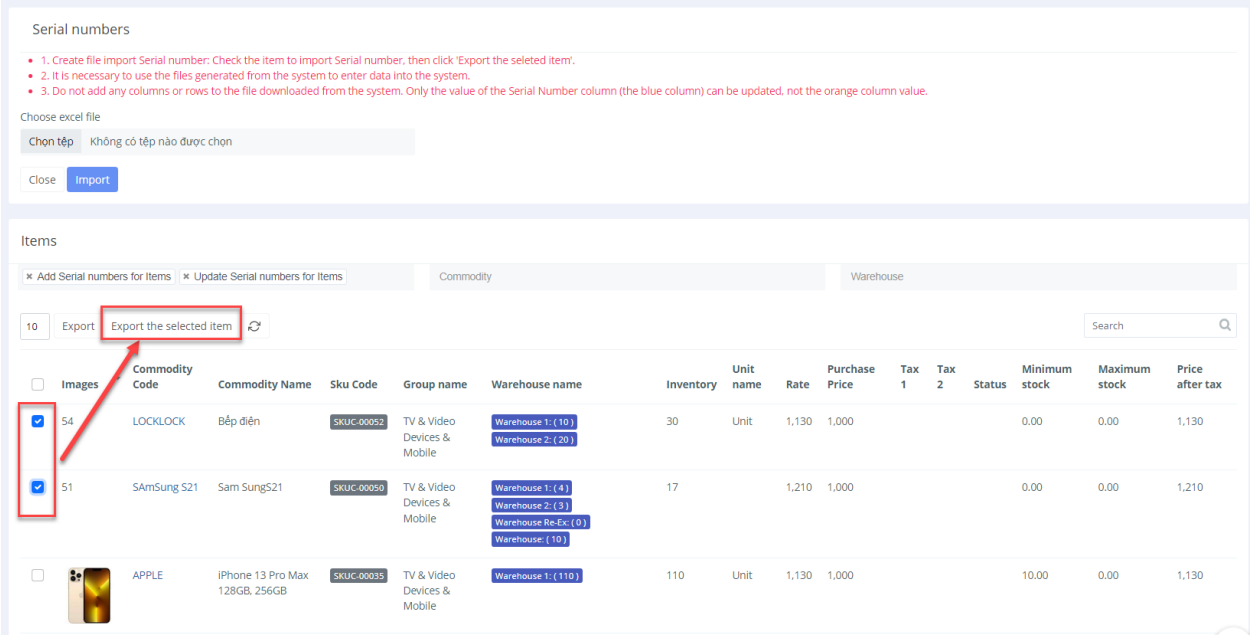
- Filter case according to the type "update serial numbers for items": displays items with inventory > 0 and with serial number incubation. These items can be selected to update the serial numbers.



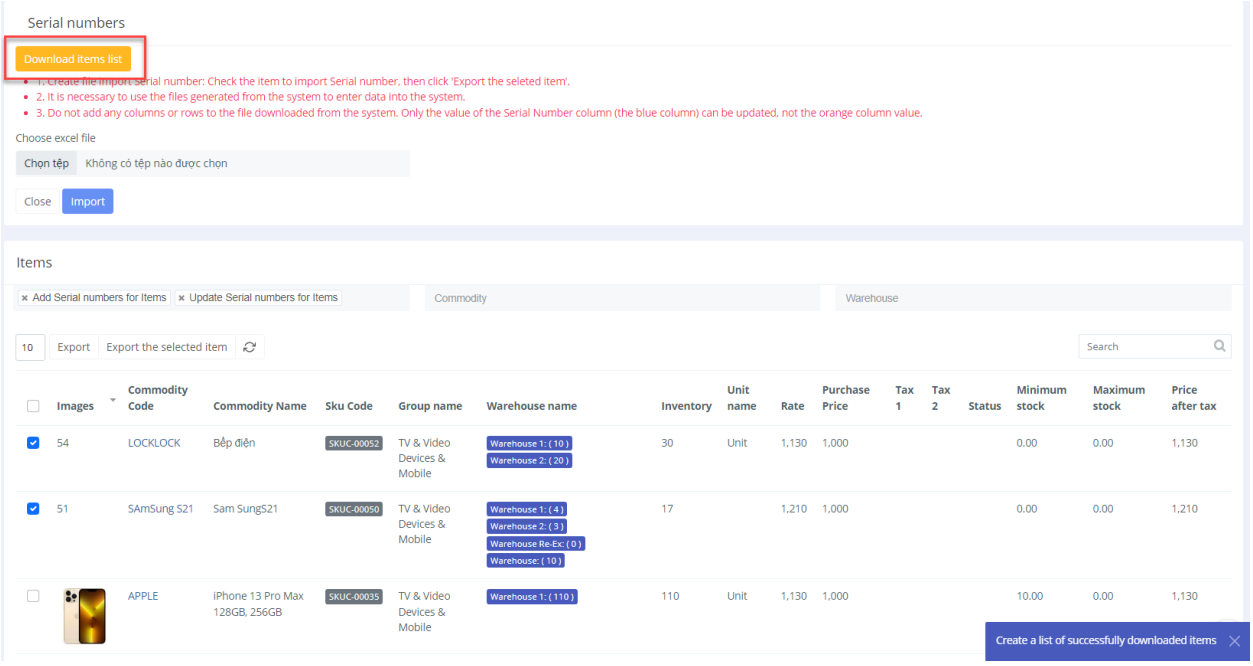
Step 1: Select the items menu -> select the import opening stock button



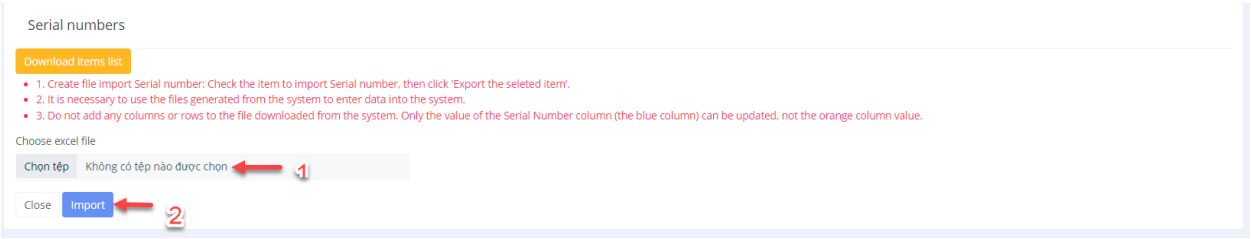
Step 2. Select the item to add or update the serial number -> and then press export the selected item



Step 3. System display button download item list -> press to download file



Step 4. Enter the contents for the newly downloaded file, and then tap the select file button and upload it to -> press import



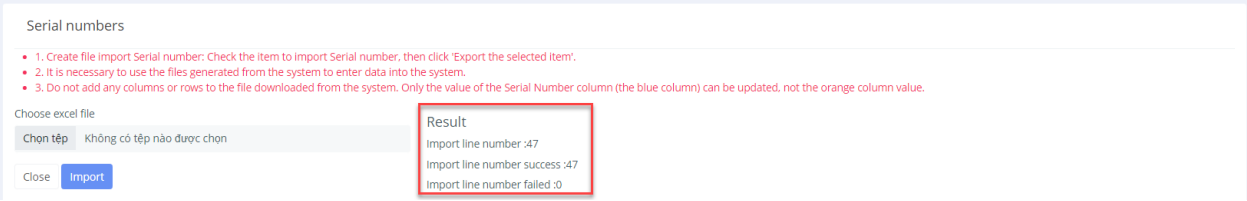
★ Considerations when entering data into the excel table:

1. Create file import serial number: check the item to import serial number, then click 'export the selected item'.

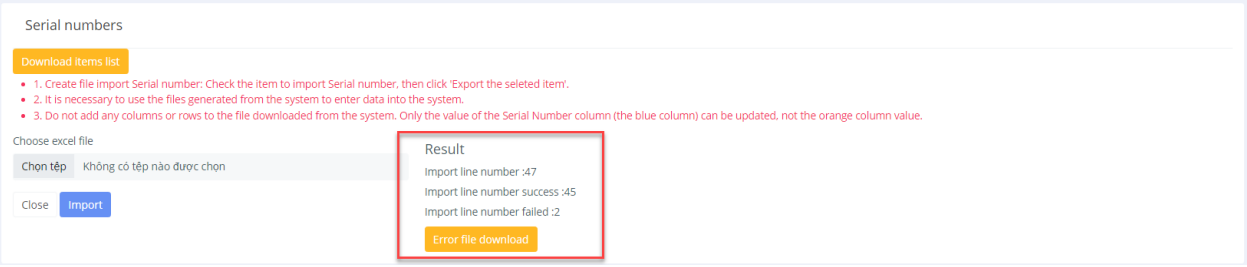
2. It is necessary to use the files generated from the system to enter data into the system.

3. Do not add any columns or rows to the file downloaded from the system. Only the value of the serial number column (the blue column) can be updated, not the orange column value.

➔ Successful import results



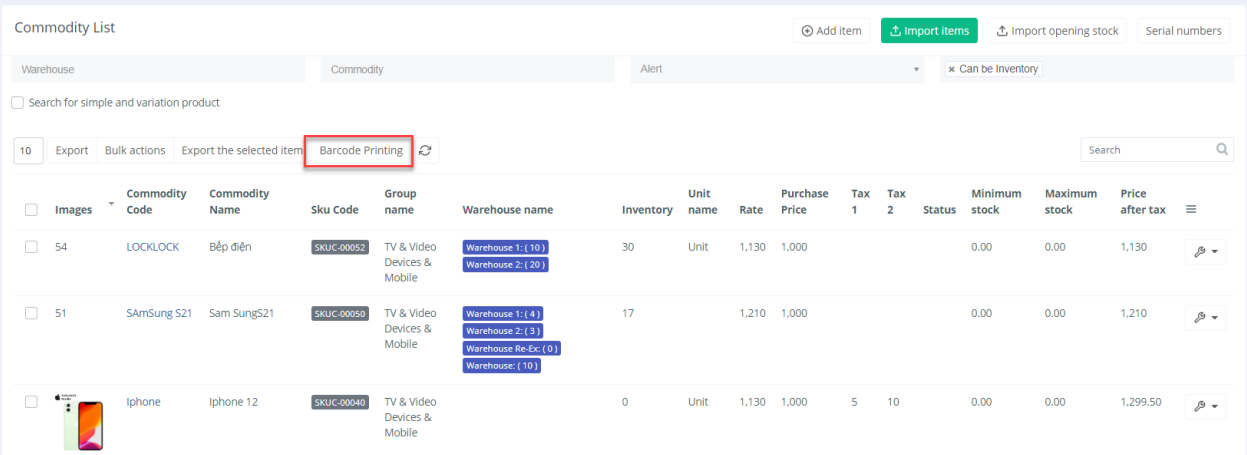
➔ Import results with error lines



Press the error file download button to download the file and see the error details

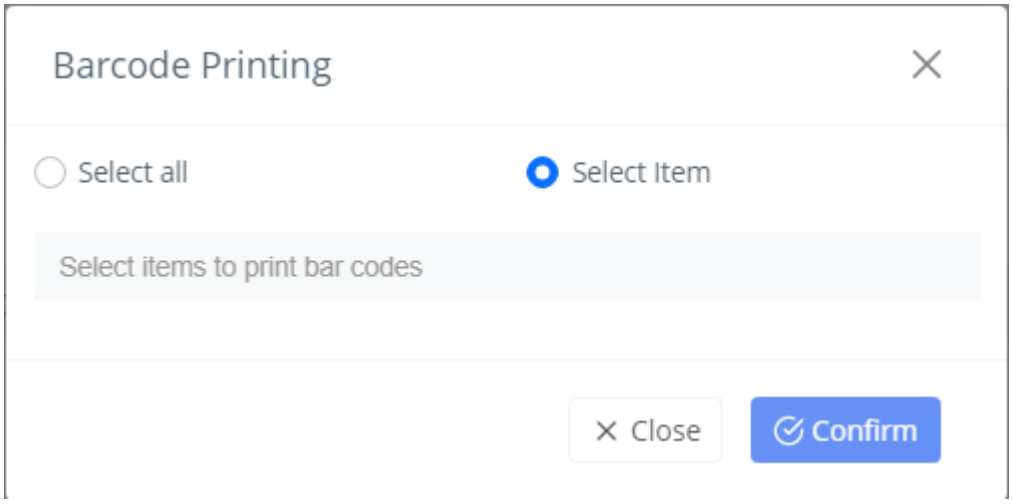
3.8. In barcode

Step 1. Select the items menu -> press barcode printing



Step 2. The system will display the barcode printing popup

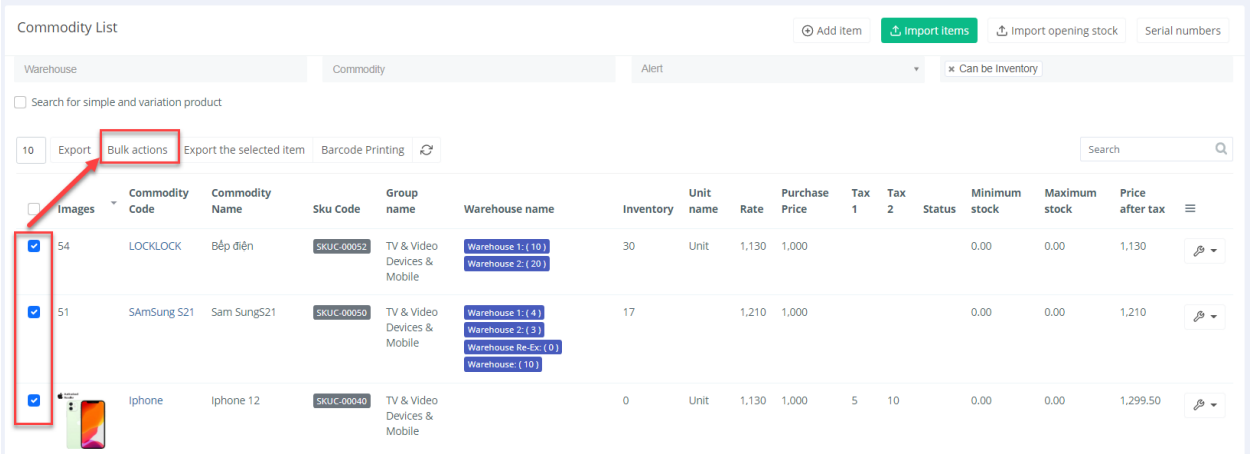
Select all to print barcodes of all items and their variations, or select items to select specific items to print barcodes -> then press confirm to save the operation work or select close to close the screen and cancel the operation just done.



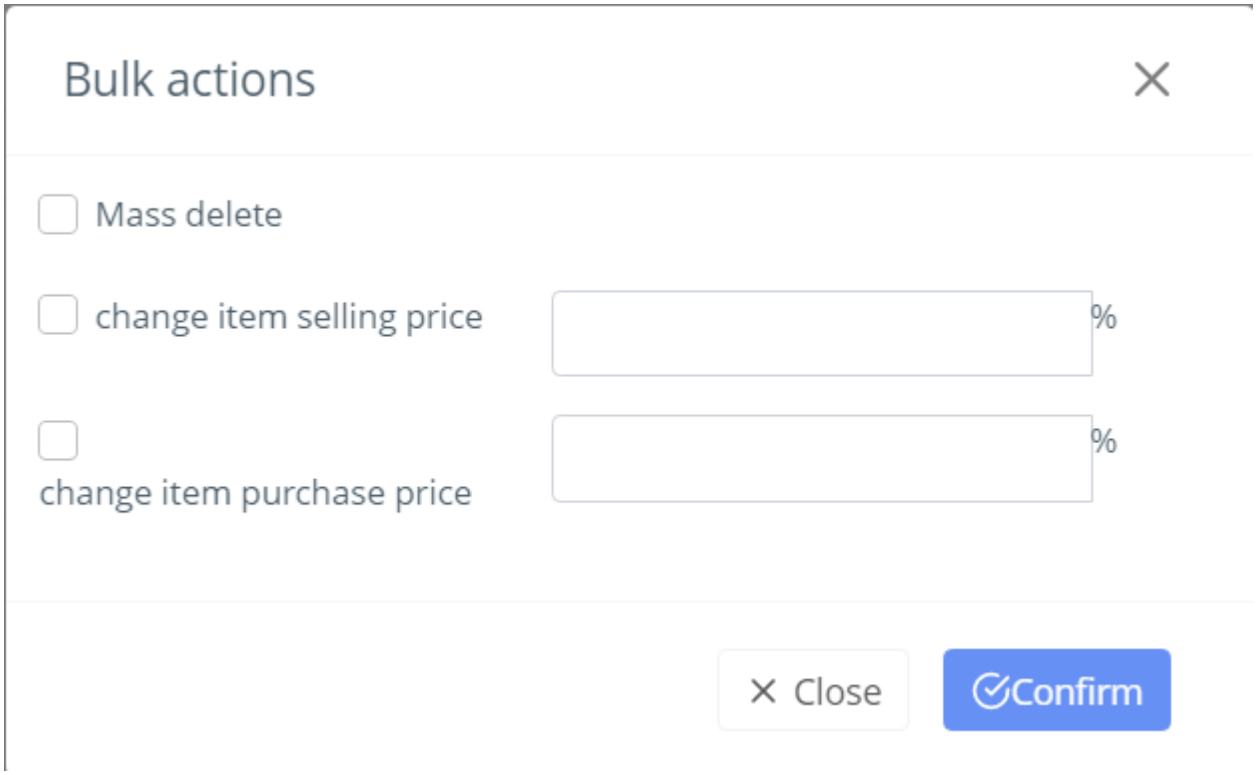
3.9. Bulk action

Used to change the selling price and purchase price and delete many items

Step 1. Select the items menu -> select items to do bulk action -> press bulk actions



Step 2. The system will display bulk actions popup



- Select checkbox mass delete to delete selected items
- Select the change item selling price to change the selling price of the selected items- > then enter the value >0 to increase the selling price or enter the value <0 to reduce the selling price

For example, entering 10, the selling price of the selected item increased by 10%.

Enter -10, and the selling price of the selected item decreases by 10%

- Select the change item purchase price to change the purchase price of the selected items- > then enter the value >0 to increase the purchase price or enter the value <0 to reduce the purchase price

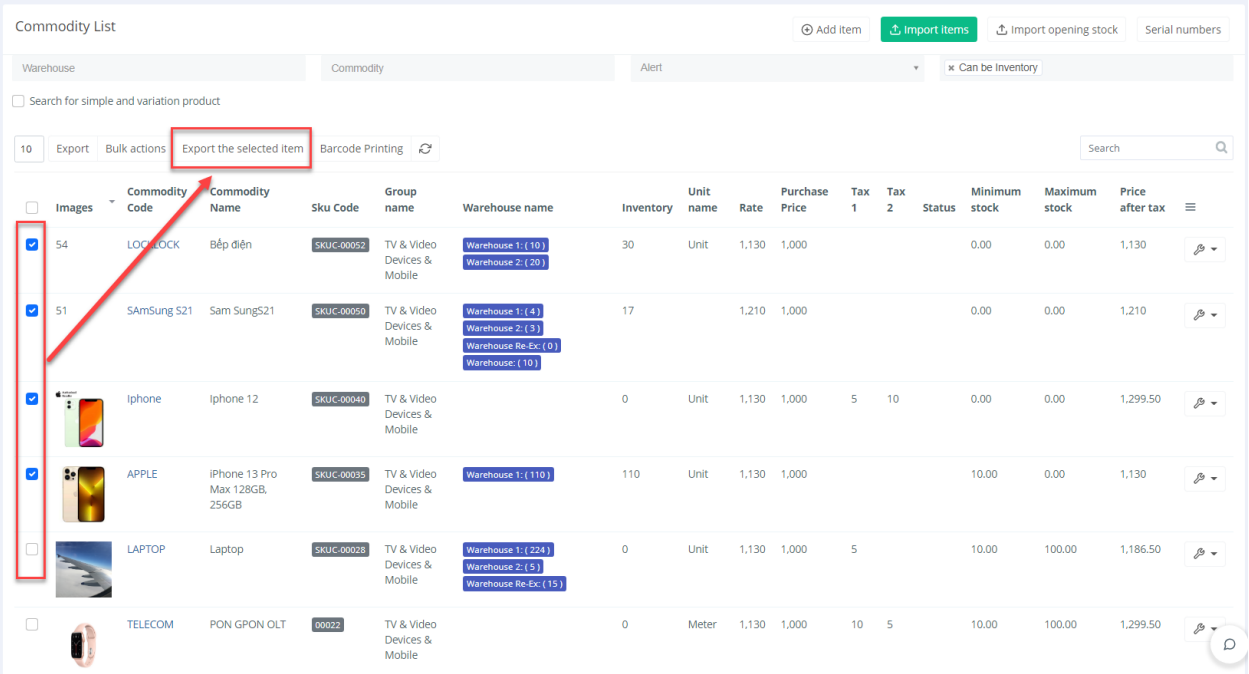
For example, enter 10, and the purchase price of the selected item increases by 10%.

Enter -10, and the purchase price of the selected item is reduced by 10%

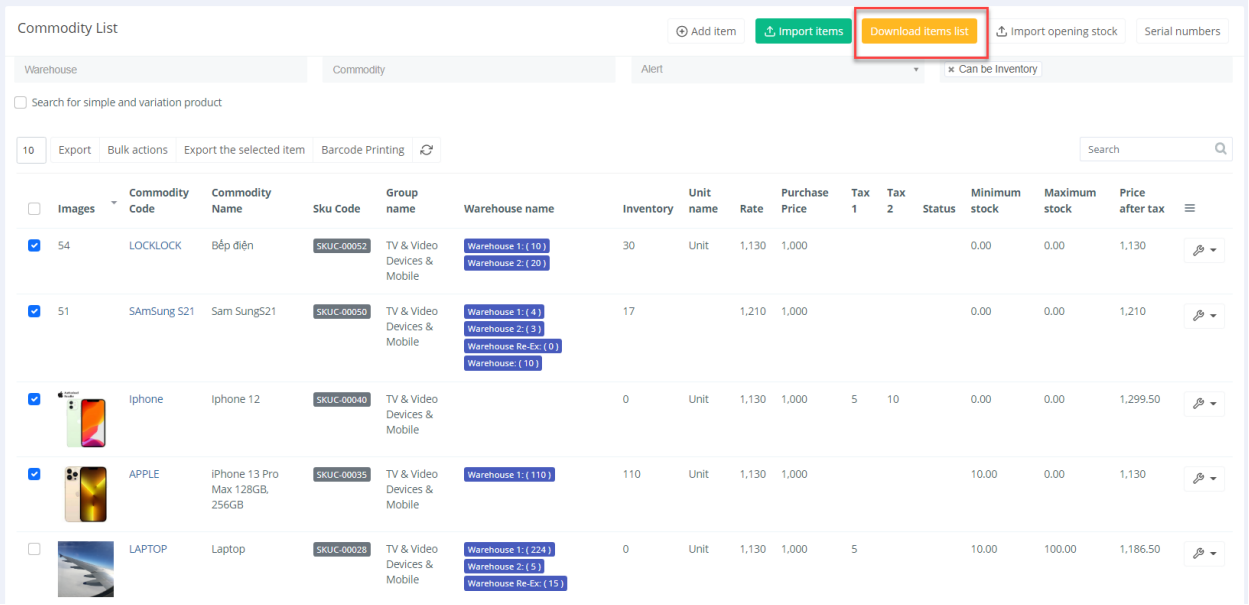
3.10. Export the selected item

Used to export the data of the item on the management screen

Step 1. Select the items to export -> and then press exported the selected item



Step 2. The system displays the download item list button -> press the button to download the file

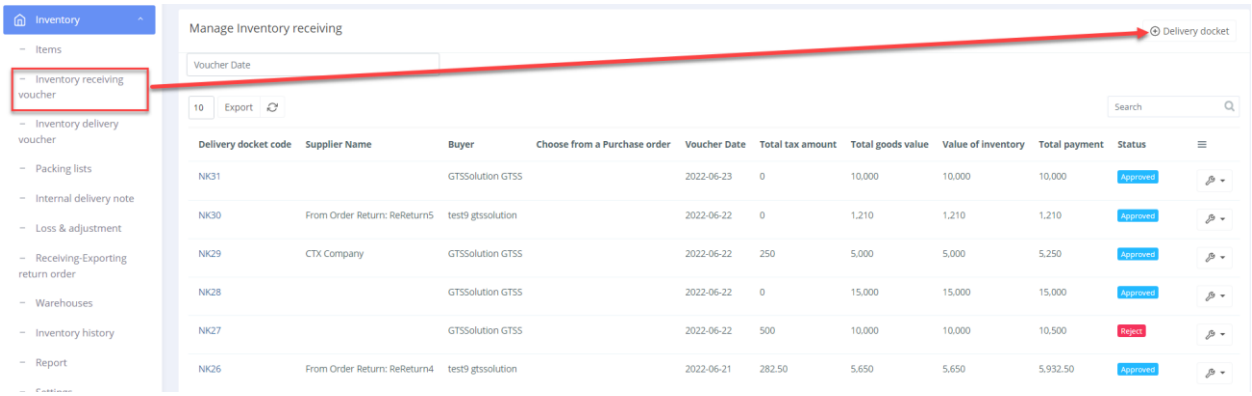


4. Inventory receiving voucher

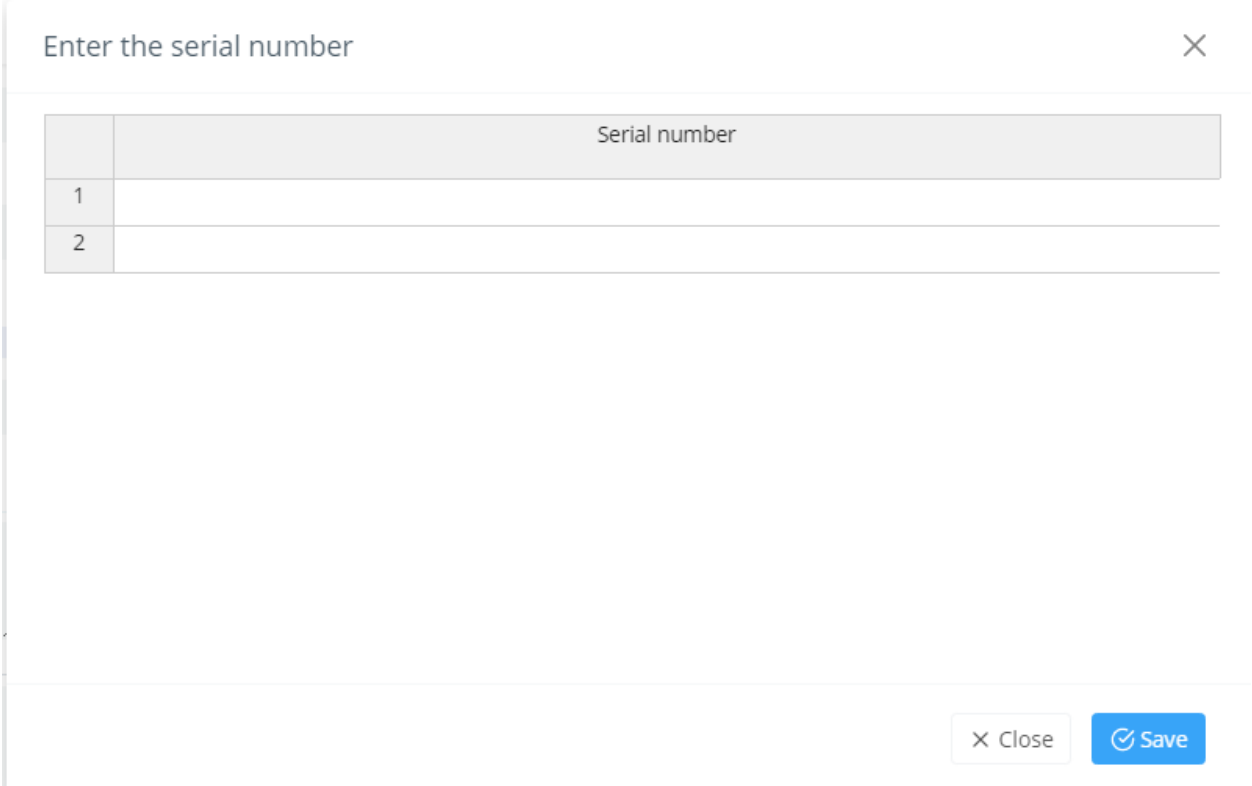
Used to create inventory slips that increase item inventory

4.1. Add a warehousing slip

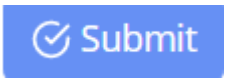
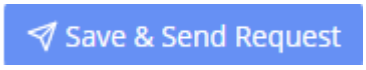
- Step 1: Select the inventory receiving voucher menu-> select the delivery docket button

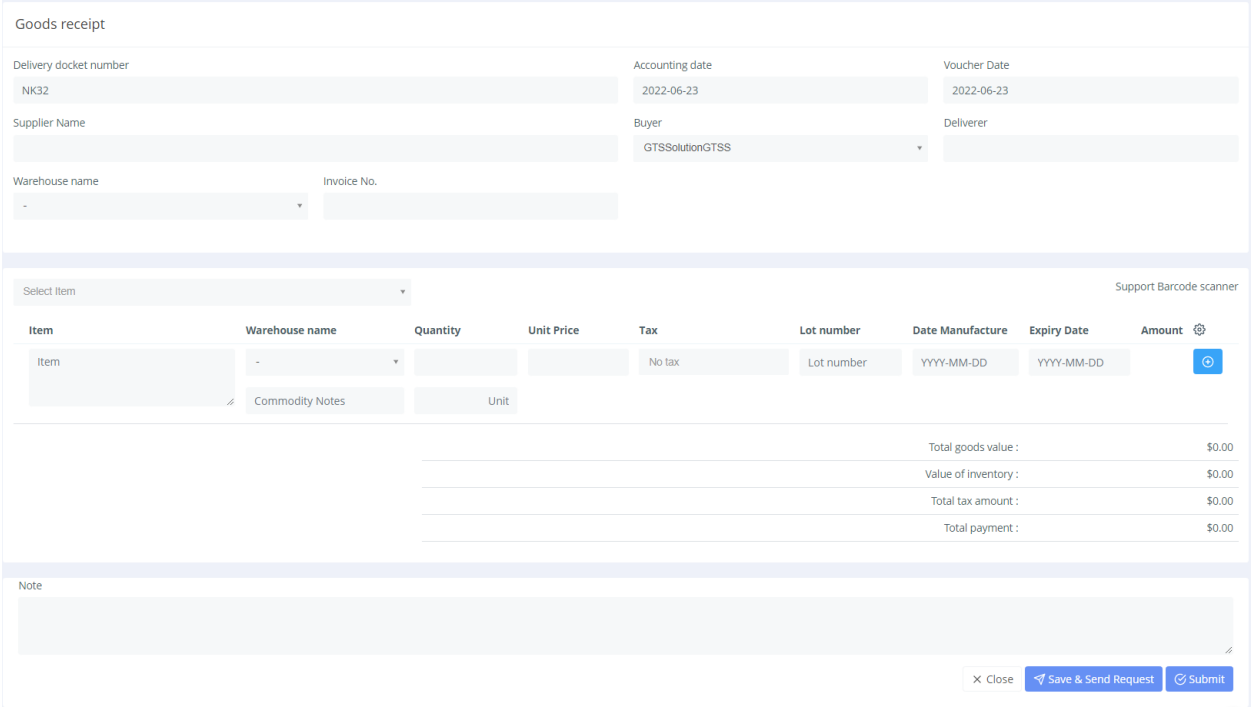


- Step 2: the system will display the goods receipt screen -> enter the necessary data -> then tap to add this item to the input slip -> then the popup display enter the serial number of the item; you can enter or not enter this step.



Step 3. Press save to save the operation or select close to close the screen and cancel the operation just done.

Step 4. Then press  to save the operation without submitting an approval request or press  to save and send the approval request to the first person in the approval process; browse or select close to close the screen and cancel the operation just done.



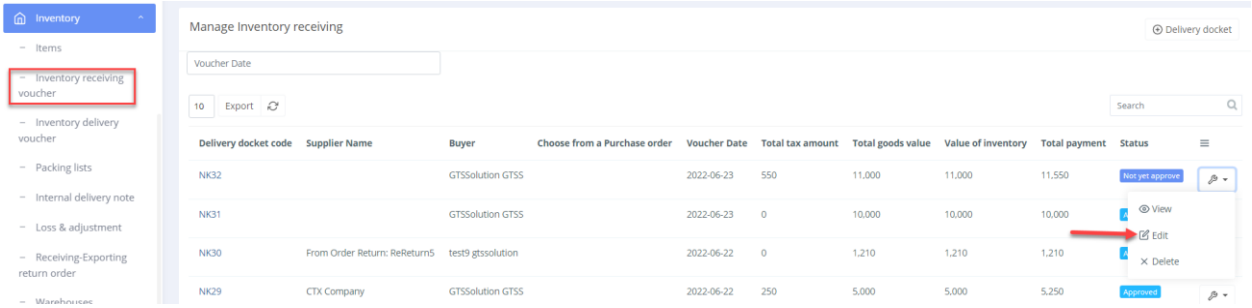
*explanation:

- The delivery docket number field shows the number of inventory slips, including number prefix and inventory received number set in the setting
- Accounting date: used to select the settlement date of the warehousing slip
- Voucher day is used to enter the purchase date of the warehouse voucher
- The supplier name field is used to enter the name of the supplier of items
- The buyer field is used to select the name of the employee requesting the warehouse. Data at the field taken from the team-> team members screen
- Deliverer field used to enter recipient name
- The warehouse name field is used to select the warehouse to import items.
- Invoice field no. Used to enter invoice numbers
- Select item is used to select the item to enter the warehouse. Data taken from the items screen and displayed only items with the check option *can be inventory*
- The warehouse name field in the list is used to select the warehouse to import goods into.
- The qty field is used to enter the inventory number of items.
- The unit price field used to enter the purchase price of the data item at this field takes the value at the purchase price field of the selected item to display. Allows editing of purchase price
- The tax field is used to select taxes for items. If the item is already taxed, it will automatically show up in this field. Allow other taxes to be selected. Data from core's taxes screen
- The lot number field enters the batch number of the item
- Date manufacturing field: enter the production date of the item
- The expiry date field is used to select the expiration date of items; if data entry is available for this field when viewing item details, the expiration date of the items will be displayed in the expiry date tab.
- The amount field calculates the total item amount (excluding taxes) = qty * unit price
- The total goods value field is used to show the total amount of items excluding taxes= qty * unit price
- The value of the inventory field is used to display the warehousing value of the coupon
- The total tax amount field is used to show the total tax of the items in the list. The tax amount is calculated according to the formula = quantity * unit price * Tax %
- The total payment field is used to show the total value of the warehousing voucher. Total payment = total goods value + total tax amount

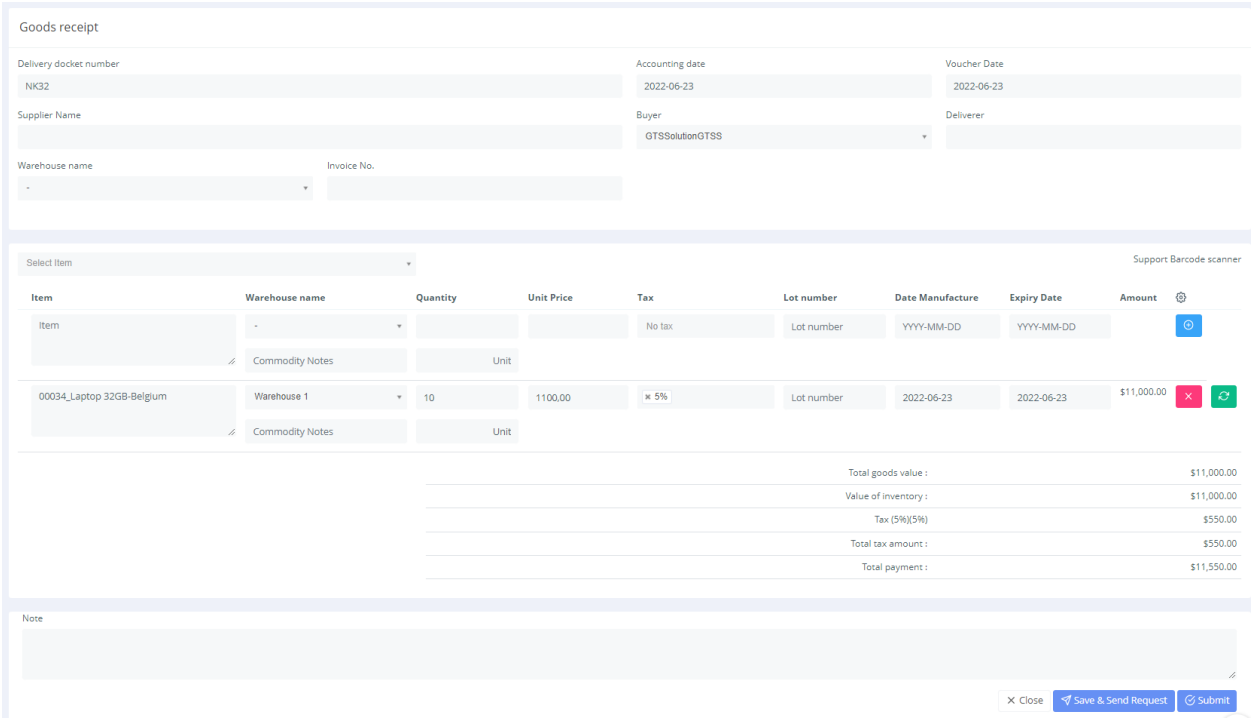
- Note field used to enter notes for input slips
- Button : click on this button to delete the added item
- Button : click on this button to reopen the popup and enter the serial number.

4.2. Editing of warehouse entry slips

Step 1: at the inventory receiving voucher-> screen, select the corresponding line to edit -> select edit function

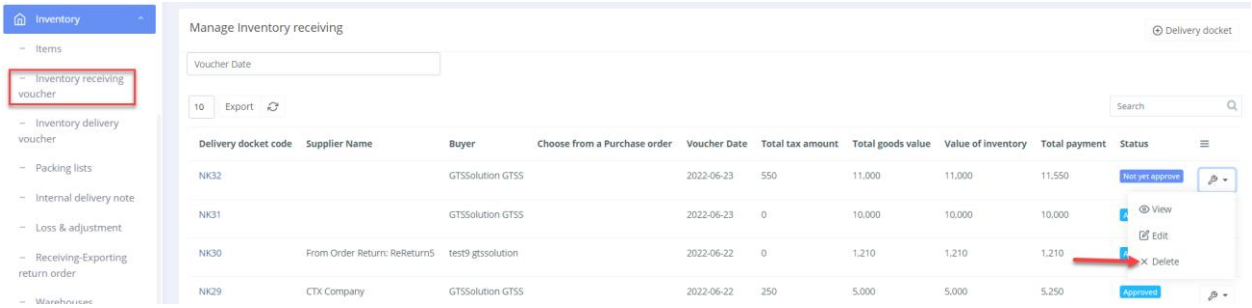


Step 2: the system will display the corresponding edit screen -> proceed data editing -> then press Submit to save the operation without submitting a critical request; browse or tap Save & Send Request to save and send the approval request to the first person in the approval process or select close to close the screen and cancel the operation just done it.



4.3. Delete the warehousing slip

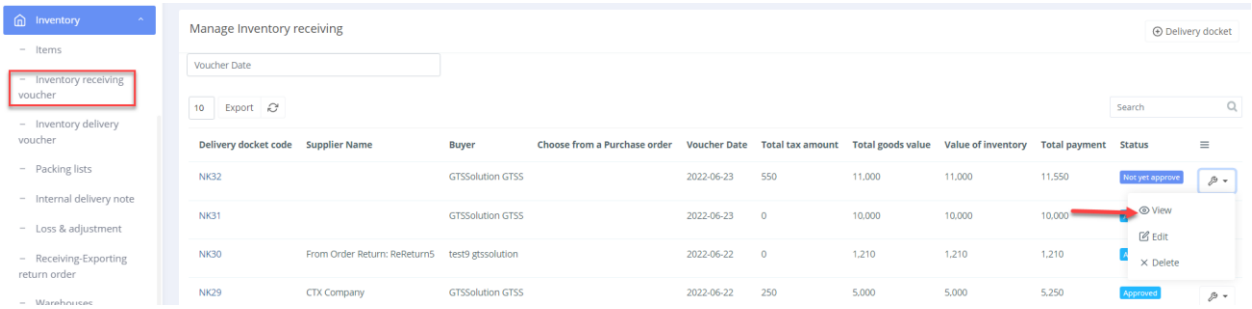
Step 1: at the inventory receiving voucher-> screen, select the corresponding line you want to delete-> select delete function



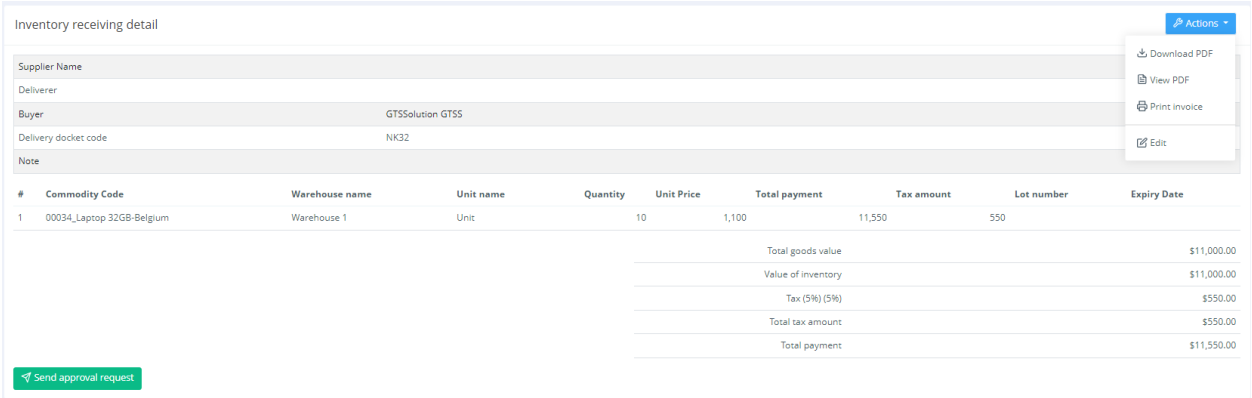
Deleting an inventory with approved status reduces the inventory of items that collect deleted inventory slips, and the corresponding serial numbers (if created) are also deleted.

4.4. View details of warehousing slips

Step 1: at the inventory receiving voucher-> screen select the corresponding line to see the details -> select the view function



Step 2. Redirecting system to inventory receiving details page



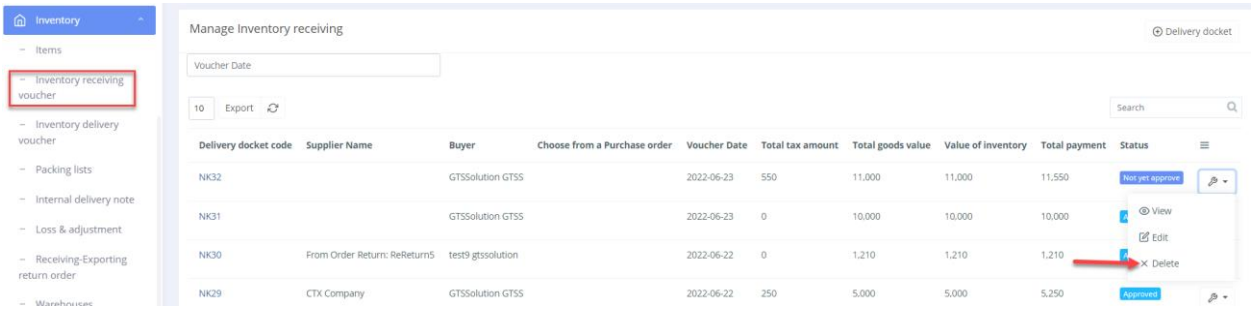
* explanation:

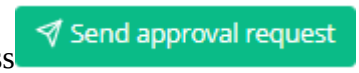
The button action is used to download pdf, view pdf, or edit inventory receiving

The send approval request button is used to submit a request for approval of a warehouse entry slip.

4.5. Submit a request for approval to the approval process

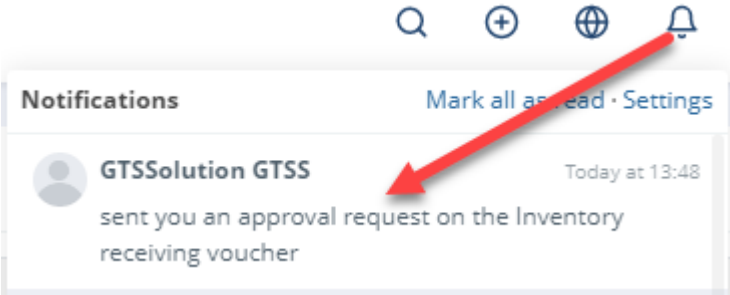
Step 1: Select the inventory slip as not yet approved -> press view



Step 2. : press 

❖ For the approval process, select a person for approval

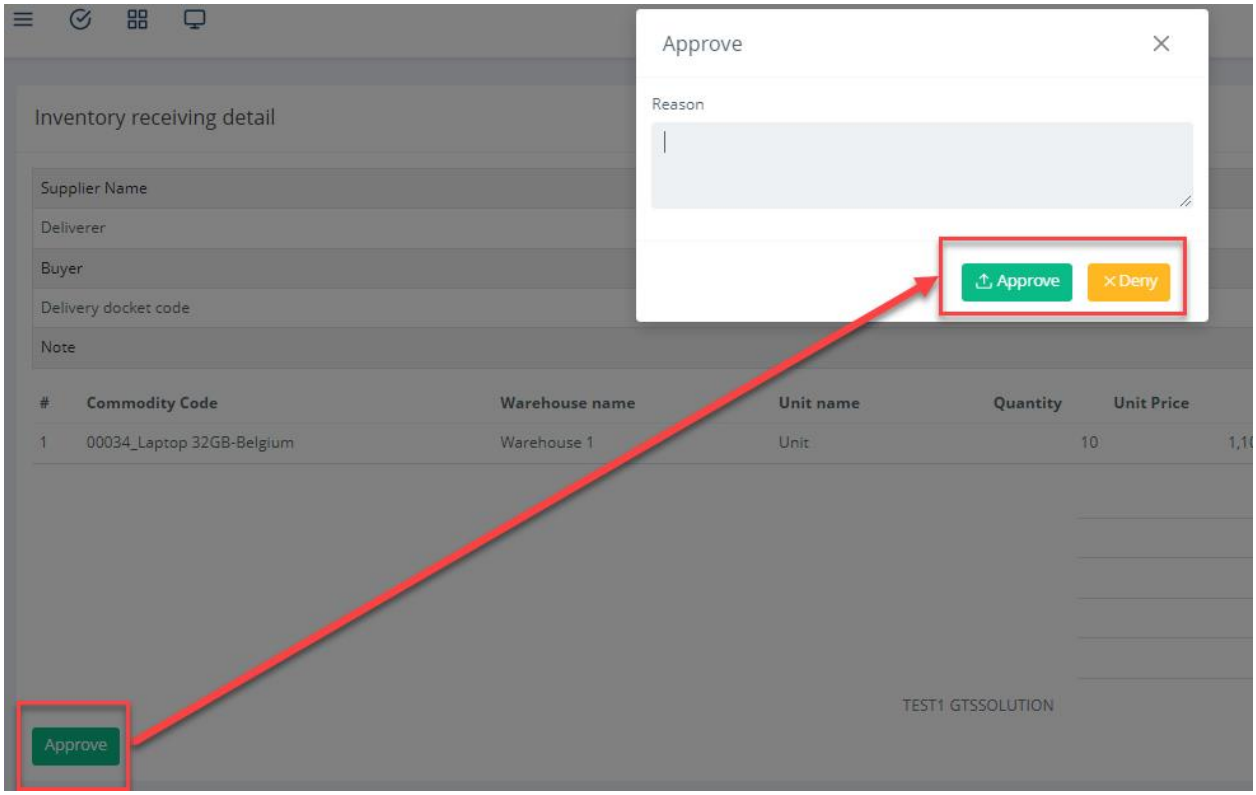
- The system sends a request for approval to the person in the process. The approver in the process of receiving the notification of the approval request via email and web - > proceed to select the notification or go to the inventory receiving voucher screen and view the details of the warehousing slip



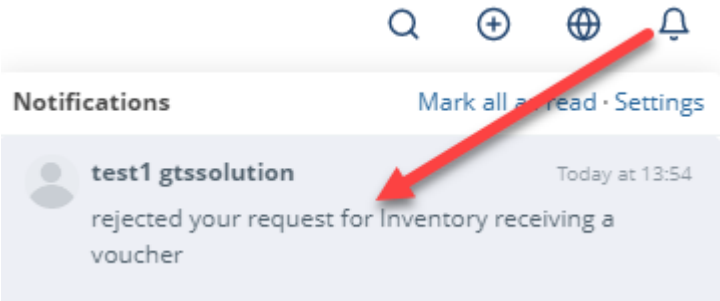
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → the status of the inventory slip transferred from not yet approve to approve while increasing the inventory of the item

+ Select deny to reject and enter the reason if available→. The status of the inventory slip switches from not yet approved to reject, and the inventory of the item is constant

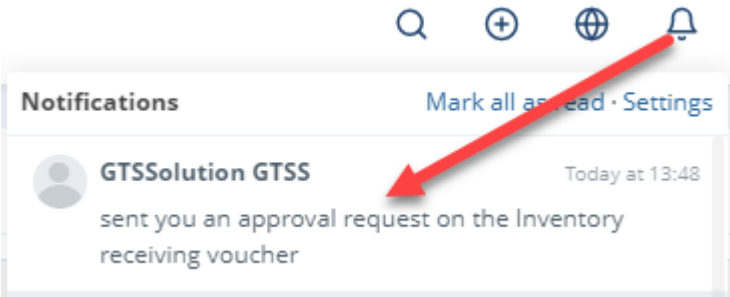


The creator of the entering voucher also receives notifications via email and the web when approve or deny approval is available.



❖ For the approval process, select multiple people to approve

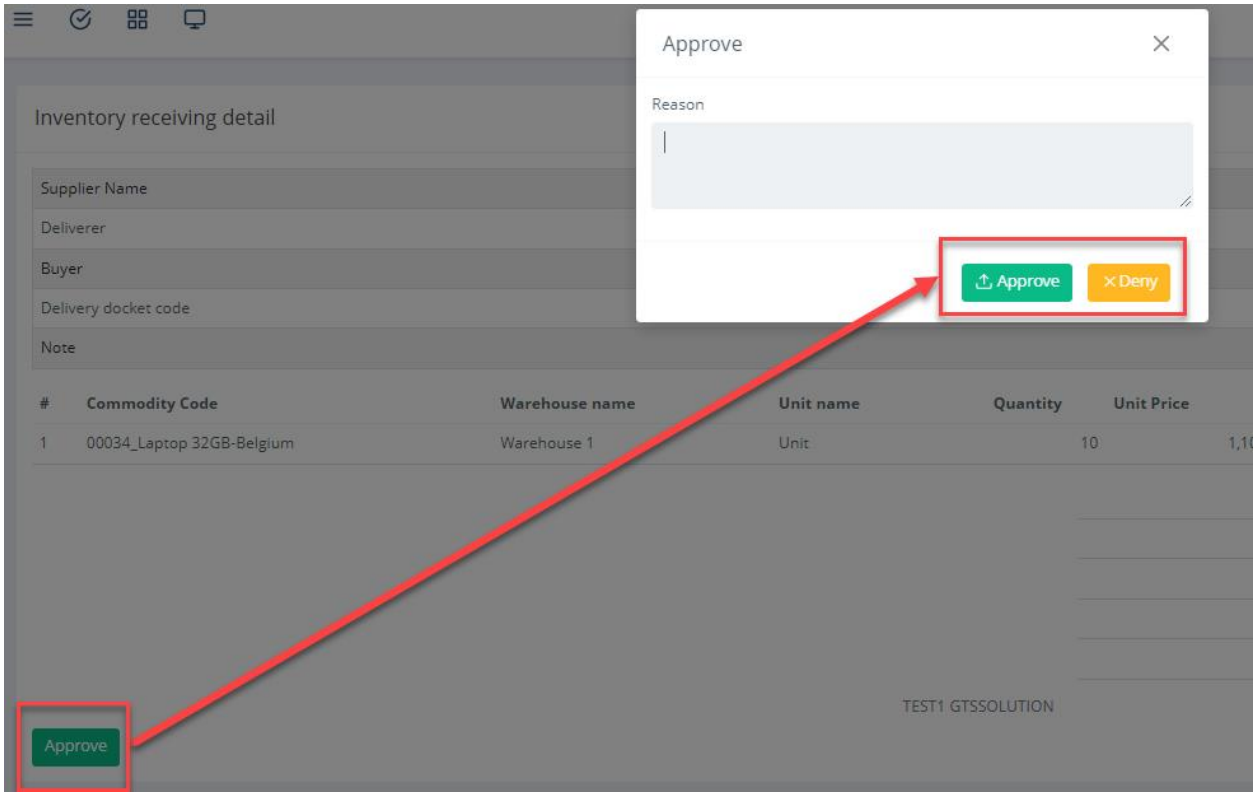
- Only the first person in the approval process receives a notification requesting approval via email and web - > proceed to select the notification or on the screening inventory receiving vouchers and view inventory details



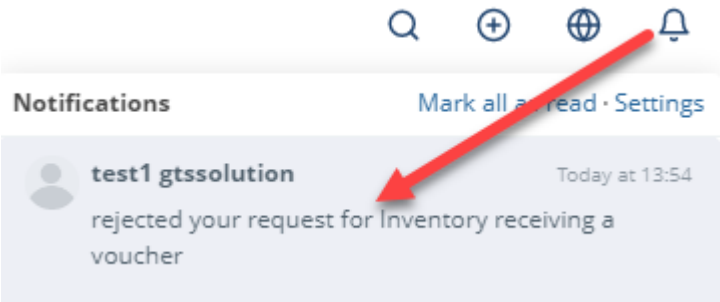
- Select the approve function - > the system will display two options: approve and deny.

+ I you agree, enter the reason (can be entered or not) and select the approve function → the status of the entering voucher remains not yet approved and requires approval. Sent to the next person in the process. The next person proceeds with approval and continues to do so until they all approve and the status of the entering voucher is transferred. From not yet approve to approve while increasing item inventory

+ Select deny to opt out and enter the reason, if any→; the next person in the approval process does not receive a notification requesting approval and cannot continue to approve for this warehouse entry slip. The status of the inventory slip moves from not yet approved to reject while the inventory of the item remains unchanged



The creator of the entering voucher also receives notifications via email and the web when approve or deny approval is available.



❖ For the approval process, including approve + sign

Similar to the approval process that selects multiple people for approval, depending on whether the process of selecting the signature action is at the last step or not, there is an event difference.

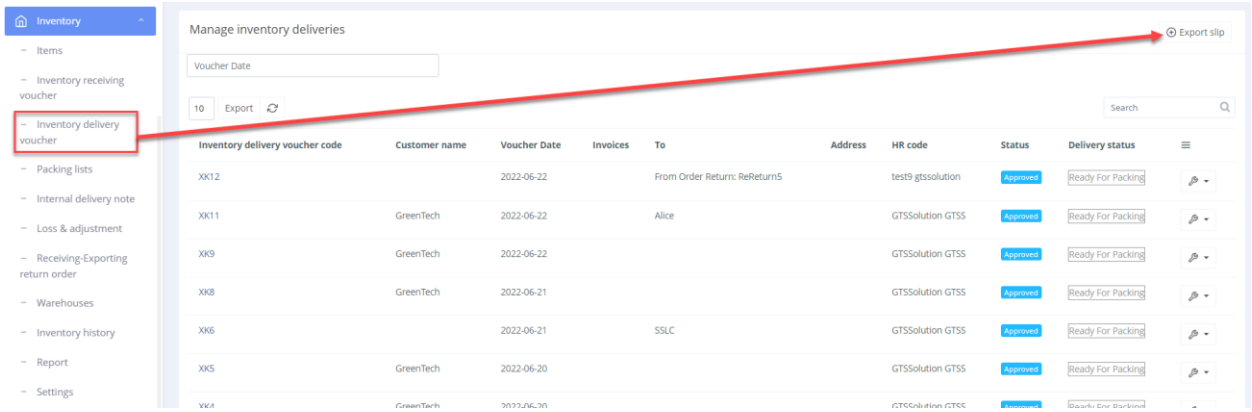
+ If the signature action is not the final step of the process, only when this person completes the signature will the approval request be sent to the person? Next

+ If the signature action is the last step, only when this person completes the signature does the status of the entering voucher switch from not yet approved to approve while increasing the inventory. Inventory of items

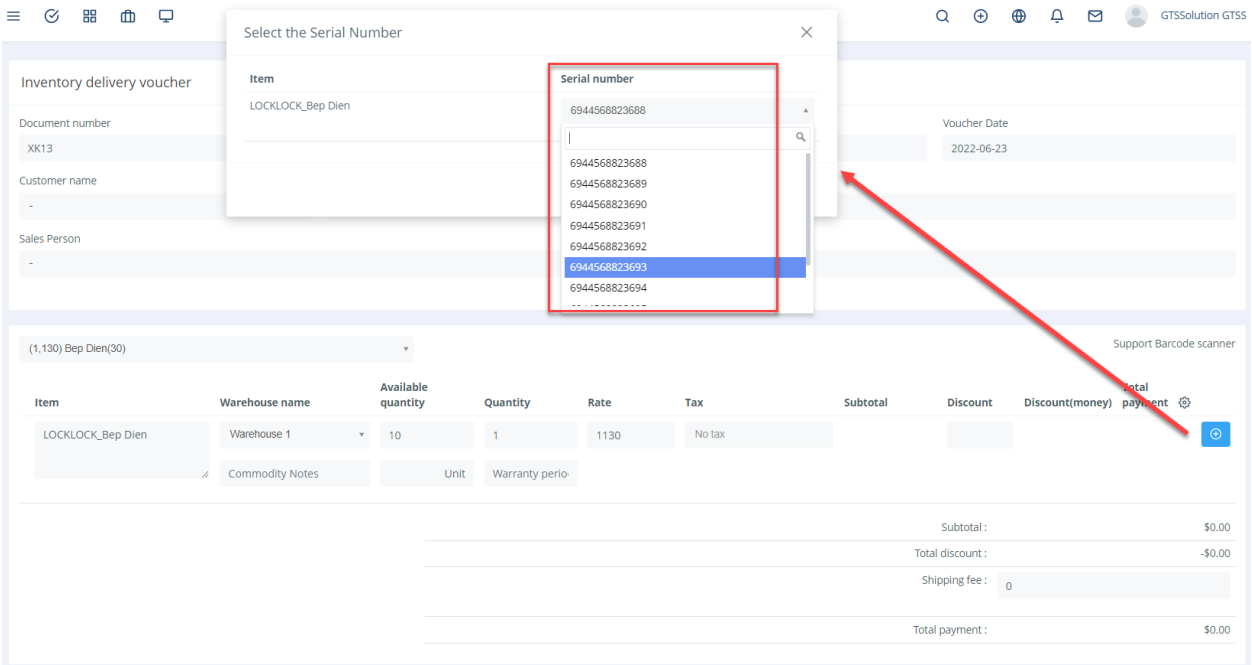
5. Inventory delivery voucher

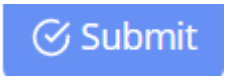
5.1. Add new warehousing slips

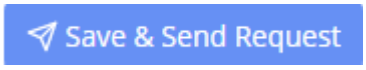
- Step 1: Select the inventory delivery voucher menu-> select the export slip button



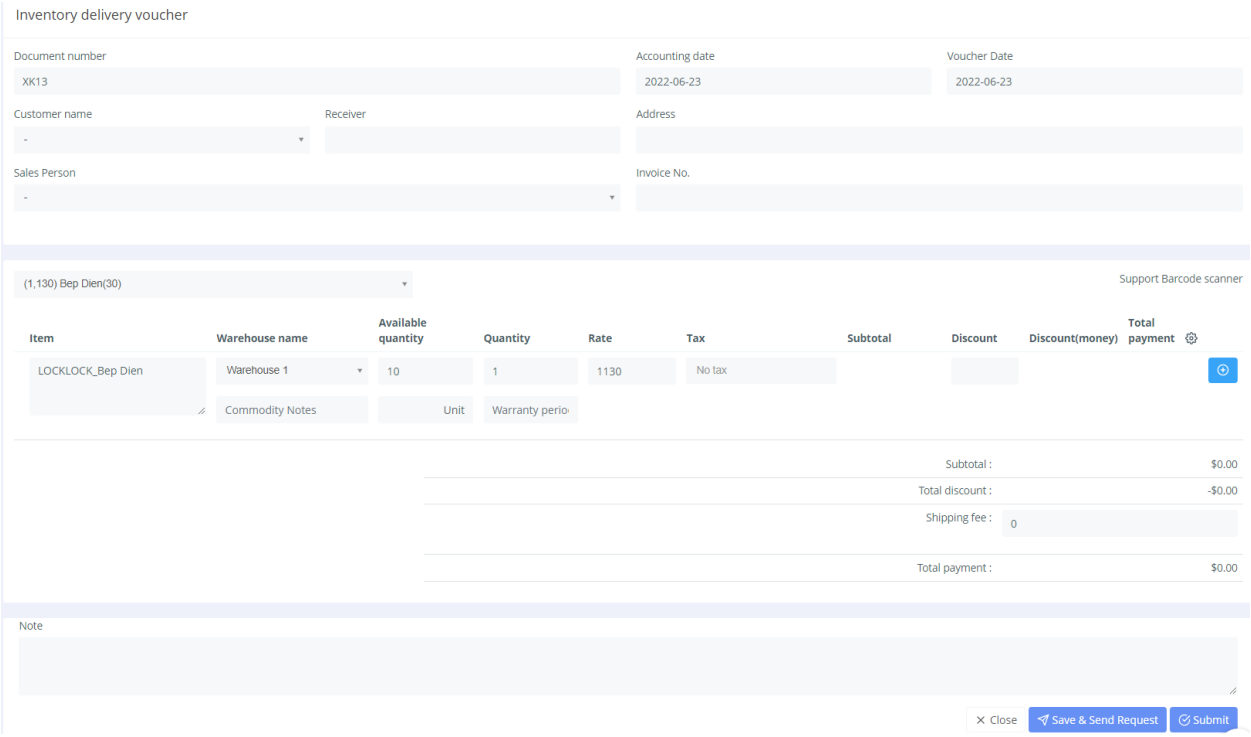
- Step 2: the system displays the inventory delivery voucher screen -> enter the necessary data -> then tap to add this item to the export slip -> then the display shows popup information the serial number will export (if the item enters the serial number). You can change the serial number -> press save to save the operation



Step 3. Then press 

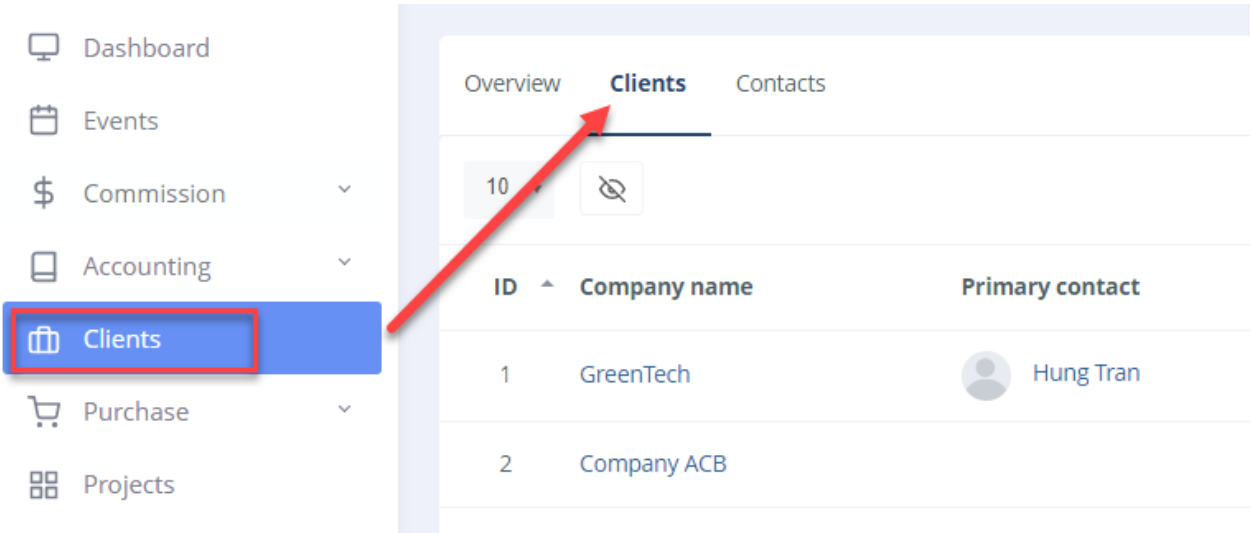
to save the operation without submitting an approval request or press 

to save and send the approval request to the first person in the approval process; browse or select close to close the screen and cancel the operation just done.



*explanation:

- The document number field is a prefix number + delivery number.
- Accounting date field: used to select the settlement date of the warehousing slip
- The voucher day field is used to enter the export date of the warehousing slip
- Customer name field: select the customer for the inventory slip. Data were taken from the client's screen

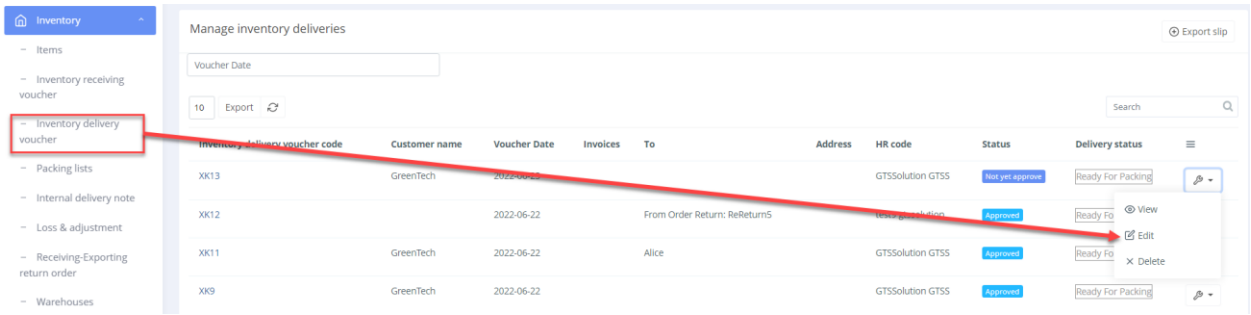


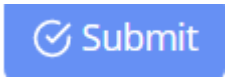
- Receiver field: enter recipient name
- Address field: enter the receiving address
- The salesperson school selects the salesperson. Data were taken from the team-> team members screen
- Invoice field no. Used to enter invoice numbers
- Select item field: displays items with a check option that can be inventory
- Warehouse name field: used to select the export warehouse, only load the repositories that this item contains in it.
- The available quantity field shows the current inventory of the item in the selected repository.
- Quantity field: enter the quantity of warehousing. The quantity must be less than or equal to the available quantity.

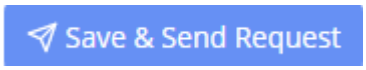
- Rate field: load from the selling price of the selected item
- Tax field: allows you to choose a variety of taxes. The load verb by item is selected if the item has a tax option.
- The subtotal field used to calculate the total export value excluding taxes calculated according to the following formula: qty * sale price
- Discount field: enter % discount
- The discount field (money) is used to calculate the discount value of each item and calculate the formula (qty * sale price * tax) * discount
- Total discount field: used to calculate the total discount of the coupon.
- Trường total payment: (qty * sale price * tax) - total discount
- Shipping fee field: the user enters the shipping cost himself. Can be edited
- Total payment field: calculates the total payment of the voucher and calculated according to the formula = subtotal + total tax + total discount + shipping fee

5.2. Editing of warehousing slips

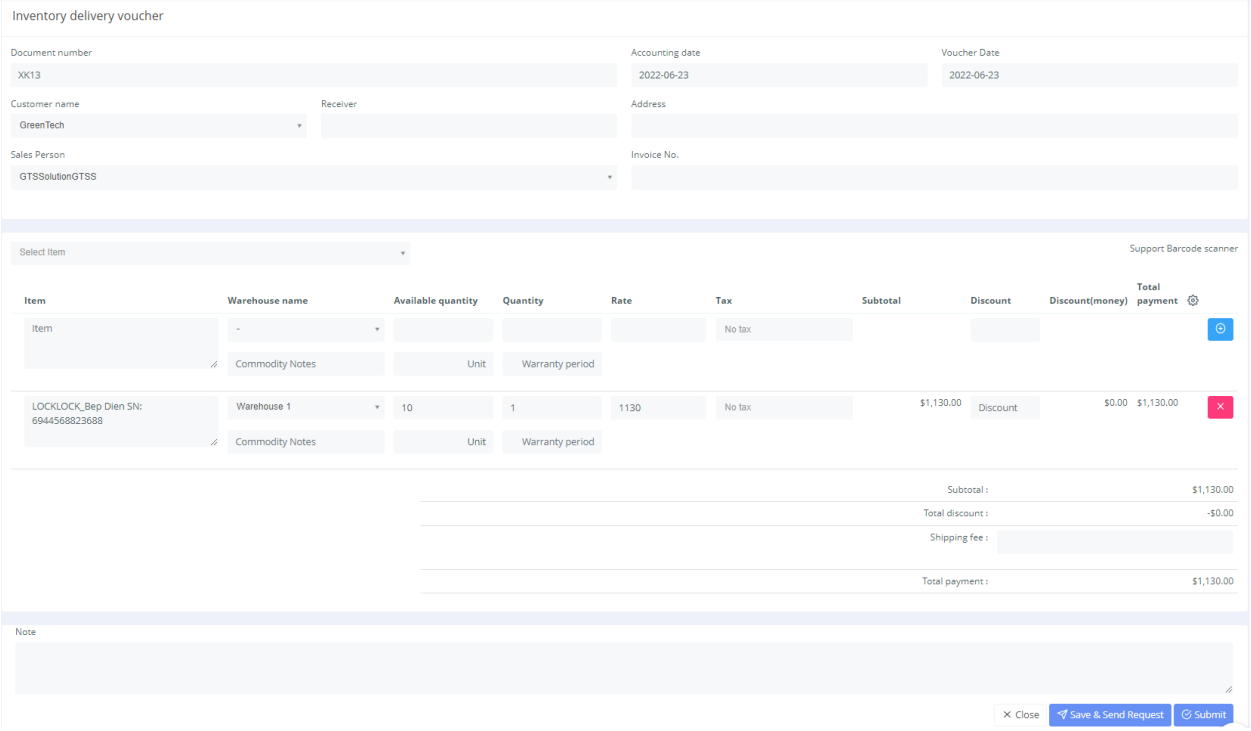
Step 1: at the inventory delivery voucher-> screen, select the corresponding line to edit -> select edit function



Step 2: the system will display the corresponding edit screen -> proceed data editing -> then press 

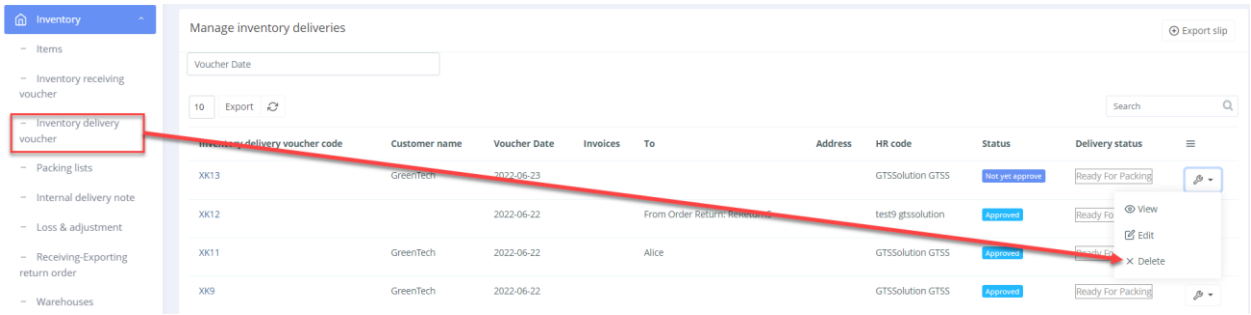
to save the operation without submitting a critical request; browse or tap 

to save and send the approval request to the first person in the approval process or select close to close the screen and cancel the operation just done it.



5.3. Delete the warehousing slip

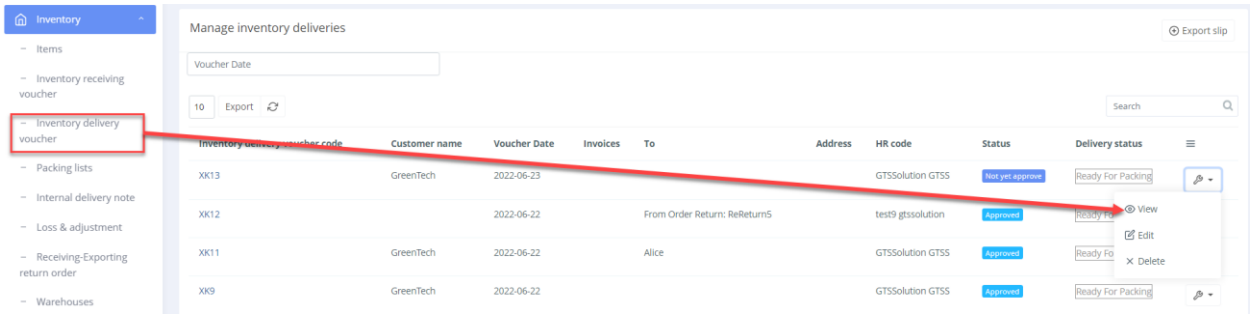
Step 1: at the inventory delivery voucher-> screen, select the corresponding line you want to delete-> select delete function



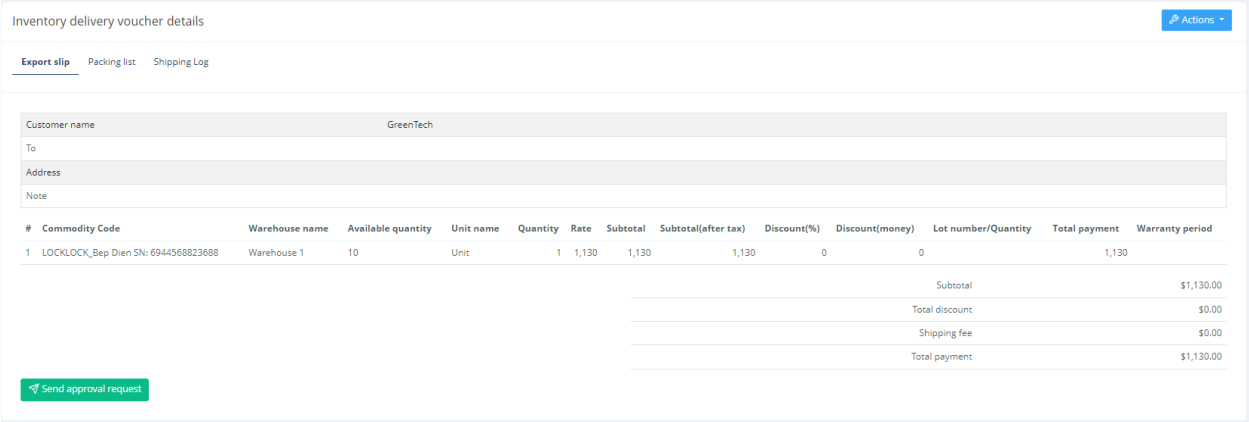
Delete the inventory entry slip with approved status => inventory refund. Uncheck the exported serial numbers. Delete the warehouse history.

5.4. View details of warehousing slips

Step 1: at the inventory delivery voucher-> screen, select the corresponding line to see the details -> select the view function



Step 2. Redirect system to inventory delivery voucher details page



* explanation:

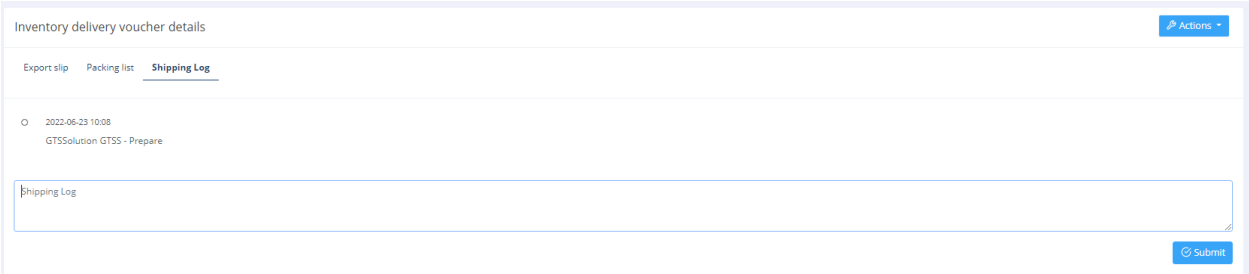
Button action used to download pdf, view pdf, or edit inventory delivery

The send approval request button is used to send a request for approval of the inventory slip.

Export slip tab showing inventory slip information

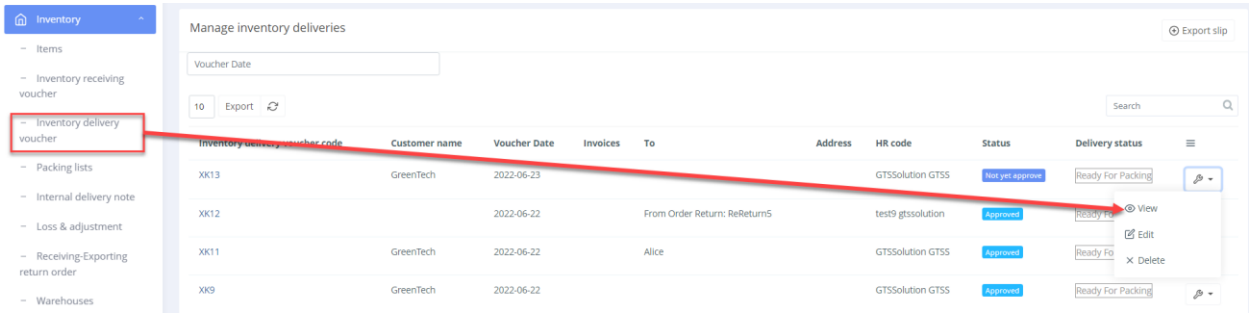
The packing list tab is used to display packing list slips created from this inventory slip

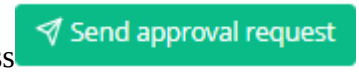
The shipping log tab used to record shipping history



5.5. Submit a request for approval and conduct approval

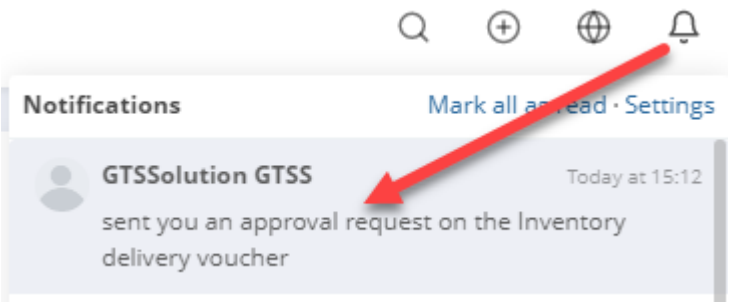
Step 1: Select the inventory slip as not yet approved -> press view



Step 2. : press 

❖ For the approval process, select a person for approval

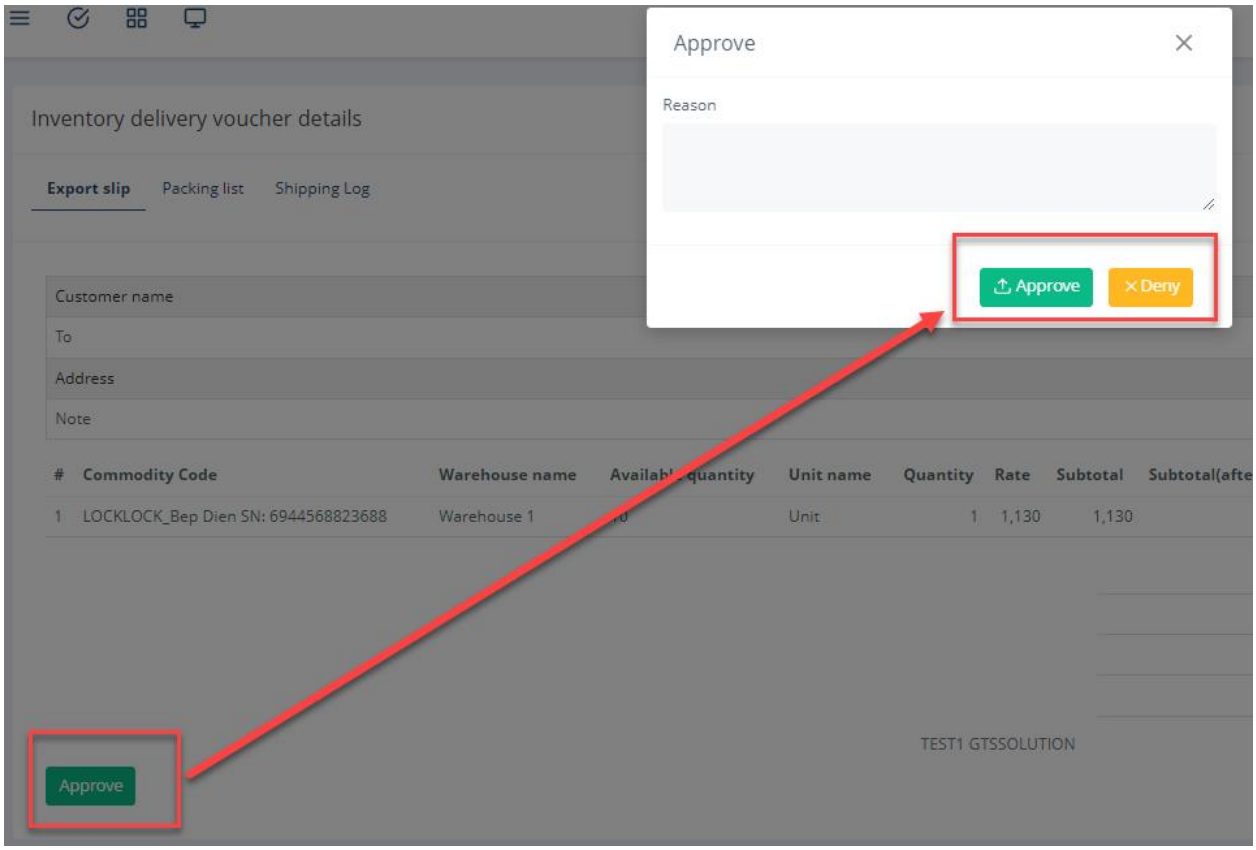
- The system sends a request for approval to the person in the process. The approver in the process of receiving the notification of the approval request via email and web - > proceed to select the notification or go to the inventory delivery voucher screen and view inventory details



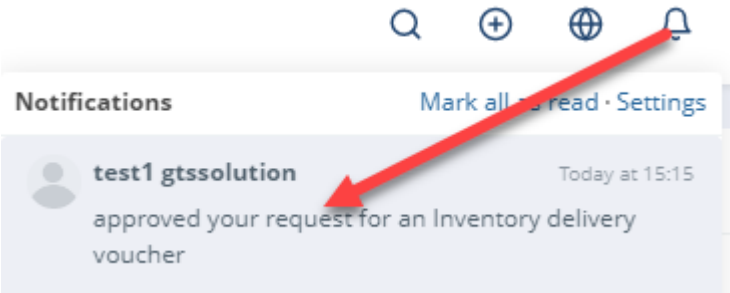
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → the status of the export slip transferred from n not yet approve to approve while reducing the inventory of items, marking the serial numbers that have been exported (if there is a serial number)

+ Select deny to reject and enter the reason, if any→; the status of the inventory slip moved from not yet approve to reject, and the inventory of the item is constant

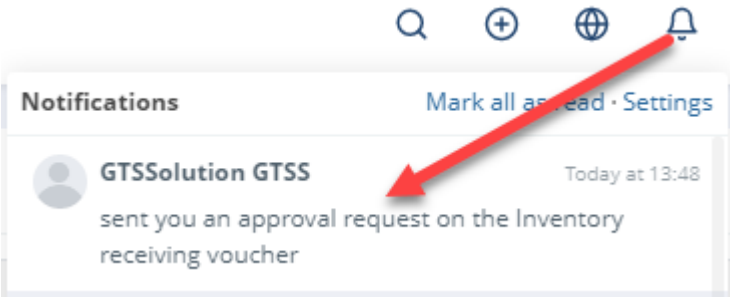


The creator of the inventory slip also receives notifications via email and the web when the approval or deny approval is obtained.



❖ For the approval process, select multiple people to approve

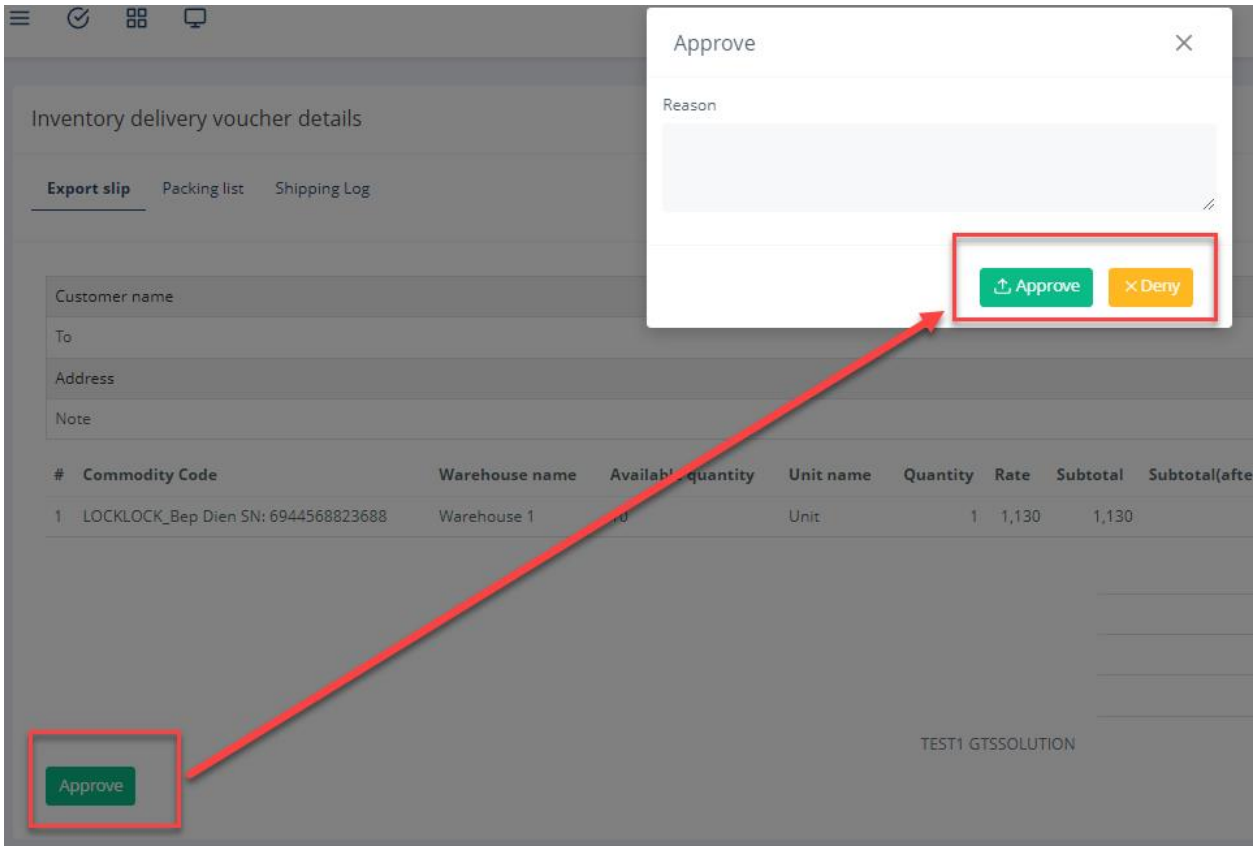
- Only the first person in the approval process receives a notification requesting approval via email and web - > proceed to select the notification or on the screening inventory receiving vouchers and view inventory details



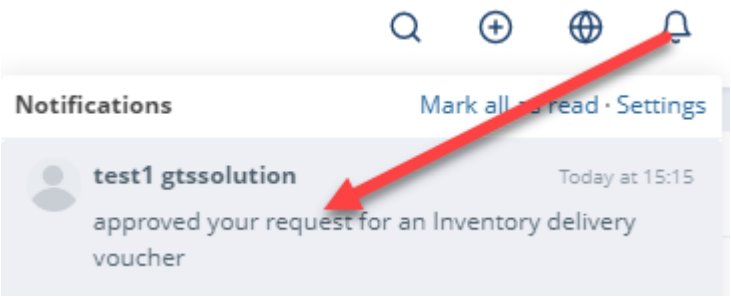
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → the inventory slip status remains not yet approved and requires approval. Sent to the next person in the process. The next person proceeds with approval and continues to do so until all are approved, the status of the out-of-stock voucher transfers. From not yet approve to approve while reducing the inventory of items, marking the serial numbers that have been exported (if there is a serial number)

+ Select deny to opt out and enter the reason, if any→; the next person in the approval process does not receive a notification requesting approval and cannot continue to approve for this warehouse slip. The inventory status moves from not yet approved to reject, and the inventory of the item is constant



The creator of the inventory slip also receives notifications via email and the web when the approval or deny approval is obtained.



❖ For the approval process, including approve + sign

Similar to the approval process that selects multiple people for approval, depending on whether the process of selecting the signature action is at the last step or not, there is an event difference.

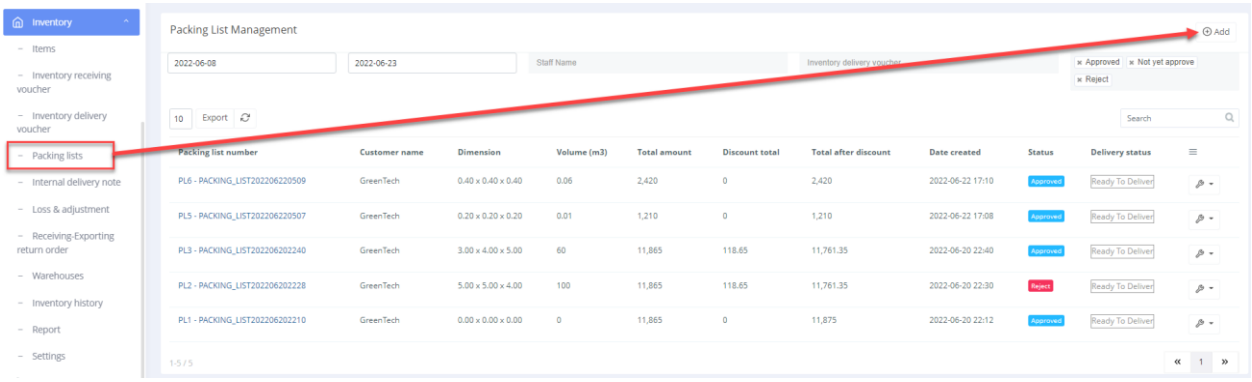
- If the signature action is not the final step of the process, only when this person completes the signature will the approval request be sent to the person? Next
- If the signature action is the final step, only when this person completes the signature does the status of the inventory slip go from not yet approved to approve simultaneously. Reduce inventory of items, mark serial numbers that have been exported (if the serial number is entered)

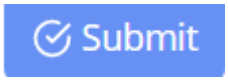
6. Packing lists

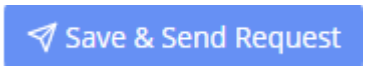
A stock voucher is created on multiple packing lists. If the first packing list is made up of a portion of the inventory slip and has been approved, the second packing list only shows the rest of the inventory slip.

6.1. Add a new packing list

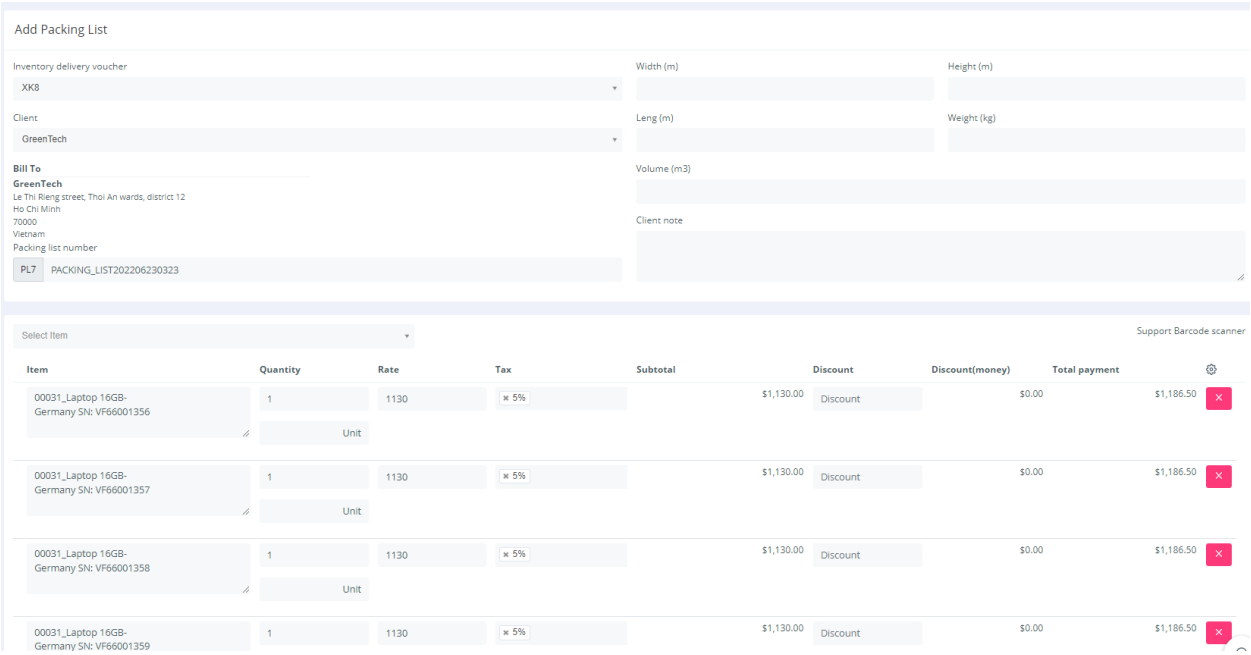
Step 1: Select the packing lists menu-> select the add button



- Step 2: the system displays the added packing list screen ->; enter the necessary data -> then tap 

to save the operation without submitting an approval request or pressing 

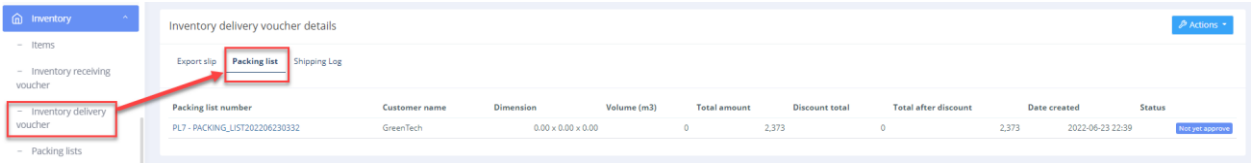
to save and submit an approval request to the first person in the approval process or to select close to close the screen and cancel the operation just performed



*explanation:

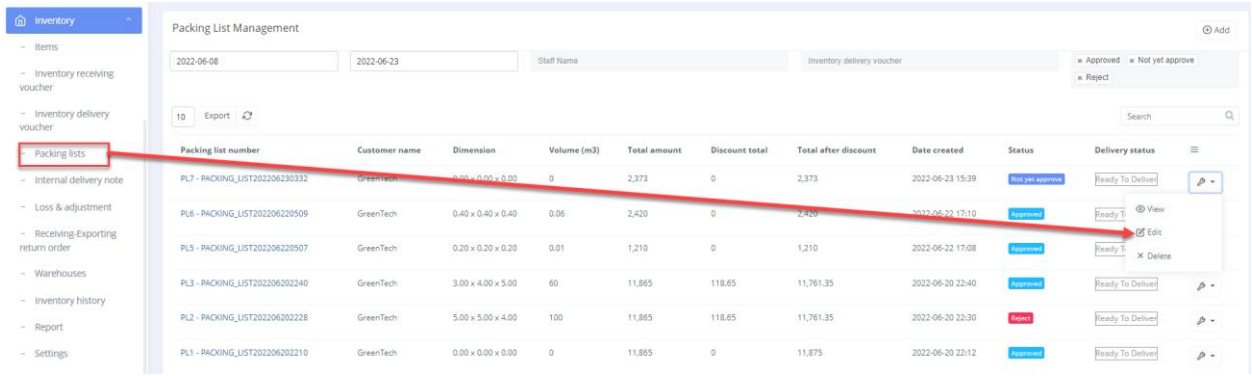
- Inventory delivery voucher field: displays warehouse vouchers that have been approved và have not been fully packaged.
- Client field: automatically fill in according to the export slip selected if the export slip selects customer name. If the inventory slip does not pre-select data in the customer name field, the client field in the packing list is empty
- The bill to field takes the address of the selected client.
- The width field used to enter postal width
- The height field used to enter postal height
- Leng field used to enter the postal length
- Trường volume (m3) = width (m) * height (m) * leng (m)
- Client note field used to enter customer notes
- Packing list number field: prefix + number preconfi configured in prefix setting
- The item column displays the item name with the serial number(if any) of the selected inventory sheet
- Qty field: automatically filled according to the selected inventory slip. If the item does not have a serial number, the number can be edited. Conversely, if the item has a serial number, the number cannot be edited.
- Rate field: load from the selling price of the item in the selected inventory slip
- Tax: allows you to choose a variety of taxes. Load by selected warehousing slip
- Subtotal: calculates the total value of each item, excluding taxes. Calculated by formula = qty * sale price
- Discount: enter % discount or load according to the selected export slip
- The discount field (money) is used to calculate the discount value of each item and calculate the formula (qty * sale price * tax) * discount
- Total discount field: used to calculate the total discount of the coupon.
- Trường total payment: (qty * sale price * tax) - total discount
- Shipping fee field: the user enters the shipping cost himself. Can be edited
- Total payment field: calculates the total payment of the voucher and calculated according to the formula = subtotal + total tax + total discount + shipping fee

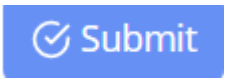
After successfully creating a packing list, the packing list is displayed in the details of the warehouse slip.

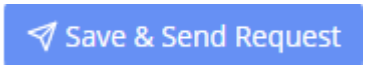


6.2. Edit packing list

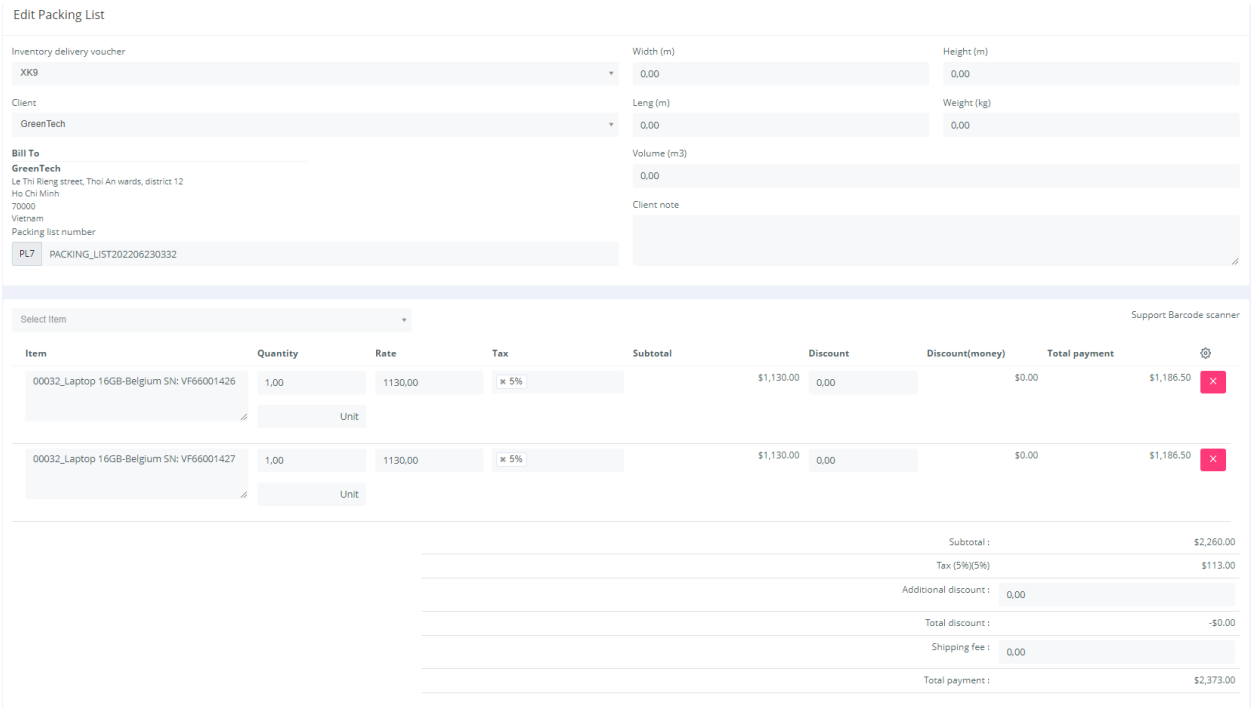
Step 1: at the packing list screen -> select the corresponding line to edit -> select edit function



Step 2: the system will display the corresponding edit packing list screen -> proceed to edit the data -> then press 

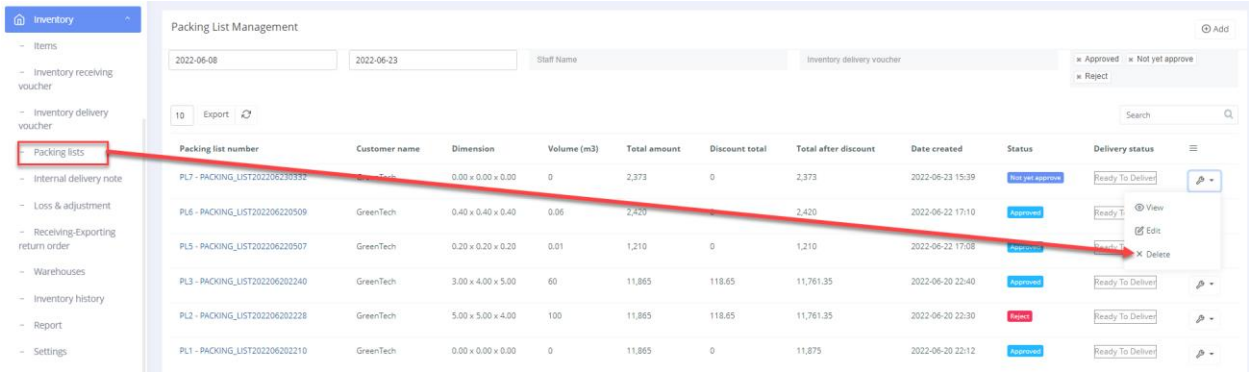
to save the operation without submitting a request approve or tap 

to save and submit an approval request to the first person in the approval process or select close to close the screen and cancel the operation the work just did.



6.3. Delete packing list

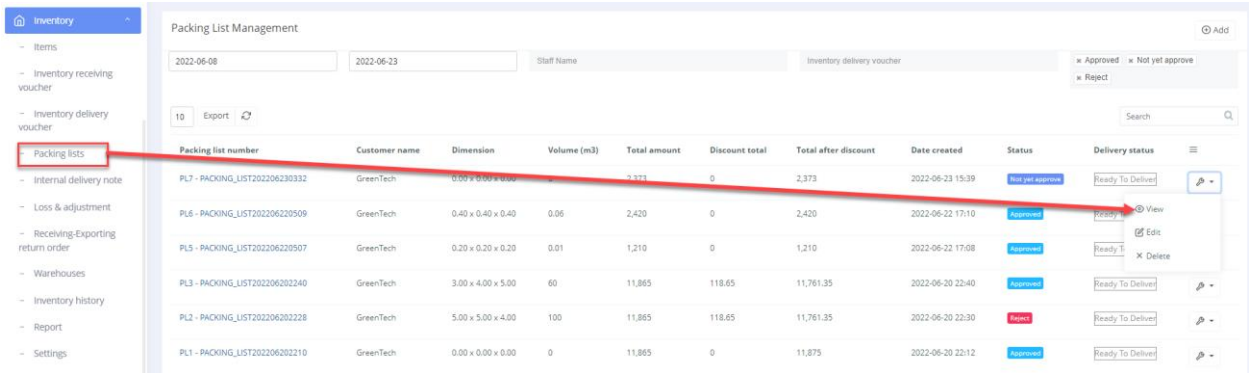
Step 1: at the packing lists-> screen select the corresponding line that wants to delete-> select delete function



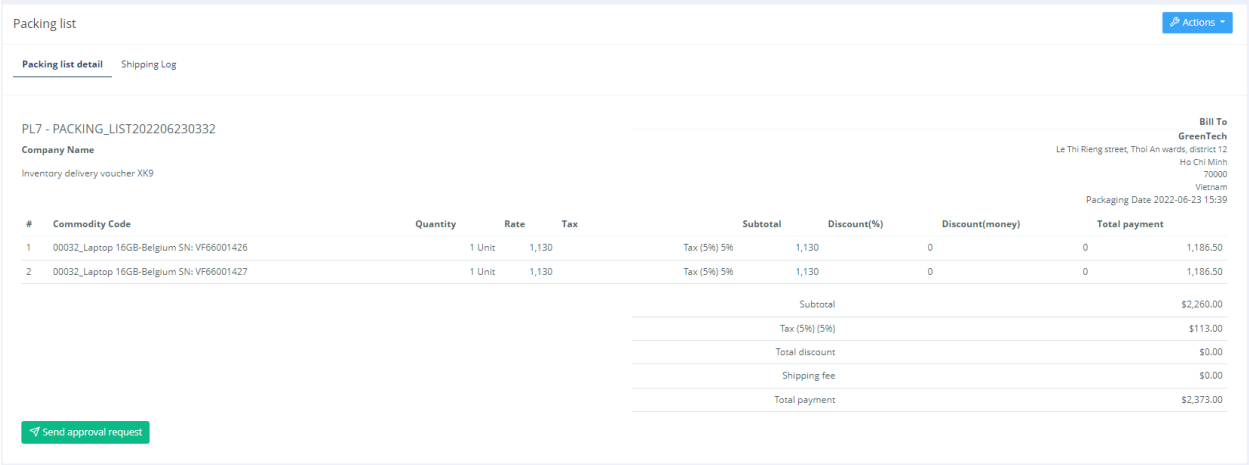
Unable to delete packing lists with approved and rejected status

6.4. See packing list details

Step 1: at the inventory delivery voucher-> screen, select the corresponding line to see the details -> select the view function



Step 2. Navigation system to packing list details page



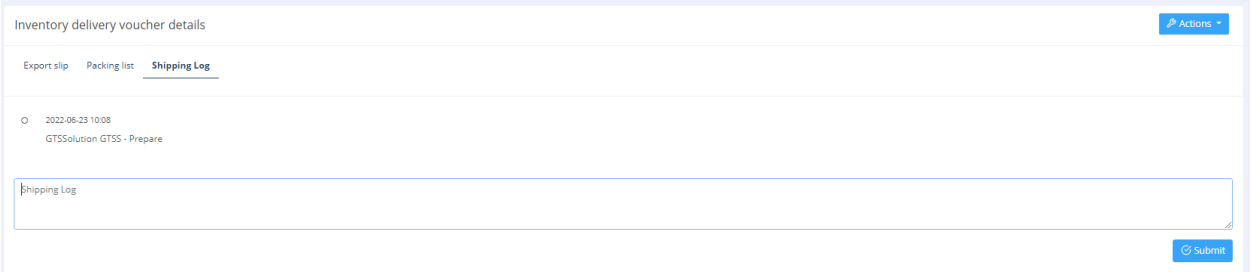
* explanation:

The button action is used to download pdf, view pdf, or edit the packing list

The button that sends approval requests is used to submit a packaged voucher approval request.

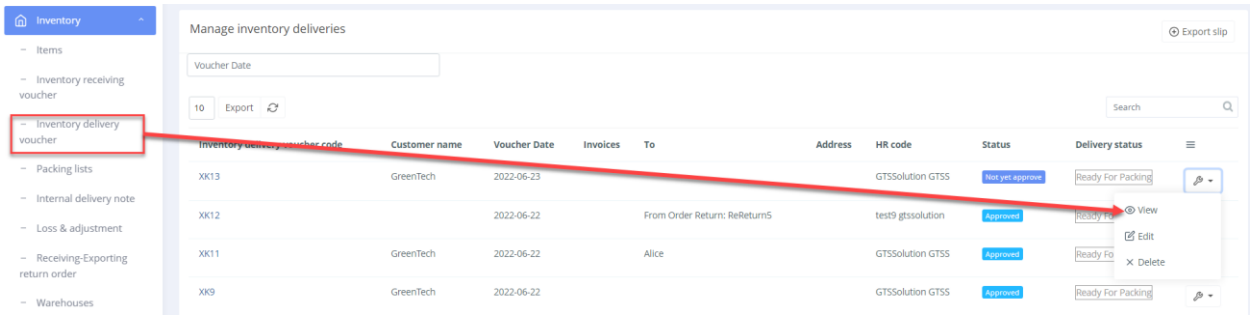
The packing list detail tab shows packing slip information

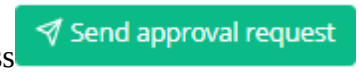
The shipping log tab used to record shipping history



6.5. Submit a request for approval and conduct approval

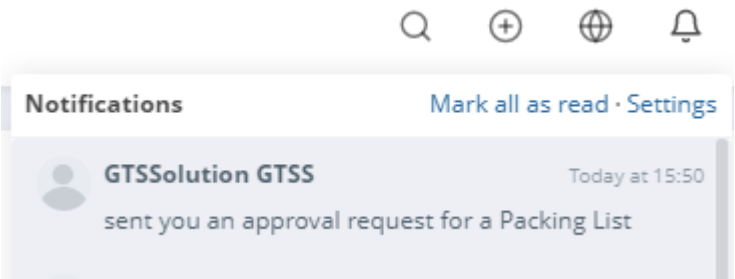
Step 1: Select the packing list whose status is not yet approved -> press view



Step 2. : press 

❖ For the approval process, select a person for approval

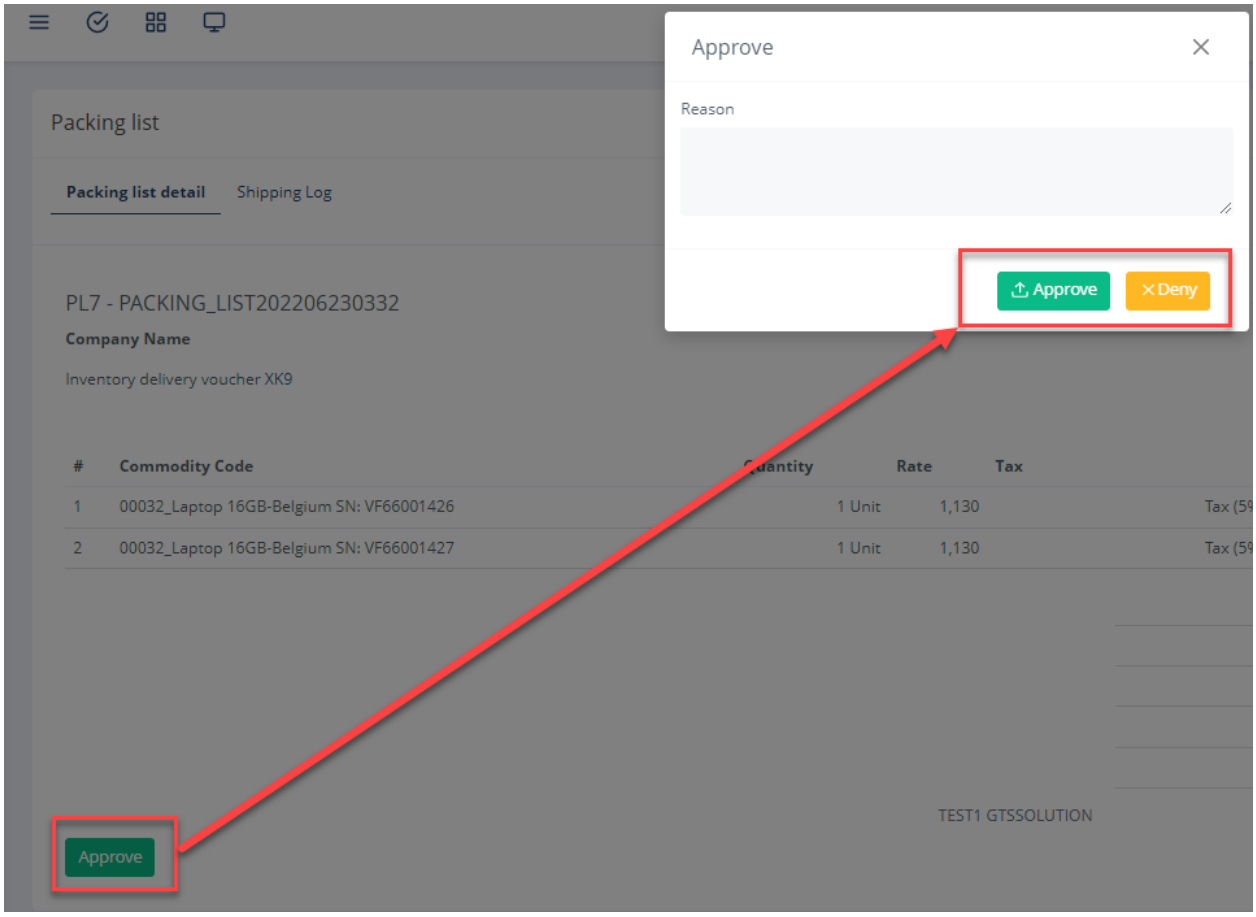
- The system sends a request for approval to the person in the process. The approver in the process of receiving the notification of the approval request via email and the web - > proceed to select the notification or go to the packing list screen and view packing slip details



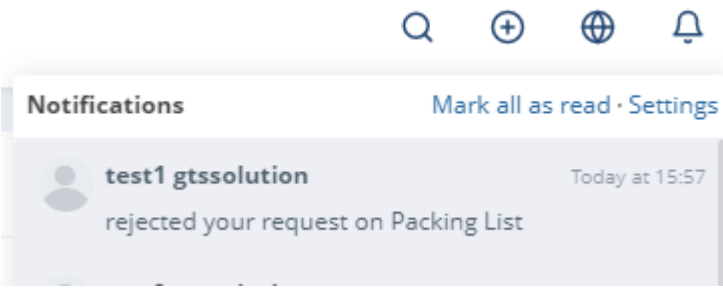
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can enter or not) and select the approve function → packing list status switch from not yet approve to approve → if packaged in full warehousing slips can no longer be packaged for this warehousing slip. Conversely, if a portion of the inventory slip is packaged, the next packing only shows the rest of the unpacked inventory slip.

+ Select deny to reject and enter reasons if available→ packing list status switches from not yet approve to reject - > allow re-creation of packaging for this inventory coupon

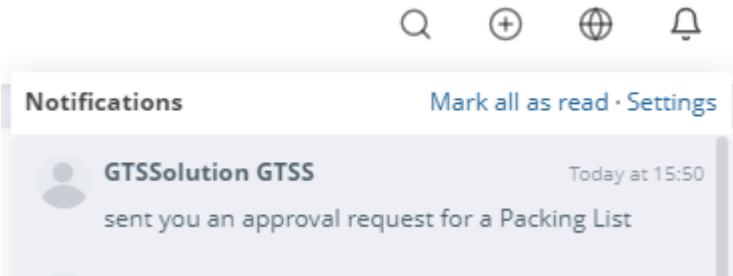


Packing list holders also receive notifications via email and the web when the approval or deny approval is available.



❖ For the approval process, select multiple people to approve

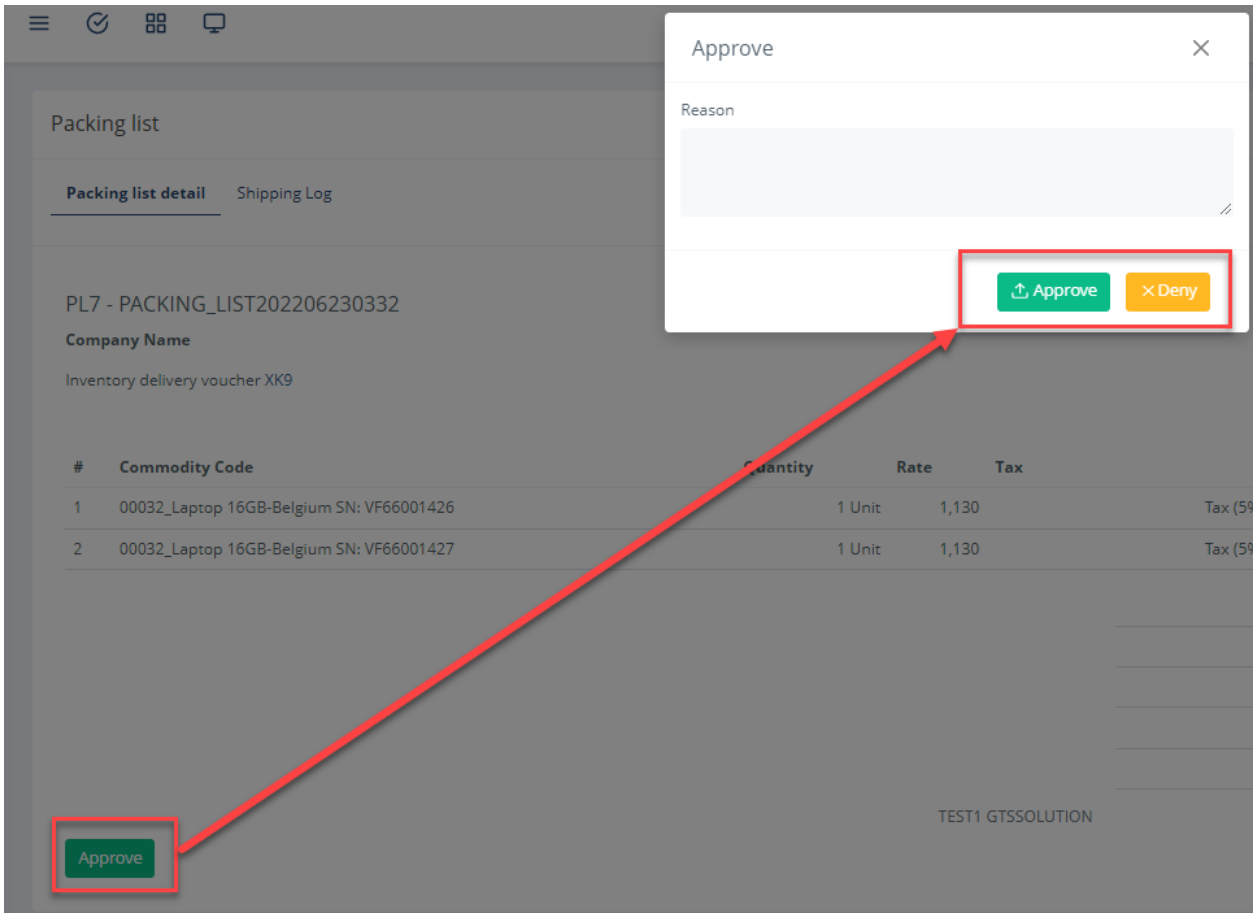
- Only the first person in the approval process receives a notification requesting approval via email, and the web - > proceed to select the notification or go to the packing list screen and see packing slip details



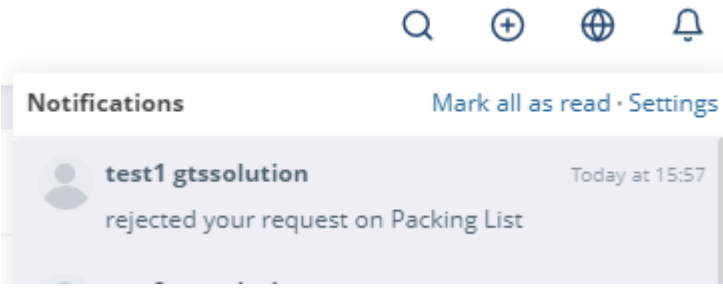
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → the inventory slip status remains not yet approved and requires approval. Sent to the next person in the process. The next person proceeds to approve and so on until they all approve ⇒ then the packing list status moves from not yet approved to approve → if you pack the entire inventory slip, you can no longer create a package for this warehouse voucher. On the contrary, if one part of the warehousing slip is packed, the next packing only shows the rest of the unpacked inventory slip. Package.

+ Select deny to opt out and enter the reason, if any→. The next person in the approval process does not receive a notification requesting approval and cannot continue → packing list status switches from not yet approved to reject - > allows re-creation of packaging for this warehouse slip.



Packing list holders also receive notifications via email and the web when the approval or deny approval is available.



❖ For the approval process, including approve + sign

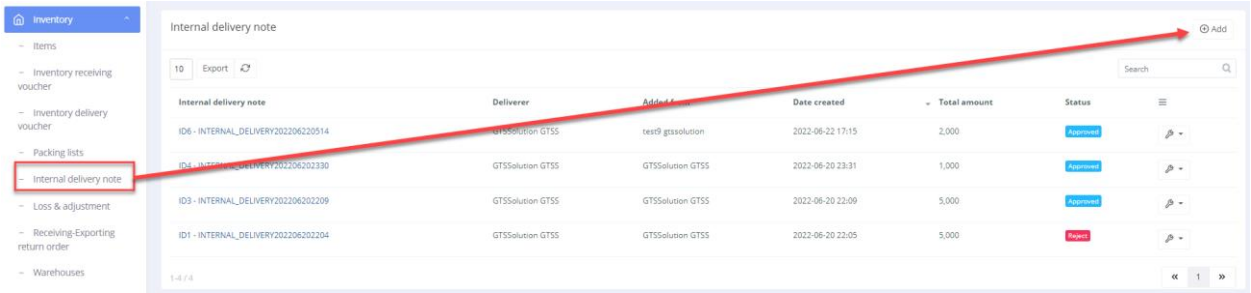
Similar to the approval process that selects multiple people for approval, depending on whether the process of selecting the signature action is at the last step or not, there is an event difference.

- If the signature action is not the final step of the process, only when this person completes the signature will the approval request be sent to the person? Next
- If the signature action is the last step, only when this person completes the signature does the status of the out-of-stock voucher go from not yet approved to approve → if packaged completely, the inventory slip can no longer be packaged for this warehouse slip. Conversely, if a portion of the inventory slip is packaged, the next packing only shows the rest of the unpacked inventory slip.

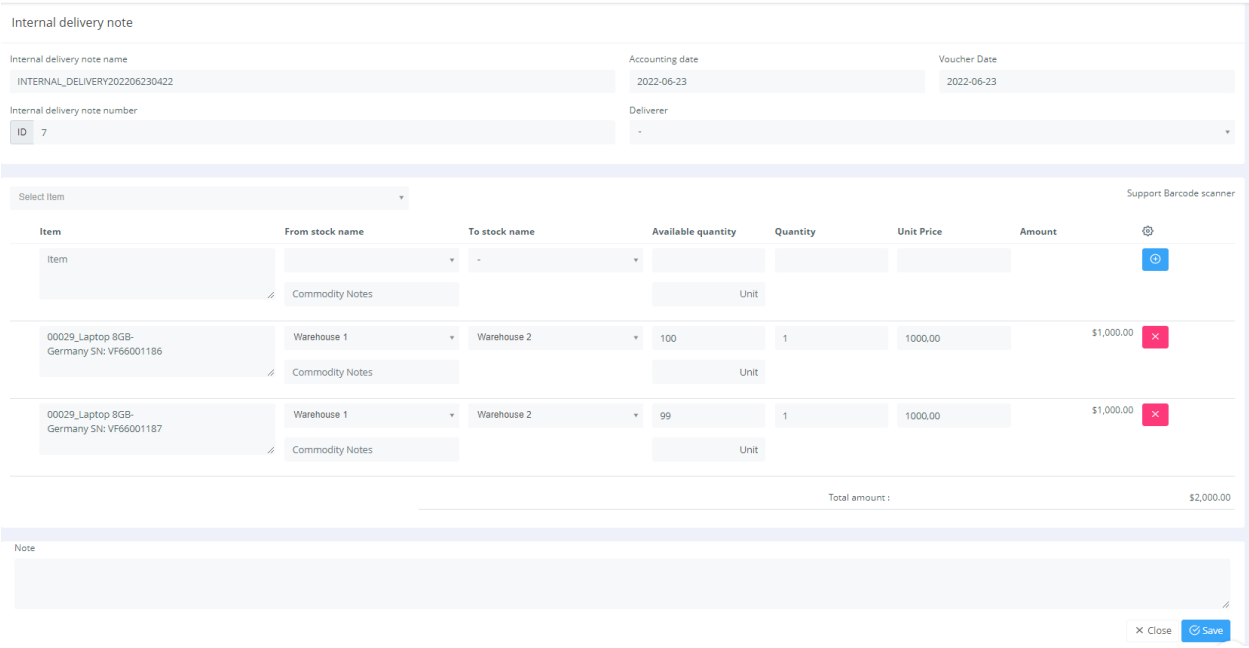
7. Internal delivery note

7.1. Add a new internal delivery note

Step 1: select the internal delivery note-> menu to select the add button



- Step 2: the system will display the internal delivery note screen -> enter the necessary data -> then tap to add this item to the warehouse transfer slip -> then press save to save the operation or select close to close the screen and cancel the operation just done



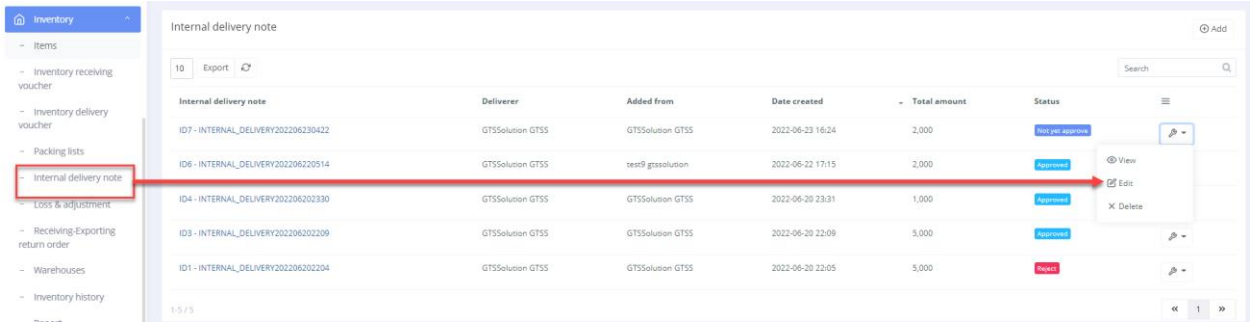
*explanation:

- The internal delivery note name field is the name of the warehouse transfer slip, and it gives birth to itself.
- Accounting date field: used to select the settlement date of the warehouse transfer slip
- The voucher day field is used to enter the export date of the warehouse transfer slip

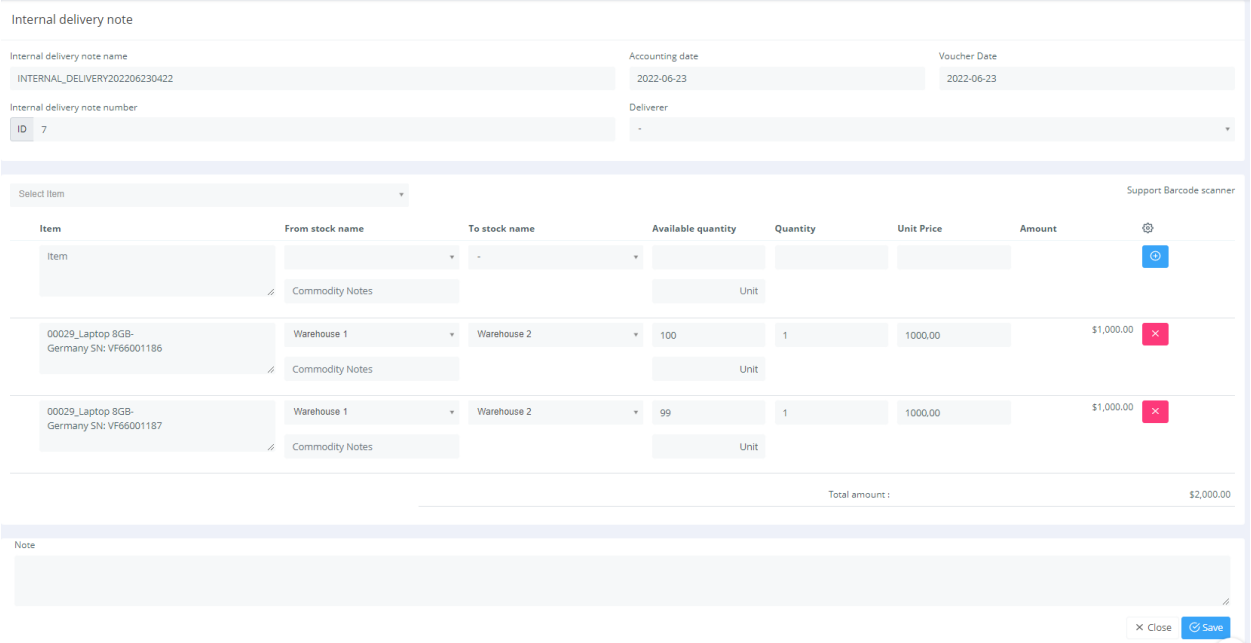
- The internal delivery note number is a prefix + number prefix + number prefix transfer number preconfigured in the setting
- The deliverer field is used to select the recipient. Data were taken from the team-> team member screen
- Select item field: displays items with a check option that can be inventory. If the item has a serial number, the system prioritizes selecting the items assigned to the serial number and selecting the first serial number in the list to transfer.
- From stock name field: used to select the export warehouse, only load the warehouses that this item contains in it.
- To stock name field: used to select the receiving warehouse. Data is taken from the warehouse screen and can only select warehouses that are in the display state
- The available quantity field shows the current inventory of the item in the selected repository.
- Quantity field: enter the quantity of warehousing. The quantity must be less than or equal to the available quantity.
- Unit price field: load from the purchase price of the selected item
- The amount field is the total warehouse transfer value of the item. Quantity * unit price formula
- The total amount field calculates the total warehouse transfer value of all items in the coupon
- Note field used to enter notes for warehouse transfer slips
- Button : click on this button to delete the added item

7.2. Edit internal delivery note

Step 1: at the internal delivery note -> screen, select the corresponding line to edit -> select edit function

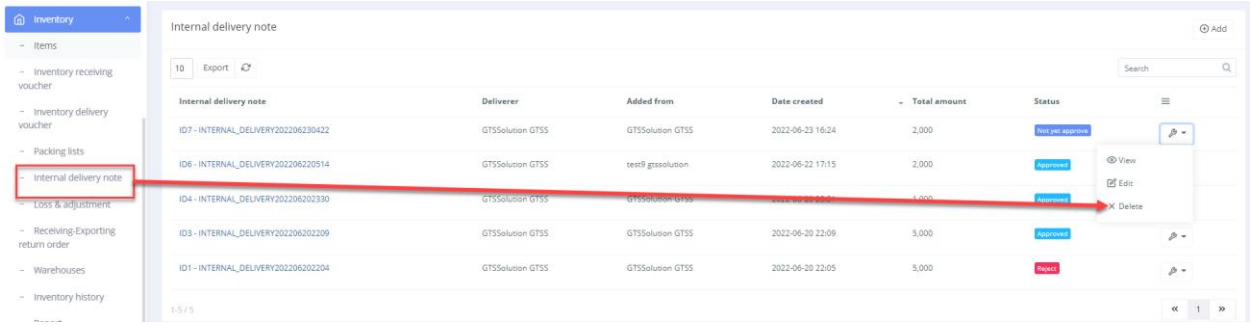


Step 2: the system will display the corresponding edit internal delivery screen -> proceed with data editing -> then press save to save the operation or select close to close the screen and cancel the operation just done.



7.3. Delete internal delivery note

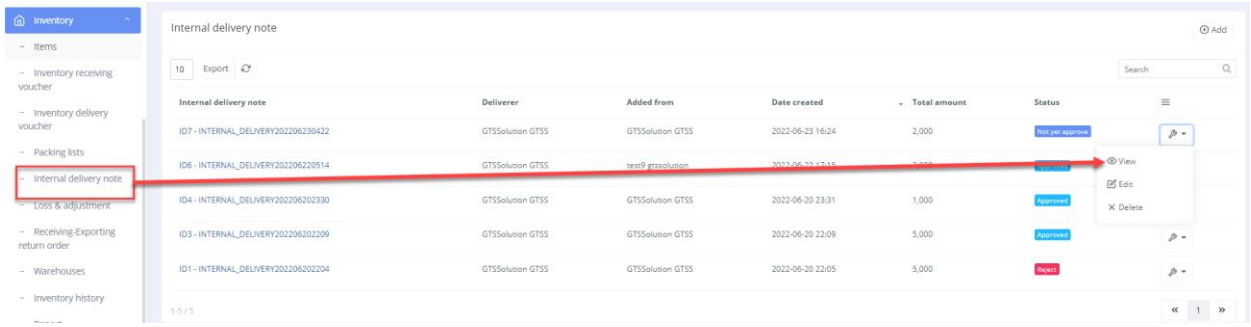
Step 1: at the internal delivery note -> screen, select the corresponding line you want to delete-> select delete function



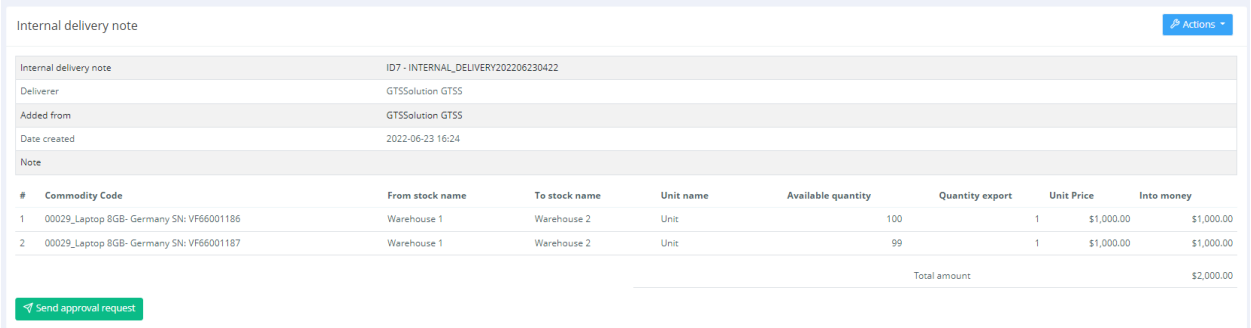
Internal delivery cannot be deleted with approved and rejected status

7.4. View internal delivery note details

Step 1: at the internal delivery note-> screen, select the corresponding line that wants to see the details -> select the view function



Step 2. The system redirects to the internal delivery note details page



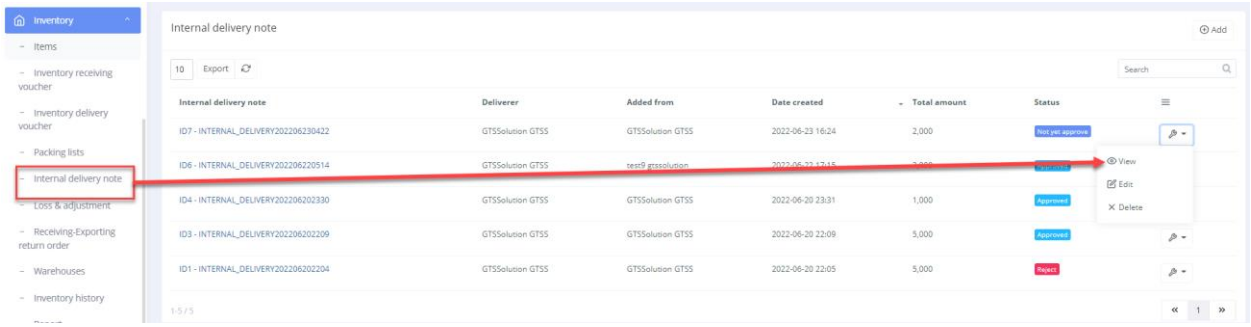
* explanation:

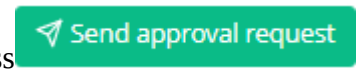
The button action is used to download pdf, view pdf, or edit internal delivery note

The send approval request button is used to submit a request for approval of a warehouse transfer slip.

7.5. Submit a request for approval and conduct approval

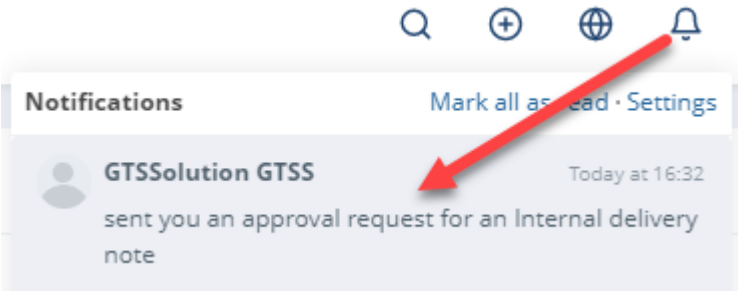
Step 1: select internal delivery whose status is not yet approved -> press view



Step 2. : press 

❖ For the approval process, select a person for approval

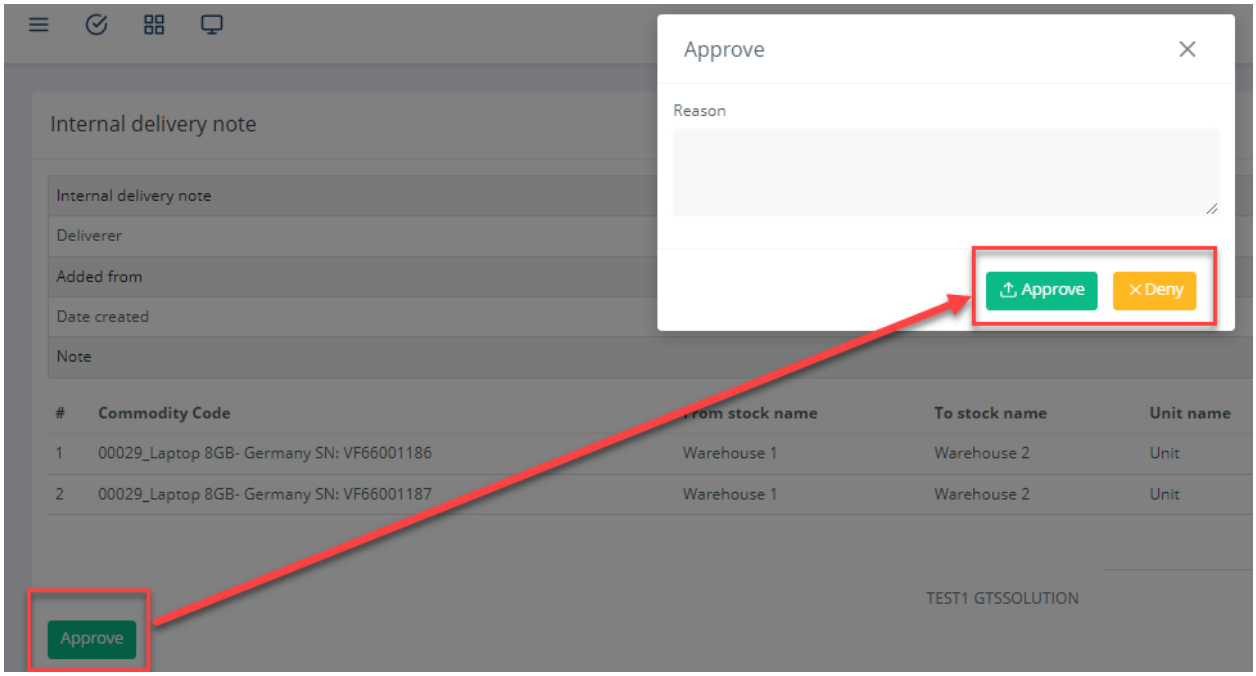
- The system sends a request for approval to the person in the process. The approver in the process of receiving the notification of approval request via email and the web - > proceed to select the notification or go to the internal delivery note screen and view internal warehouse transfer slip details



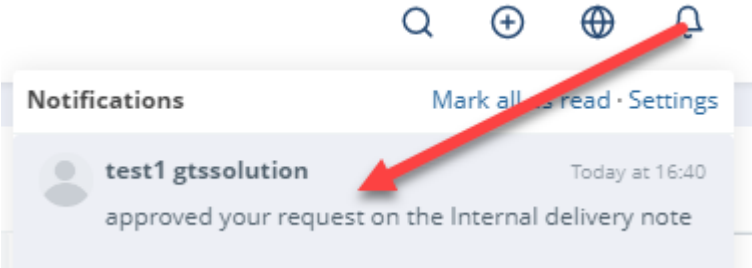
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → internal delivery status to switch from not yet approve to approve → inventory of the item in the warehouse transfer down, the item is transferred to the incoming warehouse and increase the inventory at the incoming warehouse. Record the transaction history in the transaction history tab (in item details). If the item has a serial number, mark the moved serial number in the transaction history tab. Also, record history in the inventory history menu

+ Select deny to reject and enter a reason if any→ internal delivery status switches from not yet approve to reject - > inventory is constant, no items are transferred

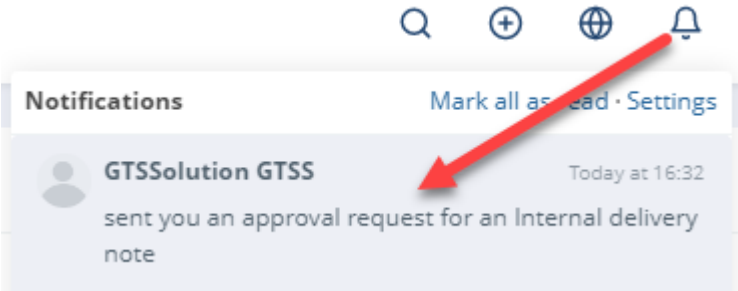


Internal delivery voucher creators also receive notifications via email and the web when the approval or deny approval is available.



❖ For the approval process, select multiple people to approve

- Only the first person in the approval process receives an email and web approval request notification -> proceed to select the notification or go to the internal screen delivery and view warehouse transfer slip details

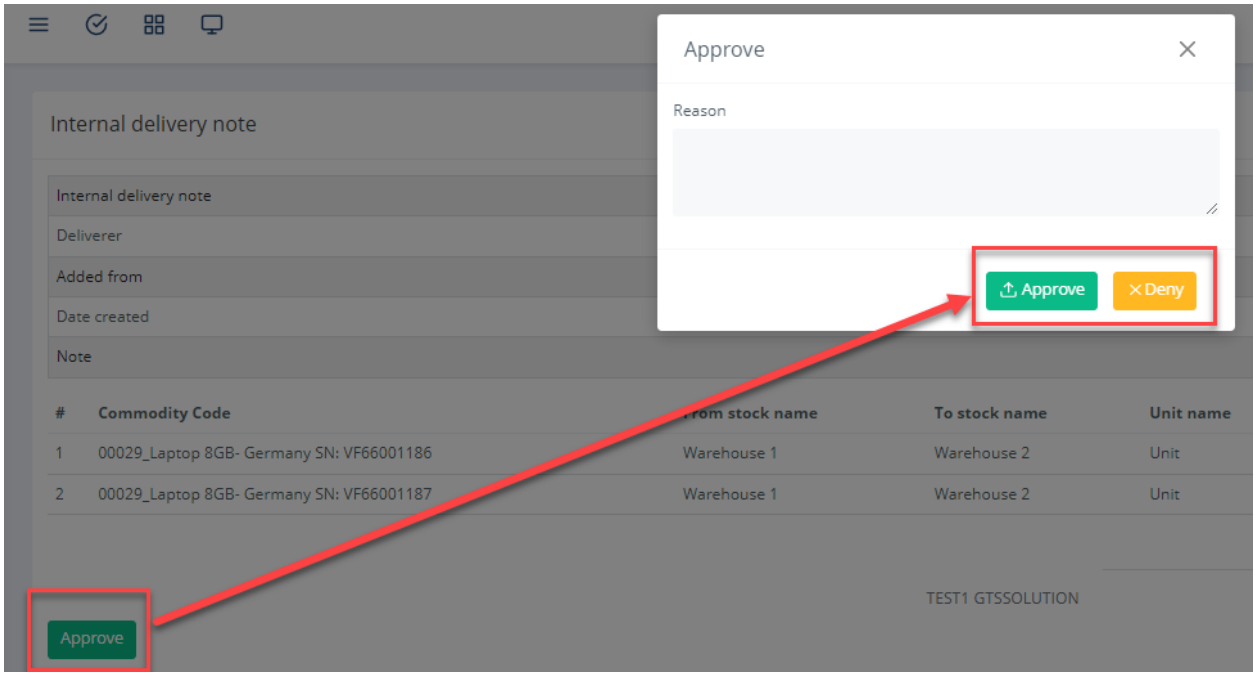


- Select the approve function - > the system will display two options: approve and deny.

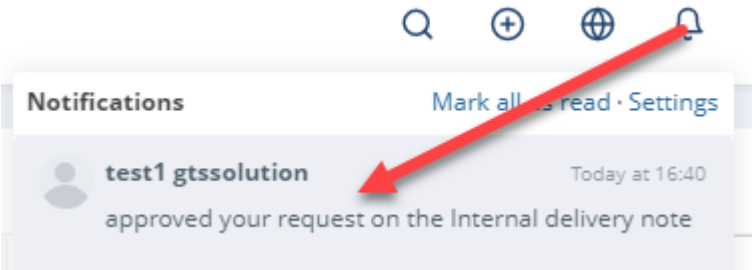
+ If you agree, enter the reason (can be entered or not) and select the approve function → the inventory slip status remains not yet approved and requires approval. Sent to the next person in the process. The next person conducts approval and continues to do so until all approve → internal delivery status moves from not yet approved to approve → the inventory of the item in the warehouse is reduced, the item is transferred to the incoming warehouse and increases the inventory in the incoming warehouse. Record the transaction history

in the transaction history tab (in item details). If the item has a serial number, mark the moved serial number in the transaction history tab. Also, record history in the inventory history menu

+ Select deny to opt out and enter the reason, if any→; the next person in the approval process does not receive a notification requesting approval and cannot continue → internal delivery status switches from not yet approve to reject - > inventory is constant, no items are transferred



Internal delivery voucher creators also receive notifications via email and the web when the approval or deny approval is available.



❖ For the approval process, including approve + sign

Similar to the approval process that selects multiple people for approval, depending on whether the process of selecting the signature action is at the last step or not, there is an event difference.

- If the signature action is not the final step of the process, only when this person completes the signature will the approval request be sent to the person? Next
- If the signature action is the final step, only when this person completes the signature does the status of the out-of-stock voucher switch from not yet approved to approve → the inventory of the person. Items in the warehouse are transferred down, and the item is transferred to the incoming warehouse and increases the inventory in the incoming warehouse. Record the transaction history in the transaction history tab (in item details). If the item has a serial number, mark the moved serial number in the transaction history tab. Also, record history in the inventory history menu

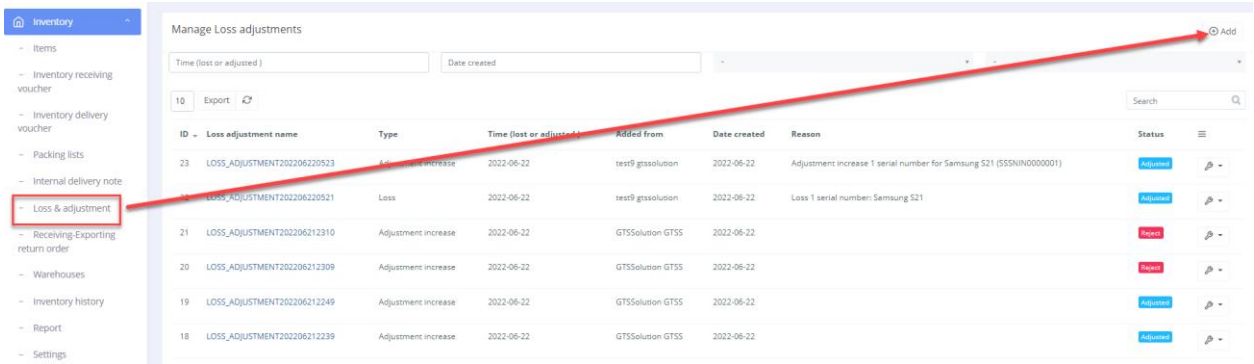
8. Loss & adjustment

There are two types of warehouse adjustments: loss and adjustment increase.

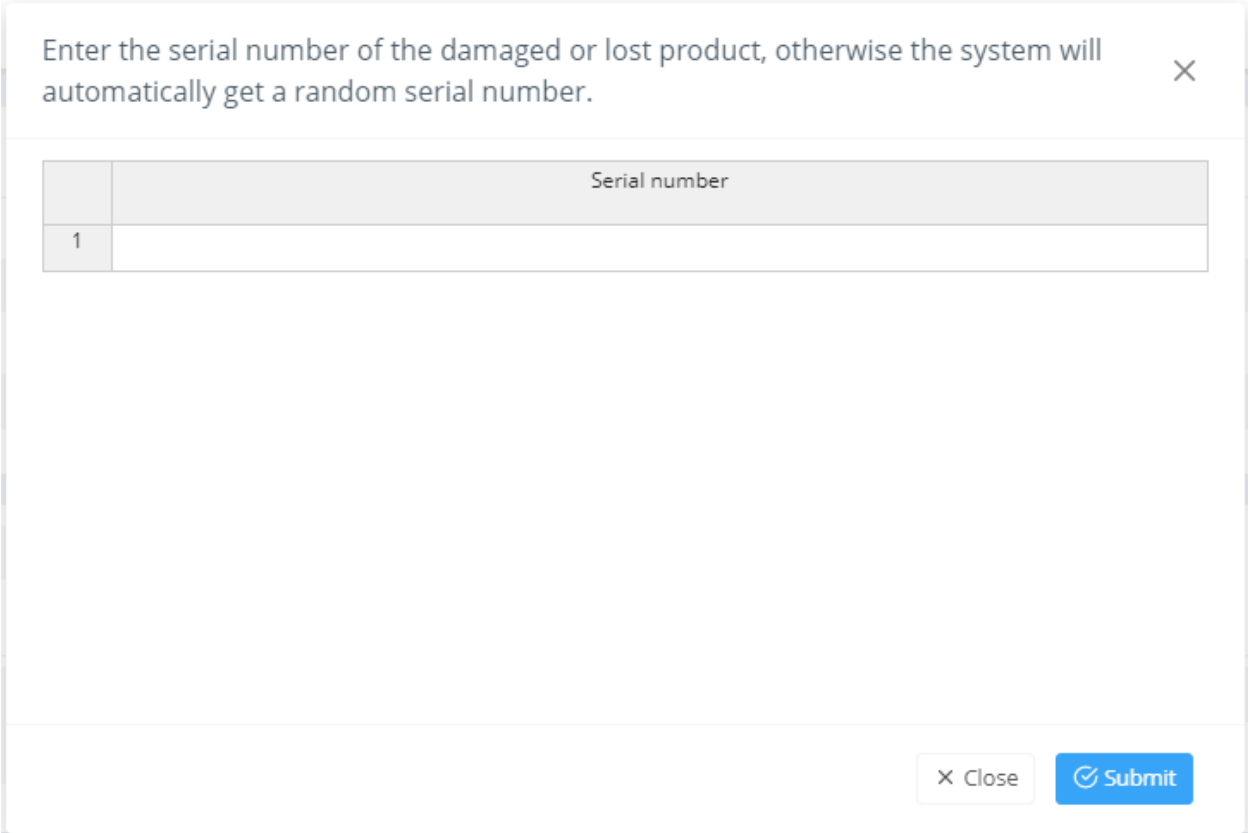
- Adjust inventory reduction => need to enter the lost serial number; otherwise, entering it will randomly retrieve the serial number to mark the cancellation
- Adjust inventory increase => need to enter the increased number and enter the serial number (can enter or not)

8.1. Add new warehouse adjustments

Step 1: Select the loss & adjustment menu > select the add button

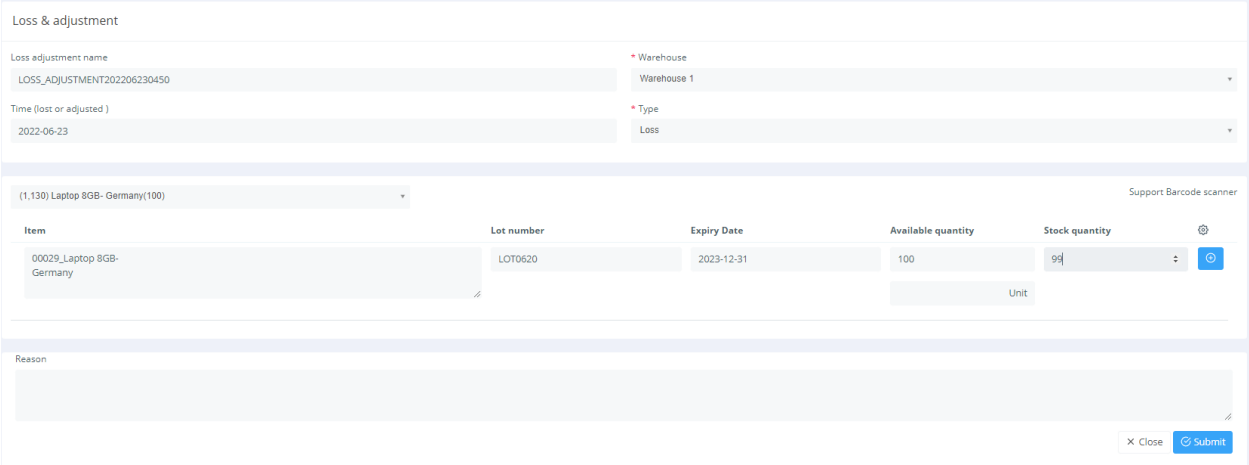


- Step 2: the system will display the loss adjustment name screen -> select type as the loss to create inventory coupons, or select type as adjustment increase to increase inventory -> later that enters the required data -> then tap to add this item to the repository adjustment slip -> if the item has a serial number - series, the screen is displayed the popup market enters the serial number of the damaged or lost product; otherwise the system will automatically retrieve the random serial number.-> then press submit to save the operation or select close to close the screen and cancel the operation just done



- Step 3. Press submit to save the operation or select close to close the screen and cancel the operation just done

-

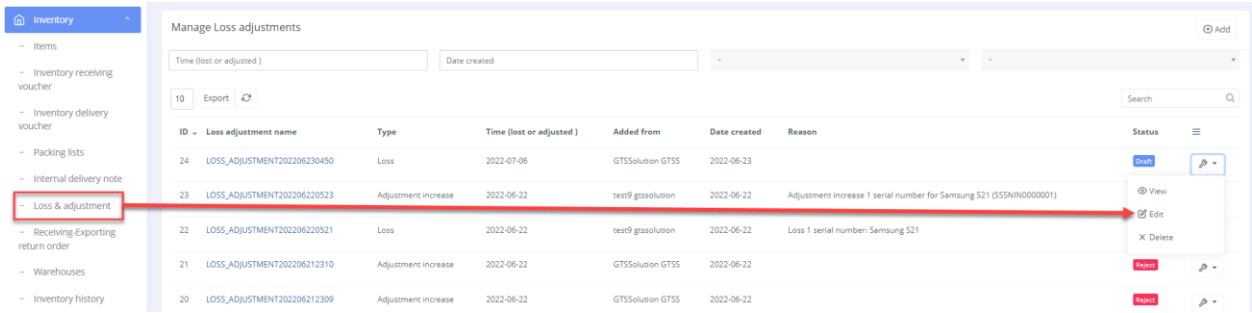


*explanation:

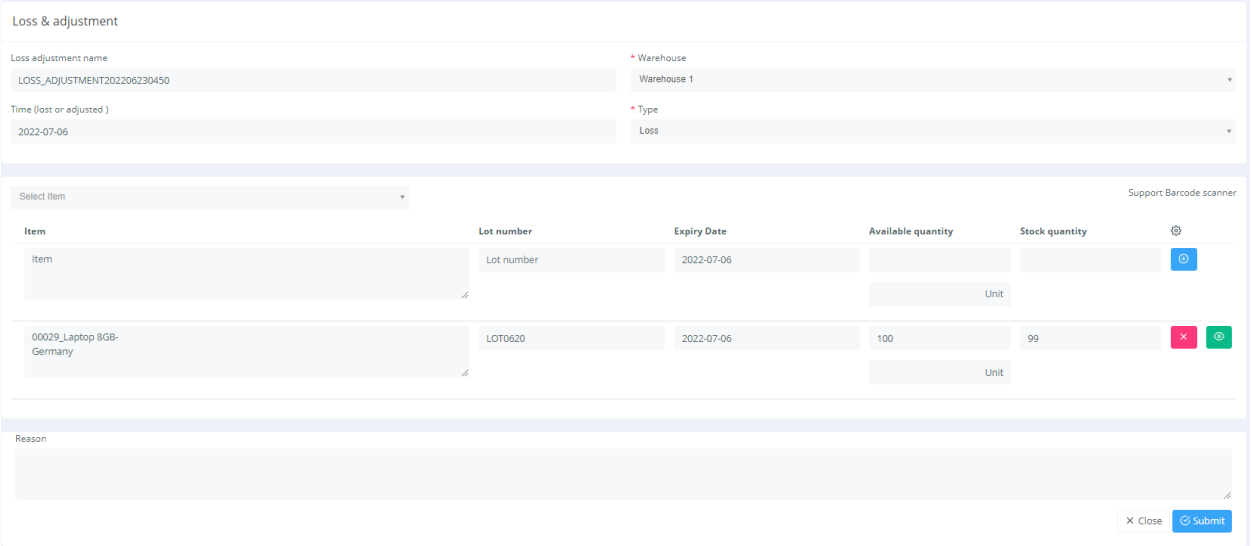
- Loss adjustment name field: is the name of the adjustment slip. This field is self-generating
- The warehouse field is used to select warehouses that need inventory adjustments
- The time field (lost or adjusted) selects the adjusted date
- Type field selects adjustment type, and there are two types of loss and adjustment increase
- The reason field used to enter the reason for an adjustment
- Button : click on this button to delete the added item
- Button : click to reopen the popup enter the serial number

8.2. Editing

Step 1: at the loss & adjustment -> screen select the corresponding line you want to edit -> select edit function

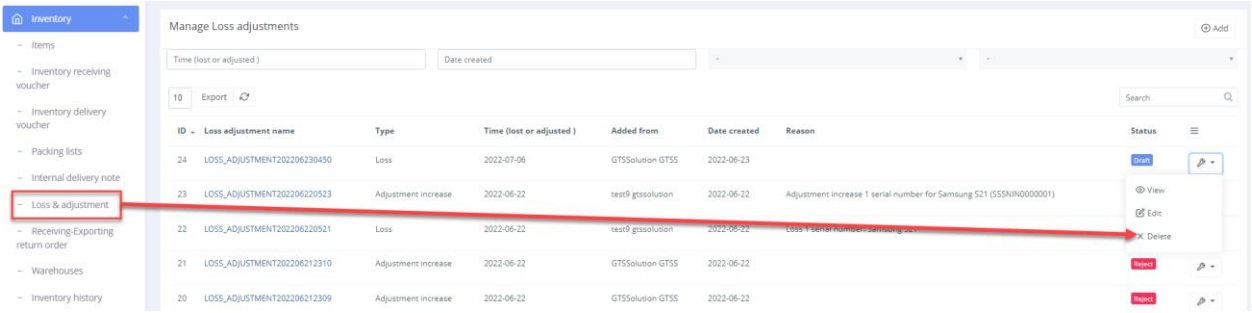


Step 2: the system will display the corresponding loss & adjustment screen -> proceed to edit the data -> then press submit to save the operation or select close to close the screen and cancel the operation just done.



8.3. Delete

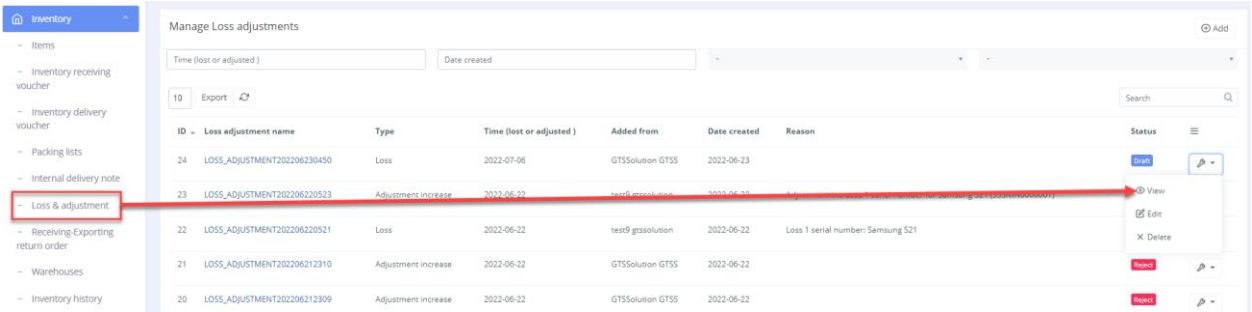
Step 1: at the loss & adjustment screen - > select the corresponding line that wants to delete-> select delete function



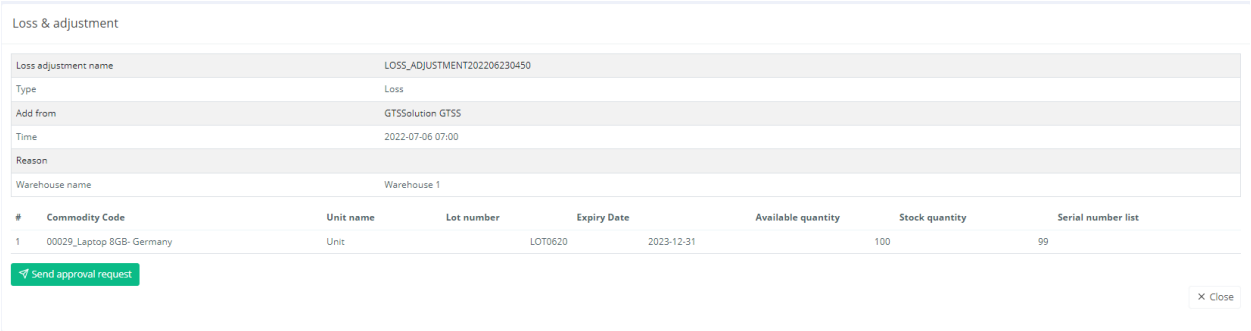
Loss & adjustments with adjusted and reject status cannot be deleted

8.4. See details

Step 1: at the internal loss & adjustment-> screen select the corresponding line that wants to see details -> select view function



Step 2. The system redirects to the internal delivery note details page



* explanation:

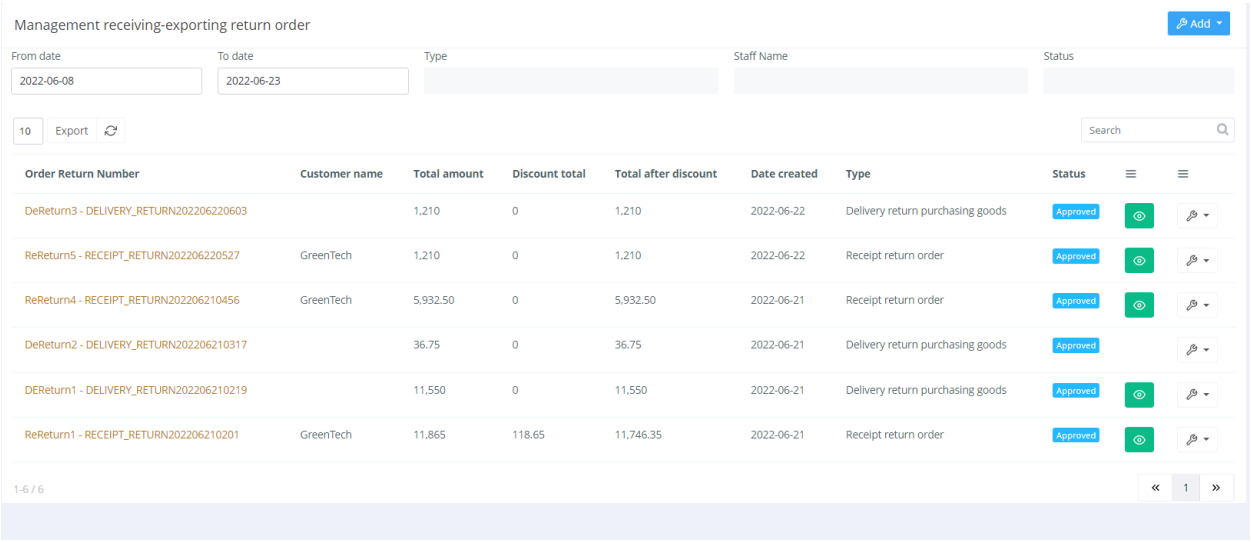
Button-close to close the detailed screen and return to the management screen

The send approval request button is used to submit an adjustment slip approval request.

8.5. Submit a request for approval and conduct approval

- The approval process is similar to the above functions.
- The case of creating "loss & adjustment" with the type "loss" after approving the inventory amount will be reduced
- The case of creating "loss & adjustment" with the type "adjustment increase" after approving the number of warehouses will increase.

9. Receiving - exporting return order

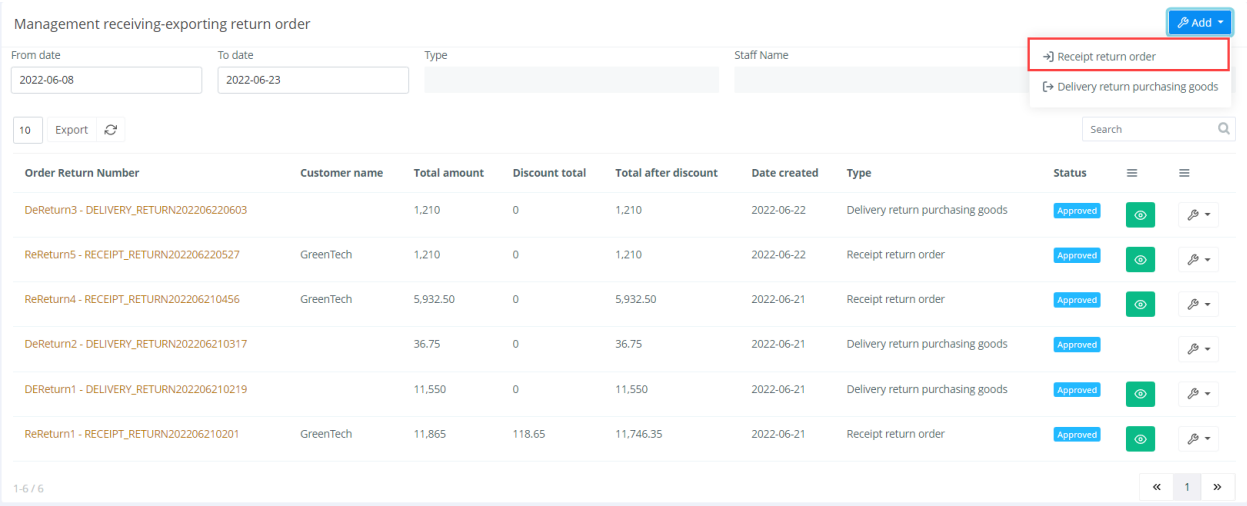


- The function of managing data related to the

+ "return entry" - when the customer has purchased the product but has a request to return the product because the product is damaged, damaged, or not in accordance with the requirements, it will be created "receiving - exporting return order" with the type "receiving return order".

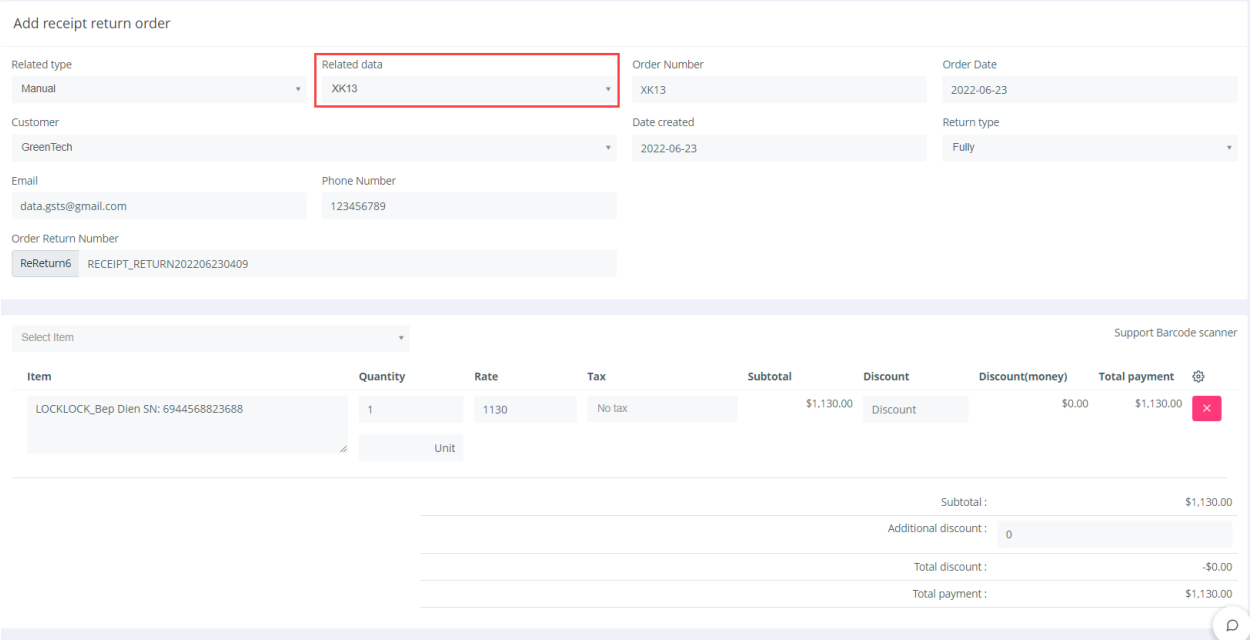
+ " return" - when there is a need to return the goods to the supplier that previously purchased, will create "receiving - exporting return order" with the type "exporting return order."

9.1. Receiving return order



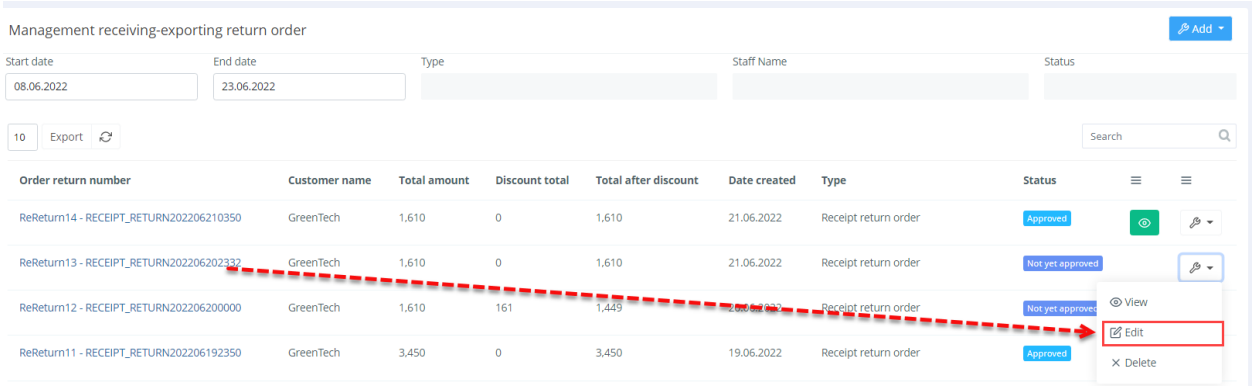
9.1.1.add new

- Select the "add" button, and then select the "receipt return order" type



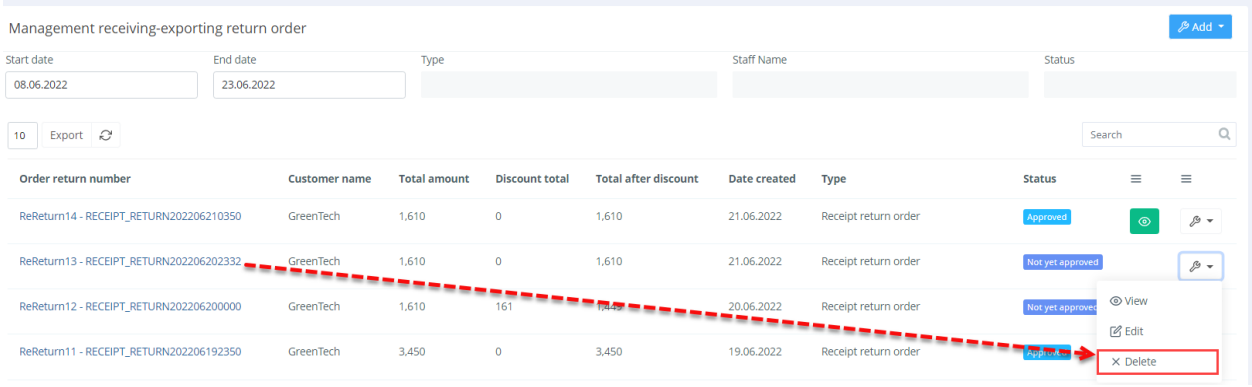
- "related data": displays all inventory slip information that is allowed to create "receipt return order". After selecting the inventory slip information, the relevant data "order number", "customer", "email", and "phone number" will be automatically retrieved from the inventory slip and fill in the fields. Respectively. Product information is also automatically displayed.
- "return type": the default is "fully"; if you want to change "partially," just delete the products that you do not want to return; default to the products displayed on the screen; new images are the products that are required to be returned.
- After entering the full data on the screen, press the "save" or "save & send request" button

9.1.2. Editing



- In addition to the management screen, select "edit": then the system will open the screen that allows editing the data, after editing select "save" to save the data, whether edited or selected "close" to cancel the change

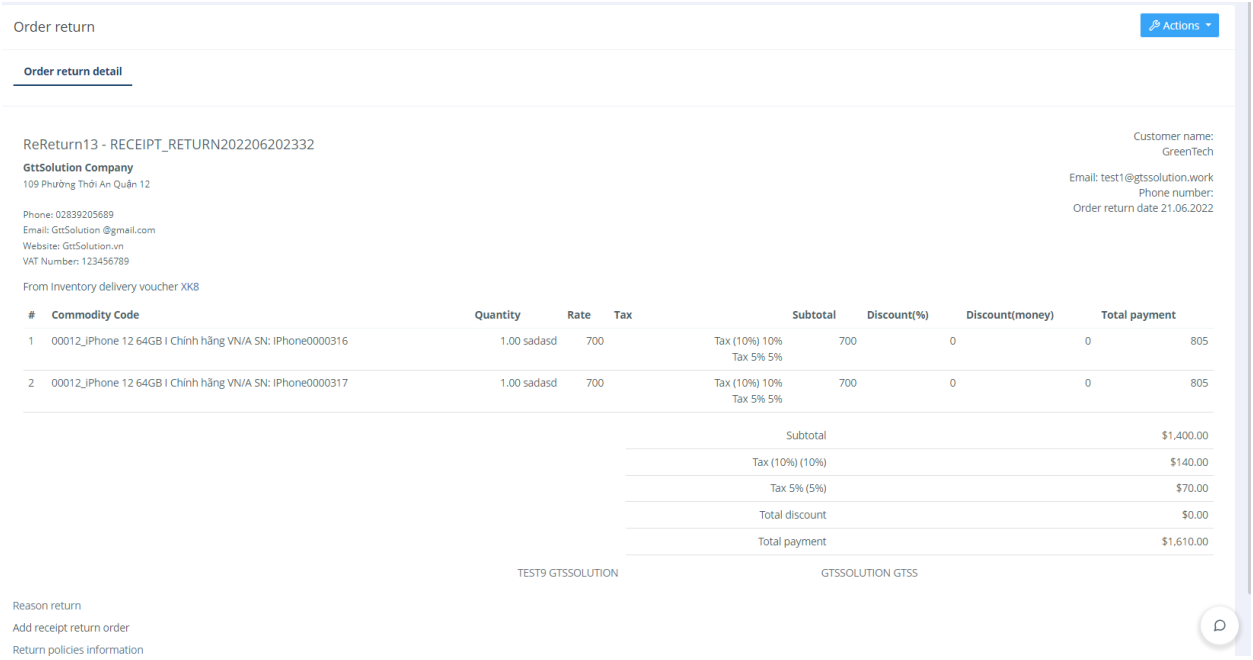
9.1.3. Delete



- In addition to the management, the screen select "delete": then the system displays confirmation that there is a clearing of the transaction in the air; confirm if you want to delete.

9.1.4. View details

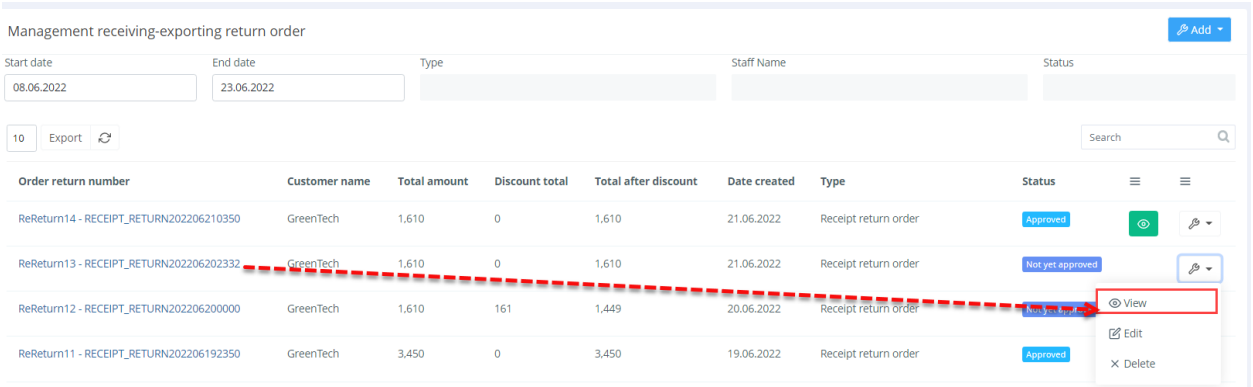
. In addition to the management screen, select "view": then the system opens the screen showing transaction details

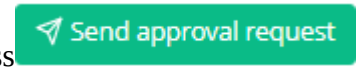


- The detailed screen displays the information of the "receipt return order" and allows pdf cents.
- The approval staff information is also displayed below. The approval process is similar to the guest functions.

9.1.5. Submit a request for approval

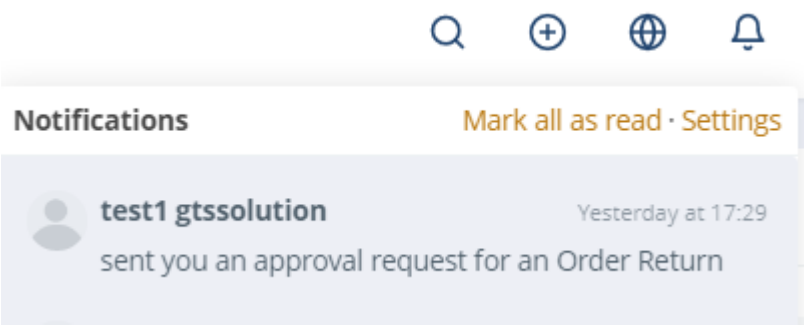
Step 1: Select a trade whose status is not yet approved -> press view



Step 2. : press 

❖ For the approval process, select a person for approval

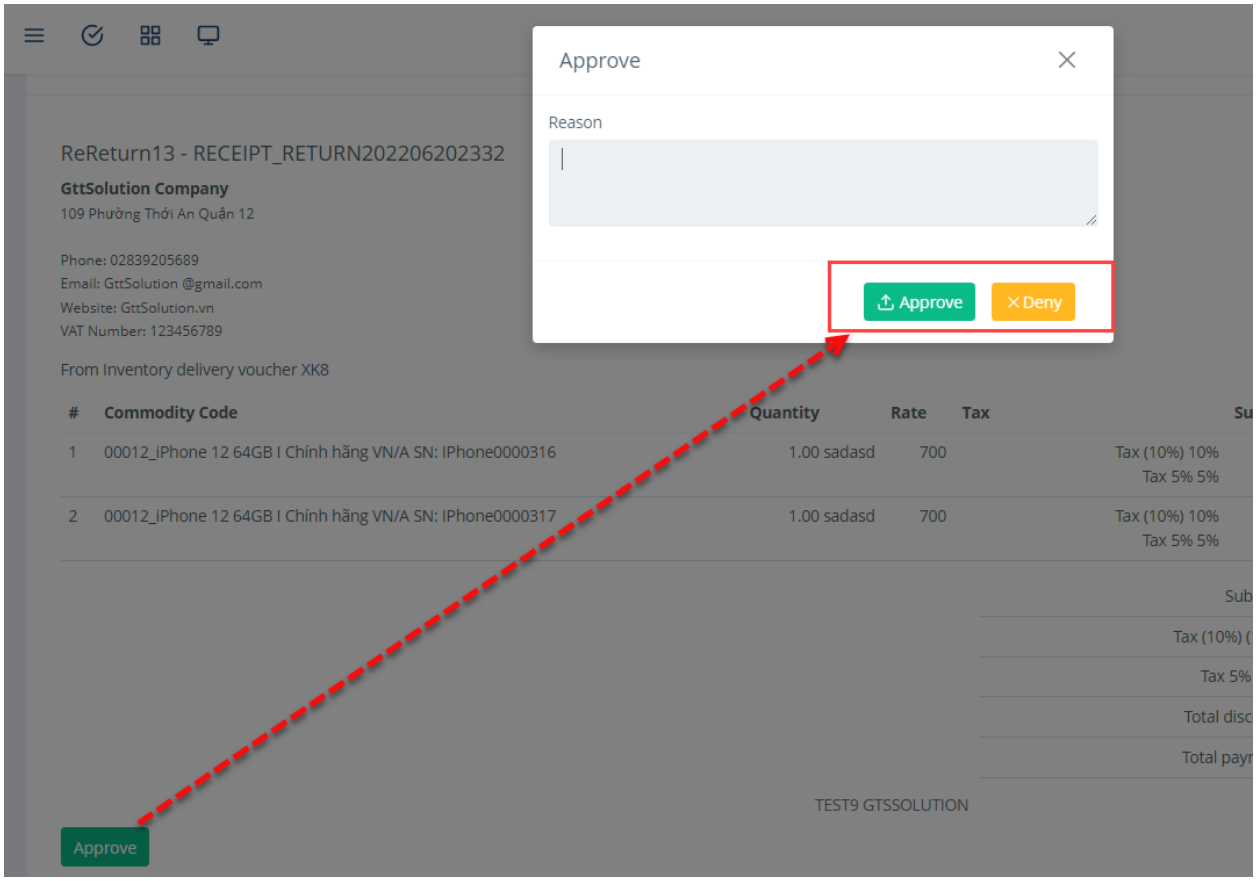
- The system sends a request for approval to the person in the process. The approver is in the process of receiving the notification of approval request via email and web - > proceed to select the notification or go to the "receiving - exporting return order" screen and see the details.



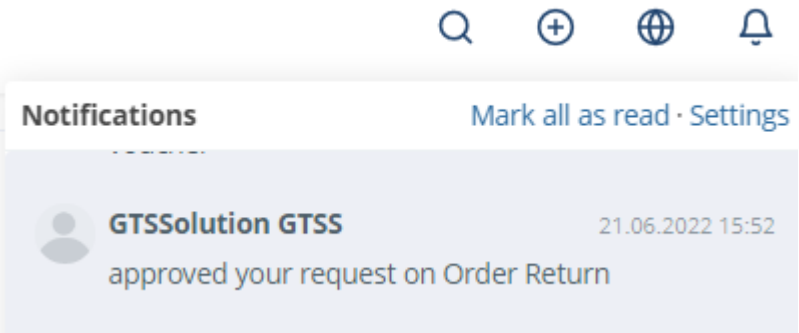
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can enter or not) and select the approve function → the transaction status moves from not yet approve to approve → an "inventory receiving voucher" coupon will automatically be generated from data taken from the "receipt return order", and the "receipt return order" will require the same approval as when creating a manual "receipt return order".

+ Select deny to reject and enter a reason if any→ the transaction status switches from not yet approve to reject - > no "inventory receiving voucher" is created.

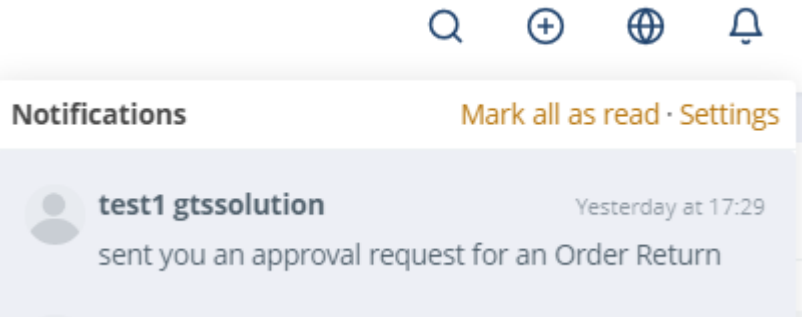


The creator of the receipt return order also receives notifications via email and the web when approved approve or deny



❖ For the approval process, select multiple people to approve

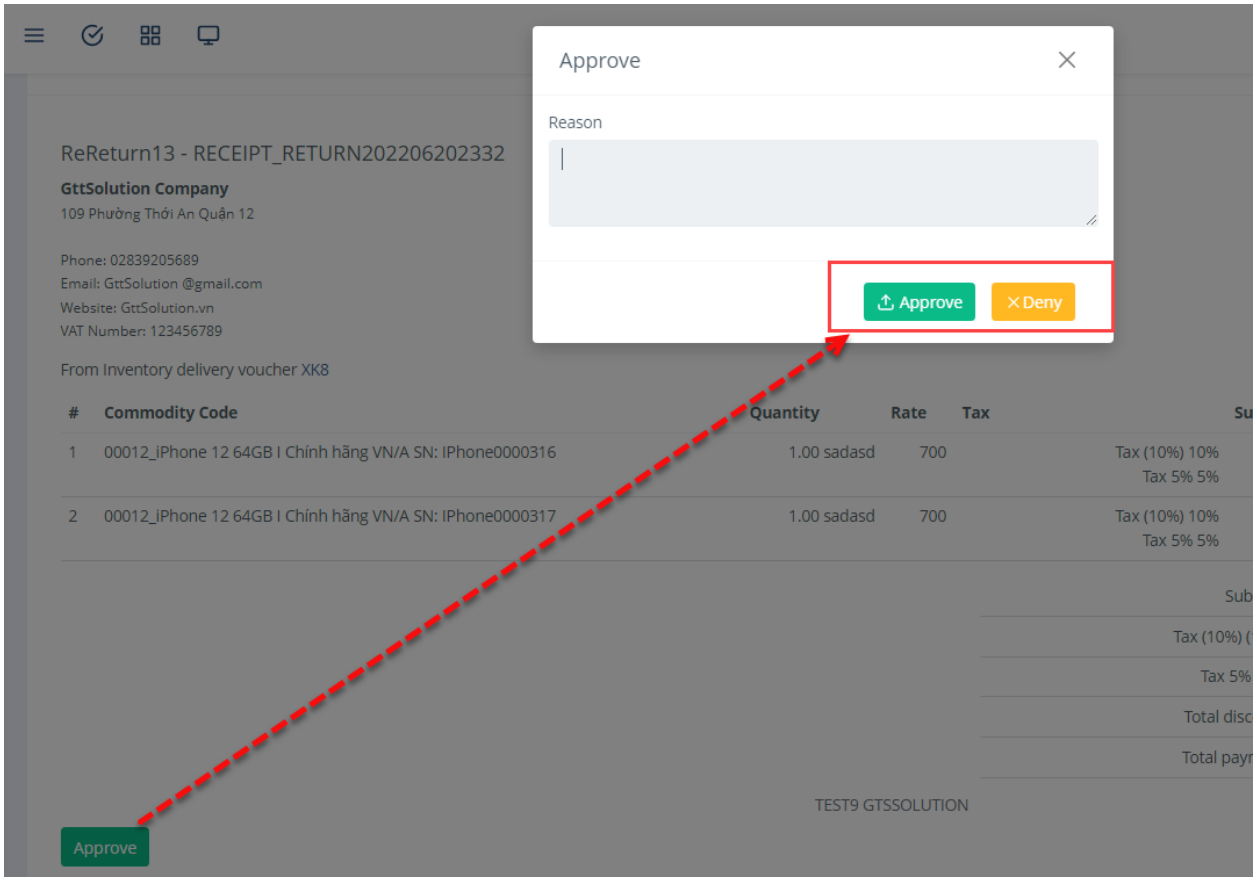
- Only the first person in the approval process receives a notification requesting approval via email and web - > proceed to select the notification or on the screen "receiving - exporting return order" and see chi.



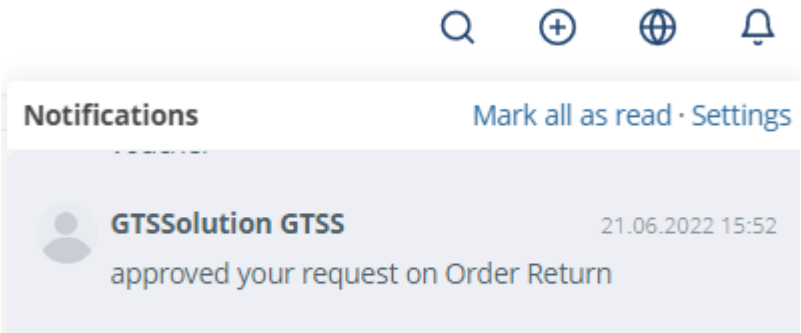
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → the "receipt return order" status remains not yet approved and requires approval. Sent to the next person in the process. The next person proceeds with approval and continues to do so until all approve → receipt return order status moves from not yet approve to approve → an "inventory receiving voucher" voucher is automatically generated from data derived from the "receipt return order", and the "receipt return order" requires the same approval as when creating receipt "return order" manual

+ Select deny to opt out and enter the reason if any→ the next person in the approval process does not receive a notification requesting approval and cannot continue → "receipt return order" status switches from not yet approve to reject - > no "inventory receiving voucher" is created.



The creator of the "receipt return order" also receives notifications via email and web when approved approve or deny

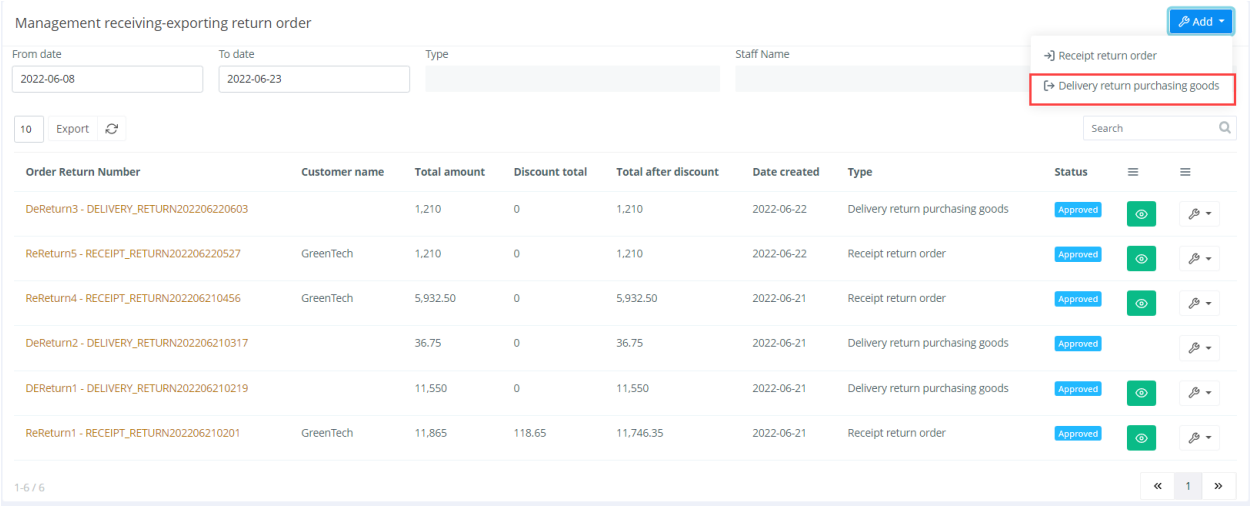


❖ For the approval process, including approve + sign

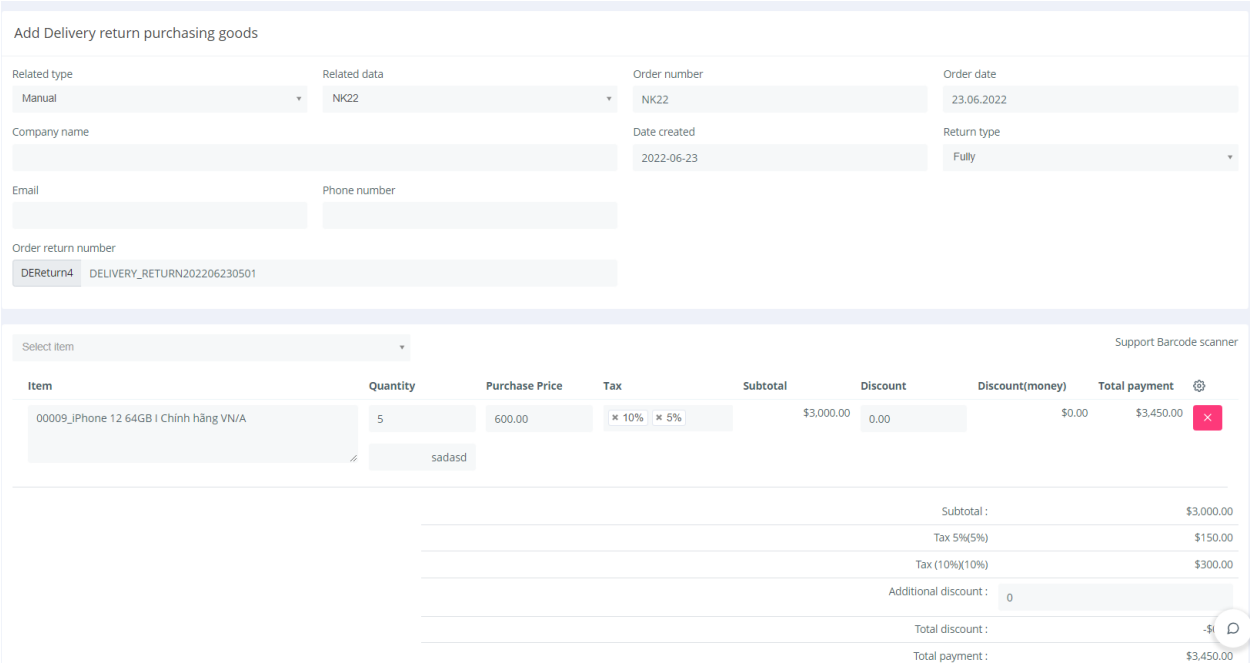
Similar to the approval process that selects multiple people for approval, depending on whether the process of selecting the signature action is at the last step or not, there is an event difference.

- If the signature action is not the final step of the process, only when this person completes the signature will the approval request be sent to the person? Next
- If the signature action is the final step, only when this person completes the signature does the status of the out-of-stock slip go from not yet approve to approve → a coupon "inventory receiving voucher" is automatically generated from data taken from the receipt return order, and the "receipt return order" requires the same approval as when creating a manual "receipt return order."

9.2. Exporting return order

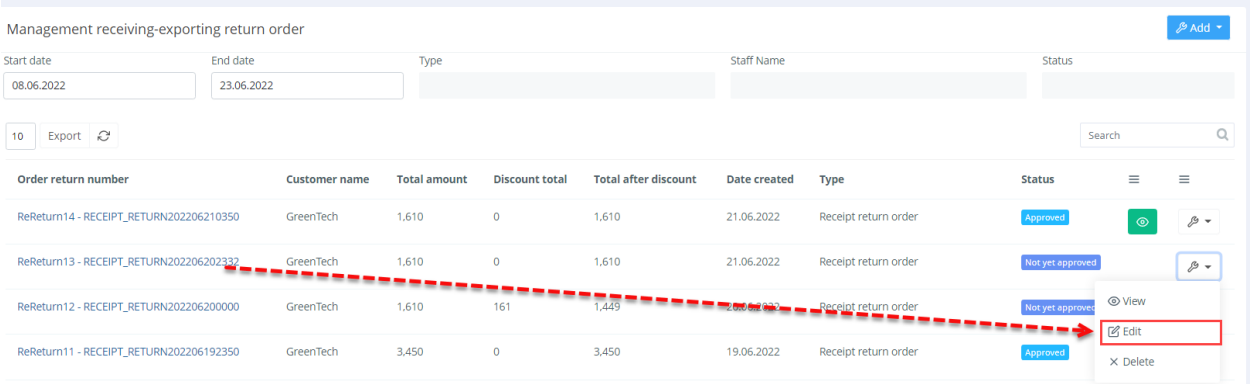


9.2.1. Add new



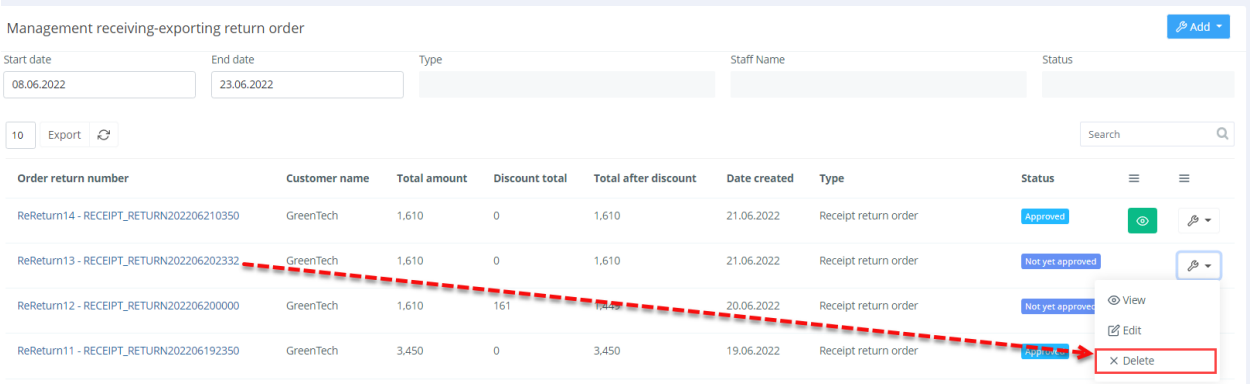
- "related data ": displays all the information of the entering voucher that is allowed to create "delivery return purchasing goods". After selecting the inventory information, the relevant data "order number", "company", "email", and "phone number" will be automatically taken from the inventory slip and filled out in the fields. Respectively. Product information is also automatically displayed.

9.2.2. Editing



- In addition to the management screen, select "edit": then the system will open the screen that allows editing the data; after editing, select "save" to save it. Whether edited or selected "close" to cancel the change

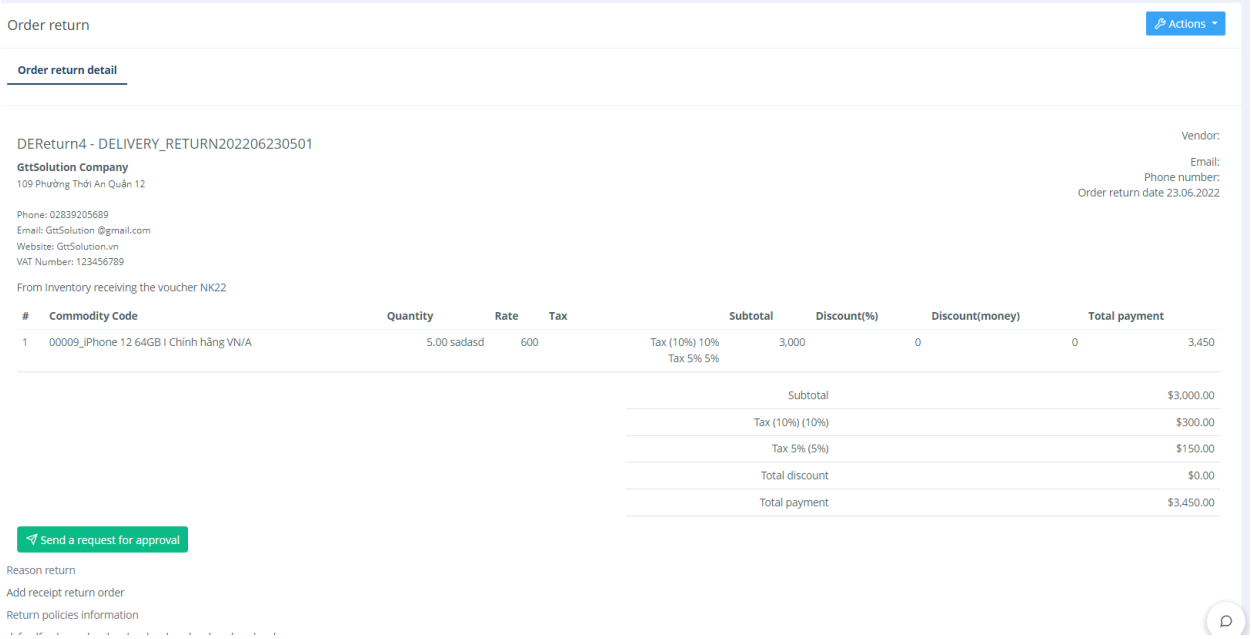
9.2.3. Delete



- In addition to the management, the screen select "delete": then the system displays confirmation that there is a clearing of the transaction in the air; confirm if you want to delete.

9.2.4. View details

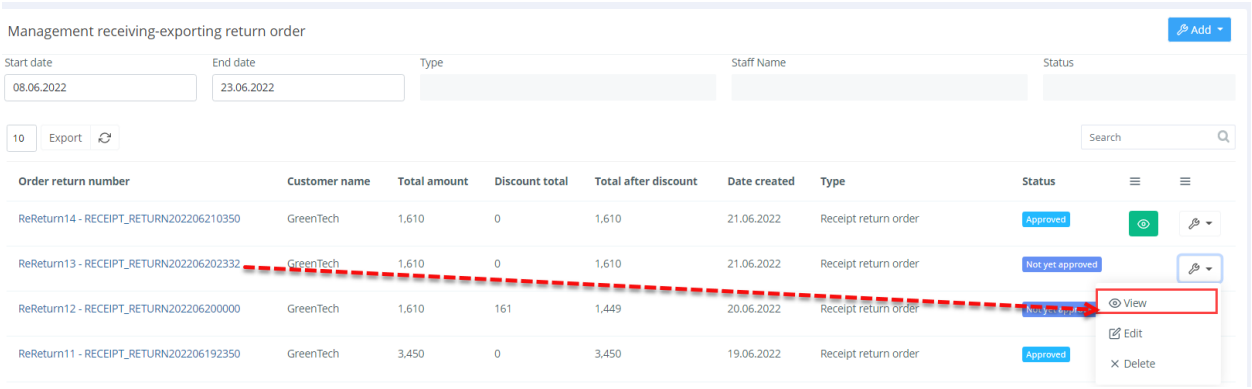
. In addition to the management screen, select "view": then the system opens the screen showing transaction details

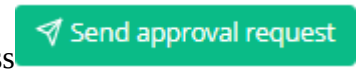


- The detailed screen displays the information of the "receipt return order", and allows pdf cents.
- The approval staff information is also displayed below; the approval process is similar to the guest functions.

9.2.5. Submit a request for approval

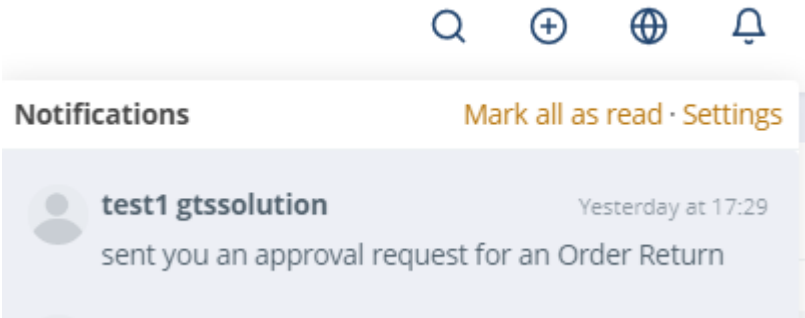
Step 1: Select a trade whose status is not yet approved -> press view



Step 2. : press 

❖ For the approval process, select a person for approval

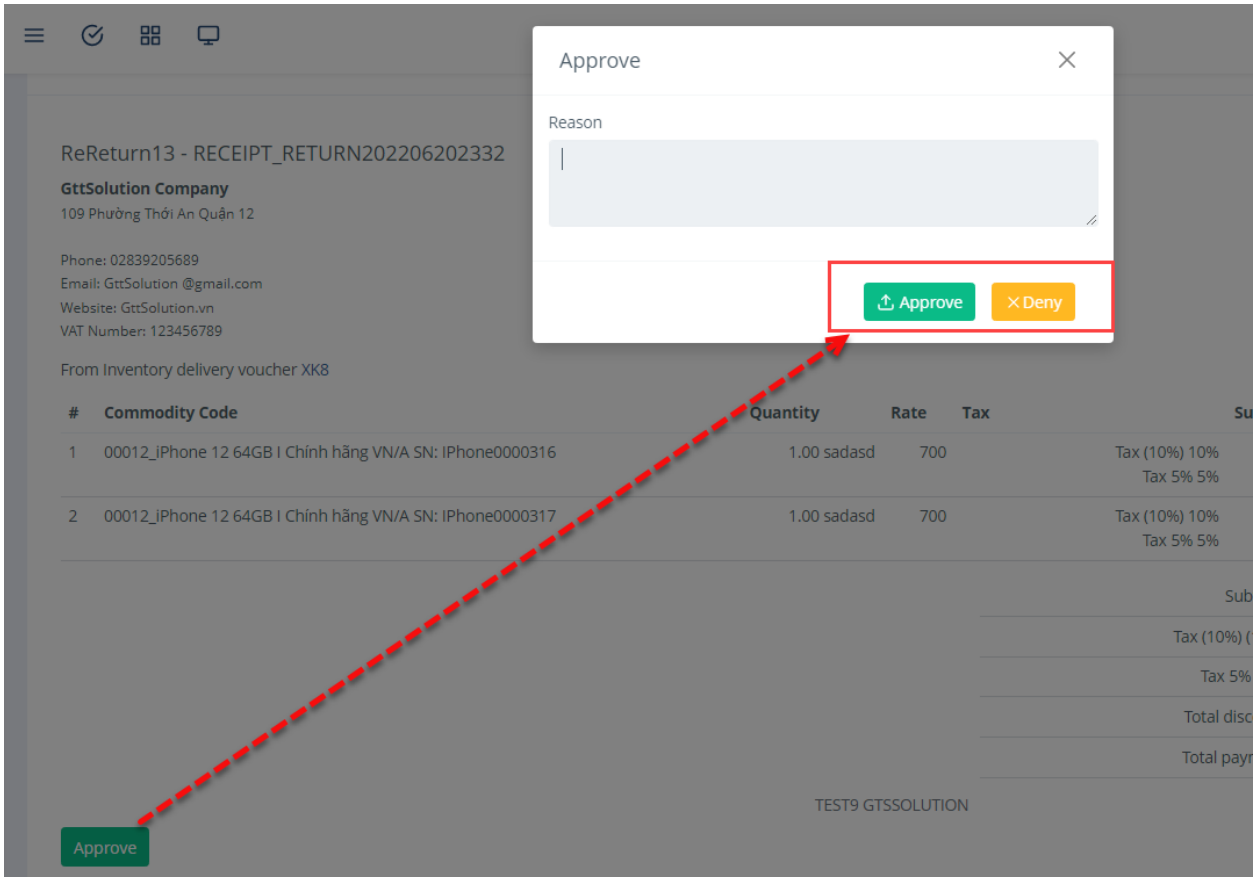
- The system sends a request for approval to the person in the process. The approver, in the process of receiving the notification of the approval request via email and the web - > proceeds to select the notification or go to the screen "receiving - exporting return order" and see the details.



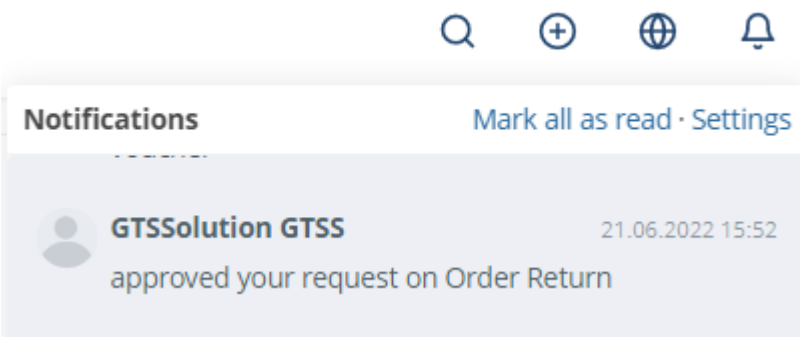
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can enter or not) and select the approve function → transaction status switch from not yet approve to approve → an inventory delivery voucher. It will automatically be generated from data derived from "delivery return purchasing goods", and the "inventory delivery voucher" will require the same approval as when creating a manual "inventory delivery voucher".

+ Select deny to reject and enter the reason if available→; the transaction status moves from not yet approve to reject - > no "inventory delivery voucher" is created.

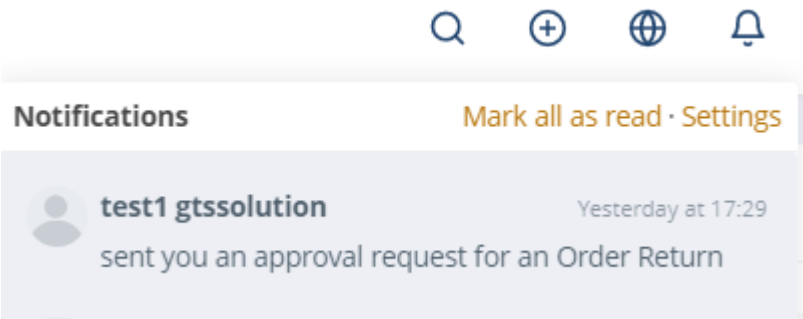


The creator of the "delivery return purchasing goods" coupon also receives an email and web notification when approval or denial approval is issued.



❖ For the approval process, select multiple people to approve

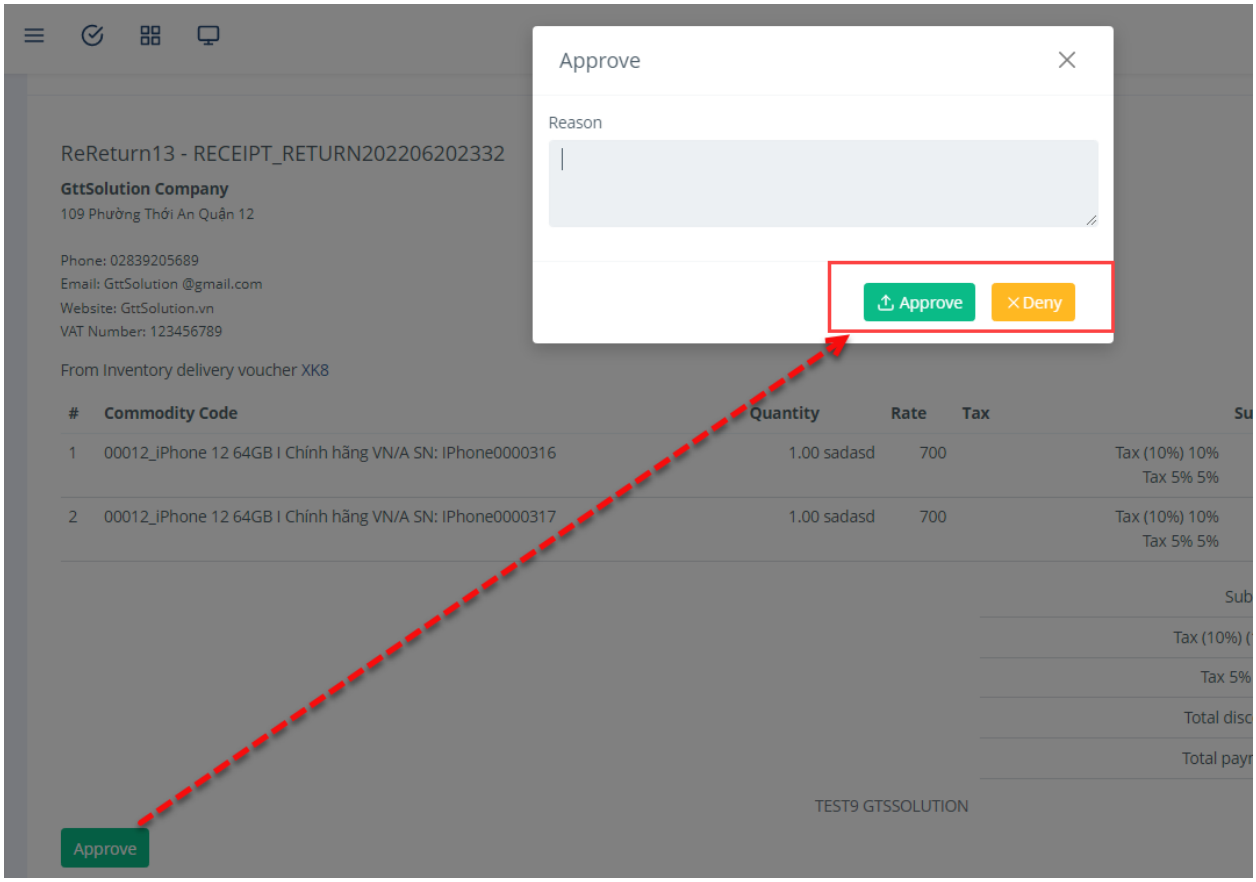
- Only the first person in the approval process receives a notification requesting approval via email and web - > proceed to select the notification or on the screen "receiving - exporting return order" and see details.



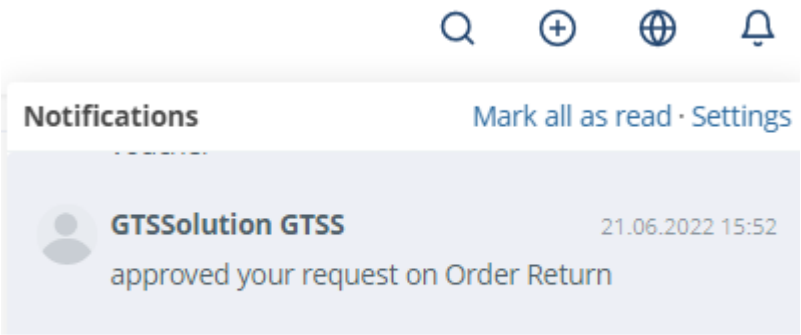
- Select the approve function - > the system will display two options: approve and deny.

+ If you agree, enter the reason (can be entered or not) and select the approve function → the status of the "delivery return purchasing goods" coupon is still not yet approved; at the same time love, the approval bridge is sent to the next person in the process. The next person proceeds with approval and continues to do so until all approve approval → the status of "delivery return purchasing goods" transfers from not yet approved to approve → an inventory delivery voucher is automatically generated from data taken from "delivery return purchasing goods," and the "inventory delivery voucher" requires the same approval. As if creating a manual "inventory delivery voucher."

+ Select deny to opt out and enter the reason if any→ the next person in the approval process does not receive a notification requesting approval and cannot continue → the "delivery return purchasing goods" status moves from not yet approve to reject - > no "inventory delivery voucher" is created.



The creator of the "delivery return purchasing goods" coupon also receives an email and web notification when the approval or deny approval is issued.



❖ For the approval process, including approve + sign

Similar to the approval process that selects multiple people for approval, depending on whether the process of selecting the signature action is at the last step or not, there is an event difference.

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- If the signature action is the final step, only when this person completes the signature does the status of the out-of-stock slip go from not yet approve to approve → a coupon the "inventory delivery voucher" is automatically generated from data taken from "delivery return purchasing goods", and the "inventory delivery voucher" requires the same approval as when creating an inventory delivery voucher. Work

10. Inventory history

Inventory history

Filters by Warehouse | Filters by Commodity | Filters by Status | Start date | End date

10 | Export | Search

Form code	Commodity Code	Warehouse code	Warehouse name	Voucher Date	Opening Stock	Closing Stock	Lot number/Quantity sold	Expiry Date	Serial number	Note	Status
XK11	SAmSung S21_Sam SungS21	WH001	Warehouse 1	2022-06-22	4	3	SSL012345 : 1		SSSN00004		Inventory delivery voucher
XK11	SAmSung S21_Sam SungS21	WH001	Warehouse 1	2022-06-22	5	4	SSL012345 : 1		SSSN00003		Inventory delivery voucher
NK29	SAmSung S21_Sam SungS21	WH001	Warehouse 1	2022-06-22		5	SSL012345		...		Inventory receiving voucher
XK9	00032_Laptop 16GB-Belgium	WH001	Warehouse 1	2022-06-22	16	15	LOT0920 : 1	2023-03-31 : 1	VF66001430		Inventory delivery voucher
XK9	00032_Laptop 16GB-Belgium	WH001	Warehouse 1	2022-06-22	17	16	LOT0920 : 1	2023-03-31 : 1	VF66001429		Inventory delivery voucher
XK9	00032_Laptop 16GB-Belgium	WH001	Warehouse 1	2022-06-22	18	17	LOT0920 : 1	2023-03-31 : 1	VF66001428		Inventory delivery voucher
XK9	00032_Laptop 16GB-Belgium	WH001	Warehouse 1	2022-06-22	19	18	LOT0920 : 1	2023-03-31 : 1	VF66001427		Inventory delivery voucher
XK9	00032_Laptop 16GB-Belgium	WH001	Warehouse 1	2022-06-22	20	19	LOT0920 : 1	2023-03-31 : 1	VF66001426		Inventory delivery voucher

Inventory history: records all transactions related to the change in the inventory volume of the product: "inventory receiving voucher", "inventory delivery voucher", "internal delivery note", "loss & adjustment".

- Each transaction on the screen will be linked to the original data where the transaction was born.
- On the search support management screen by product, warehouse, status, time, and type of transaction.

11. Report

11.1. Stock summary report

Stock Summary Report | Inventory Analytics | Inventory Valuation Report | Warranty period report

Warehouse name | Commodity: Commodity | From date: 2022-06-23 | To date: 2022-06-23 | Filters

Stock Summary Report

From date : 2022-06-23

To date : 2022-06-23

Company Name

Order	Commodity Code	Commodity Name	Unit name	Opening Stock		Import In Period		Export In Period		Closing Stock	
				Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount
1	CMC001	Item 1	Kilogram	20	2,000	0	0	0	0	20	2,000
2	2	Item T	Kilogram	73	0	0	0	0	0	73	0
3	Item 1	Item T	Kilogram	24	0	0	0	0	0	24	0
4	ITEM3	Item 3	Unit	170	170,000	0	0	0	0	170	170,000
5	00029	Laptop 8GB- Germany	Unit	100	100,000	0	0	0	0	100	100,000
6	00030	Laptop 8GB-Belgium	Unit	70	70,000	0	0	0	0	70	70,000
7	00031	Laptop 16GB- Germany	Unit	50	50,000	0	0	0	0	50	50,000
8	00032	Laptop 16GB-Belgium	Unit	15	15,000	0	0	0	0	15	15,000
9	00033	Laptop 32GB- Germany	Unit	9	9,000	0	0	0	0	9	9,000
10	00034	Laptop 32GB-Belgium	Unit	0	0	0	0	0	0	0	0
11	APPLE	iPhone 13 Pro Max 128GB, 256GB	Unit	110	110,000	0	0	0	0	110	110,000
12	SAmSung S21	Sam SungS21		17	17,000	0	0	0	0	17	17,000
13	LOCKLOCK	Bep Dien	Unit	30	30,000	0	0	1	1,130	29	29,000

In it:

- Open stock qty column: the number of inventory entered at the beginning of the period (add opening stock)

Open stock amount: = qty * purchase price

- Import in period qty column: total number of warehouses during filter time

Import in a period amount: summed up by "total payment" of warehouse entries during filter time

- Export in period qty column: total number of warehouses during filter time

Export in a period amount: calculated in a sum according to the "total payment" of warehouse exports during filter time

- Closing stock column: end-of-term inventory = open stock qty + import in period qty - export in period qty

Closing stock amount = calculates the total remaining inventory value according to the import price of each batch

For example, enter the warehouse twice

1st time: quantity ten prices 20

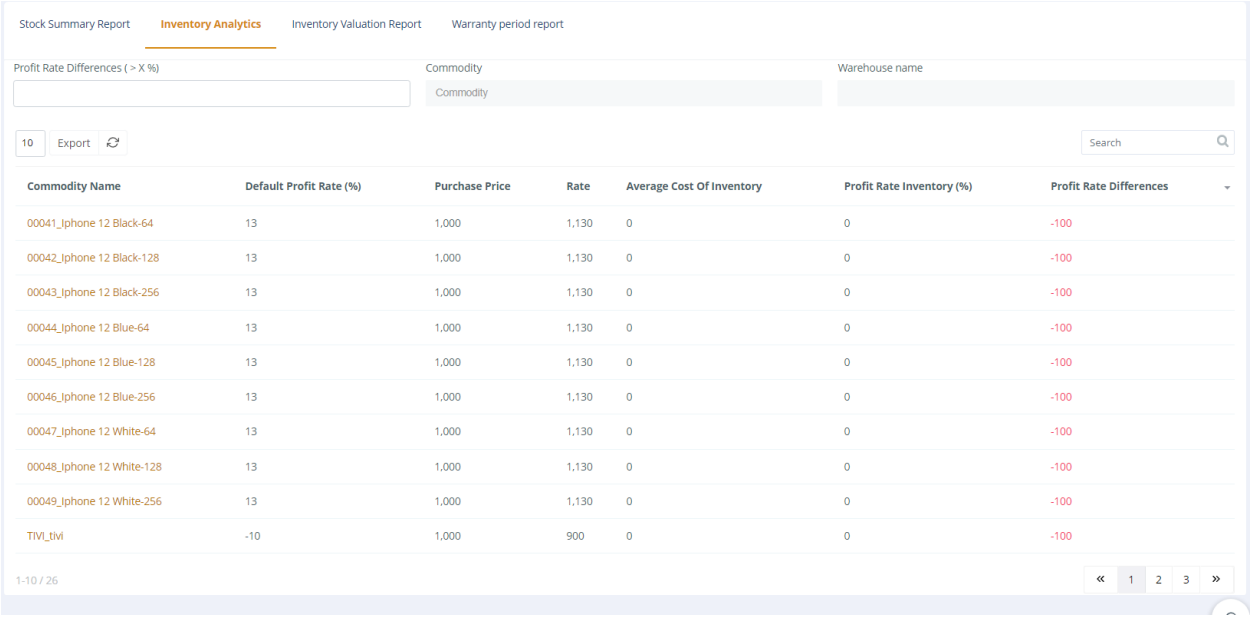
2nd time: quantity five prices 15

In which export 12 (10 products cost 20, 2 products cost 15)

=> number of 3

=> inventory price = 3*15 = 45 (not 3*10 = 30)

11.2. Inventory analytics



Commodity Name	Default Profit Rate (%)	Purchase Price	Rate	Average Cost Of Inventory	Profit Rate Inventory (%)	Profit Rate Differences
00041_Iphone 12 Black-64	13	1,000	1,130	0	0	-100
00042_Iphone 12 Black-128	13	1,000	1,130	0	0	-100
00043_Iphone 12 Black-256	13	1,000	1,130	0	0	-100
00044_Iphone 12 Blue-64	13	1,000	1,130	0	0	-100
00045_Iphone 12 Blue-128	13	1,000	1,130	0	0	-100
00046_Iphone 12 Blue-256	13	1,000	1,130	0	0	-100
00047_Iphone 12 White-64	13	1,000	1,130	0	0	-100
00048_Iphone 12 White-128	13	1,000	1,130	0	0	-100
00049_Iphone 12 White-256	13	1,000	1,130	0	0	-100
TIVI_tivi	-10	1,000	900	0	0	-100

Default profit rate: taken on the item

Purchase price: is the warehouse price of the product (will be taken on the item)

Sale price: is the expected selling price of the product (will be taken on the item)

In there

Quantity = current inventory

Total_money = purchase price * quantity; (calculate the total amount of money remaining in stock through the

Profit ratio old = profit rate of the current item

1. Average cost of inventory = total_money / quantity

2. Profit rate inventory =

If in the "sales price" setting

Calculate the selling price using the cost and profit rate ⇒ profit rate inventory = (((sale price / average cost of inventory) - 1) * 100

Calculate the selling price using the selling price and profit rate ⇒ profit rate inventory = (1 - (average cost of inventory/sale price)) * 100

3. Profit rate differences = ((profit rate inventory - profit ratio old) / profit ratio old) * 100

11.3. Inventory valuation report

The report calculates the expected profit based on the purchase price and selling price of the item.

Stock Summary Report | Inventory Analytics | Inventory Valuation Report | Warranty period report

Warehouse name | From date: 2022-06-23 | To date: 2022-06-23 | Filters

Inventory Valuation Report

From date : 2022-06-23

To date : 2022-06-23

Company Name

Order	Commodity Code	Commodity Name	Unit name	Inventory	Rate	Purchase Price	Amount Sold	Amount Purchased	Expected Profit
1	CMC001	Item 1	Kilogram	20	100	100	2,000	2,000	0
2	2	Item T	Kilogram	73	47	0	3,431	0	3,431
3	Item 1	Item T	Kilogram	24	39.59	0	950.16	0	950.16
4	ITEM3	Item 3	Unit	170	1,130	1,000	192,100	170,000	22,100
5	00029	Laptop 8GB- Germany	Unit	100	1,130	1,000	113,000	100,000	13,000
6	00030	Laptop 8GB-Belgium	Unit	70	1,130	1,000	79,100	70,000	9,100
7	00031	Laptop 16GB- Germany	Unit	50	1,130	1,000	56,500	50,000	6,500
8	00032	Laptop 16GB-Belgium	Unit	15	1,130	1,000	16,950	15,000	1,950
9	00033	Laptop 32GB- Germany	Unit	9	1,130	1,000	10,170	9,000	1,170
10	00034	Laptop 32GB-Belgium	Unit	0	1,243	1,100	0	0	0
11	APPLE	iPhone 13 Pro Max 128GB, 256GB	Unit	110	1,130	1,000	124,300	110,000	14,300
12	SAmSung S21	Sam SungS21		17	1,210	1,000	20,570	17,000	3,570
13	LOCKLOCK	Bep Dien	Unit	29	1,130	1,000	32,770	29,000	3,770
Total :				**687**			**651,841.16**	**572,000**	**79,841.16**

The inventory column takes end-of-period inventory by filtering time

The purchase price column is the product's warehouse price (will take the price on the item),

The sale price column is the expected selling price of the product (will be taken on the item)

Amount sold column: will take the selling price on item*quantity because the reality is not sold at this time, so we do not know the actual selling price, expected value if sold at the same price as so (inventory *rate)

The amount purchased column will take the entry price (entry slip)*quantity (which may be miscalculated) because each import may be a different price

Expected profit column = amount sold - amount purchased

11.4. Warranty period report

Stock Summary Report | Inventory Analytics | Inventory Valuation Report | Warranty period report

Commodity | Customer name | Warranty Expiry date: 2029-07-13 | Status: × Within the warranty period × Expiry of warranty | Actions

10 | Export | Search

Inventory delivery voucher	Customer name	Commodity Name	Quantity	Rate	Expiry Date	Lot number	Serial number	Warranty period
XK9	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001430	1 Unit	1,130	2023-03-31,1	LOT0920,1	VF66001430	2021-06-22
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001416	1 Unit	1,130			VF66001416	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001417	1 Unit	1,130			VF66001417	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001418	1 Unit	1,130			VF66001418	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001419	1 Unit	1,130			VF66001419	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001420	1 Unit	1,130			VF66001420	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001421	1 Unit	1,130			VF66001421	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001422	1 Unit	1,130			VF66001422	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001423	1 Unit	1,130			VF66001423	2024-06-20
XK2	GreenTech	00032_Laptop 16GB-Belgium SN: VF66001424	1 Unit	1,130			VF66001424	2024-06-20

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Report the warranty period of the product in the product with a warranty period x month

When creating an inventory slip for customers = > calculate the warranty period to the date of the year. The report will show all warehouse products if there is a defined warranty term (if not => not displayed), on the report if red => too, expired warranty

Note: warranty expiry date must be selected to display filter results

Created: 2022-09-14 By: greentech_solutions Email: sales@gtssolution.vn	Once again, thank you so much for purchasing this plugin. We will be glad to help you if you have any questions relating to this plugin.