

User Guide - Stock Management



Stock Management

This document will guide user

1. How to create new card request
2. How to upload file for card requests
3. How to receive card from vender
4. How to view cards on list
5. How to edit card request
6. How to transfer card to another location
7. How to track transferred card
8. How to check the card inventory

User Roles:

Branch Representative

Operational Manager

Create New Card Request (Branch Representative)

1. Login with Branch User role, and navigate to Card Management and click on Stock Management

The screenshot shows the 'Card Management' interface. On the left, a sidebar menu has 'Stock Management' highlighted. The main area displays a form for creating a new card request. At the top, there are summary cards: '0 Personalized', '37 Non Personalized', '2 Total Payez Cards', '0 Personalized', and '2 Non Personalized'. Below these, the 'Card Type' section has radio buttons for 'Classic' and 'Platinum', with 'Platinum' selected. The 'Number of Cards Required' field is set to '4'. At the top right, there are 'CANCEL' and 'SUBMIT TO BACK OFFICE' buttons.

2. Fill out the form and press Done button

This screenshot shows the 'Required Card Details' section of the form. It includes radio buttons for 'Card Kind' (Traveler, Payez) with 'Traveler' selected, and 'Card Type' (Classic, Platinum) with 'Platinum' selected. The 'Card Program' section has radio buttons for 'Non Personalized' and 'Personalized', with 'Non Personalized' selected. The 'Number of Cards Required' field remains at '4'. The 'SUBMIT TO BACK OFFICE' button is highlighted with a blue box.

3. Check card status on receive card screen

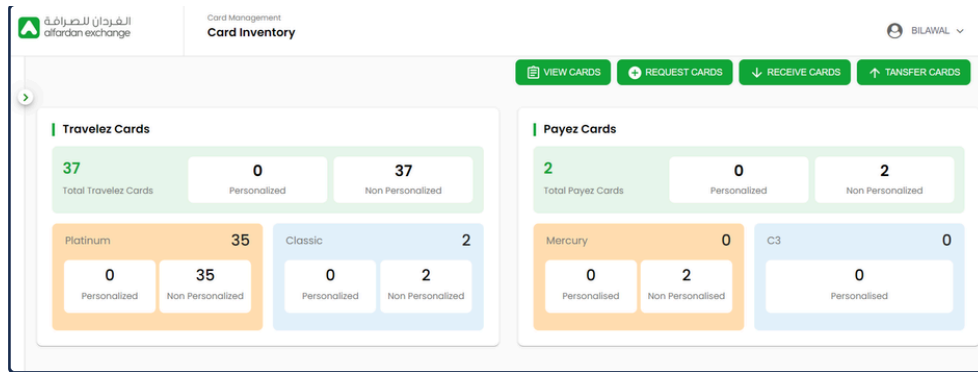
The screenshot shows the 'RECEIVE CARDS' screen. It features a search bar, filters for 'Kind', 'Program', and 'Type', and buttons for 'SEARCH', 'RESET', 'RECEIVE CARDS', and 'TRANSFER CARDS'. Below is a table with the following data:

Request ID	Kind	Type	Program	No of Cards Requested	No of Assigned Cards	Last Modified	Issue Status
106367	TRAVELEZ	CLASSIC	NON-PERSONALIZED	4	0	16 February	OPEN
106366	TRAVELEZ	CLASSIC	NON-PERSONALIZED	1	1	14 February	COMPLETE
106365	TRAVELEZ	CLASSIC	NON-PERSONALIZED	1	0	7 February	ASSIGNED
106364	TRAVELEZ	CLASSIC	NON-PERSONALIZED	56	0	1 February	ASSIGNED

4. Once card request status updated as Assigned, click on context menu and then upload file

This screenshot is similar to the previous one, but the 'Upload File' option in the context menu for the 'ASSIGNED' status of request 106365 is highlighted with a blue box.

5. Click on file upload option, upload a file and press Done button



Create New Card Request (Operational Manager)

1. Login with Operation Manager role, and navigate to Card Management and click on Stock Management

The screenshot shows the 'Request Cards' form. The left sidebar contains a 'Management' menu with options: 'Prepaid Cards', 'Stock Management', 'Transfer Cards', 'View Cards', 'Transfer Cards Request', 'Receive Cards', 'Received Transfer Cards', 'Request Cards', and 'PPC Requests'. The 'Request Cards' option is highlighted. The main form area shows a summary of card counts and a form to request new cards.

Card Type	Personalized	Non Personalized
Travelez Cards	0	46
Payez Cards	2	0

Card Type: ☐ Classic ☐ Platinum

Number of Cards Required:

Branch:

2. Operation Manager has an option to select Branch for card request, fill the form Done button

The screenshot shows the 'Required Card Details' form. The left sidebar contains a 'Management' menu with options: 'Prepaid Cards', 'Stock Management', 'Transfer Cards', 'View Cards', 'Transfer Cards Request', 'Receive Cards', 'Received Transfer Cards', 'Request Cards', and 'PPC Requests'. The 'Request Cards' option is highlighted. The main form area shows a summary of card counts and a form to request new cards.

Card Type	Personalized	Non Personalized
Travelez Cards	9	0
Payez Cards	3	0

Card Kind: ☒ Travelez ☐ Payez

Card Type: ☒ Classic ☐ Platinum

Card Program: ☒ Non Personalized

Number of Cards Required:


Branch:

3. Click on PPC Request to Edit/ Approve/ Reject requests

The screenshot shows the 'PPC Requests' table. The left sidebar contains a 'Card Management' menu with options: 'Prepaid Cards', 'Stock Management', 'Transfer Cards', 'Card Inventory', 'Receive Cards', 'Transfer Cards Request', and 'PPC Requests'. The 'PPC Requests' option is highlighted. The main table area shows a list of requests with columns: Customer Name, Phone, Card Holder ID, Kind, Type, Program, Issue Status, and No of Cards. The table is currently empty, showing 'No records available.'

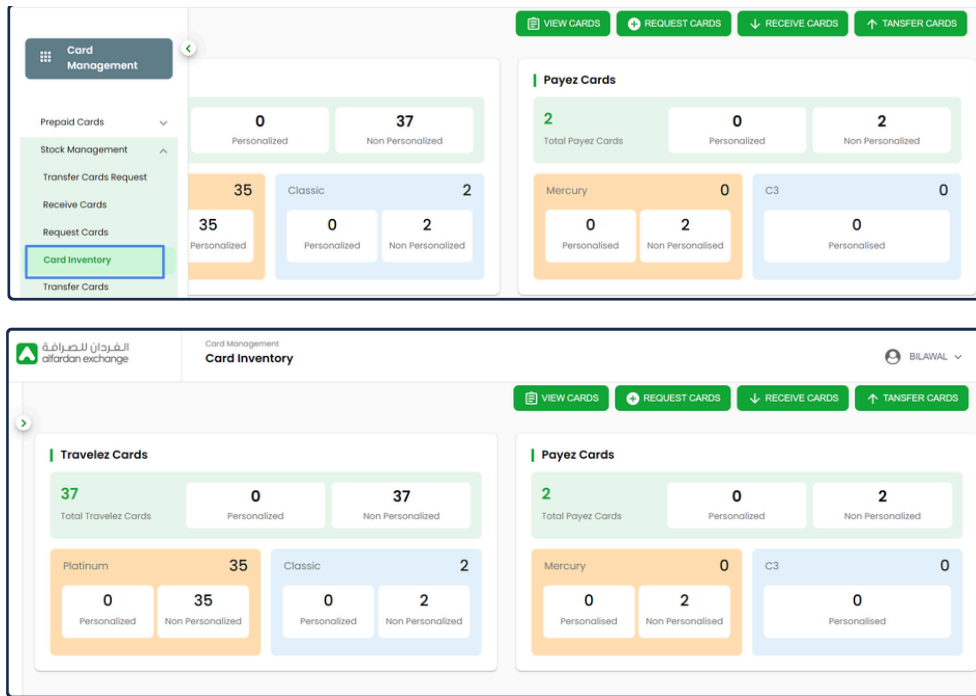
Customer Name	Phone	Card Holder ID	Kind	Type	Program	Issue Status	No of Cards
No records available.							

ID	Category	Name	Status	Priority	Count	Due Date	Action
106344	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZ...	30	0	19 OCT ASSIGNED
106343	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZ...	8	0	19 OCT ASSIGNED
106342	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZ...	8	0	19 OCT ASSIGNED
106341	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZ...	10	0	19 OCT <div> Edit/Approve </div>
106340	PPC	PAYEEZ	PLATINUM	NON-PERSONALIZ...	8	8	19 OCT APPROVE
106339	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZ...	8	8	31 OCT REJECT
106338	PPC	PAYEEZ	PLATINUM	NON-PERSONALIZ...	8	0	19 OCT ASSIGNED

106367	TRAVELEZ	CLASSIC	NON-PERSONALIZED	4	0	16 February	<div><div></div><div>Upload File</div></div>
106366	TRAVELEZ	CLASSIC	NON-PERSONALIZED	1	1	14 February	COMPLETE
106365	TRAVELEZ	CLASSIC	NON-PERSONALIZED	1	0	7 February	ASSIGNED

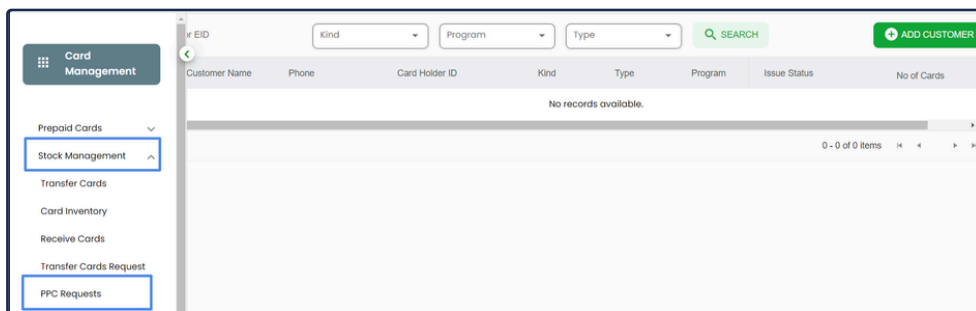
6. Click on view card tab, all uploaded card records are appearing

<div> <div> <div>Q</div> <div>Search Request ID or with the number of Requested Cards</div> </div> <div> <div>Kind</div> <div>Program</div> <div>Type</div> </div> <div> <div>Q SEARCH</div> <div>▼ RESET</div> <div>↓ RECEIVE CARDS</div> <div>↑ TRANSFER CARDS</div> </div> </div>						
Request ID	Card Holder ID	Branch Code	Kind	Type	Program	Card Expiry Date
106339	1063391	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027
106339	1063392	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027
106339	1063393	186	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027
106339	1063394	186	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027
106339	1063396	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027
106362	1063625	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027
106362	1063626	1063	TRAVELEZ	PLATINUM	NON-PERSONALIZI	30 September, 2027

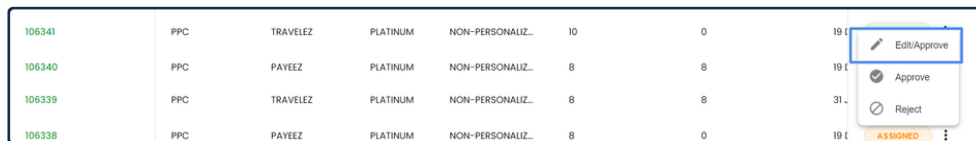


Edit Card Request (Operational Manager)

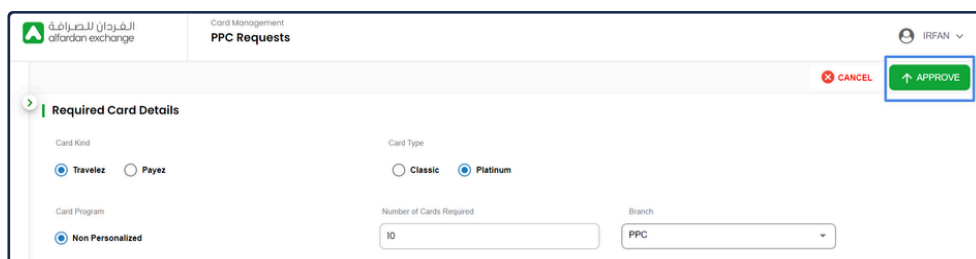
1. Operation Manager has an option to edit card request for Branch User



2. On PPC request page, record with Open status click on Edit option from context menu

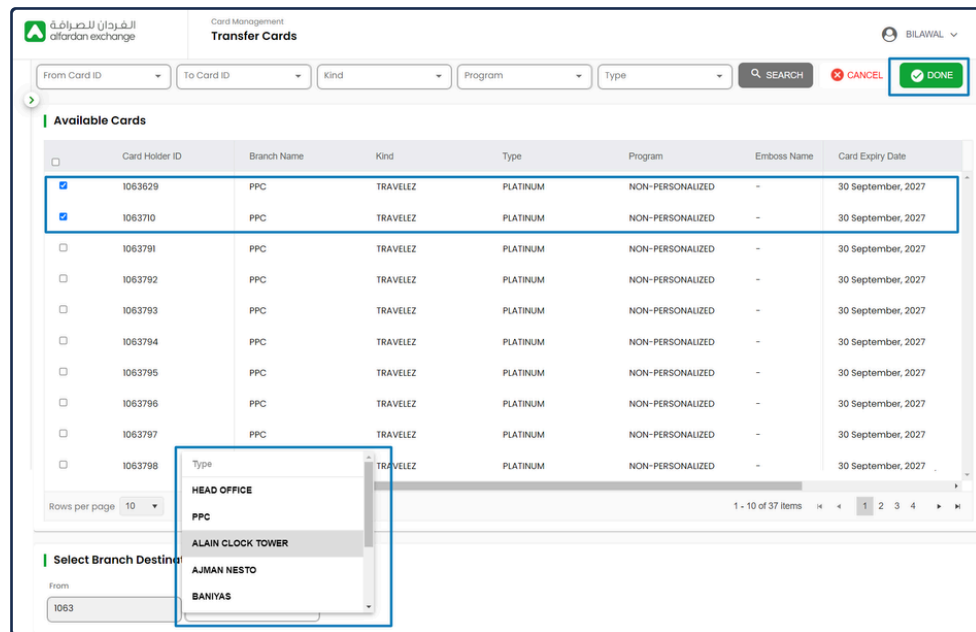
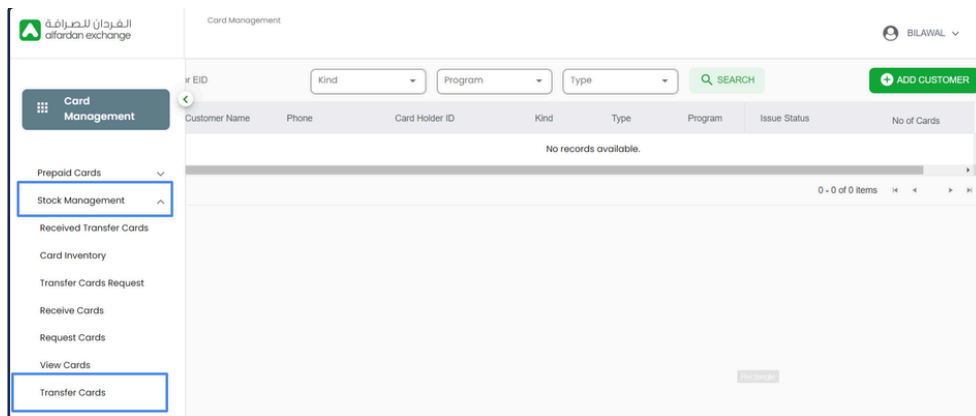


3. Edit card type, kind or number of cards and press Approve button

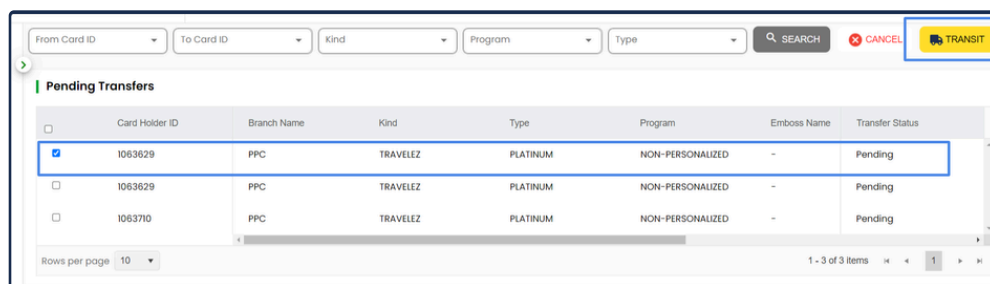
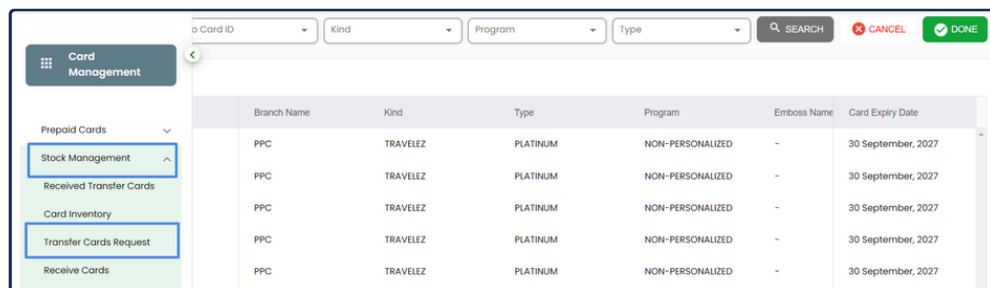


Transfer Card (Branch Representative)

1. Log in as Branch User, click on Transfer card, select card and Branch Destination and press Done button



2. Click on Transfer card request, select record and press Transit button



3. Branch that to which card is transferred, could click on Transfer card receive, select record and press Receive button

From Card ID

To Card ID

Kind

Program

Type

SEARCH

RECEIVE CARDS

Pending Transfers

	Card Holder ID	Branch Name	Kind	Type	Program	Emboss Name	Transfer Status
<input checked="" type="checkbox"/>	1063629	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	In Transit
<input type="checkbox"/>	1063629	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	In Transit
<input type="checkbox"/>	1063710	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	In Transit

Rows per page 101 - 3 of 3 items

Q

Search Request ID or with the number of Requested Cards

Kind

Program

Type

SEARCH

RESET

RECEIVE CARDS

TRANSFER CARDS

Request ID	Card Holder ID	Branch Code	Kind	Type	Program	Card Expiry Date
106339	1063391	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZED	30 September, 2027
106339	1063392	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZED	30 September, 2027
106339	1063396	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZED	30 September, 2027
106362	1063625	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZED	30 September, 2027
106362	1063628	23622	TRAVELEZ	PLATINUM	NON-PERSONALIZED	30 September, 2027

1. Log in as Operational Manager, click on Transfer card, select card and Branch Destination as Destroy and press Done button

[illegible]

Card Management
Transfer Cards

From Card ID To Card ID Kind Program Type SEARCH CANCEL DONE

Available Cards

	Card Holder ID	Branch Name	Kind	Type	Program	Emboss Name	Card Expiry Date
<input checked="" type="checkbox"/>	1063791	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063792	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063793	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063794	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063795	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063796	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063797	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063798	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063799	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027
<input type="checkbox"/>	1063810	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	30 September, 2027

Rows per page 10 1 - 10 of 35 items 1 2 3 4

Select Branch Destination

From To

186 DESTROY LOCATION

2. Click on Transfer receive card when any branch transferred card to Operational Manager

Card Management

Prepaid Cards

Stock Management

Receive Cards

Request Cards

Card Inventory

View Cards

PPC Requests

Received Transfer Cards

Transfer Cards

From Card ID Kind Program Type SEARCH DESTROY

Branch Name	Kind	Type	Program	Emboss Name	Transfer Status
ALAIN CLOCK TOWER	TRAVELEZ	CLASSIC	NON-PERSONALIZED	-	In Transit
PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	In Transit
PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	In Transit
PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	In Transit

1 - 4 of 4 items 1

3. Operational Manager has options whether Receive card or Destroy Cards

Card Management

Received Transfer Cards

From Card ID To Card ID Kind Program Type SEARCH DESTROY RECEIVE CARDS

Pending Transfers

	Card Holder ID	Branch Name	Kind	Type	Program	Emboss Name	Card Iss	Transfer Status
<input checked="" type="checkbox"/>	23622602	ALAIN CLOCK TOWER	TRAVELEZ	CLASSIC	NON-PERSONALIZED	-	3 Janua	In Transit
<input checked="" type="checkbox"/>	1063829	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	3 Janua	In Transit
<input checked="" type="checkbox"/>	1063829	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	3 Janua	In Transit
<input checked="" type="checkbox"/>	1063710	PPC	TRAVELEZ	PLATINUM	NON-PERSONALIZED	-	3 Janua	In Transit

Rows per page 10 1 - 4 of 4 items 1

Select Branch Destination

From To

186 DESTROY LOCATION