INVENTORY MANAGEMENT SYSTEM

USER MANUAL

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**Step by step guide**

1.a) Customer creation

Use this functionality to add a new customer to the database. Each customer can have multiple addresses each address can be associated with 4 contact persons. One address must be marked as “Main address”. Among the 4 contact person slots, one contact is considered main while the other three are optional.

* Click on hamburger button on top left to open the side menu. Click on ‘Add Customer’ from the list to open the create customer page.
* Enter all the necessary data in the proper fields.
* Click on ‘add more button to add another form’ or ‘remove’ button to remove an address.
* Click on the ‘Main’ checkbox to make that address main and check the SEZ box to mark it as SEZ eligible.
* Finally click the ‘Add customer’ button to add the customer details to database.

1.b) Manage customer

Use this functionality to modify an existing customer. This includes updating contact person, email, GST value etc. You can also mark an address as invalid from this screen.

* Open the side menu and select Manage customer to enter the Manage customer page.
* Select one existing customer from the dropdown on top to display all the details of that entry.
* The fields that cannot be allowed to be modified are marked as (read only), this values cannot be changed.
* Toggle to ‘valid contact person’ or ‘valid address’ check box to enable and disable them.
* When finished, click the edit button on the bottom to save the changes to database.

2.a) Create new asset-type

This functionality enables to define a new asset-type (Like Desktop, RAM etc.) and saves it to database. This process must be done before you enter any asset of this particular type.

* Open the side menu and select ‘add to inventory’.
* Click on the ‘Add new asset type’ button that is beside the select asset type dropdown.
* After the ‘add asset type’ page opens enter the name of your asset in the designated field and click ‘create’ button to continue.
* Then you will be prompted to enter the ‘asset-type-attributes’ of this asset type.
* This is a dynamic table where each row represents an attribute belonging to the asset-type.
* The user can add new attribute or remove existing one by clicking ‘add more’ button or clicking on that particular row’s ‘-’ (remove) button respectively.
* Aside from entering the name of each attribute the user can mark the particular attribute as ‘modifiable’ or ’mandatory’ by checking the corresponding checkboxes.
* Finally click on the submit button to submit the new asset-type to database.

2.b) Edit asset-type

Use this functionality to edit an existing asset-type, i.e., the user can add more attributes to that asset types. Although for data consistency reasons: deleting previously entered attributes are prohibited.

* Open the side menu and click on ‘edit asset type’ to open the edit asset type page.
* The rest of the functionality is similar to ‘create new asset-type’ aside from the fact that all the previously entered attributes will be displayed as locked and cannot be altered.
* User can click on the reset button to reset the unsaved alterations.
* User can click the submit button to commit the changes to database.

3.a) Add assets to inventory

Use this functionality to add an asset to the inventory. To add the asset, the asset-type that the asset belongs to must be defined. If asset type is not defined, use the ‘add new asset-type’ functionality to do so beforehand.

* Open the side menu and click on ‘add to inventory’ to open the page.
* Select the asset type of that asset from the dropdown, the form will be dynamically modified accordingly.
* Enter all the static details (attributes that are common to all asset types) in their corresponding fields.
* Enter the serial ids in the designated fields (and press enter).
* To enter multiple assets at once, enter their serial ids and press enter. Do this for all the assets and the system will automatically add multiple entries to database.
* You can remove one or more serial ids by clicking the ‘x’ button on their corresponding tags.
* After that fill in the dynamic attributes accordingly, these attributes are different for each asset type and must be defined by the user in the ‘create new asset-type’ functionality.
* Finally click on the ‘sava asset’ button to save the asset(s) to database.

3b)Manage Inventory

Use this functionality to manage the various nuances of the inventory.Press the breadcrumb to access Manage Inventory. There are three tabs to fetch the three modules of the functionality.

* First Functionality is to manage the returned assets. Provide the customer name on the autocomplete field. Then select a asset type to return from the customer and select different assets by providing the serial number which will filter that particular asset. Choose the various assets to be returned and mark them returned proper or returned damaged. Then click on “Return” button to add them back to the inventory.
* Second Functionality is the manage the modified components. All assets that have been modified with another asset can be reset or reconfigured here. Type the serial number of the asset to be reconfigured in the autocomplete field and then press the “Remove button”
* Third functionality is to either mark different in stock assets as damaged or to manage various “sent for repair” assets to add them to the inventory again. Provide the serial number in the autocomplete field and then either mark the asset as damaged (you can also provide a comment as to why or how it is damaged) or you can press “Return from repair” to add a damaged component back into the inventory.

4.a) Order asset

This functionality enables the user to make an order for a set of assets on rental/demo/standby/repair basis.

* Open side menu and choose ‘Order Asset’.
* Choose an asset type from the ‘category’ dropdown and all the assets belonging to that category will be displayed as rows along with all the details in a table format.
* Choose a branch from the dropdown to show only the assets available in that branch.
* The user can further filter/search assets based on serial number, and dynamic attributes.
* Damaged assets will be marked as damaged, unavailable assets will be displayed as inactive.
* You can access the add asset or remove asset functionality from here.
* Click on the checkbox corresponding to a (one or more) asset (row) and click on add button located at the bottom of the table to add them to the cart.
* After assets are added to cart, click on the ‘cart’ button located on top right corner to display the cart, form here click on ‘checkout’ to continue to the checkout page.
* When in the checkout page the selected assets will be displayed as cards describing their specifications.
* User can click on the add component button associated with a card to begin assembling that asset.
* After clicking add component a page will open where the selected asset card will be displayed along with all the other assets in cart that are available for assembly.
* Click on an asset shown in the ‘available for assembly’ to add them to the ‘you have chosen section’
* Use reset button to reset selection or click commit button to commit changes and go back to checkout page.
* The modified asset will be marked as modified.
* After clicking submit user will be taken to ‘generate challan’ page, here the user will fill in the necessary details of the transaction as follows.
* User has to select a challan type (rental/ demo/ repair etc), then select a customer from the search/dropdown field, then choose one of the available delivery addresses and parent challan id from dropdown.
* The overview of that customer will be displayed and then the user has to choose a valid contact person from available ones.
* Fill out the start and end date of the rental process and enter the necessary details like unit price, GST etc.
* To save the challan as draft click on ‘save as draft’ button on the bottom to save the challan to modify later ( open ‘saved drafts’ page to access).
* Finally click on submit button to commit the order and print the challan.

4.b) asset (out of stock)

Use this functionality to add an out of stock asset to a customer’s asset at the customer’s end.

* Select a customer using autocomplete field.
* Select an asset’s serial number using an autocomplete field.
* Select an asset type to modify it with
* Select an asset’s serial number to modify it with
* Click on modify to modify it out of stock.

4.c) Remove asset assembly

Use this functionality to remove an existing asset attribute from an asset.

* Select an asset type
* Select an asset’s serial number
* Select an asset and then select the attribute to be removed(if it can)
* Select the asset type to be added to inventory.
* Fill in the relevant fields and then add the removed attribute as an asset to the inventory.

4.d) Edit saved challan of an order (saved challan drafts)

Use this functionality to edit previously saved challans (that are not submitted). You can edit the challan and save it again as drafts or submit.

* Select ‘saved challan drafts’ from the side menu opens the page listing all the saved challans in a table format along with their descriptions (customer name, asset list etc).
* Click on a row to open that challan and resume editing.

5. Dashboard

This page shows all the reports and summaries.

* This is the main page that opens by defaults or can be accessed from the side menu.
* The Asset summary section displays the details of available assets. Count of total in stock, out of stock, damaged assets for each asset types along with overall totals.
* Clicking on a cell of the table will display further details of all assets belonging to that particular asset type of selected category.
* Customer Details section shows total count of customers and their names and PAN as table format.
* Selecting a row of the table will show further details of that customer as card.
* Clicking on the order history button on the card will show details of the order from that customer.