General User Manual for an Inventory System

Getting Started

- To access the inventory system, you will need to log in using your username and password. If you do not have login credentials, please contact your system administrator.
- Once logged in, you will be taken to the main inbound stock master dashboard, which displays an overview of the inventory levels, sales data, and other important information.

Adding Items to Inventory

- To add items to inventory, click on the "Generate" button to generate transaction number + “New Item” on the dashboard.
- Enter or Edit the item name, brand, description, and other relevant details.
- Set the initial quantity and price for the item, and select the supplier if applicable.
    - Supplier Selection: To choose a provider, click the magnifying glass icon, choose an existing supplier, and then click the "Select" button when the supplier appears in the list of options and textboxes.
- Click "Add to List" to add the item to inventory.

Managing Inventory Levels

- To view and manage inventory levels, click on the "Inbound Stock" on the side panel. From the Inbound Stock dashboard.
    - “Click” an item in the table to populate the details in field boxes.
    - “Double Click” or click the “Preview Item” button to view the item details.
- Use the search bar to find specific items or filter by name, transaction reference, or other parameters.
- View the current quantity and value of each item, and adjust the quantity as needed by typing the numbers or clicking the arrow up and arrow down button.
- To restock an item, click on one item from the table and alter or enter the new quantity and click on the "Save Current" button. requires
- To delete an item, select the item from the table then once “Barcode Field" is not Empty, click on the “Delete Item” button. Same process for replacing the image.

  Note: "Editing a current item always requires a barcode id or item id.”

Processing Outbound and Orders

- To process outbound or orders, click on the "Outbound Stock" tab on the side panel.
- Select the division/customer by clicking the magnifying icon and add the items being ordered.
    - To add items from inbound transaction to outbound transaction select an item then click “add selected below” or double click the selected item.
    - To edit items in the Outbound table select the item from the table and click the “Edit selection” button, a dialog will open and enter the quantity you want to transact. Finally, click the “Enable stock out button” checkbox to have the system check first before confirming stock out.
- The system will automatically calculate the total amount and adjust the inventory levels accordingly.
- If required, you can generate invoices or purchase orders to send to the divisions.

Processing Return Orders

- To process return orders, click on the "Return Stock" tab on the side panel.
- Select the outbound transaction reference number by clicking the magnifying icon.
    - From the Outbound List use the search bar to find the transaction you want to return or look on the first row of the table for recent ones. Select and Copy the reference number or Select and click the “Select button”.
    - To add items from outbound transactions to the return transaction table, select an item then click “add selected below” or double click the selected item.
    - To edit items in the Return table select the item from the table and click the “Edit selection” button, a dialog will open and enter the quantity you want to transact. Finally, click the “Enable return stock button” checkbox to have the system check first before confirming stock return.
- The system will automatically calculate the total amount and adjust the inventory levels accordingly.
- If required, you can generate invoices of return orders.

Generating Reports

- To view sales data, inventory levels, or other reports, click on the "Reports" tab on the side panel.
- Select the report type (“Item Report, Employee Report, Customer/Division Report, & Supplier Report”) and date range, and customize any other relevant parameters or data fields.
- The system will generate a report that can be batched, previewed, and printed.
- My Documents: All batched transactions or processes will be sent and filtered in batch documents for previewing and printing purposes.

System Settings

- To adjust system settings, click on the "Settings" tab on the side panel.
- Here, you can change company name, logo, stock low detection, outbound warranty settings, and customize other preferences.

Getting Help

Contact your system administrator or go to the user guide or support materials that the software vendor has provided if you have any queries or problems with the system.