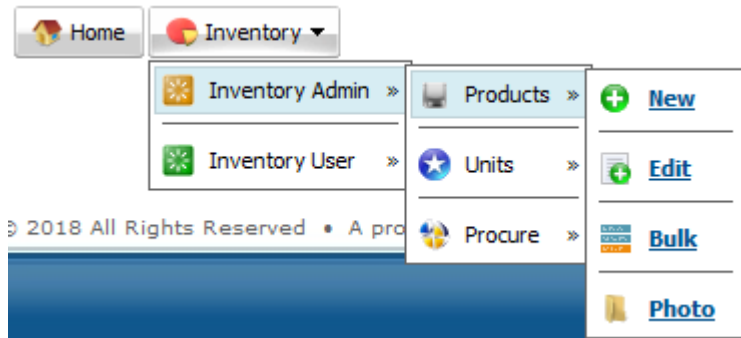# Inventory Module

Inventory Admin

It is only accesed by those with inventory admin system access and admin system access.

Enables management of products owned by the school at a higher level.

It has three areas: Products, Units and Procure

A) Products

Enables entry and edit of products owned by the school

It has four sub areas: New, Edit, Bulk and Photo

1) New

Enables entry of details of one product at a time into the system.

Enter the product details and click on new product details to save the entry

Note The supplier details need to have populated in the finace module before making a new product entry

2) Edit

Enables making changes to exiting products in the system.

Click on the desired product name.

	Serial	Name	Supplier
1	NC102	Bunsen Burner	Cameron Limited

Make the desired changes and click on edit product details to save your entry.

To upload a photo, click on the upload photo link.

edit product details

Serial	NC102
Name	Bunsen Burner
Supplier	Cameron Limited
Category	Inventory
Unit	Pieces
Unit Cost	2000.00
Quantity	12
Reorder Level	1

Upload Photo

[Edit Product Details] [Clear Form]

Click browse and navigate to where you have stored the product photo, select it then click upload photo

Upload photo of Bunsen Burner

[   ] [Browse...] **click to insert photo**

[Upload Photo] [Clear Form]

Once uploaded, click on edit product details to save the changes made.

edit product details

Serial	NC102
Name	Bunsen Burner
Supplier	Cameron Limited ▼
Category	Inventory ▼
Unit	Pieces ▼
Unit Cost	2000.00
Quantity	12
Reorder Level	1

[Edit Product Details]   [Clear Form]

Upload Photo

3) Bulk

Enables entry of multiple product details by uploading a csv file (**Not Excel**)

Click on browse, navigate to where the file is, select it and click on submit

Serial*	Name*	Supplier ID*	Category ID*	Measure ID*	Unit Price*	Quantity*	Reorder Level*

Upload your CSV file with above item columns (Without the headings)

Choose your file:

[Browse...]   [Submit]

Below is a sample csv file (**Not Excel**) indicating correct column details

	A	B	C	D	E	F	G	H
1	NC103	Beaker	1	5	7	500	50	1
2	NC104	Test Tubes	1	5	7	100	40	1
3	NC105	Burette	1	6	6	500	10	1
4	NC106	Pipette	1	5	7	200	12	1

Category	Category ID
Land	1
Building	2
Vehicles and Machinery	3
Furniture and Equipment	4
Inventory	5
Other Assets	6
Office Supplies	7
Commissions	8
Advertising	9
Fuel	10
Other Consumables	11
Good Will	12
Insurance	13
Lease	14

Note
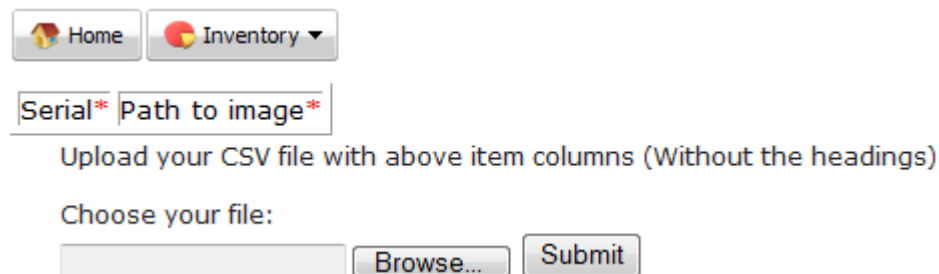
Use supplier id rather instead of the supplier name (refer details from the finance module)

Use category id rather instead of the category name (use the table provided for reference).

Use measure id rather instead of the measure name (refer details from the units area, edit sub area)

4) Photo
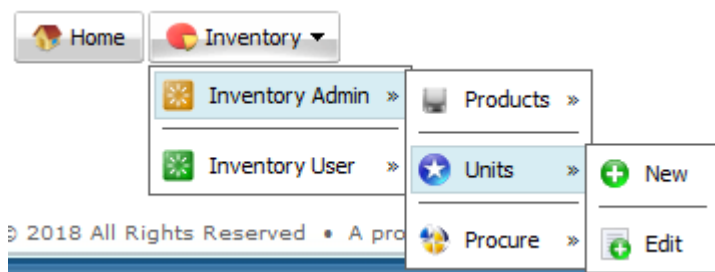
Enables entry of product photos in bulk from a csv file (**Not Excel**)

B) Units

Enables entry or edit of product units of measurement. Has two sub areas: New and Edit.

1) New

Enables entry on product unit of measurement. Enter the unit abbreviation and full name then click submit

2) Edit

Enables making changes to existing units of measurements for the products. Click submit after making changes

Unit ID	Abbr	Name
1	kg	kilograms
2	g	grams
3	lts	litres
4	ml	milliliters
5	sk	sacks
6	bx	boxes
7	pc	Pieces
8	pac	packets
9	cn	cans
10	bl	bales

submit

C) Procure

Enables process of acquiring school products by replenishing deleted ones.

The process is initiated when a product quantity reaches the re-order level

Has five sub areas: Request Quotation, Update Quotation, Order, Receive Delivery and Report

1) Request Quotation

It populates product whose quantity are at or below the re-order level. Below are the steps to request quotation:

    a. Select the most suitable supplier (based on school preference) from the supplier list

    b. Enter the quantity of the product that you desire to be given quotes on

    c. Change Status from **Pending** to **Approve**

    d. Select to put a tick if you desire the supplier to be sent a text message / sms requesting for the quote

Click submit

ID	Name	Supplier	Category	Quantity		Status	SMS
1	Diesel - Unleaded	Shell Oil Industries ▼	Fuel	10	litres	Pending ▼	☐

submit

Note: Once the quote request is sent, it is passed on to the next level (update quotation) and disappears from the queue

2) Update Quotation

This is the second stage after requesting for a quote. It assumes that the supplier responds with their quotation

Select the suitable supplier and click submit

Update quotation

Supplier Shell Oil Industries ▼

Submit Reset

All quotation requests awaiting to be updated under the supplier will be visible

Click on hyperlink of desired product so as to update the quote as received from the supplier.

Product	Qty	Date Entered	Supplier	User
Diesel - Unleaded	1000	2016-08-01 04:29:40	Shell Oil Industries	support

Update the unit price, discount and VAT amount, Select Approve or Cancel, Click submit

Update Quotation Search

Quotation ID   1

Product   Diesel - Unleaded

Supplier   Shell Oil Industries

Category   Fuel

In Stock   10 litres

Qty Ordered   1000 litres

Unit Cost (Ksh)   85.00

Unit Price (Ksh)   **86.00**

Discount (Ksh)   1

VAT (Ksh)   0

Total Unit Price (Ksh) 0.00

None | Approve | Reject
  ⦿   ○   ○

Submit   Reset

Note: Select **Approve** to accept the quote or **Reject** to cancel the quote and take it back to the previous step

3) Order

This is the third step where an order to the supplier is generated once their quote has been updated and approved / accepted

Select the suitable supplier and click submit

Update Order

Supplier Shell Oil Industries ▼

Submit   Reset

All orders awaiting to be updated under the supplier will be visible

Click on hyperlink of desired product so as to update the orders.

🏠 Home	🔴 Inventory ▼			
Product	**Qty**	**Date Entered**	**Supplier**	**User**
Diesel - Unleaded	1000	2016-08-01 17:43:29	Shell Oil Industries	support

Update the desired quantity to be ordered, select whether to sms the supplier

Select whether to Approve or Cancel the order, Click submit

Update LPO Search

Order No	1
Product	Diesel - Unleaded
Supplier	Shell Oil Industries
Category	Fuel
In Stock	10 litres each @ Ksh 85.00
Qty Approved	1000 litres each @ Ksh 85.00
Qty to Order	1000 litres
SMS Supplier	☐

None | Approve | Reject
  ◉   ○   ○

[Submit] [Reset]

Note: Select **Approve** to accept the order or **Reject** to cancel the order and take it back to the previous step

4) Receive Delivery

This is the fourth and final step in the procurement process where once an order is approved / accepted, an LPO (Local Purchase Order) No is generated and the supplier uses this as a reference to supply the product

Update Delivery

Supplier [Shell Oil Industries ▼]

[Submit] [Reset]

All LPO of products awaiting to be delivered under the supplier will be visible,

Click on hyperlink of desired product so as to update the delivery.

Product	Qty	Date Entered	Supplier	LPO No
Diesel - Unleaded	1000	2016-08-01 17:43:29	Shell Oil Industries	LPO-A0A0A0A0

Enter the quantity of product delivered, invoice number, select approve and click Submit

Update Delivery Search

LPO No	LPO-A0A0A0A0
Product	Diesel - Unleaded
Supplier	Shell Oil Industries
Category	Fuel
In Stock	10 litres each @ Ksh 85.00
Qty Approved	1000 litres each @ Ksh 85.00
Qty Ordered	1000 litres each @ Ksh 85.00
Qty Delivered	1000 litres of Diesel - Unleaded
Invoice No	1
SMS Supplier	☑

None | Approve
○   ◉

[Submit] [Reset]

Note: once product has been received, the supplier payment process is then transferred to the Finance Module and the delivered product quantity is added into the corresponding; existing inventory product quantity

5) Report

This is a professional report where a start and end date ranges may be set to view reports below

a. Approved or rejected quotes

b. Approved or rejected orders

c. Paid or unpaid deliveries

d. Active or expired annuities (Insurance policies)

Procure Report

2016-08-01 18:12   **Start Date**

Quotations		Orders		Deliveries		Annuity	
Approved	Rejected	Approved	Rejected	Paid	Unpaid	Active	Expired
◉	○	○	○	○	○	○	○

2016-08-01 18:12   **End Date**

[Submit] [Reset]

Below are sample reports

Mosoftware High School
P.O Box 1234 Nakuru
Motto : .yes we can

Approved Quotations Report between 2016-07-31 18:18 and 2016-08-02 18:18

Mon 01st Aug 2016

Date	Serial	Name	Supplier	Category	Price	Quantity	User
2016-08-01 04:29:40	C081	Diesel - Unleaded	Shell Oil Industries	Fuel	85.00/-	1,000 litres	support

Mosoftware High School
P.O Box 1234 Nakuru
Motto : .yes we can

Approved Orders Report between 2016-07-31 18:20 and 2016-08-02 18:20

Mon 01st Aug 2016

Date	Serial	Name	Supplier	Category	Price	Quantity	User
2016-08-01 04:29:40	C081	Diesel - Unleaded	Shell Oil Industries	Fuel	86.00/-	1,000 litres	support

Mosoftware High School
P.O Box 1234 Nakuru
Motto : .yes we can

Unpaid Deliveries Report between 2016-07-31 18:22 and 2016-08-02 18:22

Mon 01st Aug 2016

Date	Serial	Name	Supplier	Category	Price	Quantity	User
2016-08-01 18:11:17	C081	Diesel - Unleaded	Shell Oil Industries	Fuel	86.00/-	1,000 litres	support

Inventory User

Can be accessed only by those with inventory user, Inventory admin and admin system access.

Enables management of school products at a lower level.

It has three areas: Issue, Return and Report
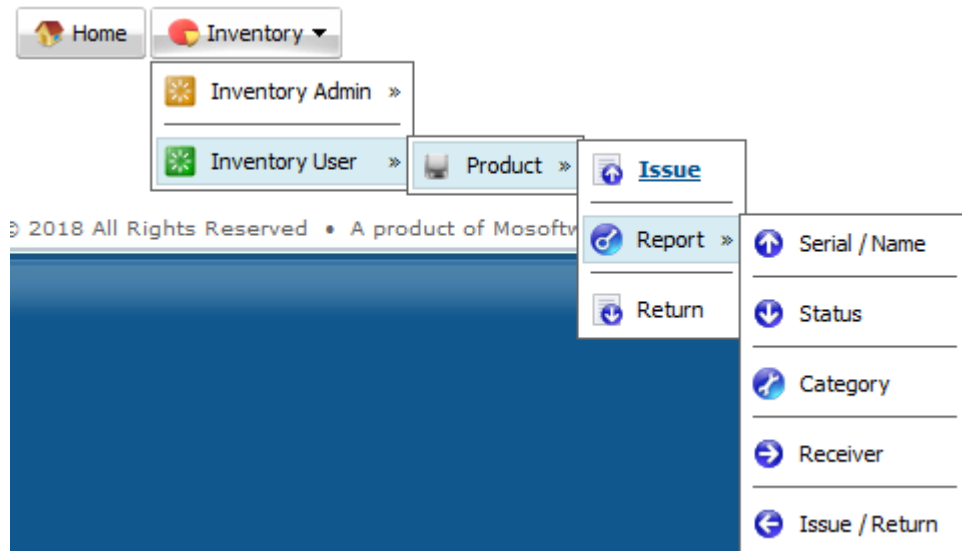
A) Issue

Enables dispensing of product to ether an enrolled student or employed member of staff

Select desired student or staff details and click submit.

Select the desired name from the list.

Enter either product name or serial and click submt

State   Enrolled ▼

Adm/ID   100 ▼

Type   Student ▼

Name   Wilkister Makacha Makokha ▼

Student Product Issue

◉ Product Name   ○ Product Serial

%

[Submit] [Reset]

Select desired product name from the list

[🏠 Home] [🥧 Inventory ▼]

NC102 Bunsen Burner

Confirm the desired product to be dispensed, enter the quantity being dispensed and click issue product

[🏠 Home] [🥧 Inventory ▼]

State   Enrolled ▼

Adm/ID   100 ▼

Type   Student ▼

Name   Wilkister Makacha Makokha ▼

Student Product Issue

Name   Bunsen Burner

Quantity* 1   12 Pieces

Condition New ▼

[Issue Product] [Clear Form]

Note The product is auto deducted from the store and placed on the student / staff account

B) Return

Enables receiving of returned product from either staff or student

Select the desired student / staff from the list

Return Product

	Name	Type
100	**Wilkister Makacha Makokha**	Student

Change status from issued to returned and click on submit

State   Enrolled ▾

Adm/ID   100 ▾

Type   Student ▾

Name   Wilkister Makacha Makokha ▾

Student Product Return

Serial	Name	Condition	Status	Qty	Issue Date
NC102	Bunsen Burner	New	Returned ▾	1	2018-01-22 22:50:10

submit

Note The product is auto removed from the student / staff account and added back to the store

C) Report

Enables download of information on lower management of products owned by the school.

It has five sub areas: Serial/Name, Status, Category, Receiver and Issue/Return

1) Serial/Name

Enables search of existing products by their serial number or name

Product Search

◉ Serial   ◯ Name

%

Submit   Reset

Select the desired product from the list

NC102 Bunsen Burner

Below is a sample display of existing product

Home   Inventory ▼

Product Details

Serial	NC102
Name	Bunsen Burner
Category	Inventory
Stock	12 Pieces
Cost	2,000/-
Re-order at	1 pc
Supplier	Cameron Limited
Contact	0722000000
Email	ssl@ssl.com
Status	In-Stock

2) Status

Enables searching of existing products based on their availability or lack of availability.

Below is a sample status document result

Masomo High School
P.O Box 1234 Nakuru
Motto : .yes we can
Product Search

Serial	Name	Supplier	Category	Price	Quantity	Status	Reorder
NC102	Bunsen Burner	Cameron Limited	Inventory	2,000.00/-	12 Pieces	In-Stock	1

3) Category

Enables searching of existing products based on existing fourteen product category names.

Below is a sample category document result

Masomo High School
P.O Box 1234 Nakuru
Motto : .yes we can
Product Search

Serial	Name	Supplier	Category	Price	Quantity	Status	Reorder
NC102	Bunsen Burner	Cameron Limited	Inventory	2,000.00/-	12 Pieces	In-Stock	1

4) Receiver

Enables searching by details of the individual who has been issued with a product in the past.

Below is a sample receiver document result

Serial	Name	Supplier	Category	Quantity	Issue Date	Returned Date
NC102	Bunsen Burner	Cameron Limited	Inventory	1 Pieces	2018-01-22 22:50:10	2018-01-22 08:51:32

5) Issue/Return

Enables searching based on start and end dates, details of who has been issued with or returned a given product.

Select the desired date range, either issued or returned and click on sumit

Home   Inventory ▼

2018-01-22 00:00   **Start Date**

◉ Issued   ○ Returned

2018-01-22 23:59   **End Date**

Submit   Reset

Below is a sample issued / returned document result

Masomo High School
P.O Box 1234 Nakuru
Motto : .yes we can
Issued Product, report between 2018-01-22 00:00 and 2018-01-22 23:59

Serial	Receiver	Type	Product Name	Category	Quantity	Issued Date	issuer
NC102	100 Wilkister Makacha Makokha	Student	Bunsen Burner	Inventory	1 Pieces	2018-01-22 22:50:10	support