

Inventory System Walkthrough

Last updated: 5th Dec 2017

This document will guide you through step-by-step in using the inventory system Receiving Note feature.

1. System Access

The demo system can be accessed with the following URLs.

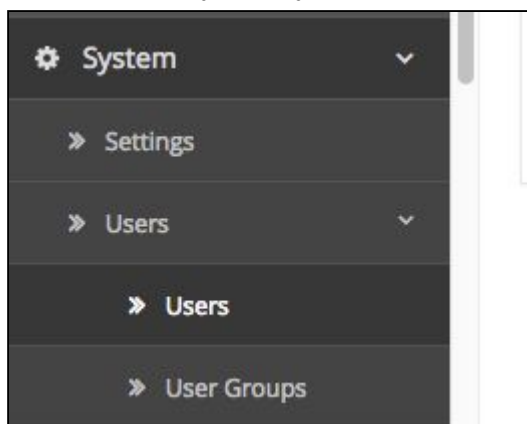
Store Front	http://demo.opencart.my/spenco/
Admin Back-end	http://demo.opencart.my/spenco/admin

2. Admin Login Test Accounts

You may use the following credentials to access the admin back-end.

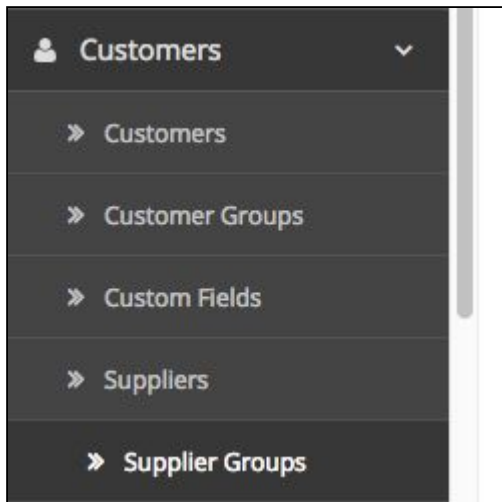
Role	Role Description	Username	Password
Admin	Master Account. Can change everything including stock quantity	admin	admin
Staff	Limited access and cannot change stock quantity. You should be using this for day-to-day operation data-entry to avoid tampering with stock quantity.	andy	1234

- You may modify password or add more user account from admin > System > Users > Users.

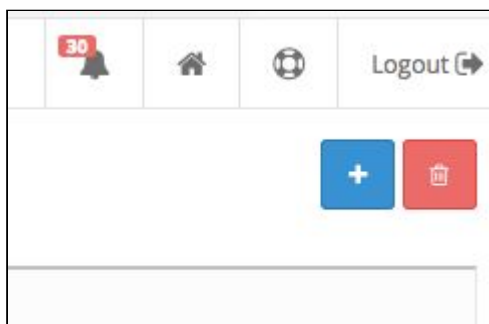


3. Adding Supplier Group

i) Navigate to admin > Customers > Supplier Groups.



ii) Click the [+] Add New button on the top right of the page:



iii) Fill in the form on the page and submit.

- Normally, you will only need 1 Supplier Group for all your Suppliers account.

4. Adding Supplier

- i) Navigate to admin > Customers > Suppliers.
- ii) Click the [+] Add New button on the top right of the page like before.
- iii) Supplier Group: (Select the Supplier Group that you have created previously in Step 3 from the drop-down)
- iv) Fill up the rest of the form with your supplier's details.
- v) Password / Confirm: (Just enter "1234" as Supplier cannot login for now)
- vi) Status: Enabled.
- vii) Approved: Yes.
- viii) Safe: Yes.
- ix) Click on (+) Add Address button to add an address and company details for the supplier:

- You can add multiple companies & addresses for the same supplier.

- x) Default Address: (Click on the radio button to select your address as Default Address for this Supplier, especially there are multiple addresses for this supplier.)
- xi) When you are done, click on the "Save" button on the top right of the page to save your entry:

5. Adding a Receiving Note

Before we start adding a receiving note, please make sure the following:

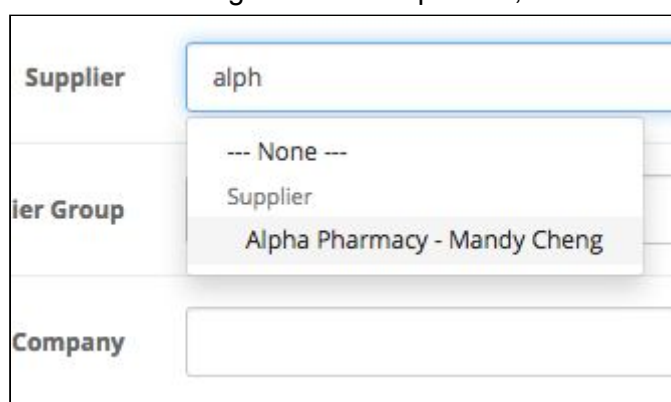
i) when you create a new product entry, make sure all the stock quantity value is set to “0”. As you will use Receiving Note to update the actual quantity of your product stock.

ii) Navigate to admin > Catalog > Receiving Notes.

iii) Click the [+] Add New button on the top right of the page like before.

iv) **Tab 1: Supplier Details:**

- Fill up the form with the relevant details:
- Store (Leave it at “Default”)
- Currency (“Ringgit Malaysia” or others if any)
- Invoice No. (The invoice no. on the invoice from supplier, just to keep record for reference)
- Supplier (Click on the field and start typing your supplier company’s name or person name that you have entered previously in Step 4: Adding Supplier. When you see the Supplier you are looking for in the drop-down, click on it to add to the form):



The screenshot shows a form with three fields: 'Supplier', 'Supplier Group', and 'Company'. The 'Supplier' field contains the text 'alph'. A dropdown menu is open below the 'Supplier' field, displaying three options: '--- None ---', 'Supplier', and 'Alpha Pharmacy - Mandy Cheng'. The 'Supplier Group' and 'Company' fields are currently empty.

- Once you click on the name, you will noticed all other details will be filled up automatically in the rest of the fields below. But you can always overwrite the fields anytime.
- Click “Continue” button on the lower right to go to the next tab:



The screenshot shows a blue button with a white right-pointing arrow and the text 'Continue'.

v) **Tab 2: Products**

- Choose Product: start typing the product name that you want to add:

Add Product(s)

Choose Product	spen
Quantity	
Unit Price	

Choose Option(s)

- Click on the product that you desired and the product Unit Price together with its Options will appear at the bottom
- Quantity: (Set a quantity)

Quantity 2

- Unit Price: (Set the price of the product as shown on your invoice. This is for receiving note record purpose only and will not reflect on your store-front or product database)

Unit Price 249.0000

- Choose Options: (Select the option as shown on your invoice. Make sure this option matches the quantity you set before, as this will reflect on the stock quantity in your product database later):

Choose Option(s)

* Shoe US size

✓ --- Please Select ---

6

7

- Add Product: (Click on the (+) Add Product button on the bottom right of the page to add the selected product to your receiving note product list above):

Add Product

- You will then see the product appear in the product list above:

Add Receiving Note

1. Supplier Details **2. Products** 3. Shipping Details 4. Payment Details 5. Totals

Product	Model	Quantity	Unit Price	Total	Action
spen - Shoe US size: 6	Spenco Canvas Ocean Blue	2	249	498	

Add Product(s)

Choose Product: spen

- Click “Continue” button on the lower right to go to the next tab.

vi) Tab 3: Shipping Details

- This page records the shipping details of the current receiving note. If you send the products directly to customer, you will have to enter your customer’s details on this page. If you collect the products yourself or supplier send to you, you should key in your details. Please open a new tab and navigate to admin > Customers > Customers to create new Customer entry.
- Shipping Method: (Choose the appropriate shipping method used. Shipping Methods can be setup in Extensions > Extensions > “Shipping” drop-down)
- Shipping Cost: (enter an amount if there’s a delivery fee associate with this product shipment, else, enter 0 for none.)
- Shipping Customer (type your customer name or your own name to start searching for customer names)

Shipping Customer

pet

--- None ---

Distributor

Peter Lau

Customer Group

- Click on the customer name and the rest of customer’s details will be filled in on the form.
- If this customer has multiple addresses, you may select the right address to be filled in:

Choose Address

--- None ---

✓ Peter Lau, No. 3, Ampang, Malaysia

- Of course, you can edit or add any details on the form.
- Click “Continue” button on the lower right to go to the next tab.

vii) Tab 4: Payment Details

- On this page, you will enter the details of payment.
- Tax: (Select a tax. Tax can be setup in System > Localisation > Taxes > Tax Rate):

Tax	<div> <div>--- Please Select ---</div> <div>Eco Tax (-2.00)</div> <div>✓ GST (6%)</div> </div>
Tax Cost	29.88

- Tax Cost: (enter the tax amount as shown on your invoice from supplier)
- Payment Method (Select a payment method you used to pay your supplier)
- Payment Customer (Select a customer who made the payment. If you are the one who paid, you may search for your name to add)
- Upon clicking on the Customer name, the rest of customer's details will be automatically filled in on the form.

Payment Customer	Peter
Customer Group	<div> <div>--- None ---</div> <div>Distributor</div> <div>Peter Lau</div> </div>

- Of course, you may edit any fields here.
- Click "Continue" button on the lower right to go to the next tab.

viii) **Tab 5: Totals**

- On this page, you may review your Receiving Note to ensure the product, quantity, and total amount is correct before submitting to the system:

1. Supplier Details		2. Products	3. Shipping Details	4. Payment Details	5. Totals
Product	Model	Quantity	Unit Price	Total	
spen - Shoe US size: 6	Spenco Canvas Ocean Blue	2	249	498	
Sub-Total:				498	
Shipping (Flat Rate):				0	
GST (6%):				29.88	
Total:				527.88	

- Receiving Details > Receiving Status: (You may select a Receiving Status from the drop-down to mark this receiving status. For example, if the item is in transit, you may select "Pending". If you have received the items in good order, you may select "Complete"):

Receiving Details

Receiving Status

Comment

Canceled

Canceled Reversal

Chargeback

Complete

Denied

Expired

Failed

✓ Pending

Processed

Processing

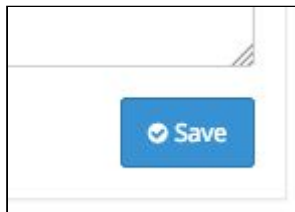
Refunded

Reversed

Shipped

Voided

- Receiving Details > Comment (Enter any comment or footnotes on this particular Receiving Note.)
- Save (Once you are ready, click on the Save button on the lower right of the page to save this entry to the system.):




- You may also edit existing Receiving Note by click on the “Edit” button next to the Receiving Note entry in the list:

<input type="checkbox"/>	Receiving ID ^	Supplier	Company	Status	Total	Date Added	Date Modified	<div>Edit</div>
<input type="checkbox"/>	3	Mandy Cheng	Alpha Pharmacy	Pending	RM527.88	05/12/2017	05/12/2017	<div> <div></div> <div></div> </div>

Showing 1 to 1 of 1 (1 Pages)

6. Quantity Stock Restriction

- i) Navigate to admin > Catalog > Products > “Spenco Canvas Ocean Blue” > Click on the Edit button on the right.
- ii) Click on the “Option” tab to see your option stocks:

 **Edit Product**

General

Data

Links

Attribute

Option

Recurring

Discount

Shoe US size

Option

Required

Yes

Option Value	Quantity	Subtract Stock	
6	2	Yes	<div>+</div> <div>0.0000</div>
7	0	Yes	<div>+</div> <div>0.0000</div>

- As you can see, if you are logging in as “Staff” role account, you will not be able to change the stock quantity in the fields.
- The quantity has also been updated from the previous Receiving Note that you just added above.
- If an order is made on your store-front, the quantity will be subtracted based on the quantity that your customer ordered.

End.