User manual

Inventory

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1. Introduction

Inventory #FFFFFF is a web-based application for tracking and managing inventory, orders and returns of a store. You can use this system to view stock levels, add new products to your catalogue, edit existing products information, process orders from suppliers and returns from customers. The system comes with the accounts managing options, supporting different user roles with different access levels to the features. The main roles are Manager and Employee.

This manual will explain how to install, start and use the system. It also explains the key features and gives step by step instructions for use.

1.1 Purpose

This manual will help to:

- Install and run the system.
- Learn core features and use (inventory, orders, returns, accounts).
- Troubleshoot basic issues

1.2 Scope

Included in the manual:

- Installation and setup.
- Core feature usage with examples.
- Information on optional quality of life features.
- Troubleshooting and FAQ.

  Not included in this manual:
- System architecture and database scheme (refer to the project report).

2. Getting started (installation)

2.1 Prerequisites

Before you install and run Inventory #FFFFFF you will need the following

Software:

- A code editor, this guide will use VS code (https://code.visualstudio.com/download).
- Python 3.10+ installed on your machine (https://www.python.org/downloads/).

- Access to a modern web browser (Chrome, Firefox, Edge, Safari, Opera).

Files:
- The latest release of the project (Zip download) (https://git.chalmers.se/prosic/store_manager/-/releases)

2.2 Preparing and running the system

2.2.1 Unpack the Zip release

After downloading the latest release version, on your computer navigate to the folder where it was downloaded (most commonly the downloads folder) and unzip the file to a folder on your machine where you wish to store the app. (e.g C:\projects\inventory or /home/projects/inventory)

2.2.2 Opening the project in VS code

Open VS code and navigate to the folder you just unzipped to access the codebase.
files → Open folder → select the project folder you unzipped (store_manager)
This will open the code base inside your VS code, ensure that you are in the root directory of the program (/store_manager)

2.2.3 Create and activate virtual environment

Navigate to the Terminal in VS code by clicking on it or by pressing the keyboard shortcut
ctrl + ‘

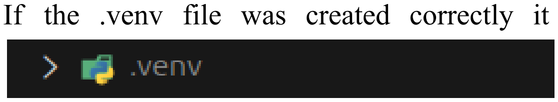
Once the terminal opens depending on your operating system run these two commands one after another pressing enter after entering the full command line allowing the system to run it.

Windows (PowerShell):
- python -m venv .venv
- ./Venv/Scripts/Activate.ps1

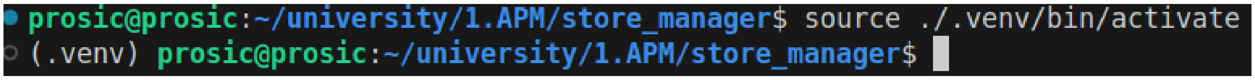
Windows (CMD):
- Python -m venv .venv
- .venv/Scripts/activate.bat

Mac OS or Linux:
- python3 -m venv .venv
- source .venv/bin/activate

If the .venv file was created correctly it will show up in your project file structure like so



If the environment was activated correctly in your terminal you will see (.venv) at the beginning of the terminal line.



2.2.4 Install dependencies

Make sure that the requirements.txt is inside the project root then inside the terminal run

- pip install -r requirements.txt

If the requirements.txt file is missing run the following installation commands in the terminal

- pip install flask
- pip install flask-login

2.2.5 Run the app

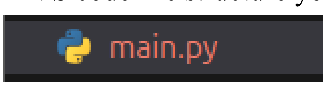
There are two main ways of running the app however the first one is less error prone and recommended.

A. In the terminal run the following commands one after another. The first command is to change directories from base to the codebase source which will allow you to run the program and second command is to run the program.

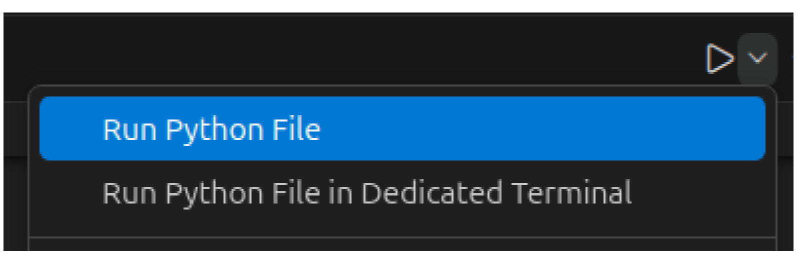
   Windows:
   - cd src
   - python main.py

   Mac OS or Linux:
   - cd src
   - python3 main.py

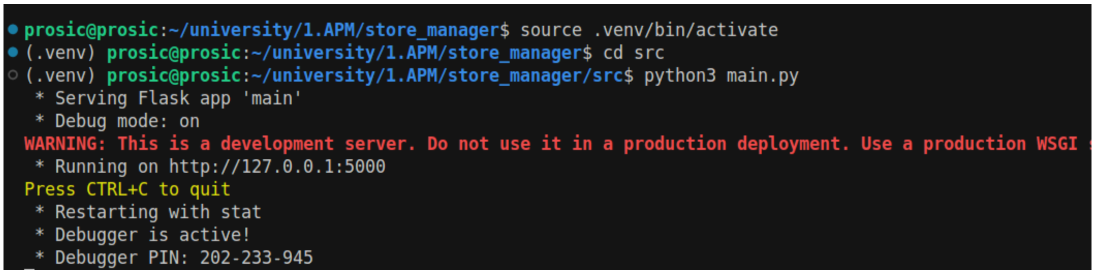
B. In VS code file structure you can double click the main.py file which will open it in edit mode.



In the top right corner of VS code click on the play button drop down menu and select the following “Run Python File”



Both methods will open the terminal and execute the following lines



Click on the hyperlink *http://127.0.0.1:5000* inside the terminal which will take you to the app, if clicking doesn't work copy and paste the hyperlink from the terminal into a browser.

2.2.7 First time log in

When the application starts, the login page will load in your web browser, use the default log in credential with manager privileges:

Username: base_user
Password: base_password

After logging in you can create a new account for your day to day use by following this guide 3.7 Accounts section. Once a new account has been created you will need to log out and log back in to switch to the new account.

2.2.8 Quick trouble-shooting

1. Application does not start:
   Check that your virtual environment is activated ((.venv) should be visible in the terminal)

2. Module not found:
   - Run the command in the terminal
     pip install -r requirements.txt
   - If the requirements.txt file is missing, install dependencies manually in the terminal
     pip install flask
     pip install flask-login

3. Port in use already:
   - Another process may be using the port 5000, to make sure no other programs are being executed inside VS code, only the store_manager directory should be open and running.

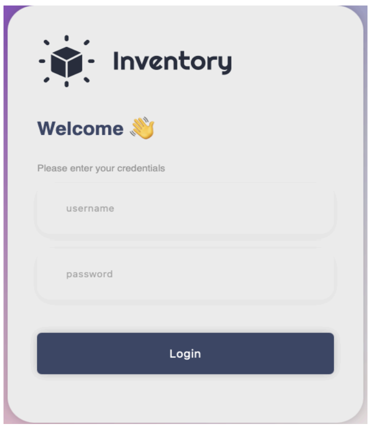
4. Login page issues:
   - Clear browser cache or try a different web browser.
   - Restart the application.

3. Basic core features usage guide

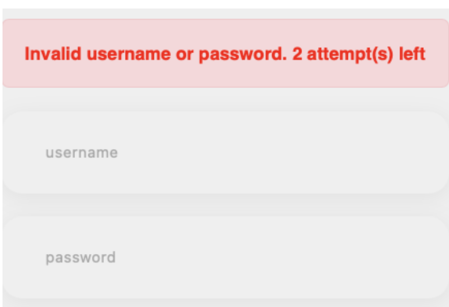
All the features shown and described below are from the perspective of a user with the role of manager. The access between manager and employee differs and which feature takes what access level is explained below each feature. In the, currently most recent, release of the program there are no settings to alter what an employee can and can not do. How you get around this is explained in point 3.8.3.

3.1 Login

The first page you will be met by when running the system is a login page. Here you enter your username and password to continue into the system.

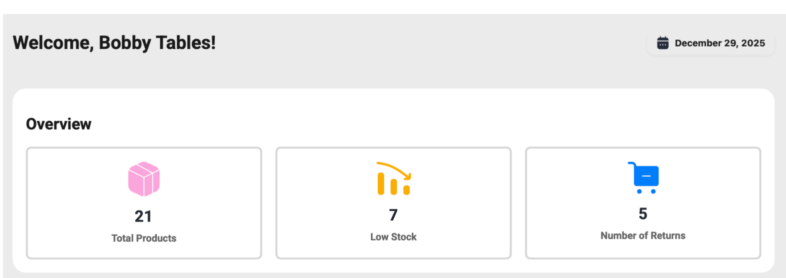


Upon entering the wrong credentials three times, you will be locked out for a certain amount of time.

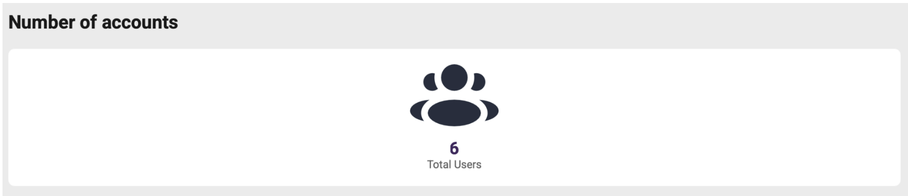


3.2 Home

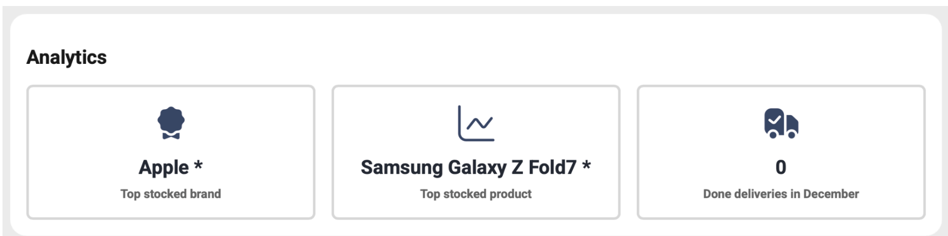
As you have logged in to the system, the first page that appears is the 'Home' page. Here your inventory's overview is displayed. The amount of items in your inventory, amount of items of low stock and the number of returns currently in process. At the top right corner is also today's date.



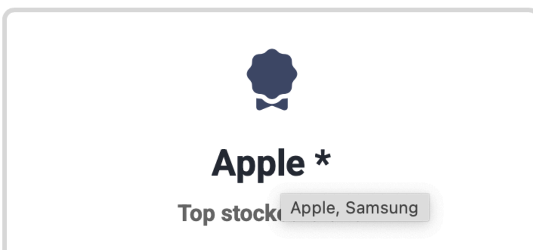
Below you can find the amount of users who currently have access to the system, regardless of access level. If the number does not match your expected or estimated count, you have access to all profiles by clicking your own user. More information at 3.7.



At the far bottom of the home page you can also find the analytics of your inventory. Displayed here, is the brand and product with the largest amount of stock at the moment and the total amount of deliveries completed this month.



If the last character of the brand of product is a ‘*’, this means there are more than one item of the criteria. In that case, you can by hovering over the label, see the full list of items.



3.3 Menu and top bar

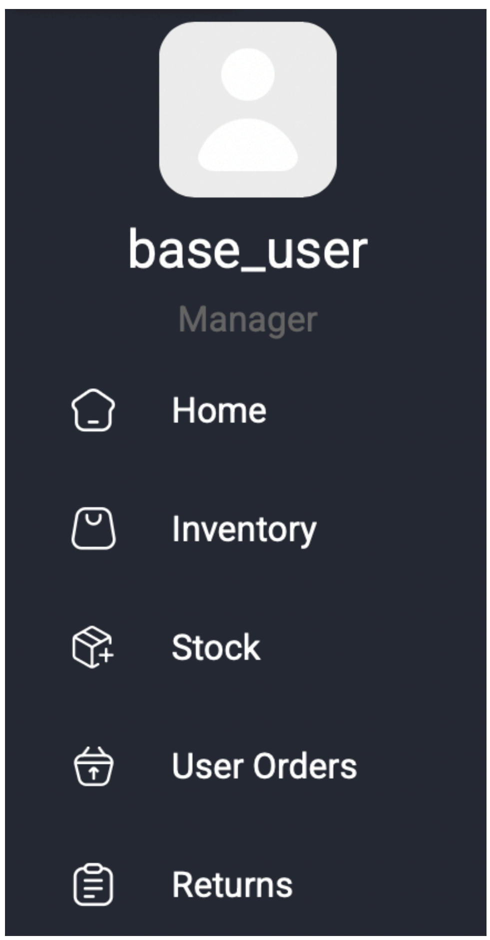
3.3.1 Top bar

At the top is a notification button with a label of a number. These are the amount of products which are currently low in stock.

By clicking the notifications you can find more information about each low stock product.

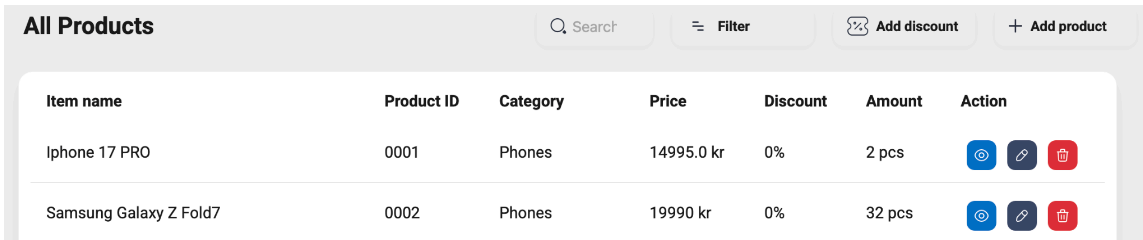
3.3.2 Side bar menu

The menu to the left has all the inventory management options (they are each described below). All the tabs of both the side bar and the top bar are available regardless of what page you are on.



3.4 Inventory

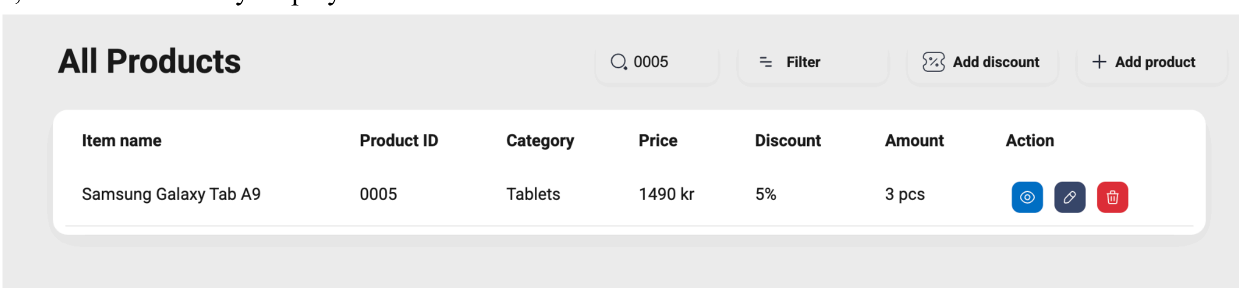
Upon pressing ‘Inventory’ in the side bar, all the items that you have added to your inventory are displayed in order of article IDs, regardless of the stock amount.



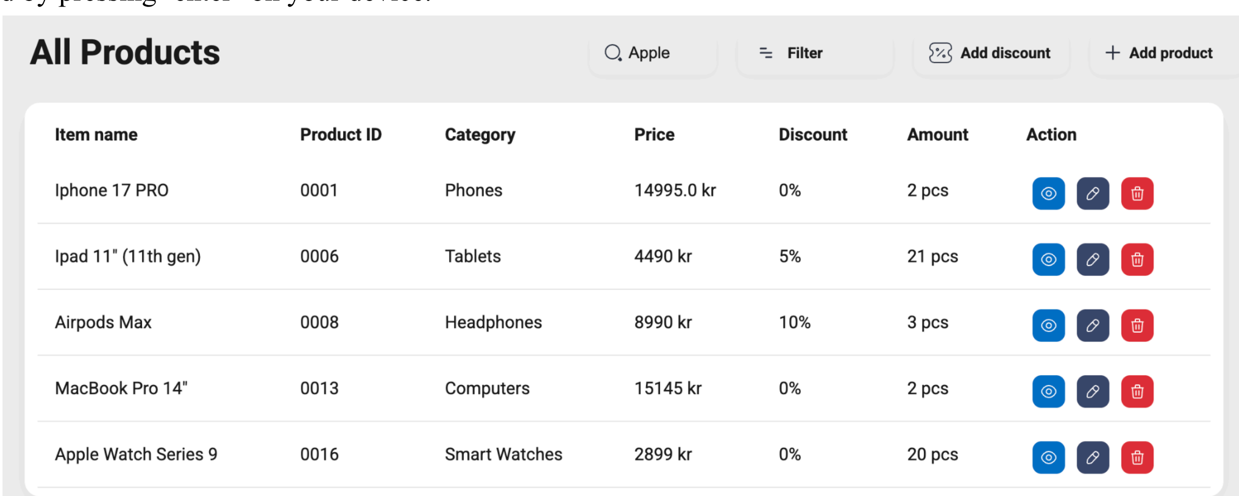
The products displayed above are to show what your inventory can contain. Upon starting up the system for the first time, your inventory will be empty and you will have to add all your products manually. How to do this is explained under point 3.4.3.

3.4.1 Search

Above your inventory, from left to right, is a search bar, where you can access an item by searching for its article ID, which will directly display the item.

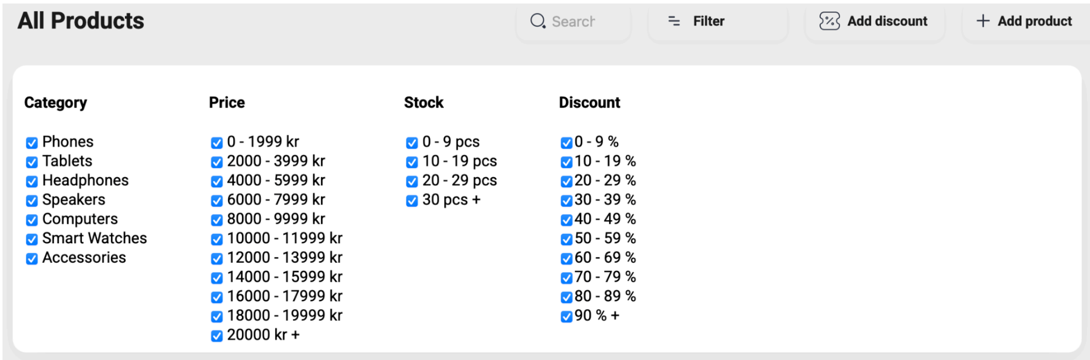


Alternatively you can search for a brand, which will display all products within that brand. The item(s) is displayed by pressing ‘enter’ on your device.

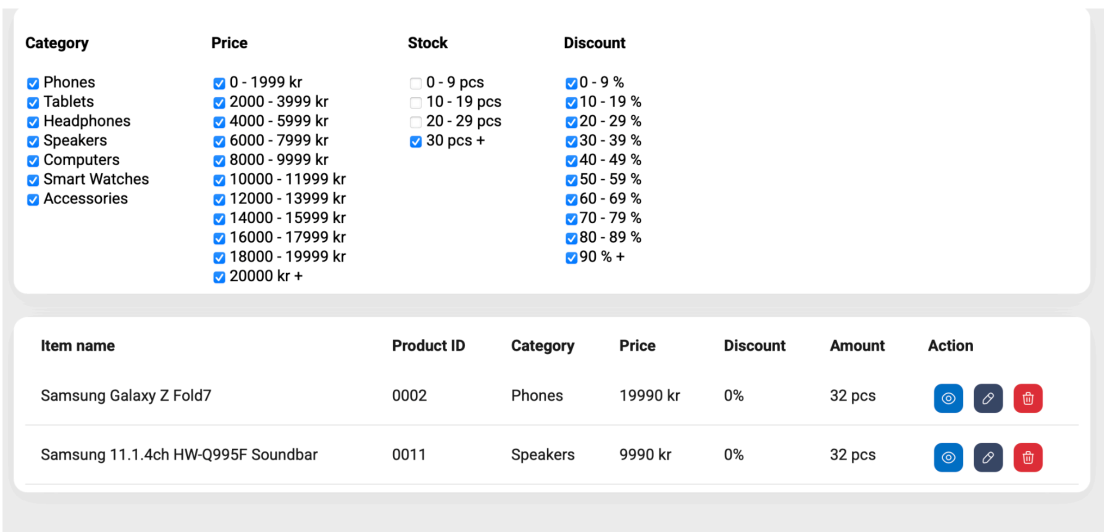


3.4.2 Filter products

To the right of search is the option to filter products. Filter is a toggle button which will display all filtering options upon pressing.

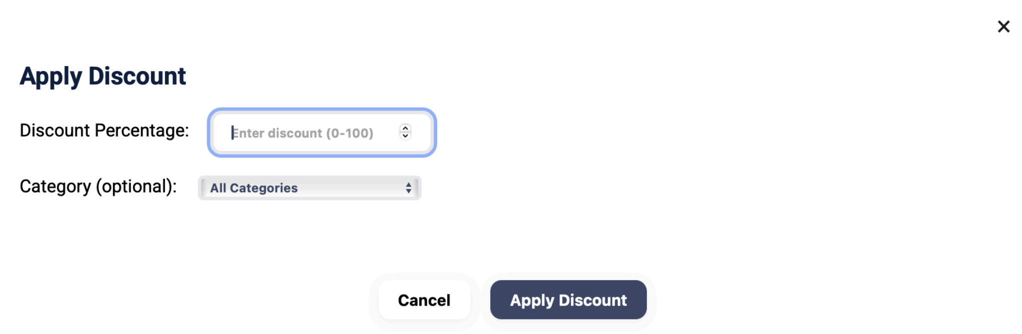


Without any filters activated all the checkboxes are clicked. To filter out certain values, uncheck the checkbox of that value and the list automatically updates. The example below filters out all products with a stock amount lower than 30 pieces.



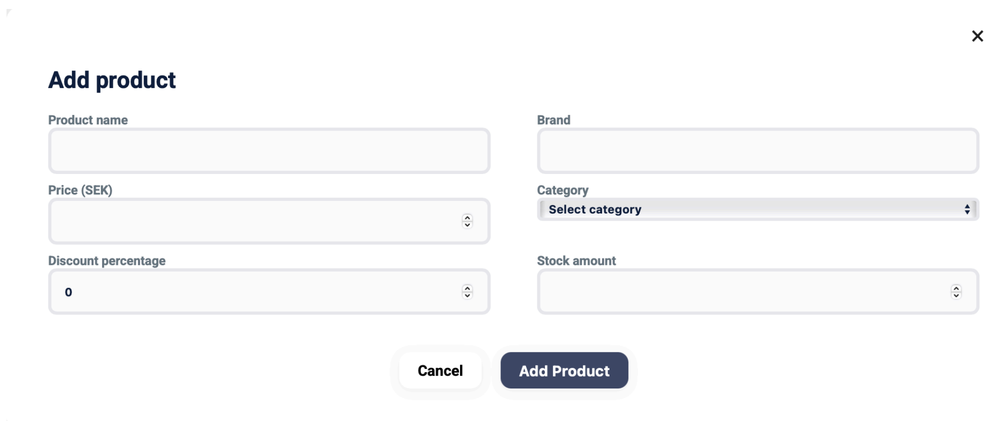
3.4.3 Add discount

To the right is an ‘Add discount button’, which will let you add a discount to a certain category, or the whole inventory. Enter the discount in percent (whole numbers, 1-100) or tap the arrows until the wanted discount is achieved. The arrows skip one (1) percent per tap. Optionally choose a category by scrolling through the options under ‘All categories’ to apply the discount to. Submit by pressing ‘Apply discount’ right below.



3.4.4 Add product

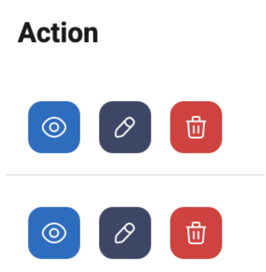
At the far right is the option to add an item with the ‘Add product’ button. Here you enter the name of the item, the brand, the item’s price and category, the amount in stock and an optional discount amount. All the values, except for discount percentage, have to be filled out for the product to be added.



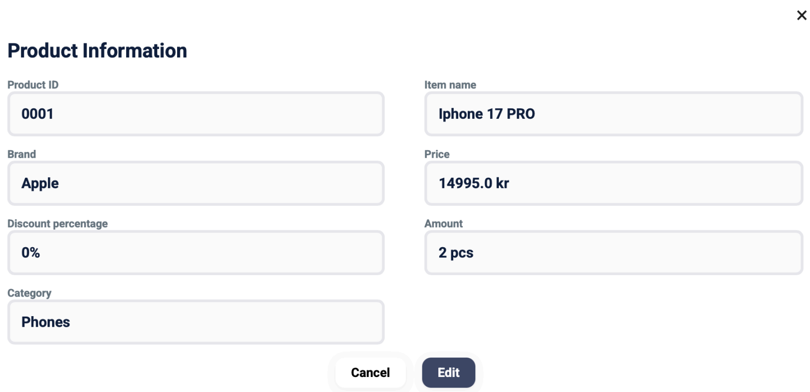
The article ID is automatically applied based on the ID of the previous item. By pressing ‘Add’, the item is added to your inventory. The option of adding a product is only visible for users with the role of ‘manager’.

3.4.5 View product information

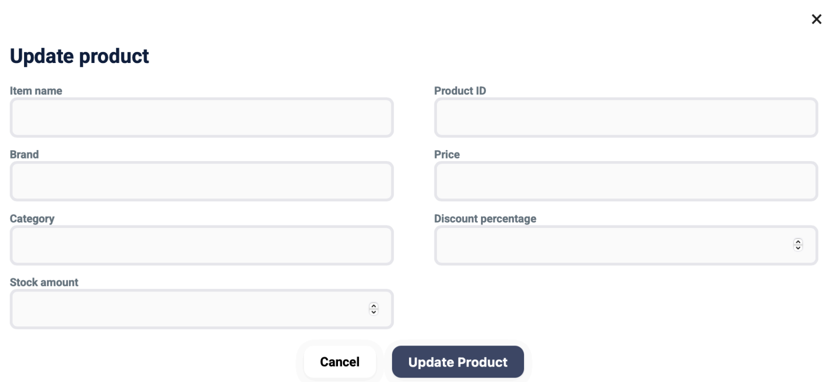
In the list of items there are three options for each one.



From left to right, the 'eye' icon lets you display all the information on that certain product. Here you can see all the information, but not edit it. If you want to edit the information of an item, you can either press the 'Edit' button at the bottom of this page, or go through the edit button on the inventory page.

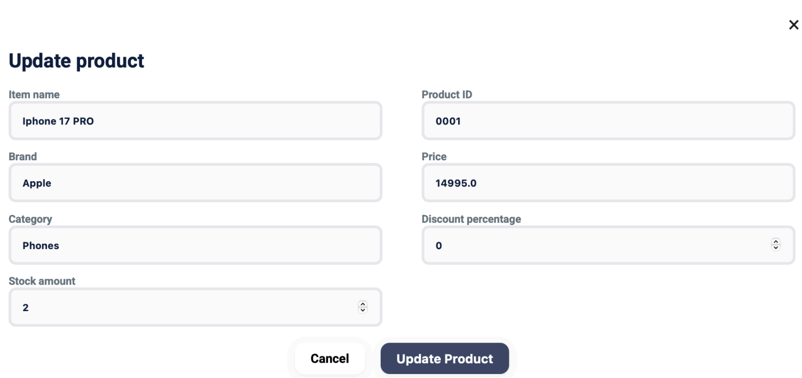


By clicking the edit button on the product information page, all the rows will be blank and the information can only be retrieved by going back to the 'access information' page. Updating the information is done through pressing 'Update product'.



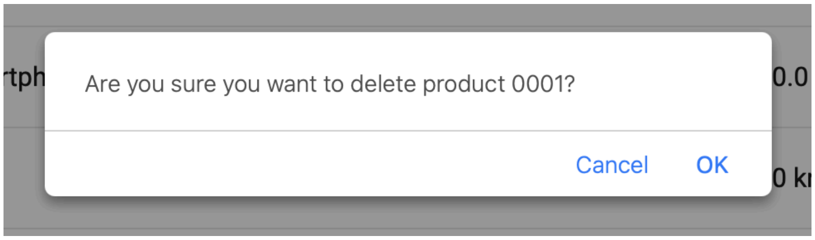
3.4.6 Edit product information

To the right is a 'pen' icon, which displays the same information as the 'eye', but this is where you can edit the information of the item. All but the article ID can be changed. In addition to the 'Apply discount', here you can apply a discount to one single product, and not a larger amount of items. You can either change one piece of information, or everything at the same time. Submit the change by pressing 'Update product'.



3.4.7 Delete product

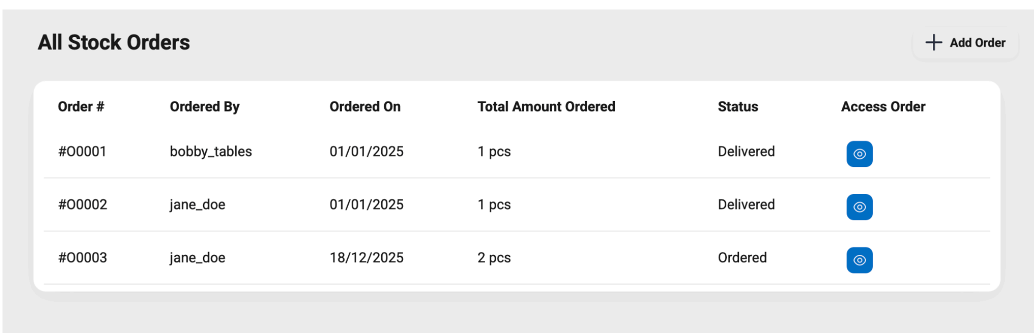
To the far right is a ‘trash can’ icon. Here you can delete a certain product from the inventory. Upon pressing this you will receive a confirmation pop up window, which will ask you if you really want to delete this product. The option of deleting a product is only visible to users with the role of ‘manager’.



The confirmation box and the options ‘Cancel’ and ‘OK’ might look different depending on your device. By pressing cancel, there will not be any changes to the item. By pressing ‘OK’, or the equivalent on your device, the item will be deleted from your inventory.

3.5 Orders

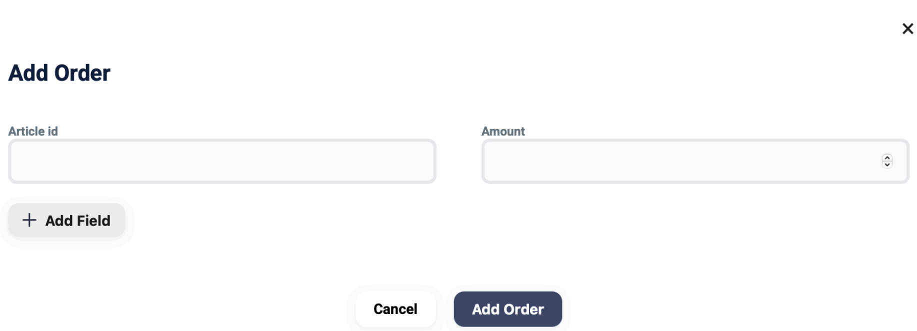
Upon pressing “Stock”in the side bar, all the orders, both already delivered and recently ordered are displayed in order of the order ID.



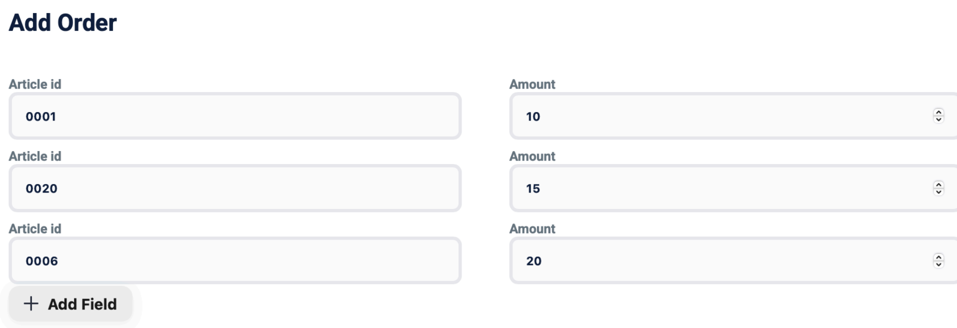
The orders displayed above are to show what your orders can contain. Upon starting up the system for the first time, your orders will be empty and you will have to add all of them manually. How to do this is explained under point 3.5.1.

3.5.1 Add Order

In the top right corner of the orders page is a button with a plus sign and the text ‘Add Order’. Upon pressing you will see a page with two input fields where you can write the article number and quantity of the product you want to reorder.



To the left just below the input fields there is a button with a plus sign and the text ‘Add Field’. Upon pressing this, two new input fields will show up and you can order another product. You can add however many products you want at the same time, as long as they already exist in your inventory.

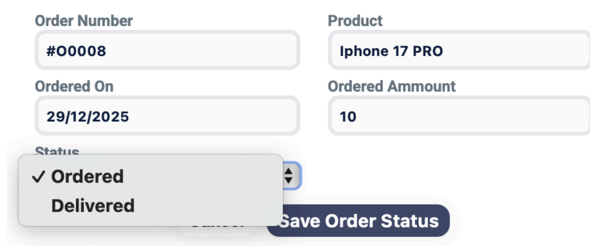


However, you cannot add a new field if the previous one is not completely filled in. By pressing “Add Order” the orders are saved and listed separately as ‘Ordered’ in the list of all orders.

The option of ordering new stock is only visible for users with the role of ‘manager’.

3.5.2 Access Order

To the right in every row of the orders is an ‘eye’ symbol that when pressed displays all the information about a specific order and if the status is not set to ‘Delivered’ the status can be updated. This is done by changing the order status in the drop down menu from ordered to delivered.

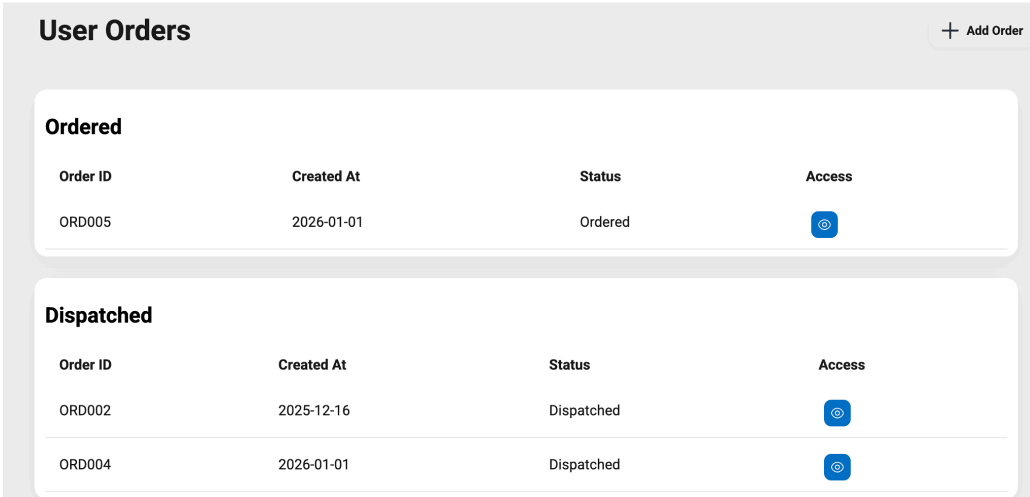


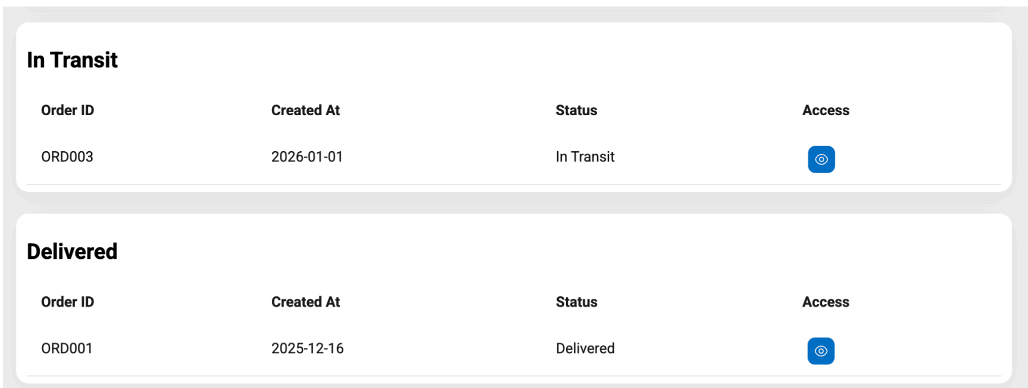
By pressing ‘Save Order Status’ the status is updated and cannot be changed back. This updates the stock of the product automatically, so there is no need to manually update the stock value under ‘Update Product’ too.

The option of handling stock orders is only visible for users with the role of ‘manager’.

3.6 User Orders

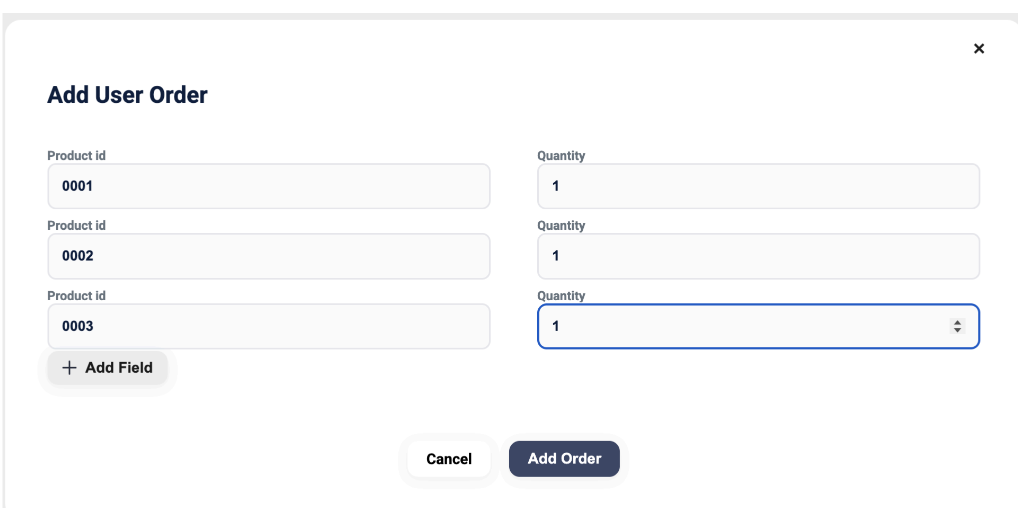
Upon pressing ‘User Orders‘ in the side bar, you will see all orders processed in the system grouped by their status and ordered by order ID, which is also the order of the date they were created.Each entry shows the order ID, the date of the order and the order status.





3.6.1 Add User Order

In the top right corner of the user orders page is a ‘Add order’ button, upon pressing you will see a page with two mandatory input fields that takes an article id and quantity.
To the left just below the input fields there is a button with a plus sign and the text ‘Add Field’. Upon pressing this, two new input fields will show up and you can order another product. You can add however many products you want at the same time, as long as they already exist in your inventory.



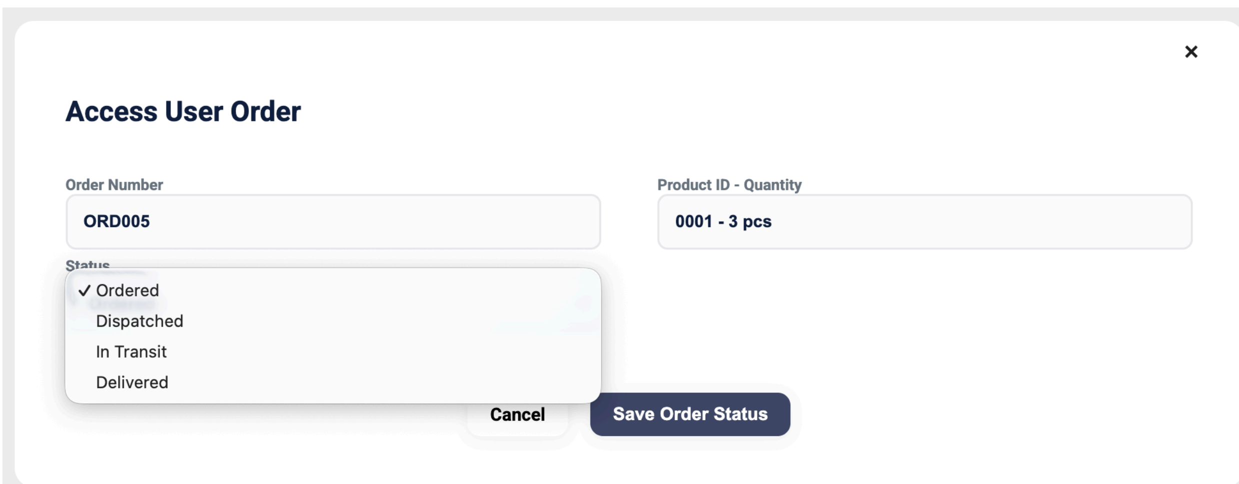
However, you cannot add a new field if the previous one is not completely filled in. By pressing “Add Order” the orders are saved and listed as one order and with the status ‘Ordered’ in the list of all user orders.

The option of adding new user orders is only visible for users with the role of ‘manager’.

3.6.2 Access User Order

To the right in every row of the orders is an ‘eye’ symbol that when pressed displays the order ID and the products ordered about a specific order and if the status is not set to ‘Delivered’ the status can be updated. This is done by changing the order status in the drop down menu from ordered to delivered.

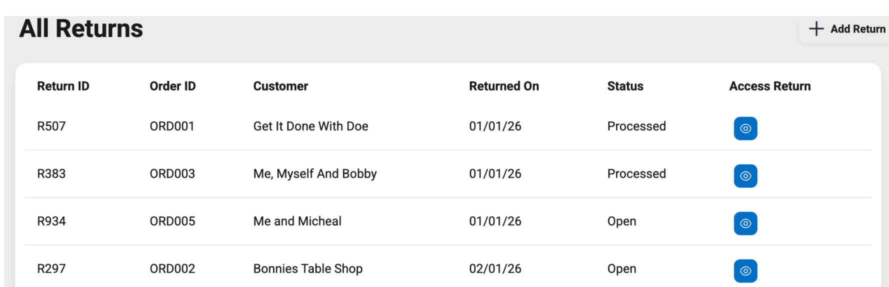
There are four statuses, ‘Ordered’ which is default for when a new order is placed, ‘dispatched’, ‘in transit’ and ‘delivered’ upon changing the status forward in the delivery chain, eg. from ‘Ordered’ to



‘Dispatched’, ‘Dispatched’ to ‘In Transit’ and ‘ In Transit’ to ‘Delivered’, but it can not be changed back.

3.7 Returns

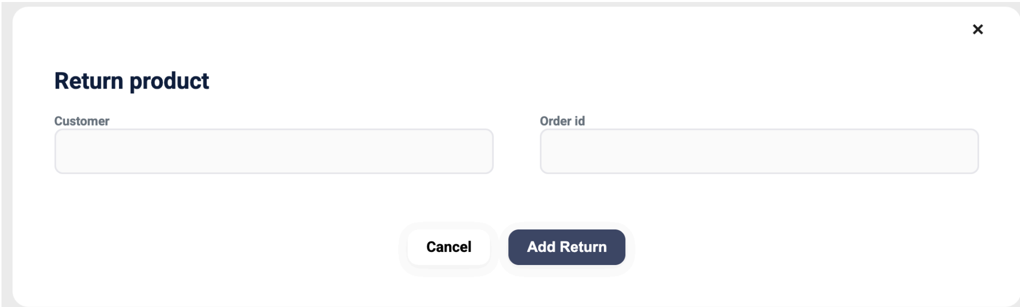
Upon selecting “Returns” in the side bar, all registered returns are displayed in order of date . Each entry shows the order ID of the order being returned, name of the customer returning the, date and status of the return.



Return ID	Order ID	Customer	Returned On	Status	Access Return
R507	ORD001	Get It Done With Doe	01/01/26	Processed	
R383	ORD003	Me, Myself And Bobby	01/01/26	Processed	
R934	ORD005	Me and Micheal	01/01/26	Open	
R297	ORD002	Bonnies Table Shop	02/01/26	Open	

3.7.1 Add Return

In the top right corner of the returns page is a ‘Add Return’ button. Upon pressing you will see a page with two mandatory input fields which takes order ID and the name of the customer.

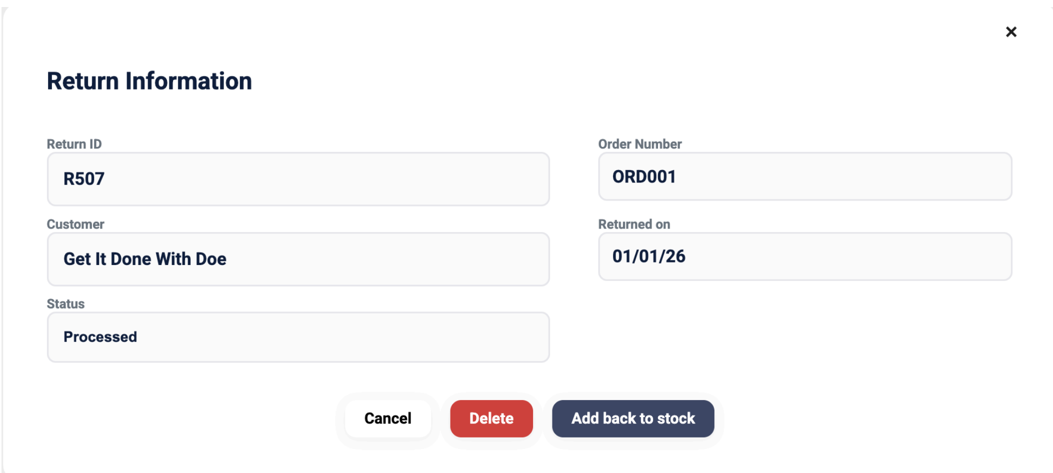


Below the input fields there is an ‘Add Return’ button which when pressed will create a new return order from the given information.

The option of adding a new return is only visible for users with the role of ‘manager’.

3.7.2 Access Return

To the right in every row of the Returns is an ‘eye’ symbol that when pressed displays all the information about a specific return.



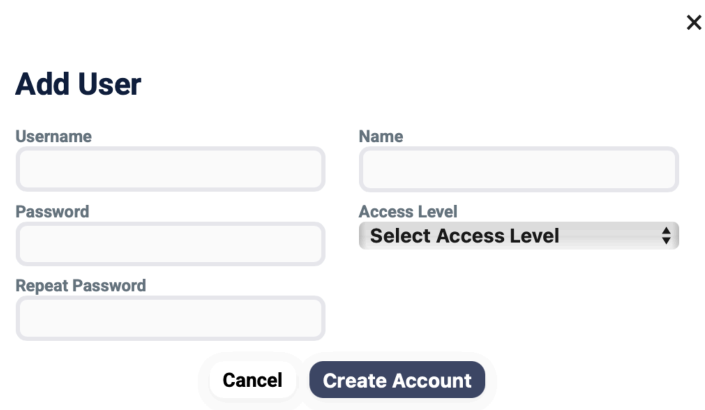
In the return information you can select the ‘Add back to stock’ button which will process the return and add the item amount back to the inventory. In the case of a faulty product you can instead use the ‘Delete’ button which will clear that specific return from the database and not add it back to the inventory. The option of accessing information about a return is only visible for users with the role of ‘manager’.

3.8 Account

To access your own account, click on your name or profile picture in the side bar. Here you can see your own user information and update your password, if you know your current one. It is not a password resetter. Enter your current password followed by your new one, twice. They have to be identical for the password to update. By pressing ‘Update Password’ your password is updated. The next time you log in the new password is the one that will get you back into the system, there is no delay.

3.8.1 Add user

At the top of the account page there are several user management options. To the left is ‘Create Account’, which is for when a new employee comes along and you want to add a new user to the system. Through entering a desired username and password, twice, along with their name and their access level in the system and pressing ‘Create Account’ you have created a new user. To create the account all fields have to be filled out. The new user cannot share a username with an existing user, however the other information can be shared.

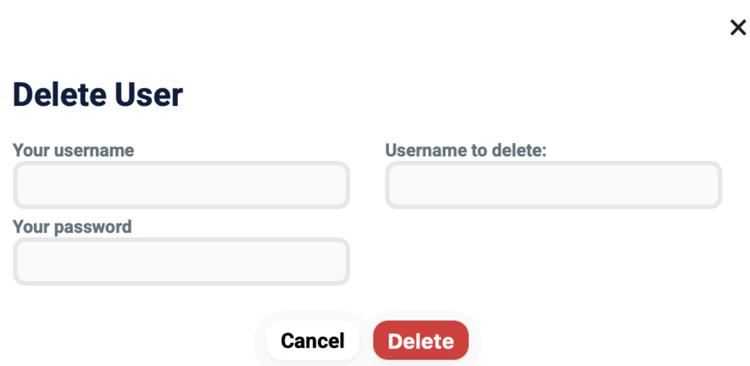


To let your new employee know they now have an account, the information must be communicated manually. The system does not do that for you, and cannot, at the moment, send the employees any information regarding their account via email or any other source of communication.

The option of adding a new user to the system is only visible to users with the role of ‘manager’.

3.8.2 Delete user

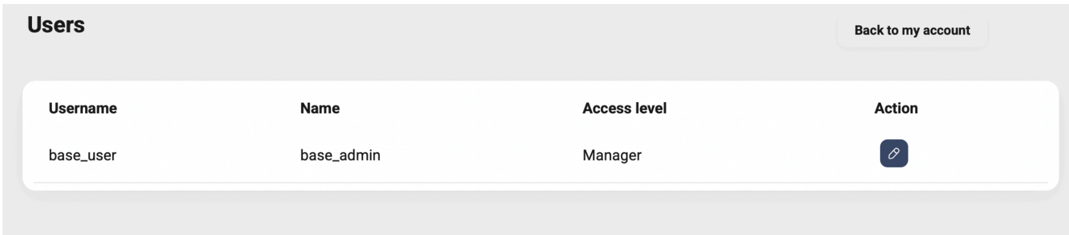
To the right is the option ‘Delete user’ to make sure that no one who should not have access to the system does not. By entering your own credentials and the username of the user you want to delete and pressing ‘Submit’, the user will be deleted.



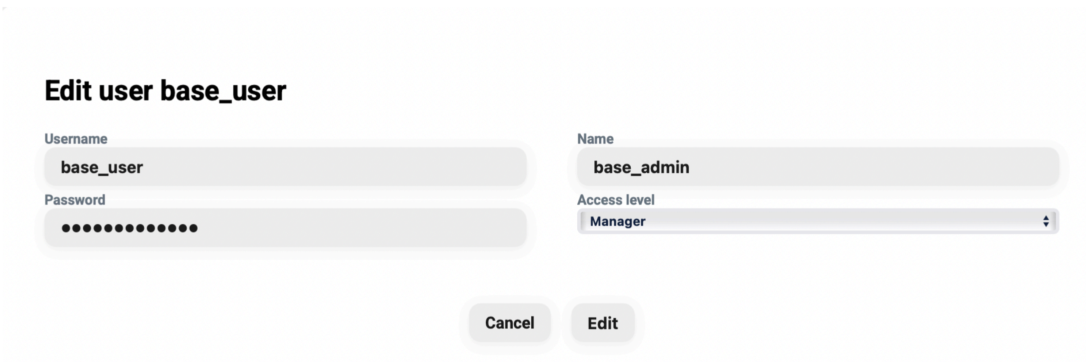
Even though this option is only visible to users with the role of ‘manager’, the entering of credentials again is to ensure that no user that shall not be deleted, is deleted.

3.8.3 Edit user information

By pressing ‘Users’, you can also display all of your employees and all their information, except for their password.



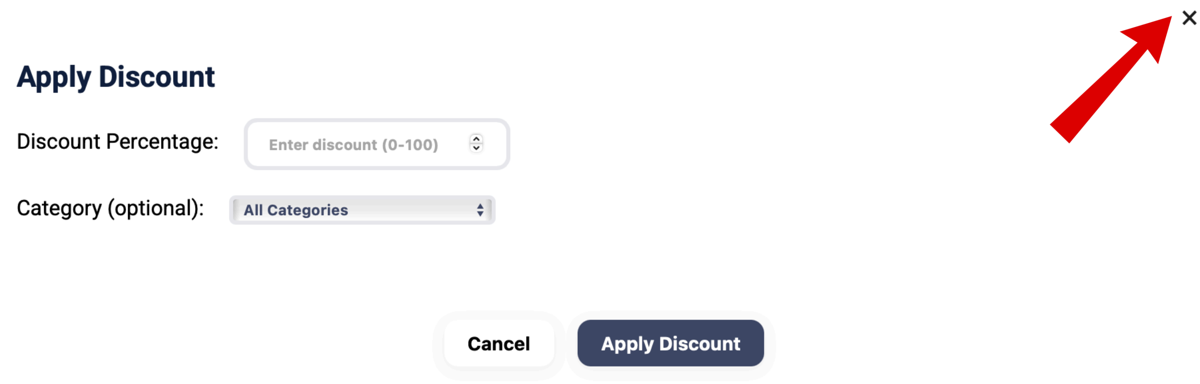
By pressing the ‘pen’ icon of any user you can edit their information, in case they e.g forget their password, want to change name or username. If you want to promote or demote them in the system you can choose their role by scrolling through the drop down menu under ‘Access level’. Changes are made by pressing ‘Edit’.



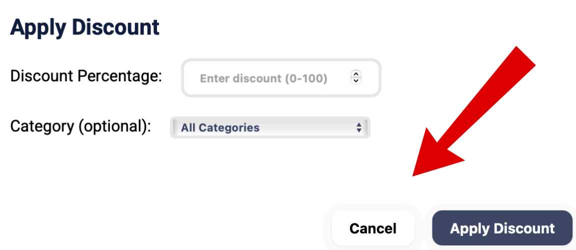
Any changes made to a user’s information and login credentials has to be directly communicated to them, the system does not do that itself.. The option to edit a user and display their information is only visible to users with the role of ‘manager’.

3.9 Other buttons

On all pages that manage the inventory or the system’s users there will be an ‘x’ at the top right. By pressing this you exit the page you are currently on and get redirected to the previous page.



The same goes for the ‘cancel’ button which is displayed on the same pages. If you begin to fill in any information and then change your mind and want to delete any input, press ‘Cancel’ and you will also be redirected back to the previous page. However, pressing ‘cancel’ after submitting a change will not affect your submission.

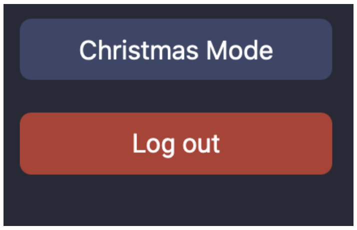


At the bottom of the side bar is the option to log out. By pressing this you get redirected to the login page, where you have to enter your credentials to get back into the system again. It is recommended to log out of the system whenever you are not using it, to make sure the security is sustained.

4. Additional features

4.1 Christmas mode

During the winter season you have the option to activate Christmas mode in the system. To do this, click on the “Christmas Mode” button at the bottom of the left menu panel. The website updates immediately to reflect a Christmas theme. Activating Christmas mode does not affect any of the functionalities of the program and can still be used to its intended purpose.



5. FAQ

5.1 Core features.

1. **How do I get access to the system without a register option?**
   As the manager who installed the system there is a base login that will get you into the system. From there you can create the accounts you need (there among your own). The base account should thereafter be deleted.
   If you are an employee your manager will create an account for you, to which you can log in to the system through the login page.

2. **How do I give my employees access to the system?**
   As a manager you can, under ‘Accounts’ in the side bar, add users. For further instructions view point 3.8.1.

3. **Why do I not have access to the same things that my manager does?**
   There is a difference in access levels between managers and employees. This is to ensure the security of the system, to make sure, e.g no new employees accidentally delete existing products etc. If you should be entitled to these actions, ask your manager to promote you in the system, which will give you the access you are now missing.

4. **I forgot my password, how do I change it?**
   Ask your manager to create a new password for you. For instructions on how to change an employee's password, view point 3.8.3. The new password has to be directly communicated to the employee, the system does not do that itself.

5.2 Inventory

1. **How can I easily access a certain item?**
   By searching for the item's article ID in the search tab on the inventory page you can access directly. By searching for a brand you can access several items under that brand.

2. **Can the system alert low stock or any other inventory abnormalities?**
   The bell icon on the top right of every page will display any item with a low stock or if any item is completely sold out. However, stock rates is the only thing that the notifications alert, as of now.

3. **Does the system support barcode scanning to add an item?**
   In the, as of now, most recent version of the system, it does not support barcode scanning.

5.3 Other

1. **What web browsers does the system support?**
   Any modern browser supporting HTML, CSS and JS (Chrome, Firefox, Edge)