

ULTIMATE INVENTORY SOFTWARE FEATURES DOC

Inventory and Warehousing

Stock Awesome gives you the tools to manage your dispatch / procurement cycle. It allows you to track every process your product goes. Below is a drill down of all sections:-

Warehousing

Warehousing allows you to view your warehouse utilization and bins Allocation.

Orders

This section allows you to make purchase orders, track them and restock your warehouse from this purchase order. A PO can have multiple items

Restock

The restock section allows you to restock products without a purchase order. This is done one item per restock.

Dispatch

Dispatch Section allows you to dispatch products to Staff only. That is people you do not want to invoice. This is done one item per dispatch.

Customers

Create customers and the contact person. View Customer Open invoices, quotes/estimations raised.

Sales Orders

This section allows you to create a quotation. You can then create Invoices from this Sales Orders.

Invoice

Create invoices and track their payments. Invoices are categorized in Paid and Unpaid Categories.

Payments

Allows you to record a payment of an invoice.

SIDERBAR OVERVIEW:-

1. Search

While on the sidebar you can perform a search on the following screens:-

- Products
- Restock
- Dispatch
- Departments
- User

Each time you perform a search the search there is shown in the search box. You can always cancel it to return the original results by clicking the x icon.

2. Reports

Every organization need reports and we provide them in excel, csv and via email.

Reports can be downloaded in the following screens

- Products
- Restock
- Dispatch
- Departments
- User

3. Count

Each screen section shows you the number of items in that section for a quick reference

Products Screen

The Products section is a record of all items that are in your store that will be dispatched to members of your organization/customers. It enables you to keep an eye on the level of your items. On this screen you can add items and also delete them.

Creating Items

When creating a product you can create it as a multiple location product or a single location product.

Multiple Location Product

A multiple location can be stored in different warehouses and bin locations and may have a different Unit Cost.

Adding a product with Multiple Location enabled

1. Ensure that the Enable Multi Storage dropdown is set to Enabled
2. Choose the Warehouse Location you want to store the product in
3. Wait while the system fetches the location
4. Enter the product quantity and Unit Cost
- 5.

Note: Multiple Locations are stored as single products in the product locations table.

Single Location Product

A single Location product is stored in a single room location. This feature is still implemented due to backward compatibility with version 2.0.

Adding a product with Single Location enabled

1. Ensure that the Enable Multi Storage dropdown is set to Disabled
2. Set the location of your product in the store text field

Viewing Created Products

You can view various attributes of your product after creation. to do so click the eye icon in the products list. You can view how much a certain product has been Dispatched and or Restocked. You can drill down on Dispatches/Restocks in specified periods this being Date, Week, Day, Month or Year

Warehousing

Version 3.0 introduces a new concept of warehousing. This enables you to have multiple warehouse locations and binlocations. This feature will continue to be streamlined and more features added in due time.

Adding a warehouse and Bin Locations

Locations added in the Warehouse screen can be used when creating a Product, Restocking a Product in the manual process or in the Purchase Order Process.

To add A warehouse click on New Warehouse and fill in required details.

After creating the warehouse you will be redirected to another screen where you can enter storage locations (bin locations) from this screen you can enter as many bin locations as you wish

Viewing Created Warehouses

The View Warehouses table provides with several important information:-

1. Number of products in a warehouse, if you click the link it will give you what the current warehouse holds
2. Add Bin Locations this allows you add bin Location to an existing warehouse
3. View Bin Locations in an existing Warehouse. From here you can edit existing bin Locations

Restock Screen

In case you want to restock items in ultimateinventory you use this screen. Ultimate inventory is clever enough to add the number of items you have procured to your product list. If you delete a restock it also negates it from the total count in your product list.

Create A Restock

When recording a restock it is important to record the item cost/ unit cost of the item. This are used in recording the cost of a single dispatch to a user. The current unit cost of a product is updated from a restock. If you have any important documents e.g. invoices, receipts e.t.c you can attach them in the upload zip section.

When Restocking several things happen:-

1. The current product you are restocking is **checked** (see above picture) if it is using multiple storage locations
2. If so you are prompted to enter the Warehouse Location and Bin Location (see above picture)

View Done Restocks

To view done restocks visit the restocked items page. it shows you details of your restock. If you want to undo a restock click on the **X** and it will be automatically decremented from inventory. You do not need to do anything else.

Departments Screen

Departments screen allows you to see an overview of how departments are using company resources. It allows you to monitor department usage and their budgets.

Menu Items

The department screen has the following menu items:-

- Add Departments : Allows you to add a department
- View Departments : Allows you to view existing departments and their current status as per their budget limits

More will be explained below

Create New Department Screen

When creating a new department several things are key. The department budget limit and the budget start date and budget end date. This are used in tracking a departments usage levels.

Department Table View

1. Dynamic Title

A dynamic title that shows which screen you are in

2/3. Limit, Count, Sum, Start Date and End Date

The table view shows you a department limit and the sum shows you how much a department has used as per the period specified (**Start Date and End Date**)

4. Edit Delete Actions

The Department screen does not allow you to restore deleted items. this is because departments rarely change in an organization. If you want to change the budget period of a department all you have to do is edit a department and specify the new periods.

5. Pagination

Pagination is used to prevent users from scrolling too much when viewing departments. Remember you can indicate how many items you want users to view in your .env file

6. Department Graph

The department graph gives you a quick visual representation of how much departments are using.

Dispatch Screen

The dispatch screen allows you to dispatch an item to a user. It allows you to record the item cost which is used to also monitor the department usage of consumables. Ultimate inventory is able to subtract the amount of a product once you do a dispatch

The dispatch screen has the following menu items:-

1. Dispatch Item : Allows you to record a dispatch
2. View Dispatches : Allows you to view a log of dispatches
3. Deleted Items : Allows you to view deleted dispatches
4. Defective Items : Allows you view a log of defective items

More will be explained below

Dispatching

The dispatch form allows you to record a product dispatch to a user. If you try to dispatch more than is in stock the system alerts you of this. If the user you are trying to dispatch to is not in the system you need to go to the Users screen and create them.

When dispatching several things happen.

1. The System checks if the product is using multiple locations.
2. If it is it prompts you to enter the Warehouse Items is in and the Bin Location you want to dispatch from.

Restocks Table View

1.Menu

Use the dispatch menu to navigate between sections

2. Amount, Dispatched to, Item Cost

On the dispatch table we highlight the item cost, person you dispatched item to and when it was dispatched to the person

3. Edit, Delete Actions

Several actions occur when you edit a dispatch:-

- We add the count of the item you had previously dispatched to the product count.
- We then subtract the count of the new dispatch from the product count.

Several actions occur when you delete a dispatch:-

- We add the count of the item you had previously dispatched to the product count.
- We add the dispatch to the list of defective items

4. Pagination

Pagination is used to prevent users from scrolling too much when viewing dispatches. Remember you can indicate how many items you want users to view in your .env file

5. Dispatch Graph

The dispatch graph shows you how many items you dispatch per day over the period of a month.

Defective Items

When you delete a dispatch, in scenarios when an item is returned you can mark it as defective if that is the case. Defective items are added to the defective section and can be restored if this was done by mistake.

Purchase Orders

Purchase Orders is a feature that was introduced in version 2.0 it is basically a replacement for Restock Screen.

Creating a Purchase Order

Stock Awesome allows you to create purchase orders for items existing in stock or non stock controlled items. To create a purchase order you should do the following.

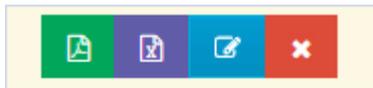
1. Ensure that your product is added in inventory you can use the create product screen to add a product.
2. Every Item that you add using the above methods is added under the Purchase Order Items. If you want to delete them by clicking the - under Action Column
3. You can add the Supplier in the Terms Section
4. It is important to list the Terms of payment e.g **30 days after invoicing**
5. We have also given you the option of selecting which currency the LPO is under

Viewing Purchase Orders

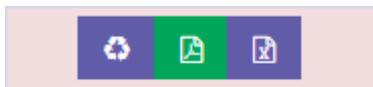
The Orders Screen lists for you a list of created LPOS. A freshly created LPO will always have the status **Awaiting Approval** to move it to the **Approved stage** all you need is to click on the edit Icon. Below the screen change **Lpo Status** to **Approved**. If LPO has been rejected you can also list it as Rejected.

1. The Info bar above the Order screen gives you a quick overview of status of your orders. You can click on the funnel to filter for that specific item.
2. Various Items have different colours based on their status.
3. The Action column allows you to do several actions to an LPO.

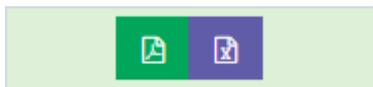
If an LPO has not been approved yet you have the capability of modifying the Order in any way you wish to.



Once approved you cannot edit the order at all. But once Items have been delivered you can click the restock icon to restock them from that order.



If you have already restocked the entire order all you can do now is make a printout of the order.



Restocking from A purchase Order

The restock from purchase order screen allows you to do a mass restock of items all you need is to fill out the amount of goods you have in hand and click restock with above values.

The system is able to keep track of partial deliveries and full deliveries.

Suppliers Screen

Suppliers screen allows you to add suppliers. This suppliers are used in the restocks menu during recording of a restock. The system automatically calculates the total amount you use on a supplier and the total restocks a supplier has done.

On the supplier screen we have the following menu items:-

1. Add Supplier : Allows you to add a new supplier
2. Suppliers : Allows you to see current suppliers and the amount you have spent on them
3. Deleted Items: This contains suppliers that you have deleted and you can restore them.

More will be explained below

Create New Supplier Screen

The supplier screen allows you to add a new supplier with the most important information you need to identify a supplier.

Restocks Table View

1. Menu Items

Use the menu items to select the screen you want to view

2. Dynamic title

It shows you the current section you are in.

3. Total Amount

The total amount section gives you a view of how much you have been spending on a supplier

4. Edit delete actions

Allows you to edit/ delete suppliers. Please note that you cannot edit the amount you spend on a supplier this is done automatically based on restocks.

5. Pagination

Pagination is used to prevent users from scrolling too much when viewing products. Remember you can indicate how many items you want users to view in your .env file

6. Supplier chart

The supplier graph gives a visual representation of spending on your suppliers.

User Screen

The users screen allows to manage users of your system. Please note by users we do not necessarily mean people who log in to your system. People who you dispatch items to are also your users.

Menu Items

The user screen has the following menu items:-

- Create User
- List All Users
- User Roles
- Deleted Users
- Upload CSV File

More will be explained below

Create New User Screen

The create/update user screen allows you to choose the department of a user and his role if he/she is allowed to logged in. You can manually reset the password of a user and upload their avatar. If no avatar is uploaded the default avatar will be used for a user.