USER GUIDE · VERSION 1

Inventory with RFID

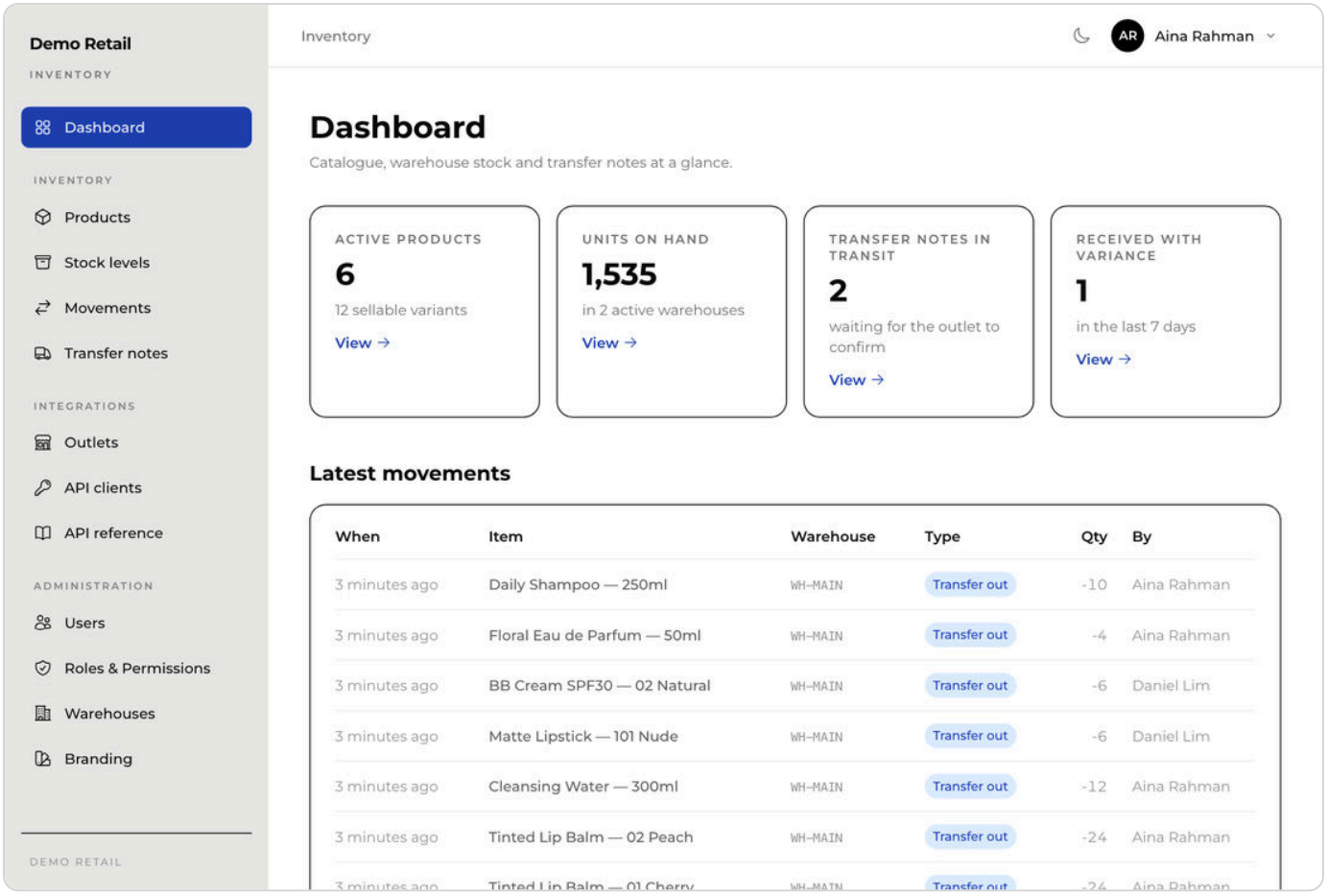
Keeps the product list and the stock in your warehouses, and sends stock to outlets and the online store on transfer notes. RFID tag reading is planned and not built yet.

1. What it is for
2. Add a product
3. Receive and correct stock
4. See every stock movement
5. Send stock to an outlet
6. Check what arrived
7. Connect the online store and the tills
8. Give someone access
9. Warehouses and branding

What it is for

For: Everyone

Inventory is where your company keeps its product list and the stock held in its warehouses. When stock leaves a warehouse for an outlet or the online store, it goes on a transfer note. The outlet's till system or the online store receives the goods and reports back what arrived, so you can see anything that went missing or was damaged on the way.



Still being built

- **RFID** (reading stock with radio tags instead of scanning barcodes) is planned. Nothing for it exists in Inventory yet.
- Inventory only counts stock in **warehouses**. Once a transfer note is received, the outlet's own system keeps that stock.
- The **Outlets** screen does not open in the current version: it shows an error. The outlet list still arrives from Master data on its own.

Words used on the screens

- **Variant**: one thing you sell, such as one shade or one size of a product. Stock and prices are kept per variant.
- **SKU**: the code that identifies one variant, for example DMO-TLB-01.
- **Transfer note**: the paper trail for stock moving from a warehouse to an outlet. Its number starts with TN and the outlet's code.

Who uses it

The roles, as named on screen:

- **Stock Clerk**: sees products and stock, receives and corrects stock, and makes transfer notes.
- **Inventory Manager**: everything a Stock Clerk does, plus adding and changing products and connecting the online store and tills.
- **Super Admin**: everything, including people, roles, warehouses and branding.

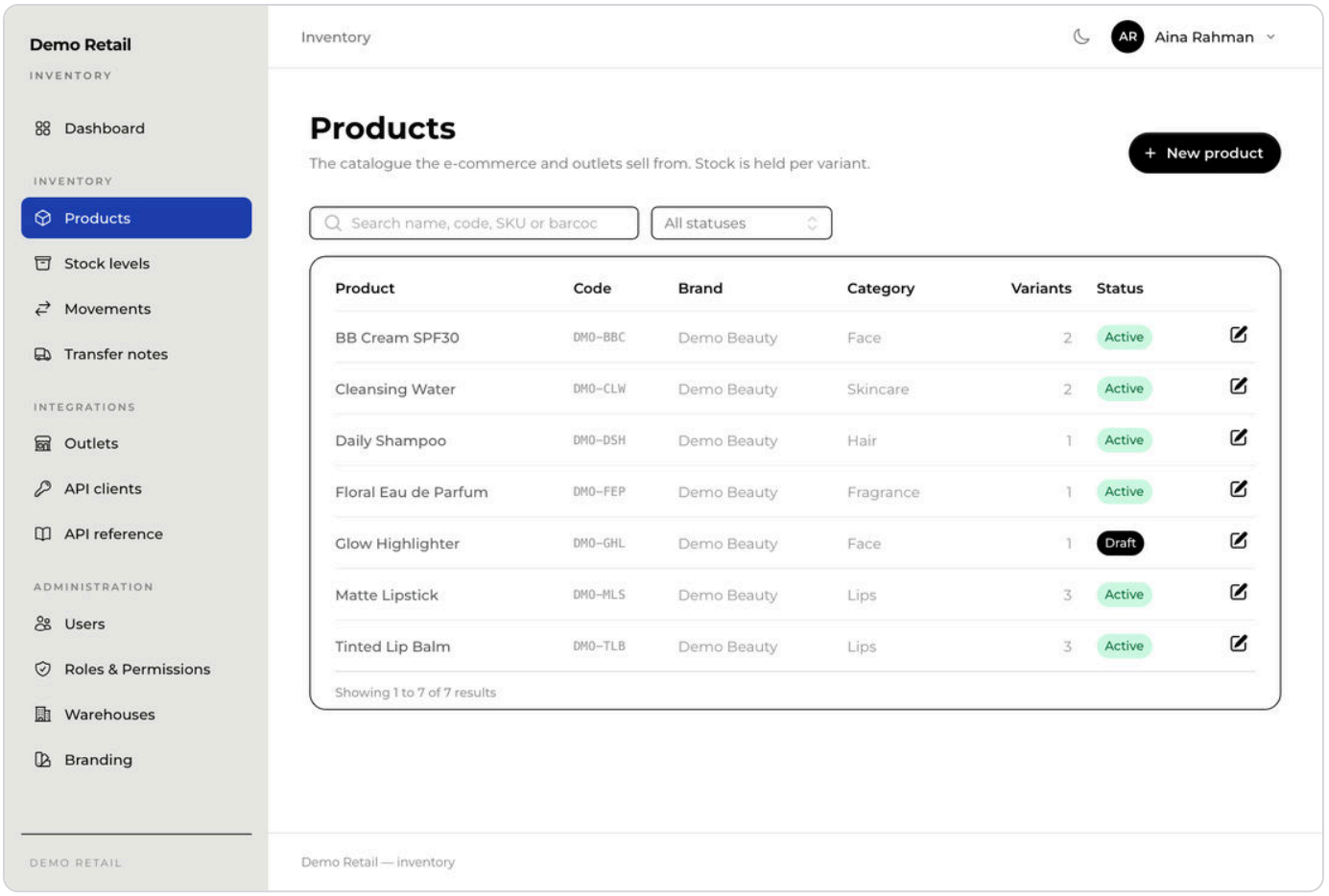
What it needs

- **Master data** for the list of outlets and for signing in staff.
- The till system and the online store, to receive transfer notes and confirm what arrived.

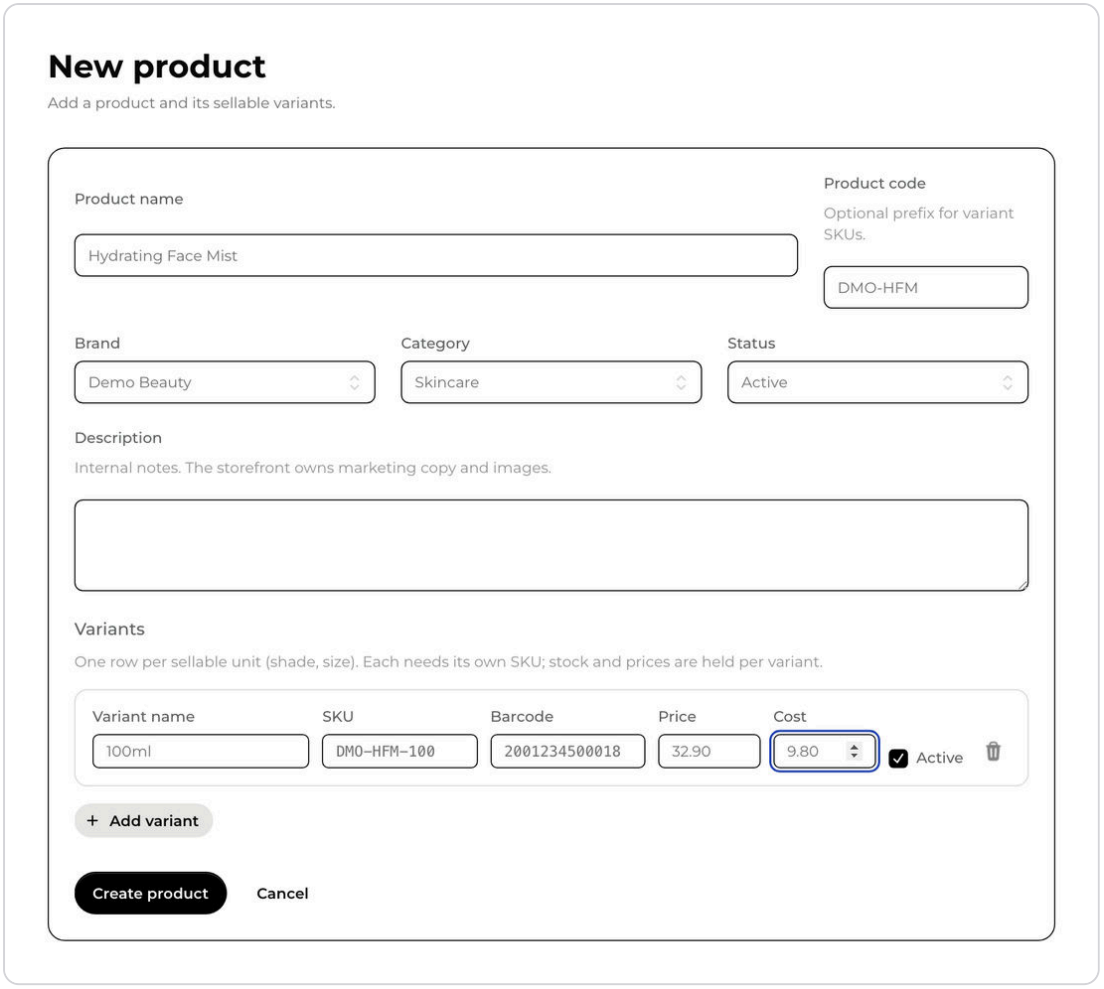
Add a product

For: Inventory managers

1. Open **Products** in the menu on the left. Use the search box to find a product by name, code, SKU or barcode, or pick a status to narrow the list.



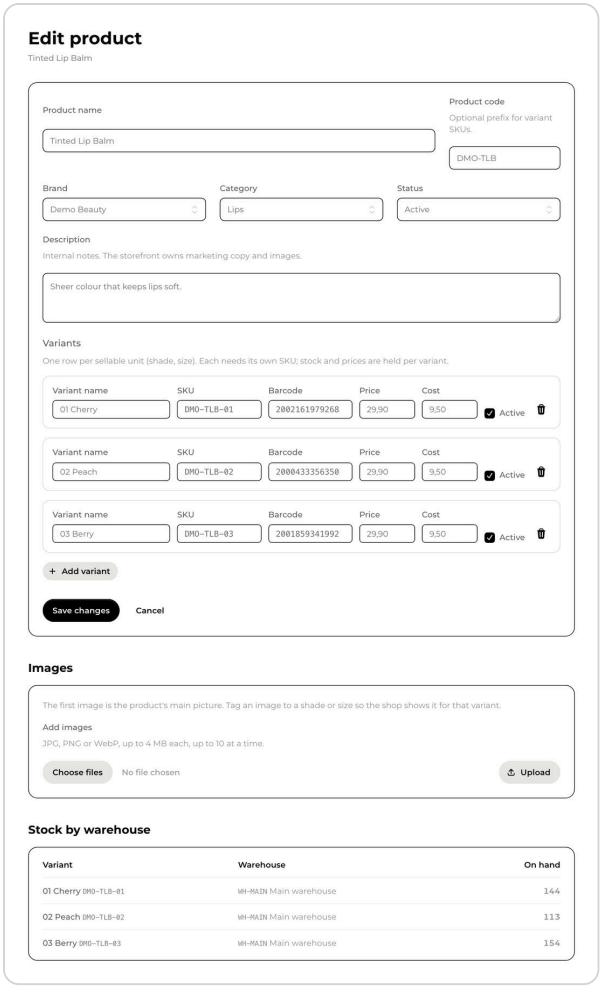
2. Press **New product**.
3. Type the **Product name**. The **Product code** is optional; it is a short code you can start every SKU with.
4. Pick the **Brand**, **Category** and **Status**:
   - **Active**: on sale. The online store's product list shows only active products.
   - **Draft**: not ready to sell yet.
   - **Discontinued**: no longer sold.
5. Under **Variants**, add one row for each shade or size. Each needs its own **SKU**. Fill in the **Barcode**, the selling **Price** and the **Cost** if you have them. Press **Add variant** for another row.
6. Press **Create product**.



Change a product, add pictures, see its stock

Press the pencil button at the end of the product's row. The same form opens with **Save changes**. Below it:

- **Images**: press **Choose files**, then **Upload**. The first picture is the main one. You can tag a picture to one shade or size so the online store shows it for that variant.
- **Stock by warehouse**: how many of each variant every warehouse holds.



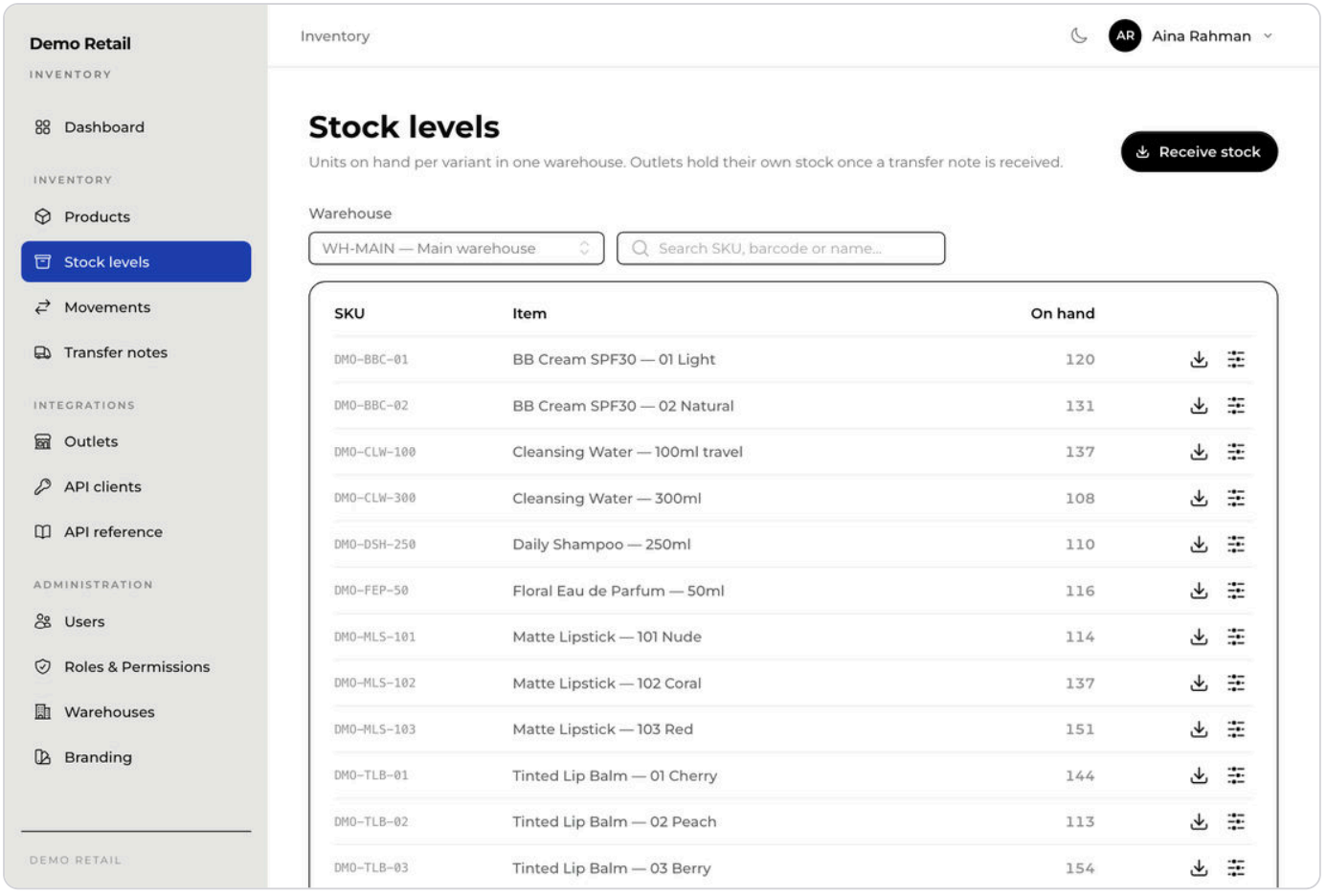
The **Description** is for staff only. The online store keeps its own product text.

Receive and correct stock

For: Stock clerks

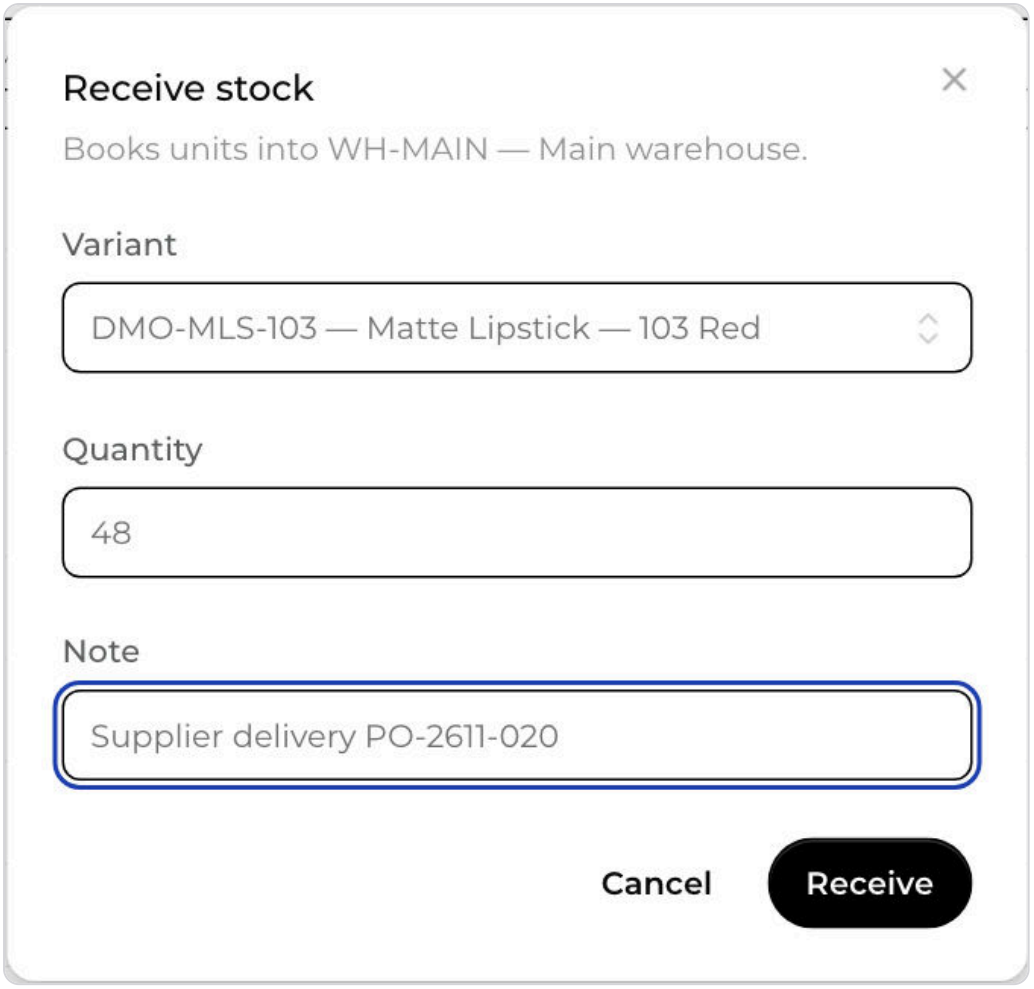
Stock levels shows how many of each variant one warehouse holds.

1. Open **Stock levels** in the menu on the left.
2. Pick the **Warehouse** at the top. Type in the search box to find an SKU, barcode or name.



Receive a delivery

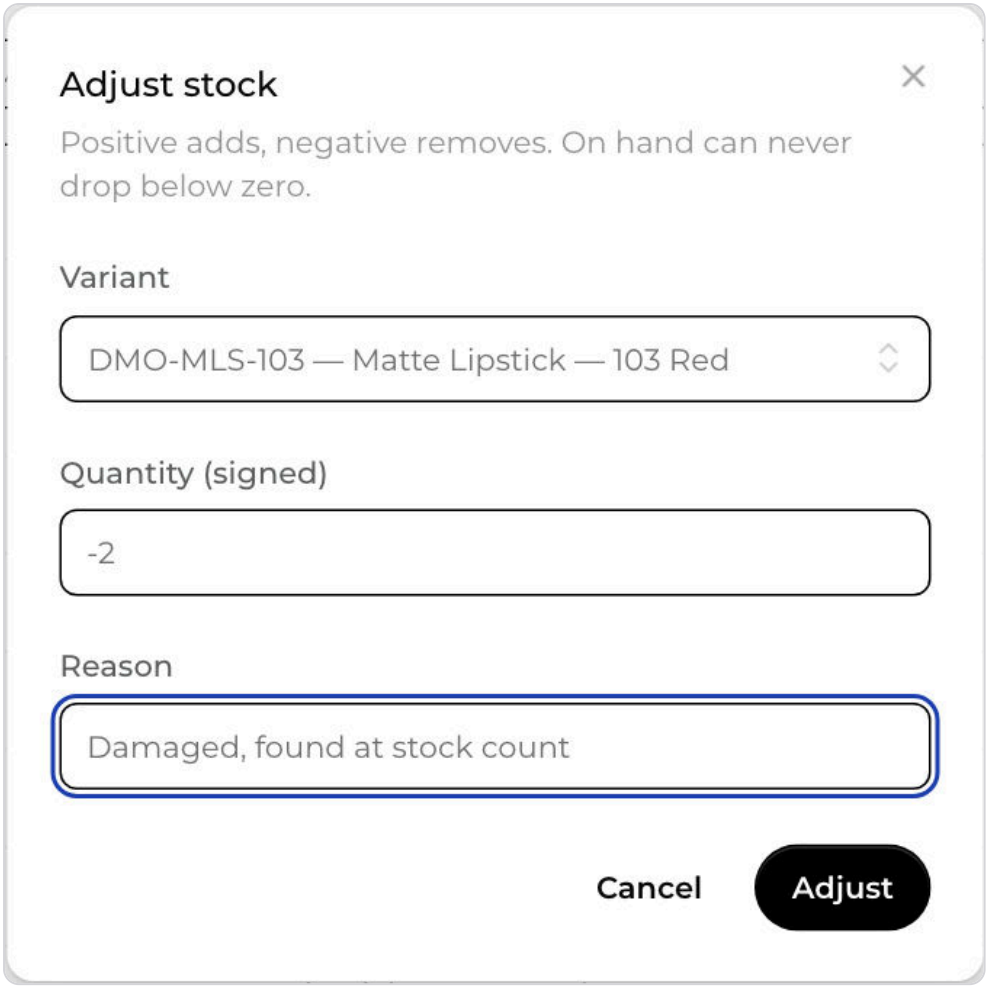
1. Press **Receive stock** at the top right, or the download-arrow button on the variant's row.
2. Pick the **Variant**, type the **Quantity**, and add a **Note**, for example the supplier's delivery number.
3. Press **Receive**.



Correct a count

Use this after a stock count, or when something is damaged or used as a tester.

1. Press the button with sliders on the variant's row.
2. In **Quantity (signed)**, type a plus number to add or a minus number to remove, for example -2.
3. Write the **Reason**.
4. Press **Adjust**.



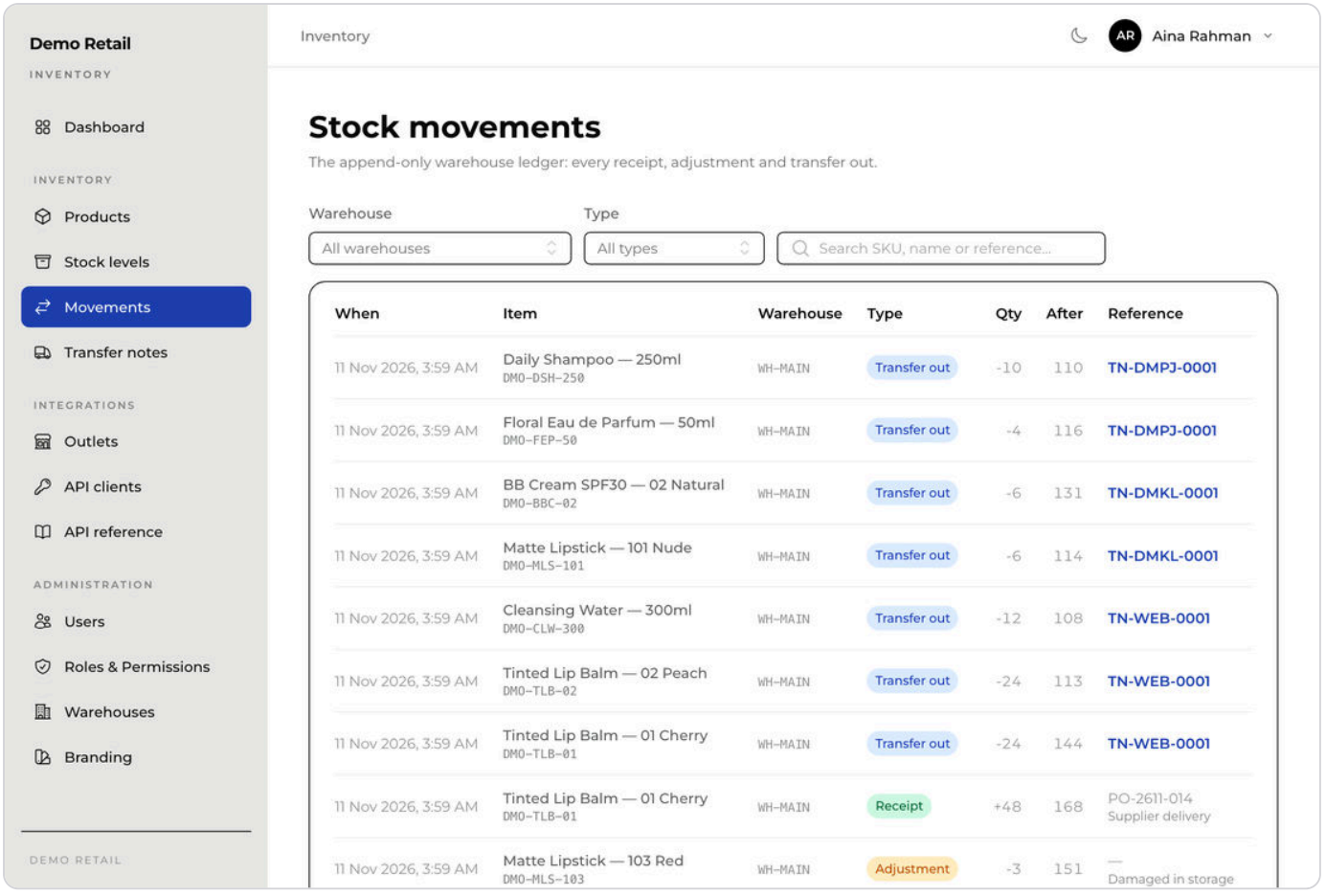
Stock can never go below zero. Every receipt and correction is recorded, and **Latest movements** on the dashboard shows who made it (see also *See every stock movement*).

See every stock movement

For: Stock clerks

Every change to warehouse stock is recorded and cannot be edited, so you can always see why a number changed.

1. Open **Movements** in the menu on the left.
2. Narrow the list by **Warehouse** or **Type**, or search by SKU, name or reference.



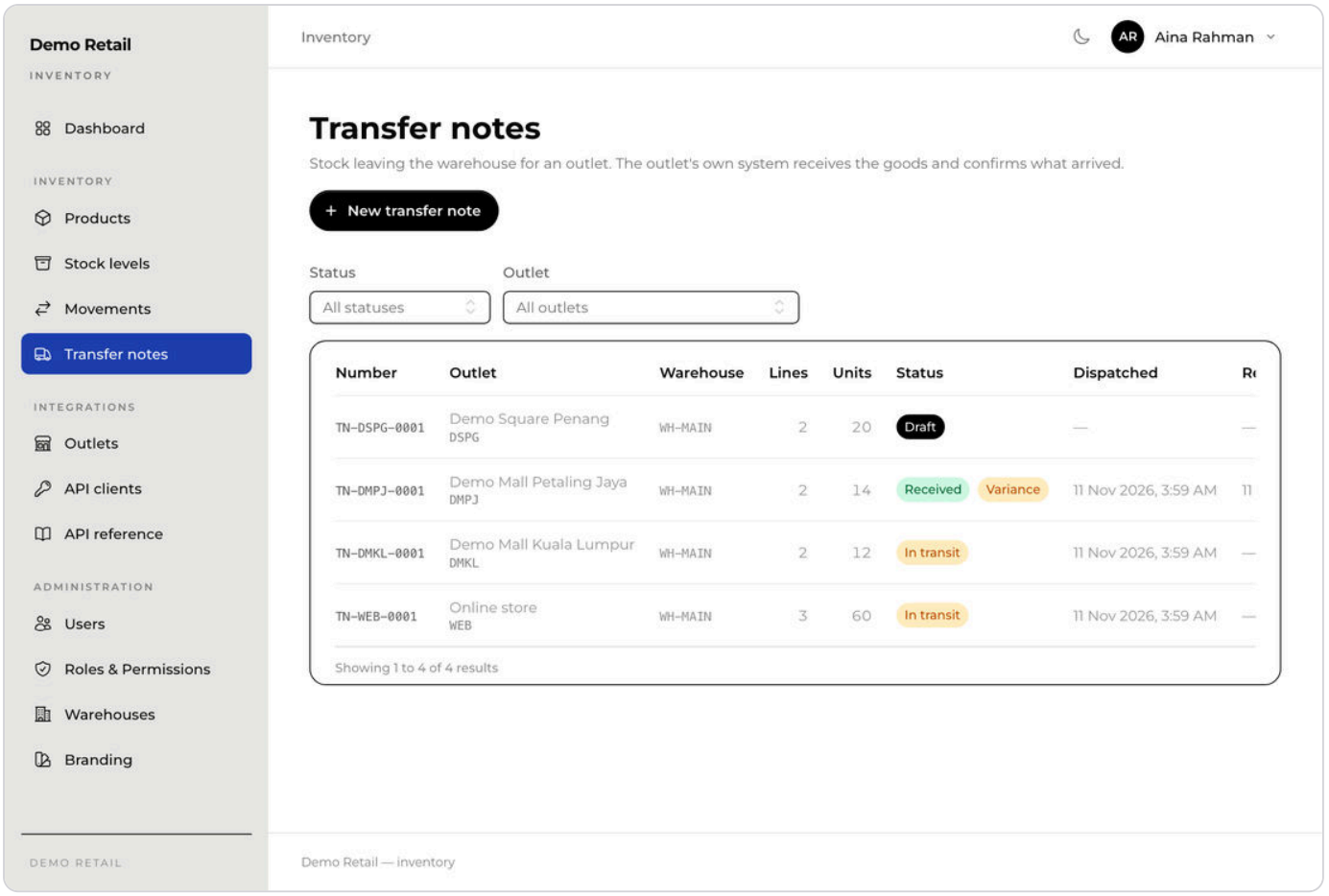
Type	Meaning
Receipt	Stock received into the warehouse.
Adjustment	A correction after a count or damage.
Transfer out	Stock that left on a transfer note.

After is how many the warehouse held straight after that movement.

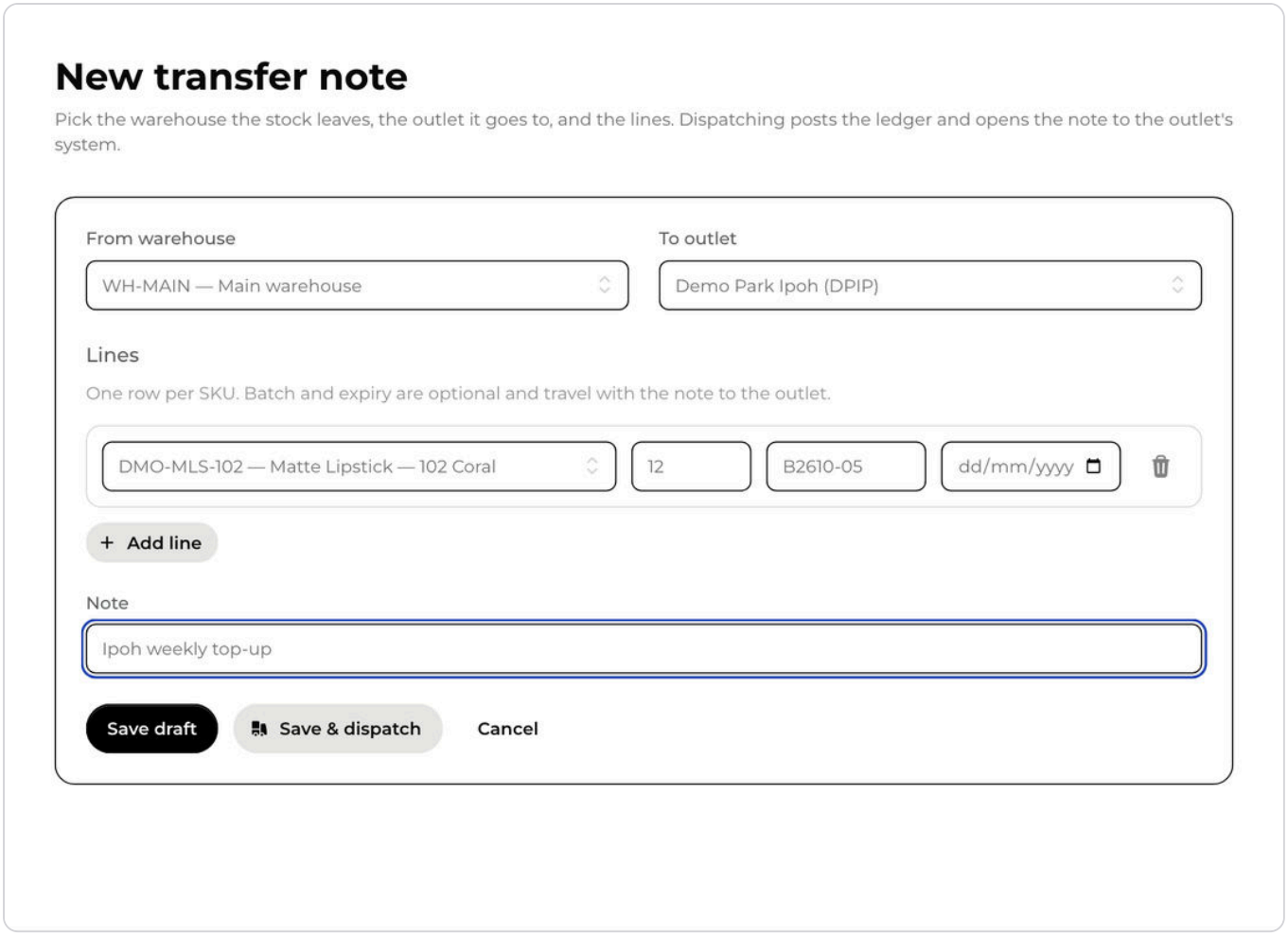
Send stock to an outlet

For: Stock clerks

1. Open **Transfer notes** in the menu on the left. Filter by **Status** or **Outlet** to find a note.



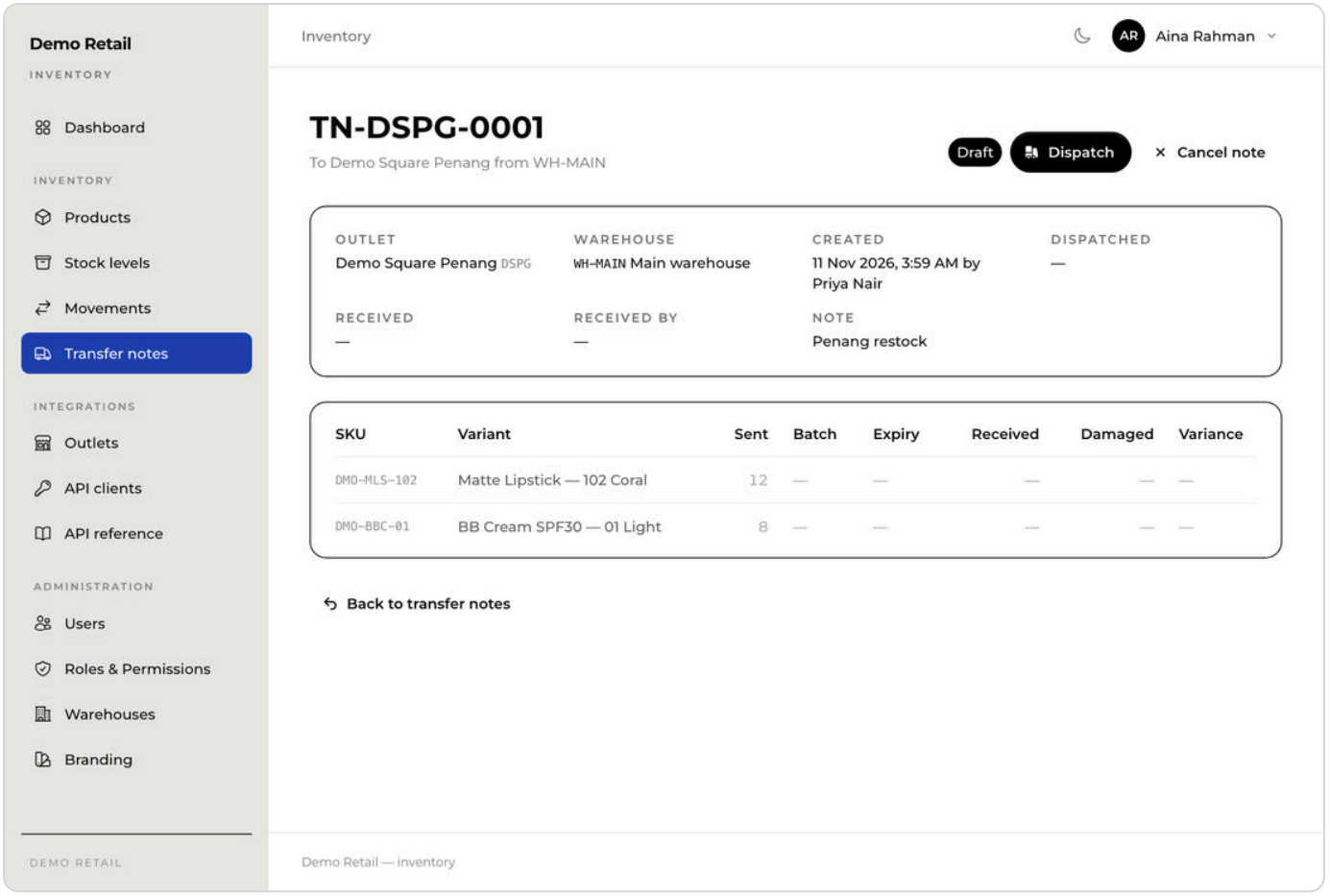
2. Press **New transfer note**.
3. Pick **From warehouse** and **To outlet**.
4. Under **Lines**, pick a variant and type how many to send. The batch number and expiry date are optional; they travel with the note to the outlet. Press **Add line** for more.
5. Add a **Note** if it helps the outlet.
6. Press **Save draft** to finish later, or **Save & dispatch** if the goods are leaving now.



Dispatch a draft

Open the draft and press **Dispatch**, then confirm. The stock is taken off the warehouse at that moment, and the outlet's system can now see the note. If the warehouse does not hold enough, Inventory refuses and nothing is sent.

Cancel note throws away a draft. A dispatched note cannot be cancelled.



While the goods are on the way

The note shows **In transit** and "Waiting for the outlet". Nobody confirms it in Inventory: the outlet's till system or the online store receives the goods in its own screens and reports back.

TN-WEB-0001

To Online store from WH-MAIN

In transit

OUTLET	WAREHOUSE	CREATED	DISPATCHED
Online store WEB	WH-MAIN Main warehouse	11 Nov 2026, 3:59 AM by Aina Rahman	11 Nov 2026, 3:59 AM by Aina Rahman
RECEIVED	**RECEIVED BY**	**NOTE**	
—	—	Weekly online store top-up	

Waiting for the outlet

The stock has left WH-MAIN. The outlet's own system (the POS or the shop) pulls this note, receives the goods, and confirms the quantities here.

SKU	Variant	Sent	Batch	Expiry	Received	Damaged	Variance
DMO-TLB-01	Tinted Lip Balm — 01 Cherry	24	B2609-17	11 Jul 2028	—	—	—
DMO-TLB-02	Tinted Lip Balm — 02 Peach	24	B2609-17	11 Jul 2028	—	—	—
DMO-CLW-300	Cleansing Water — 300ml	12	—	—	—	—	—

Back to transfer notes

Check what arrived

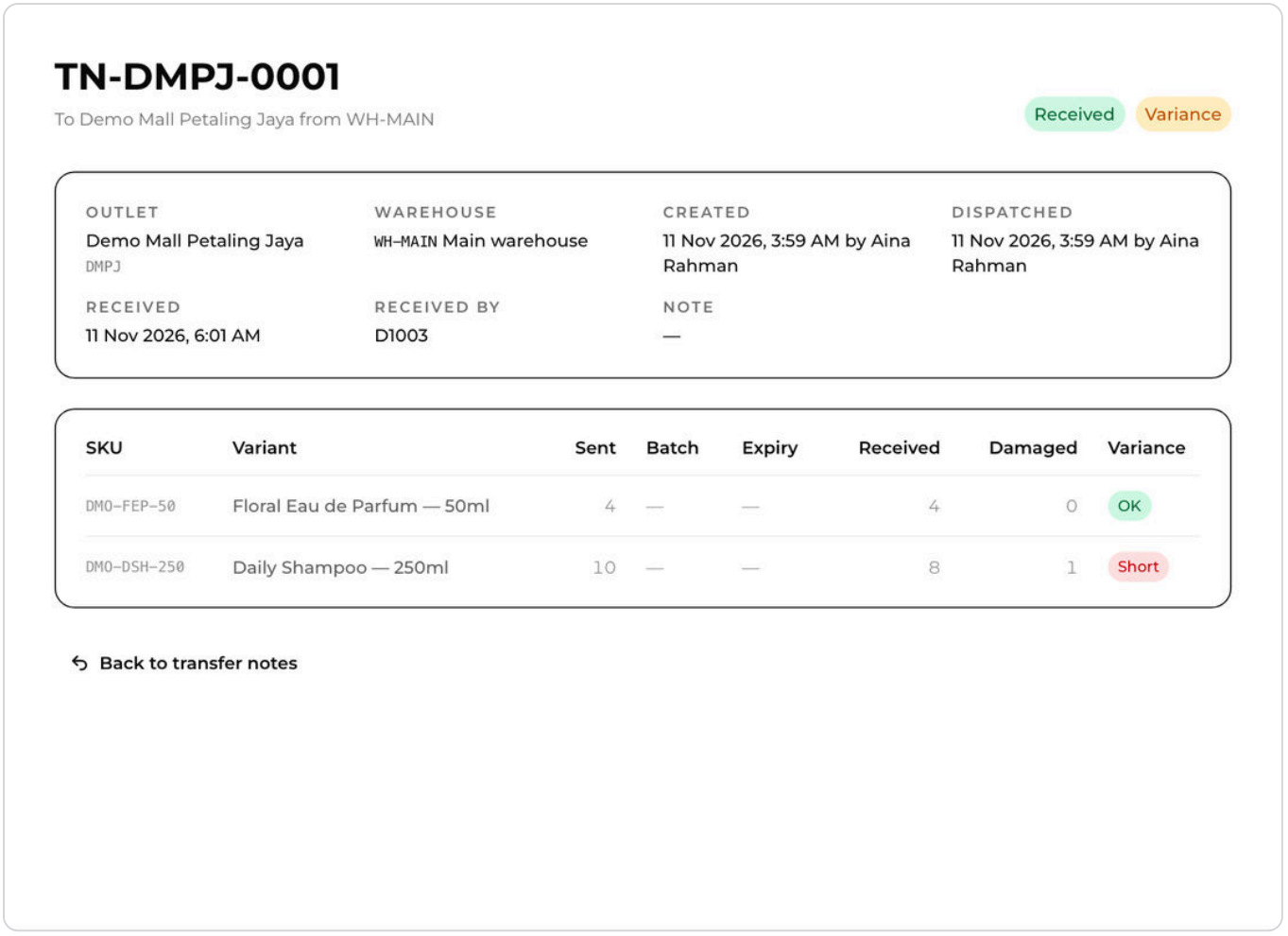
For: Stock clerks

When the outlet confirms a note, its status changes to **Received** and the arrival date and the staff code of the person who received it are filled in.

If what arrived does not match what was sent, the note also shows **Variance**. The dashboard counts these under **Received with variance** for the last 7 days.

Open the note to see each line:

- **Sent**: how many left the warehouse.
- **Received** and **Damaged**: what the outlet reported.
- **Variance**: **OK** when everything arrived, **Short** when fewer arrived or some were damaged, **Excess** when more arrived than were sent.



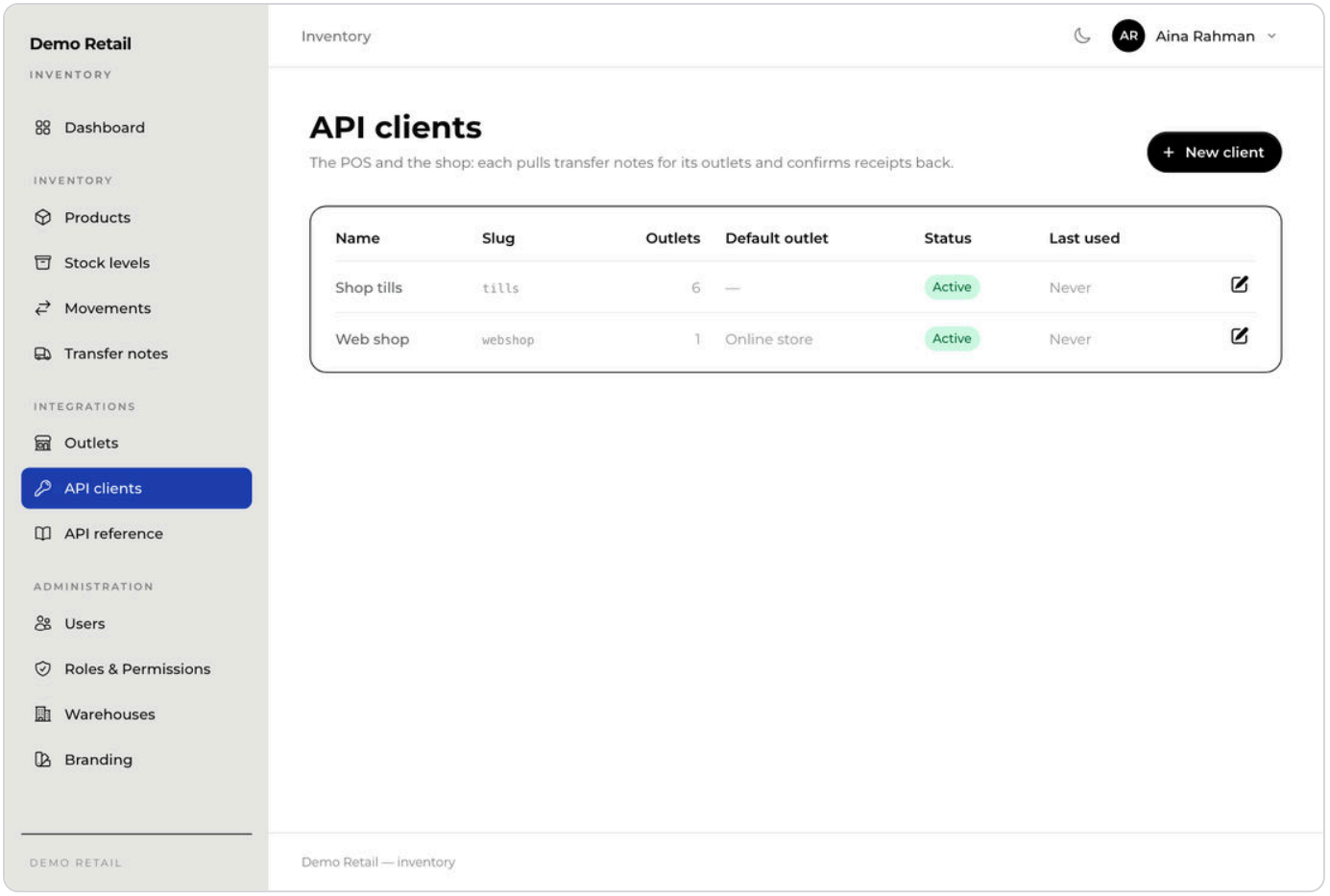
Inventory records the difference but does not fix it. Follow up with the outlet, and correct warehouse stock if the goods never left (see *Receive and correct stock*).

Connect the online store and the tills

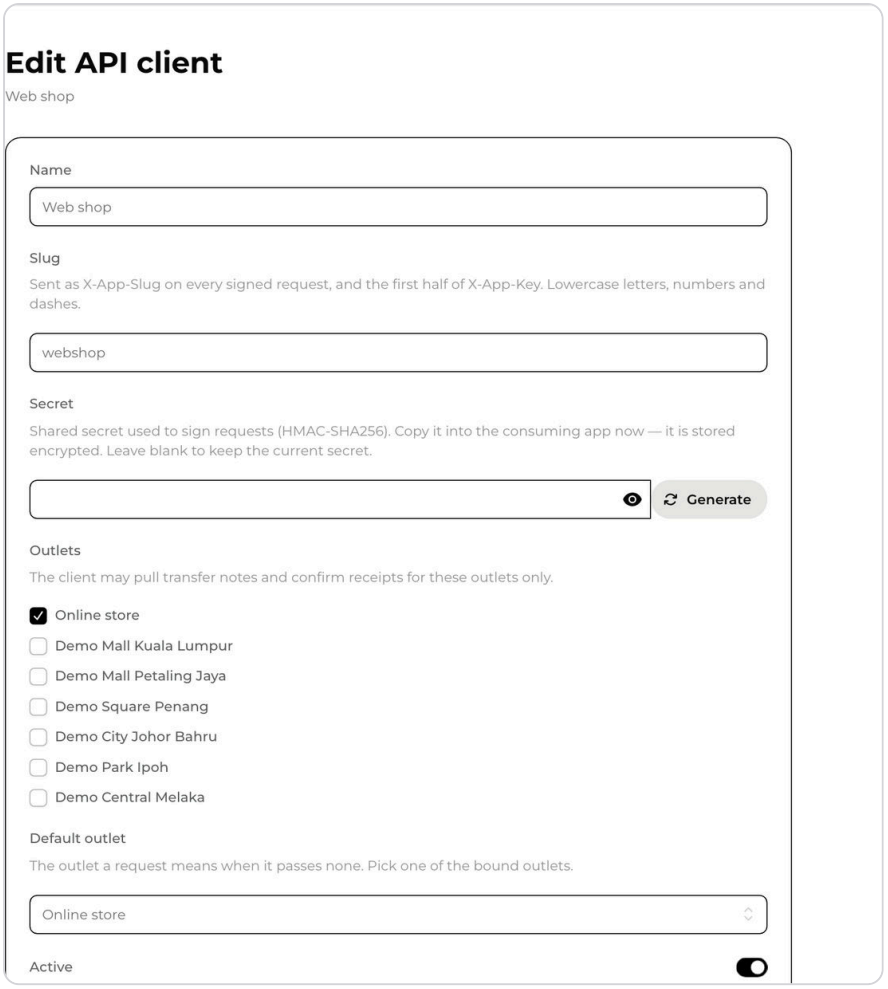
For: Administrators

The online store and the till system each need a login, called an API client, to read transfer notes and the product list and to confirm what arrived.

1. Open **API clients** under **Integrations** in the menu.



2. Press **New client**, or the pencil button at the end of a client's row to change it.
3. Type a **Name** and a **Slug**, the short name the other system uses (lowercase letters, numbers and dashes).
4. Press **Generate** to make a **Secret**, a password the other system uses. Copy it straight away: it is stored locked and cannot be shown again later.
5. Under **Outlets**, tick the outlets this system may receive stock for. The online store gets the online store outlet; the tills get the shops.
6. Pick a **Default outlet** if the system serves only one outlet.
7. Leave **Active** on, and press **Create client** or **Save changes**.



Give the slug and secret to the person setting up the other system. **API reference** in the menu opens the technical instructions for them.

Switching off **Active** cuts that system off at once.

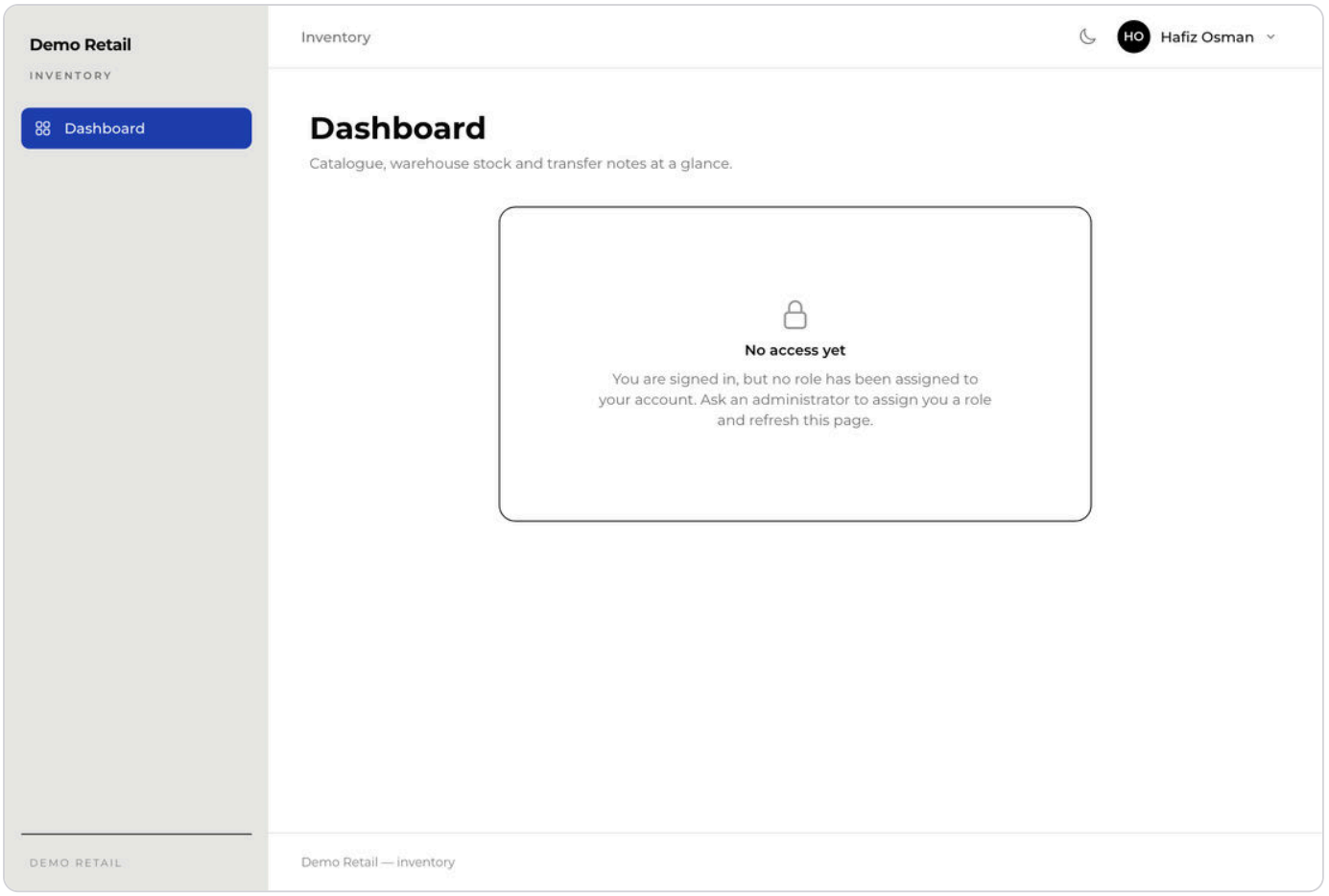
Outlets

The outlet list comes from Master data on its own. The **Outlets** screen, meant to show that list and a **Sync now** button, shows an error in the current version.

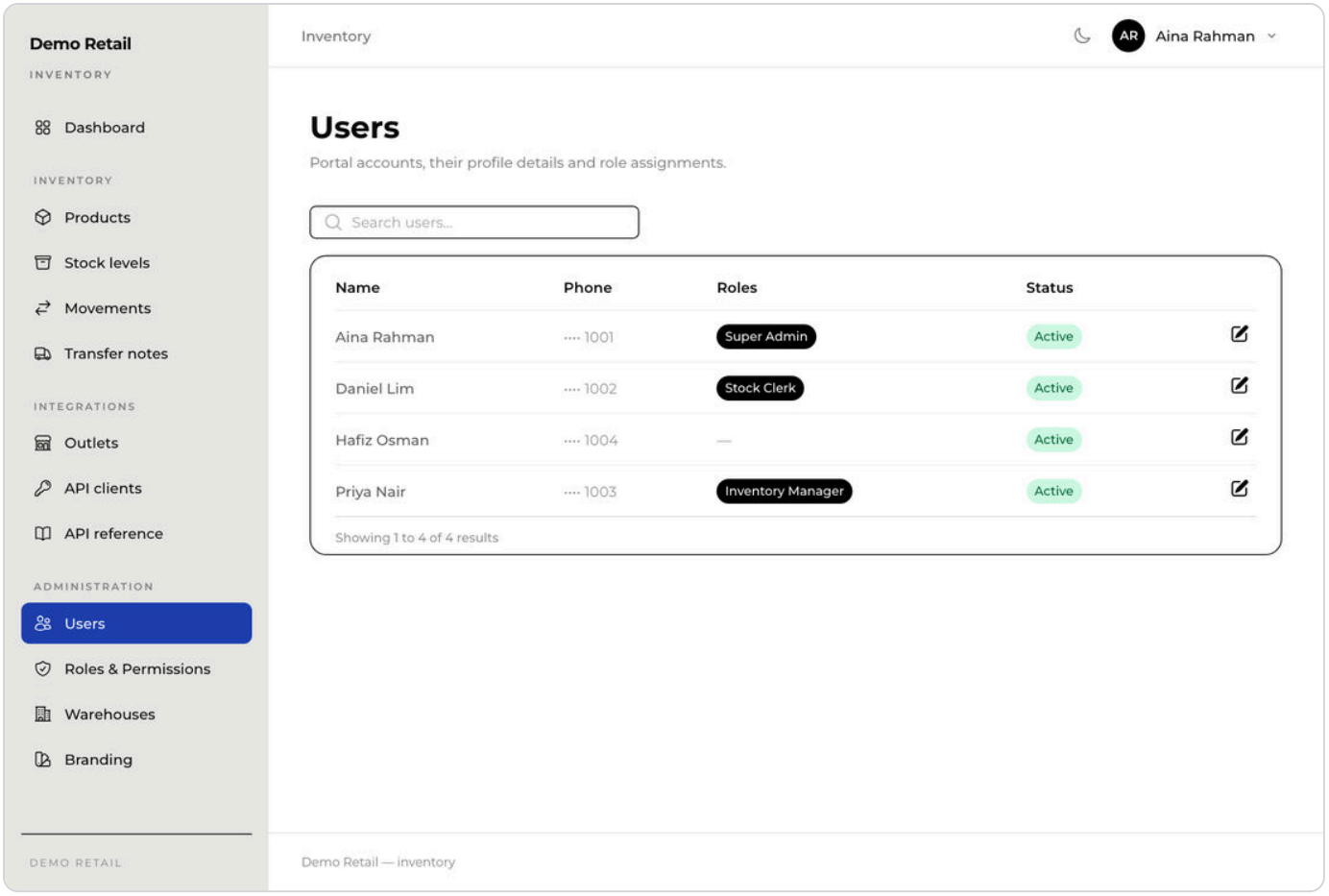
Give someone access

For: Administrators

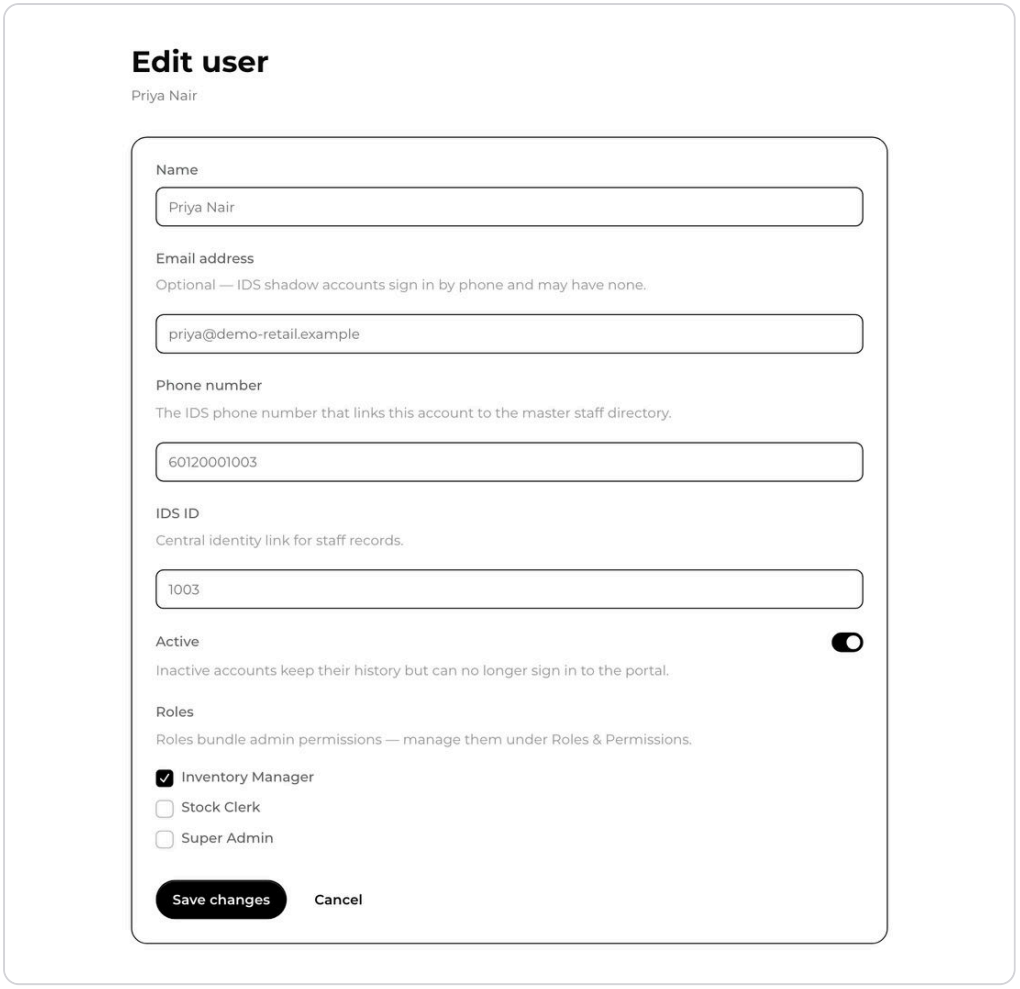
Staff sign in with the company's shared sign-in. The first time, they see "No access yet" until you give them a role.



1. Open **Users** under **Administration** in the menu.



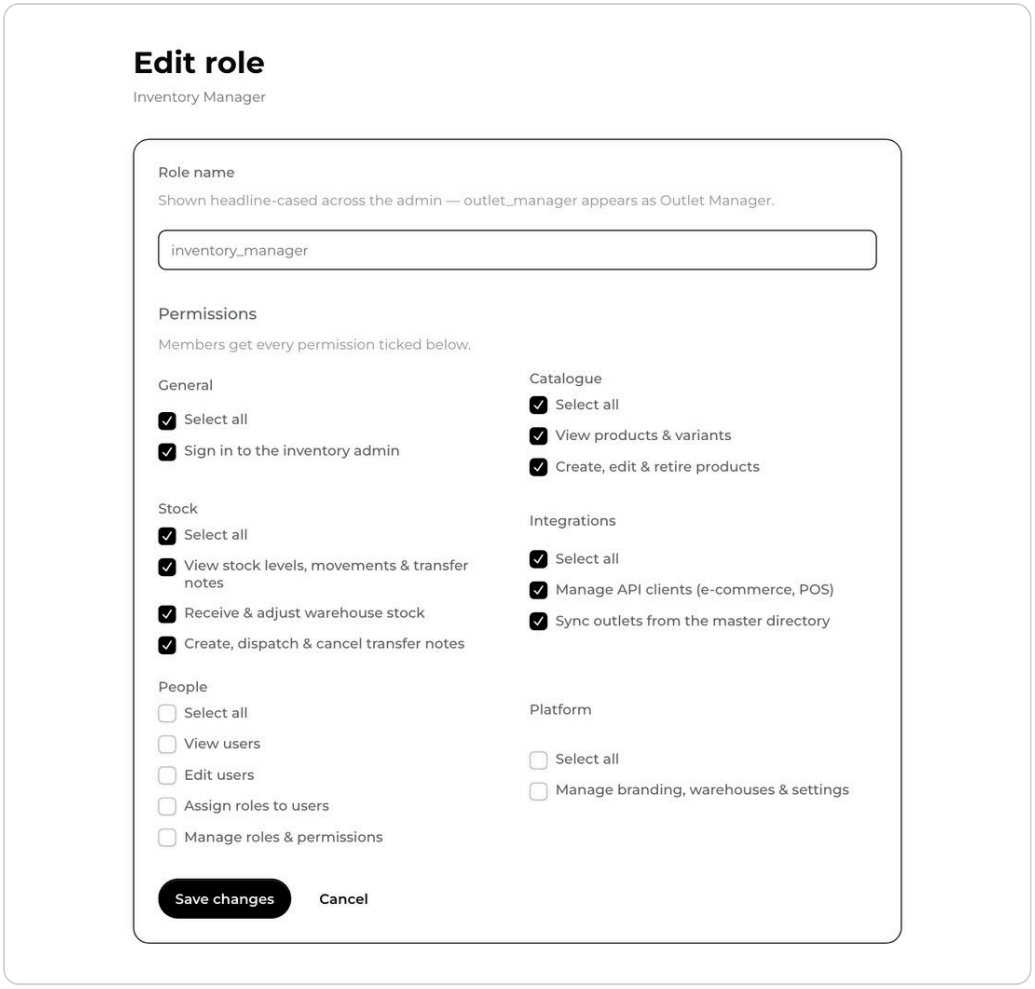
2. Press the pencil button at the end of the person's row.
3. Under **Roles**, tick one or more roles.
4. Press **Save changes**. The person refreshes the page and the menu appears.



To stop someone using Inventory, switch off **Active**. Their history stays.

Change what a role can do

1. Open **Roles & Permissions** under **Administration**.
2. Press the pencil button next to a role, or **New role**.
3. Tick what the role may do. Each line says it in words, for example **Receive & adjust warehouse stock** or **Create, dispatch & cancel transfer notes**.
4. Press **Save changes**.



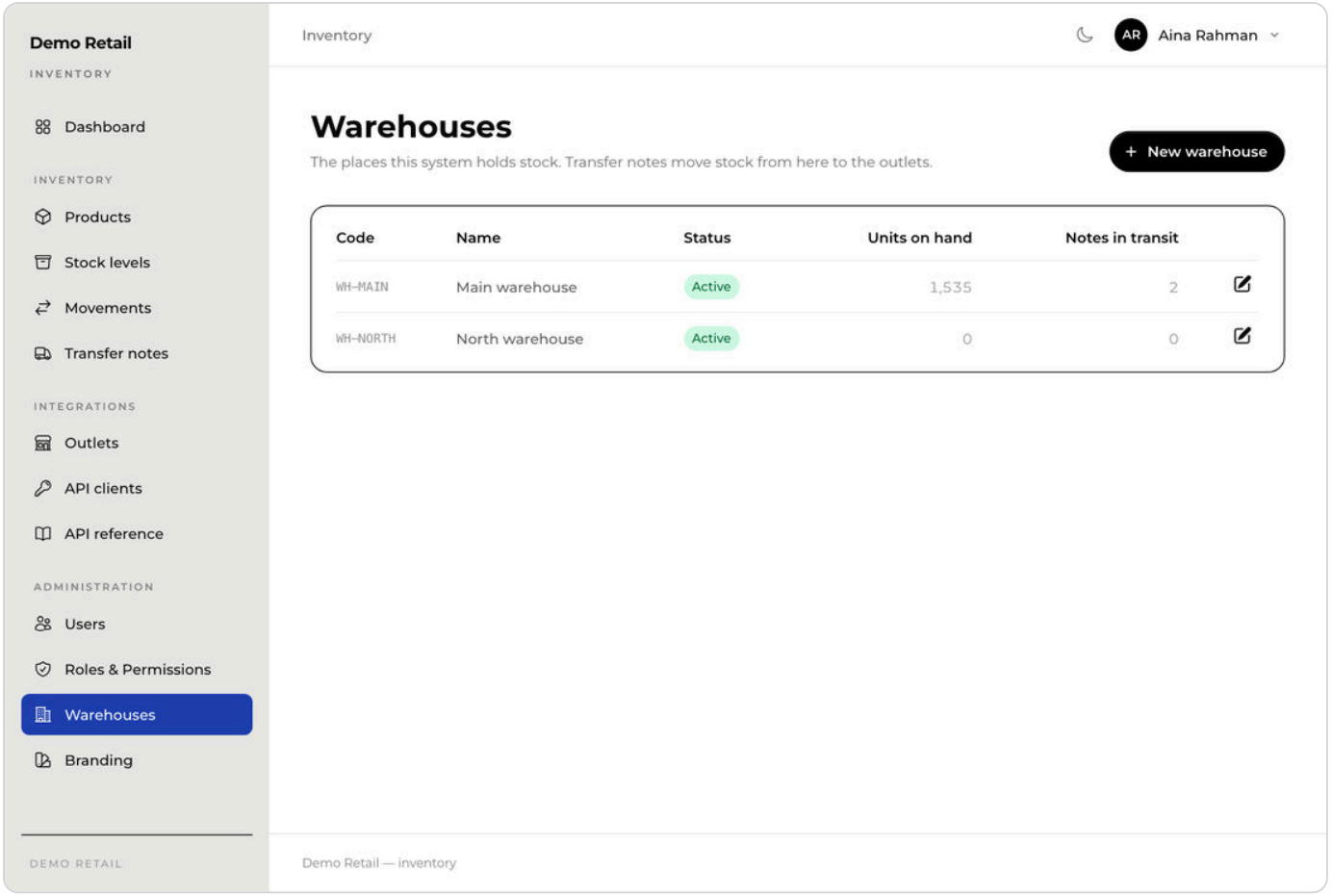
Every role needs **Sign in to the inventory admin** ticked, or its members still see "No access yet".

Warehouses and branding

For: Administrators

Warehouses

1. Open **Warehouses** under **Administration** in the menu. The list shows each warehouse's stock and how many notes are on the way from it.
2. Press **New warehouse**, and give it a **Code** and a **Name**.



Branding

Branding sets the company name, logos and colour shown in the menu and on the sign-in page.

1. Open **Branding** under **Administration**.
2. Type the **Company name** and the **App label** shown under it.
3. Under **Logos & icon**, press **Choose file** to upload a logo. Without a logo, the company name is shown as text.
4. Pick an **Accent colour**. Choose a dark one: white text sits on it.

5. Press **Save branding**.

