

Stockie - User guide

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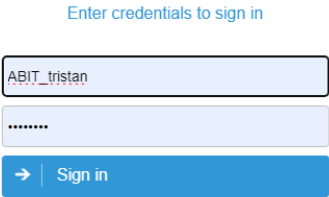
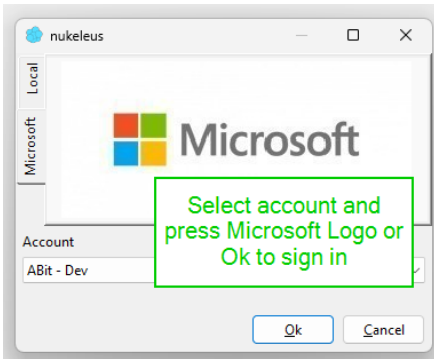
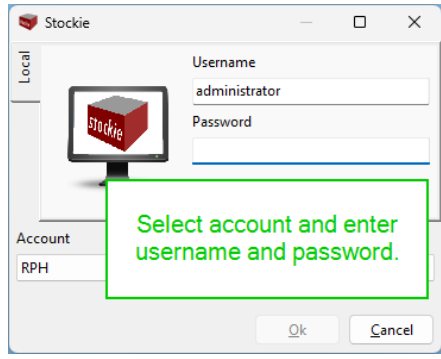
User interface

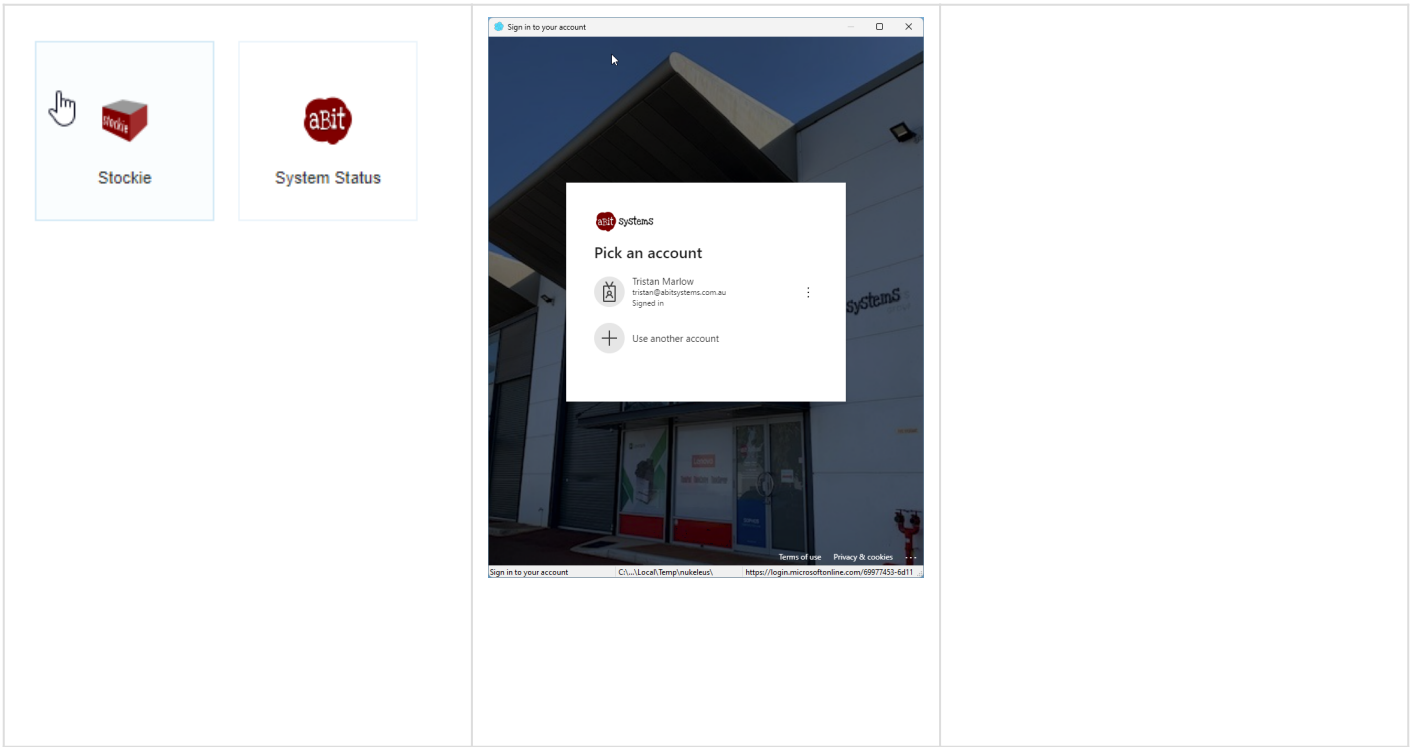
Overview

This is a general overview of the user interface for Stockie

Login

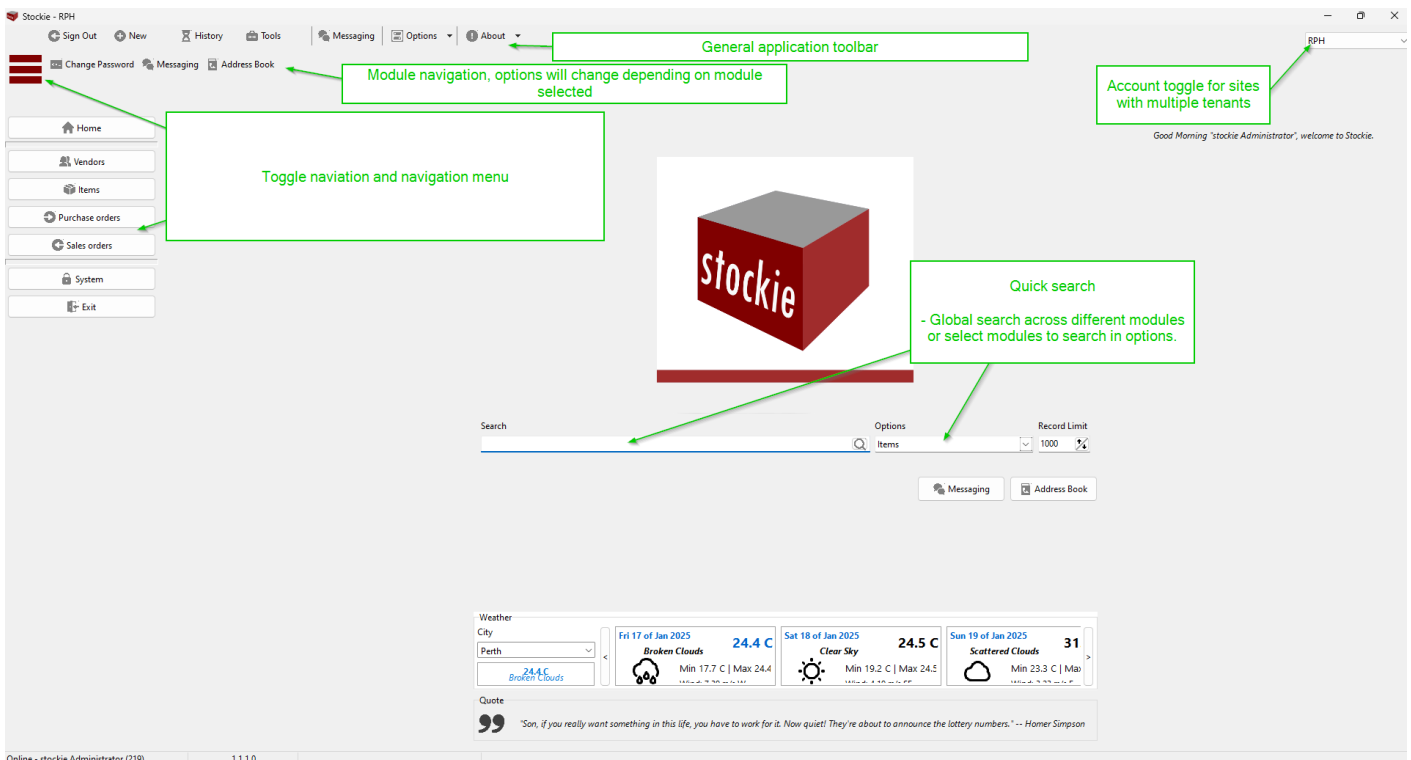
Login options may vary depending on the environment configured for your installation

Web hosted login	Microsoft SSO	Local or LDAP
 <p>Enter credentials to sign in</p> <p>ABIT_tristan</p> <p>.....</p> <p>→ Sign in</p>	 <p>nukeleus</p> <p>Local</p> <p>Microsoft</p> <p>Account</p> <p>ABit - Dev</p> <p>Select account and press Microsoft Logo or Ok to sign in</p> <p>Ok Cancel</p>	 <p>Stockie</p> <p>Local</p> <p>Username</p> <p>administrator</p> <p>Password</p> <p>Account</p> <p>RPH</p> <p>Select account and enter username and password.</p> <p>Ok Cancel</p>
After login, select "Stockie"	Login to Microsoft Entra	Login complete



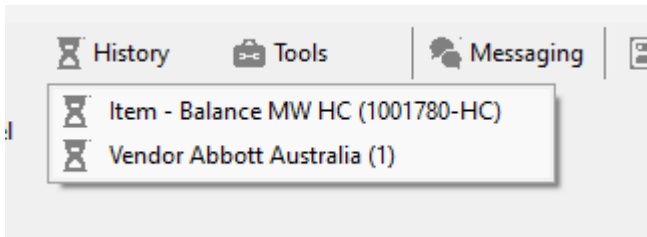
Home page and navigation

Change modules is available under the navigation menu. The home page offers quick search options



History

During use of the application, the history menu will recall the prior records you have view. Use this to quickly return to an entry.



Data grids

When data is displayed in a grid it will generally have the following features available.

When columns are moved, resized or hidden this applies only to the current user each user can have a unique display.

A screenshot of a data grid application. A 'Customise grid columns' dialog box is open, showing a list of fields with checkboxes. Annotations in green boxes point to various features:

- Show or hide columns by selected drop down arrow:** Points to a dropdown arrow in the grid.
- Resize columns:** Points to a column header in the grid.
- Drag a column to move its position and change column order:** Points to a column header in the grid.

The dialog box 'Customise grid columns' has the following content:

Fieldname	Title
<input checked="" type="checkbox"/> vendor_name	Vendor Name
<input checked="" type="checkbox"/> vendor_code	Vendor Code
<input checked="" type="checkbox"/> active	Active
<input checked="" type="checkbox"/> vendorid	Vendorid
<input checked="" type="checkbox"/> email_address	Email Address
<input checked="" type="checkbox"/> mobile_phone	Mobile Phone
<input checked="" type="checkbox"/> business_phone	Business Phone
<input checked="" type="checkbox"/> business_phone_extension	Business Phone Extension
<input checked="" type="checkbox"/> business_facsimile	Business Facsimile
<input checked="" type="checkbox"/> website	Website
<input checked="" type="checkbox"/> postal_address_street	Postal Address Street
<input checked="" type="checkbox"/> postal_address_suburb	Postal Address Suburb
<input checked="" type="checkbox"/> postal_address_postcode	Postal Address Postcode
<input checked="" type="checkbox"/> postal_address_state	Postal Address State
<input checked="" type="checkbox"/> postal_address_country	Postal Address Country
<input checked="" type="checkbox"/> street_address_street	Street Address Street
<input checked="" type="checkbox"/> street_address_suburb	Street Address Suburb

The data grid shows columns for 'Vendor Name' and 'Vendor Code'. The 'Vendor Name' column has a dropdown arrow. The 'Vendor Code' column has a resize handle. The grid contains data for various vendors, including Abbott Australia (AA), Atrium (AT), Bay Medical (BM), Bio-Excel(Australia) (BE), BioTronik (BT), Boston Scientific (BS), Braun (BR), Covidien (CO), Device Technology (DT), Diverse Devices (DD), Imaxeon (IM), Johnson_Johnson (JJ), Lifehealthcare (LH), Mallinckrodt (MA), Mayo (MY), Medical Vision Australia (MVA), Medtel Australia (MTA), Pyramed (PY), and St Jude Medical (SJM).

Grid footer options

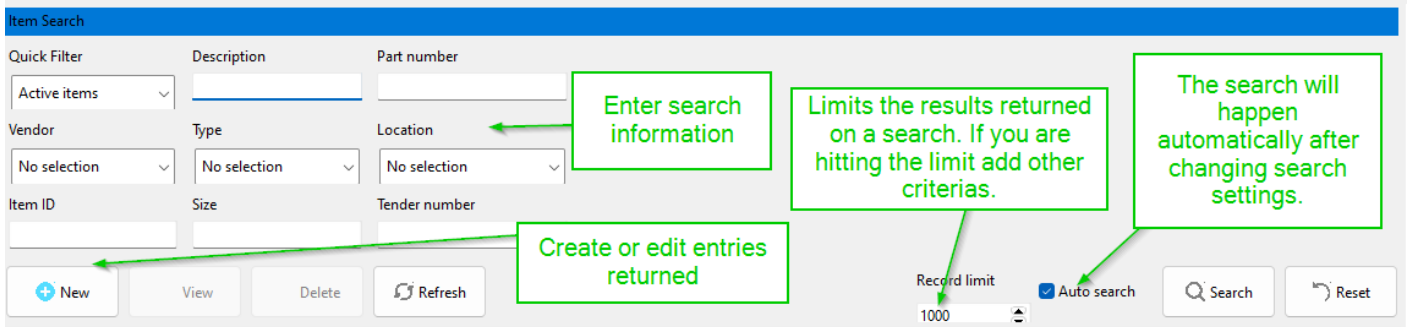
A screenshot of a data grid footer. The footer contains several options and annotations in green boxes:

- Last date and time grid data was refreshed:** Points to the text 'Last update: 17/01/2025 8:12:14 AM'.
- Current record position and total records in grid:** Points to the text '1:827'.
- How long it took to gather data:** Points to the text 'Duration: 0.015 sec'.
- Quick search of data in the grid:** Points to a search icon.
- First, prior, next or Last quick navigation:** Points to navigation icons (back, forward, first, last).

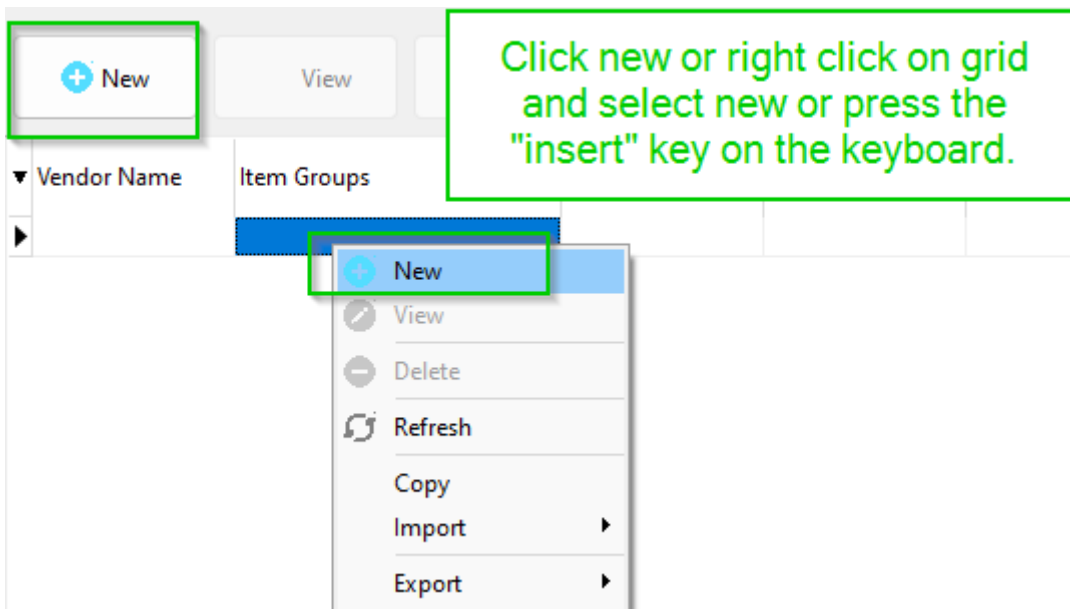
The footer also shows a list of items in the background, including 'Whisper Extra', 'HT Progress 20', 'Balance MW E', 'Hi torque Flex', and 'Hi-Torque Vers'.

Search panels

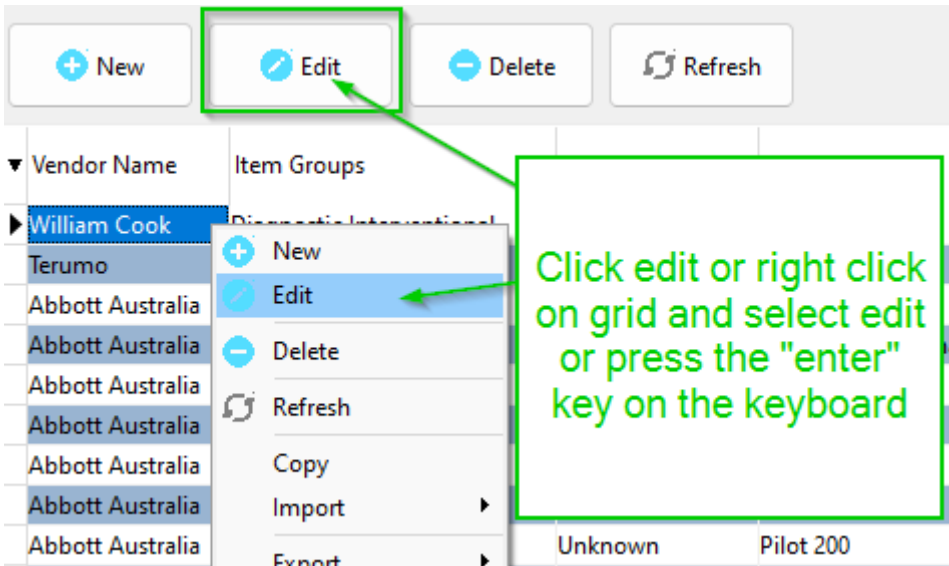
When a search panel is available it will allow quick search of information. The panel may also automatically search when fields are modified.



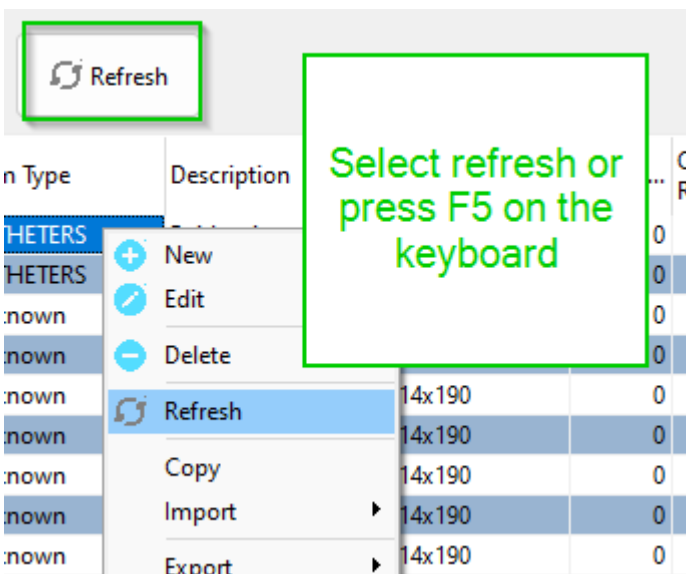
Creating new entries



Editing existing entries

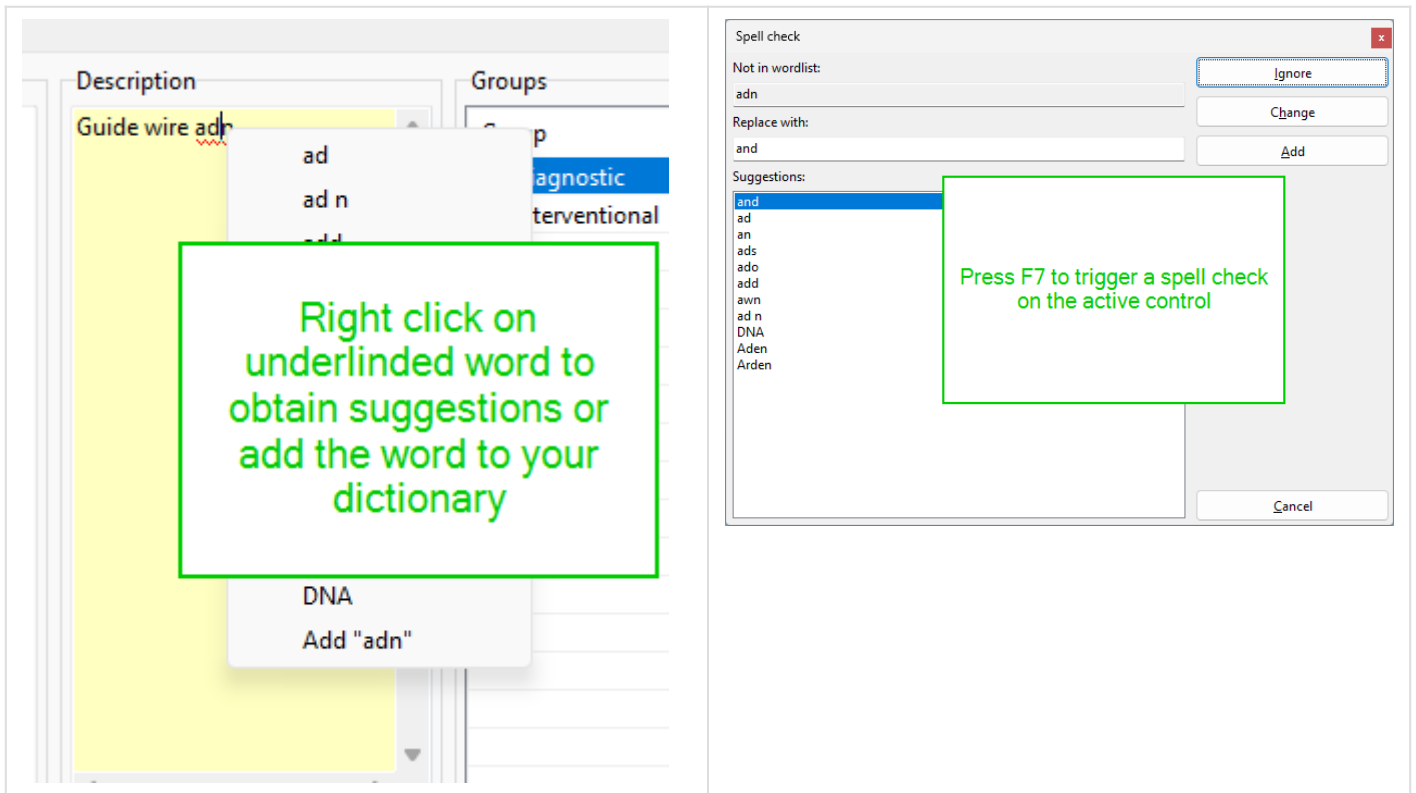


Refresh data



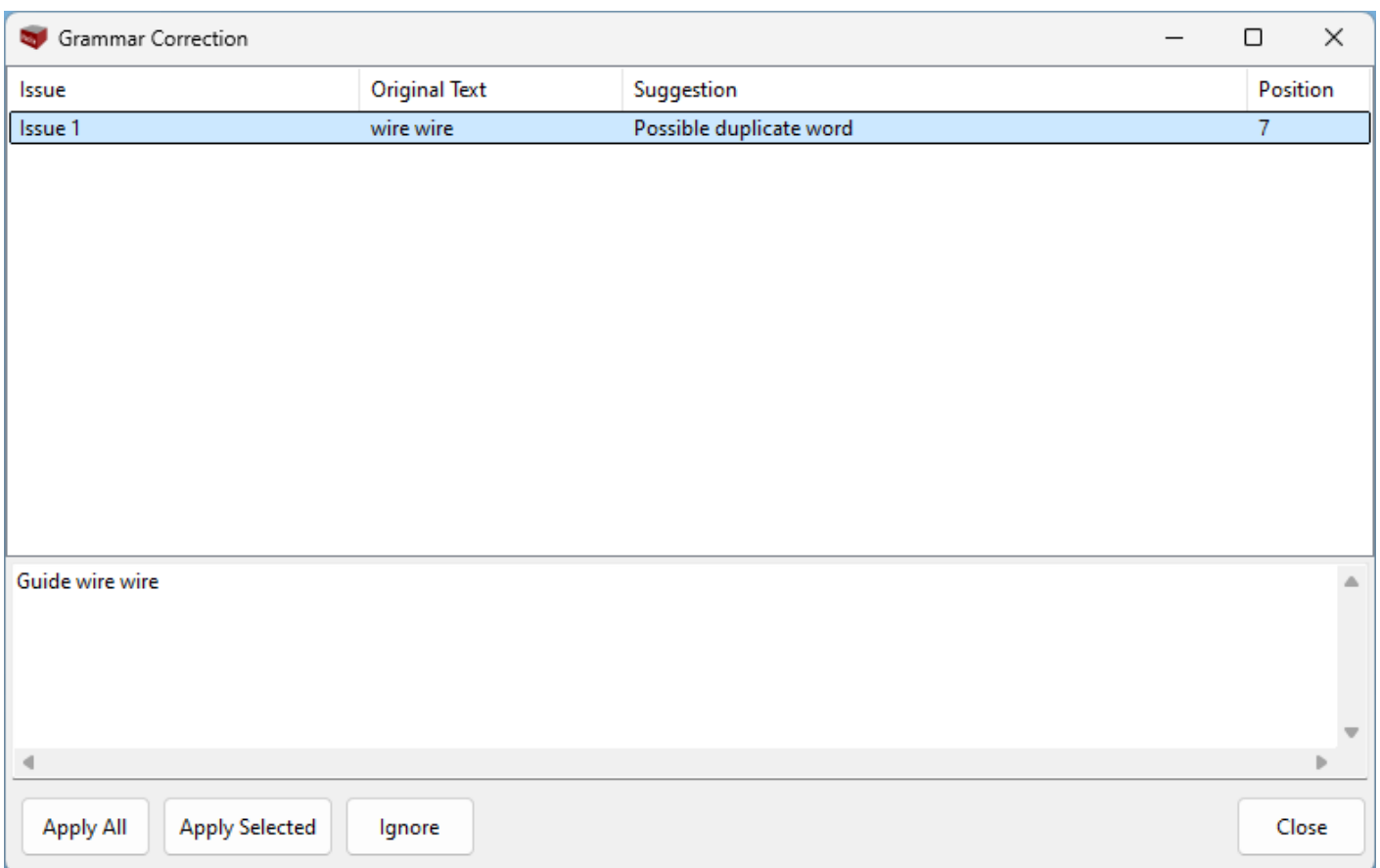
Spell checking

Many controls will underline words that contain mistakes. Right click on the word to fix the spelling mistake or add the word to your custom dictionary. Pressing F7 will also trigger a spell check.



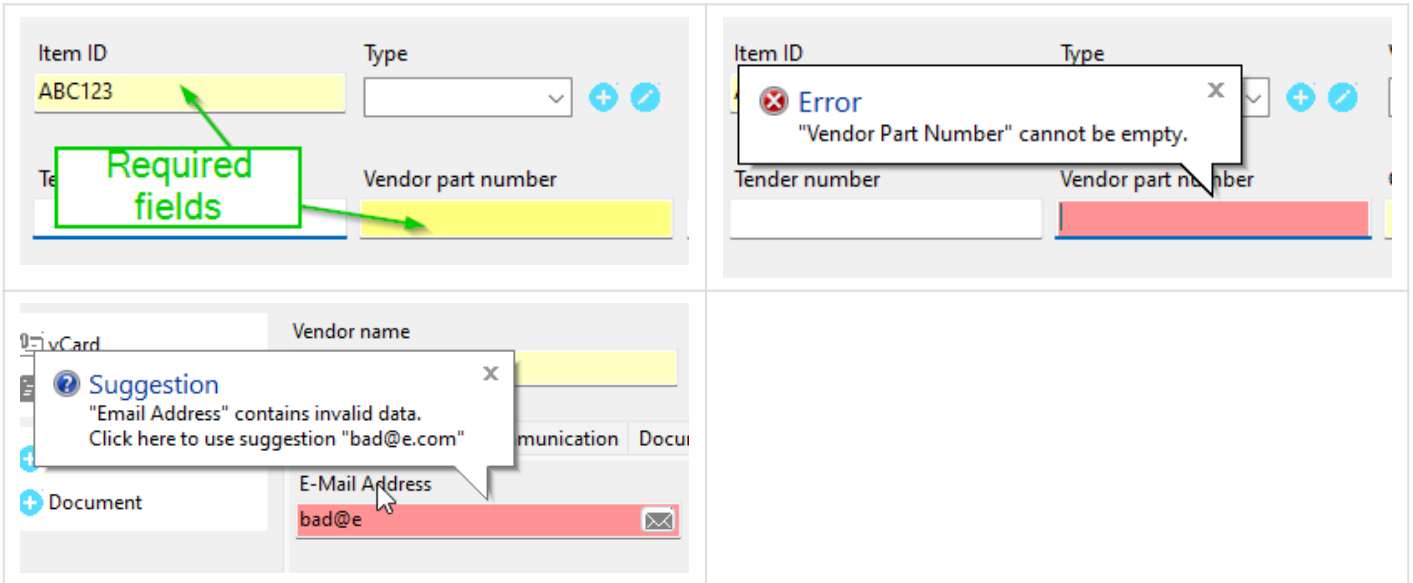
Grammar checking

Simple grammar checking features can be performed by pressing F6



Required fields and field alerts

A field that is required will be highlighted and an entry cannot be saved without the field containing data



Audit Log

Most modules will include an option to view the audit log of changes to entries in the database. The audit log will contain when and who made the changes and will also provide the old and new value.

Item details

Audit log

Add image

Clear image

Last updated

17/01/2025

10:44:47 AM

Quantity on hand

System Audit Log

System Audit Log

View Export

TStockieltems 0.035"

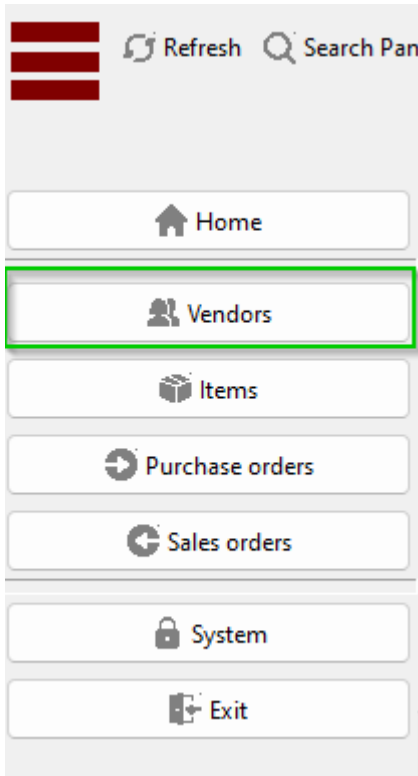
Audit Field Name	Audit Field Old Value	Audit Field New Value	Audit Notes	Fullname	Staffid
description	Guide wire wire	Guide wire		stockie Administrat	1
last_updated	17/01/2025 10:44:43 AM	17/01/2025 10:44:47 AM		stockie Administrat	1
last_updated	17/01/2025 10:42:12 AM	17/01/2025 10:44:43 AM		stockie Administrat	1
last_updated	17/01/2025 10:41:39 AM	17/01/2025 10:42:12 AM		stockie Administrat	1
description	Guide wire	Guide wire wire		stockie Administrat	1
last_updated	17/01/2025 10:34:00 AM	17/01/2025 10:41:40 AM		stockie Administrat	1
last_updated	17/01/2025 10:32:10 AM	17/01/2025 10:34:00 AM		stockie Administrat	1
last_updated				Administrat	1
last_updated				Administrat	1
last_updated				Administrat	1
last_updated				Administrat	1
last_updated				Administrat	1
last_updated				Administrat	1

Use the audit log to identify what has changed and who made the changes

Close

Vendors

Manage your vendors in the vendor module



Entry details

Vendor details

Vendor code can be left blank and Stockie will generate a code.


Vendor: 4 [Bio-Excel(Australia)]


vCard
Audit log

Communicate
Document

Vendor name: Bio-Excel(Australia) Status: Active Vendor code: BE

General | Address | Communication | Documents

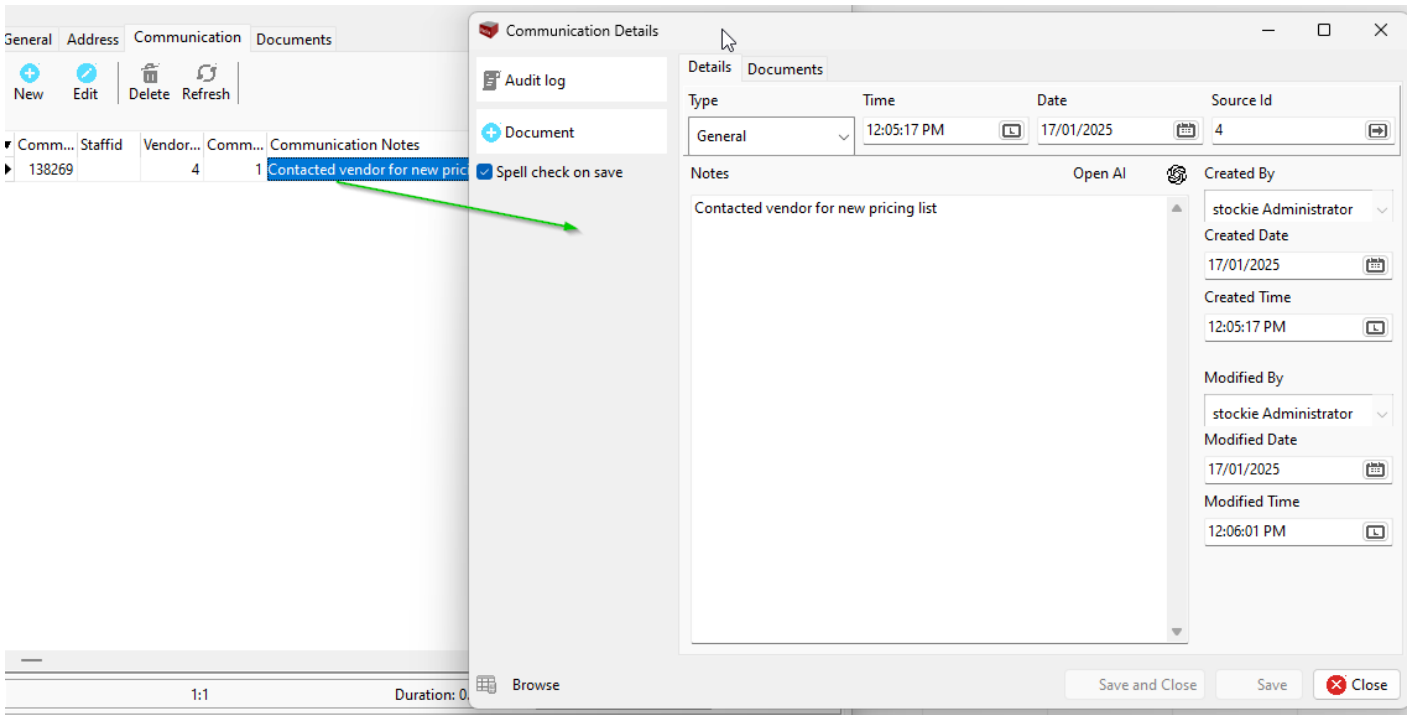
E-Mail Address:  Mobile Phone: Business Phone: Facsimile:

Website: 

Browse Save and Close Save Close

Communication

Keep a log of communication with Vendors. Documents can be stored against communication.



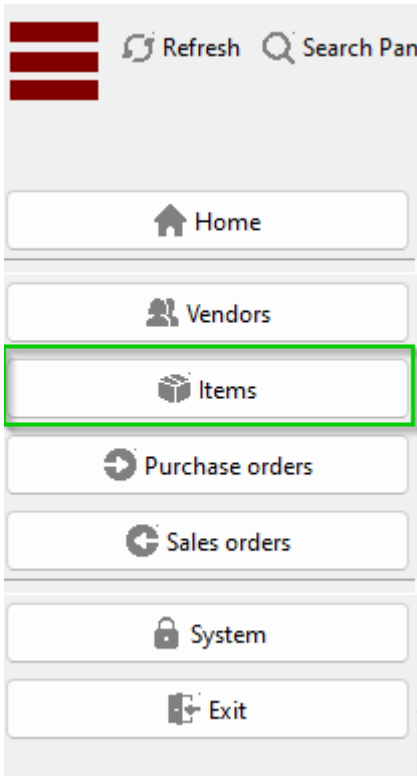
Documents

Store documents related to each Vendor

General Address Communication Documents						
View New Edit Delete Refresh Copy Export Search						
	Document Title	Document Filename	Document Keywords	Last Modified	Vendor...	Docu...
	Price List 2025	Price List 2025.xlsx		17/01/2025 12	4	2

Items

Manage items in the items module



Entry details

Item details

Item details

Audit log

Add image

Clear image

Last updated
17/01/2025
10:44:47 AM

Item ID: 0.035"

Type: CATHETERS

Vendor: William Cook

Size: 3mm J Exchange

Tender number: TSCF-35-260-3

Vendor part number: 0.035"

Quantity target: 0

Unit: Each

Price:

Location:

Active

Consignment stock

Quantity on hand: 0

Details Documents

Photograph

Description: Guide wire

Groups

Group

Diagnostic

Interventional

Use menu or right click on image and select "Add" or "Clear" image

Check box to select groups item belongs to

Browse Save and Close Save Close

Documents

Store documents or other images against each time.

Details Documents

View New Edit Delete Refresh

Search

Document Title	Document File...	Document Keyw...	Last Modifi...	Docu...	Itemid
guide_wire	guide_wire.png		17/01/2025 12	3	0.035"

Performing a stocktake

To start or resume a stock take, navigate to Items and select one of the stocktake navigation options

The screenshot shows a software interface for managing items. On the left is a navigation menu with options: Home, Vendors, Items (highlighted with a green box), Purchase orders, Sales orders, System, and Exit. The main area is titled 'Item Search' and contains several filter fields: Quick Filter (set to 'Active items'), Description, Part number, Vendor (set to 'No selection'), Type (set to 'No selection'), Location (set to 'No selection'), Item ID, Size, and Tender number. Below the filters are buttons for '+ New', 'View', 'Delete', 'Refresh', and 'Stocktake' (highlighted with a green box). A table is displayed with columns: Vendor Name, Item Groups, Item Type, Description, Size, and Quanti... A context menu is open over the 'Item Groups' column, listing options: New, View, Delete, Refresh, Copy, Import, Stocktake (highlighted with a green box), Export, Resize, Sort, Clear Sort, Customise..., and Developer tools... A green callout box on the right contains the text: 'Select stock take from one of the menu options or right click on the grid and select select stocktake.'

NOTE: Only stocktake can be active but you can close and resume the stocktake until it is closed or cancelled.

Add items to stocktake

Add items to the stocktake and update stock values

The screenshot shows the 'Stocktake details' application window. At the top, there are fields for 'Stocktake ID' (value: 3), 'Stocktake date' (value: 20/01/), 'Closed date', and 'Cancelled date'. Below these is a sidebar with options: 'Audit log', 'Close stocktake', 'Cancel stocktake', and 'Add items'. The main area contains a table with columns 'Item ID', 'Quantity reported', and 'Quantity on hand'. The first row shows '1005357H' with '1' in the 'Quantity reported' column and '0' in the 'Quantity on hand' column. A dropdown menu is open below the table, listing various item IDs including '10.0Fx10CM', '1001780-HC', '1001782-HC', '1005357H', '1009664', '1010480-H', '1010481-H', '1010482-H', '1011834H', '1011842', '1011880J', '1012067-03', '1013319', '1014652', '110100483', and '12673'. Three green callout boxes provide instructions: 'Copy the value from item quantity on hand to quantity reported' points to the 'Quantity on hand' field; 'Current item quantity on hand' points to the '0' value; and 'Add items to the stocktake, and update the quantity reported' points to the dropdown menu. At the bottom right, there are buttons for 'Save and Close', 'Save', and 'Cancel'. At the bottom left, there is an 'Insert' button.

Item ID	Quantity reported	Quantity on hand
1005357H	1	0

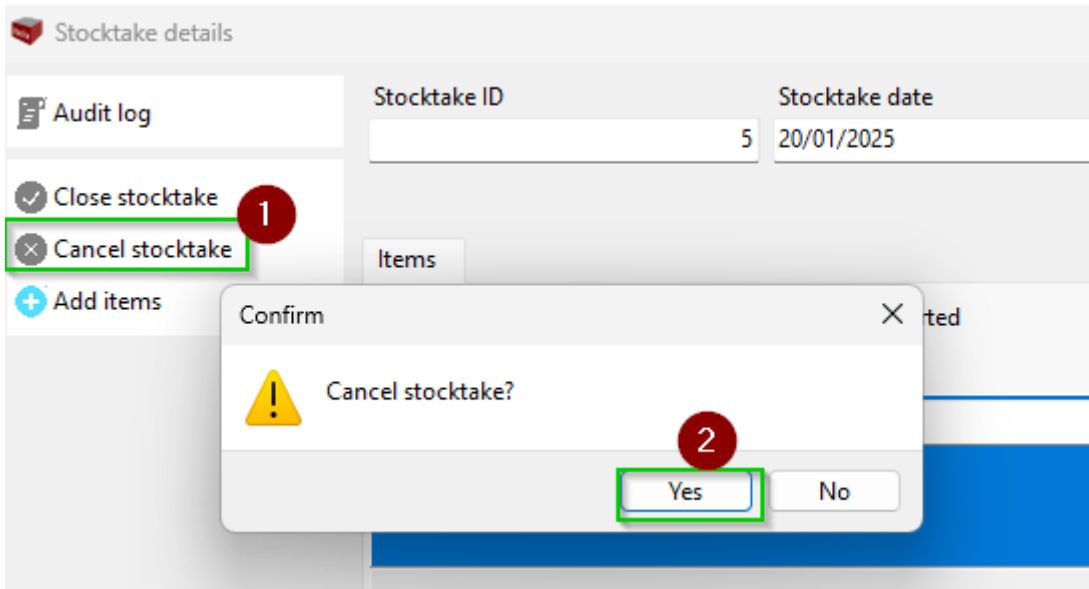
Annotations:

- Copy the value from item quantity on hand to quantity reported
- Current item quantity on hand
- Add items to the stocktake, and update the quantity reported

Option to bulk add items

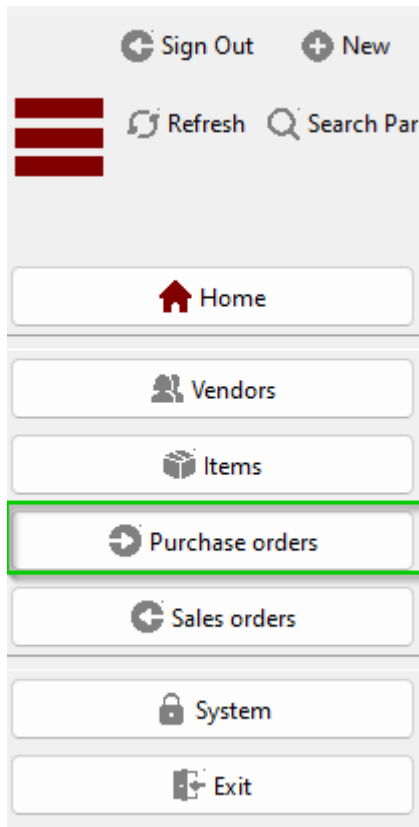
Cancel a stocktake

Cancelling a stock take will not apply any stock levels and close the stocktake so it is no longer available.



Ordering and receipt of items

Select purchase orders from the navigation menu



Creating or editing purchase orders

Search for existing or create a new entry

Purchase Order Search

Quick Filter: Description: Part number:

Vendor: Type:

Item ID: Size:

Auto search

1000

Vendor Name	Order Date	Order Reference	Vendor Code	Order By	Total O...	Total O...	Total R...	Total B...
Abbott Australia	9/09/2022		AA	Tristan Marlow	0.00	7	7	0
Abbott Australia	10/02/2025		AA	stockie Administrat	0.00	6	0	6

Select vendor and add purchase order items

Purchase order details

Reference: Order date: 10/02/2025 Vendor: Abbott Australia Order number: 5

Items Documents

Item ID	Quantity	Description	Requisition Vendor part number	Price
1014652	1	Unknown Dragonfly Opstar	1014652	0.00
1005357H	5	Unknown Whisper MS 0.014x190	1005357H	0.00

Item ID will auto complete or press the lookup button to find an item

Select vendor and add items to the order

Total items: 7 Total price: 0.00

Print purchase order

Supplier
Abbott Australia

Ordered by stockie Administrator
Ordered date 10/02/2025
Ordered reference

Delivery Address

Qty	Partnumber	Details	Requisition	Comments	Total
1	1014652	Unknown Dragonfly Opstar			0.00
5	1005357H	Unknown Whisper MS 0.014x190			0.00
Total					0.00

Receive stock

When stock has been received locate the purchase order and select "Receive stock". Adjust the quantities that have been received.

Clicking in the quantity field will automatically apply the back-order quantity, adjust this value as needed.

Values less than the expected quantity will be highlighted yellow. Values high than the quantity will not be allowed.

Reference:

Order date: 10/02/2025

Vendor: Abbott Aus

Print

Audit log

Receive stock

Receive history

Receive stock

Purchase order number: 5 Received date: 11/02/2025 Received time: 3:22:29 PM Reference:

Itemid	Description	Quantity	Back Order Quantity	Order Quantity
1014652	Unknown Dragonfly Opstar	1	1	1
1005357H	Unknown Whisper MS 0.014x190	3	5	5

Click on quantity entry to automatically apply the back order quantity.

Adjust this value as needed

If the order was incomplete and items are still on back order, when stock arrives press "Receive stock" again. Only the pending items will be displayed.

Purchase order number	Received date	Received time	Reference
5	11/02/2025	3:27:19 PM	

Itemid	Description	Quantity	Back Order Quantity	Order Quantity
1005357H	Unknown Whisper MS 0.014x190		2	5

Receive stock history

Select Receive history to view stock receipt history.

Purchase order details

Reference: [] Order date: 10/02/2025

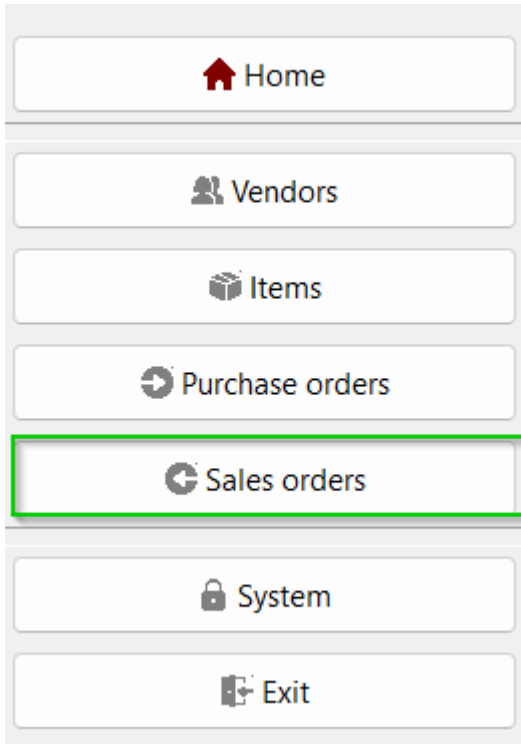
Receive stock history

Refresh | Close

Itemid	Quantity	Received D...	Received Ti...	Received By	Receipt Ref
1005357H	3	11/02/2025	3:22 PM	stockie Administrat	
1014652	1	11/02/2025	3:22 PM	stockie Administrat	

Sales and picking items

Select sales order



Creating or editing sales orders

Search for existing or create a new entry

Sales order search

Quick Filter: None | Reference: | Item ID:

Search for existing or create a new entry

Record limit: Auto search

Order Date	Order Reference	Order By	Order Compl	Total ...	Total ...	Total ...	Orde...	Orde...	Orde...	Sales...
28/01/2025		stockie Admini	1	2	2	0	1	2025	1	1

Enter order details and items

Sales order details

Reference: Order date: 13/02/2025 Order by: Order number: 3

Print
Audit log
Pick stock
Pick history

Items Documents

Item ID Quantity

10.0Fx10CM	1
10.0Fx10CM	
1001780-HC	
1001782-HC	
1005357H	
1009664	
1010480-H	
1010481-H	
1010482-H	

Save Cancel Delete

Enter order details and add order items and quantities. Items will auto complete.

Print sales order

Sales Order: 3

Reference:

Orderedby: stockie Administrator
Orderdate: 13/02/2025

Qty	Item ID	Description
10	10.0Fx10CM	CATHETERS Introducer Sheath

Pick stock

When stock has been picked

Clicking in the quantity field will automatically apply the back-order quantity, adjust this value as needed.

Values less than the expected quantity will be highlighted yellow. Values high than the quantity will not be allowed.

Pick stock

Sales order: 3
Picked date: 13/02/2025
Picked time: 2:09:04 PM
Reference:

Itemid	Description	Quantity	Back Order Quantity	Order Quantity
10.0Fx10CM	CATHETERS Introducer Sheath	5	10	10

Click on quantity entry to automatically apply the back order quantity.
Adjust this value as needed.

Quickly pick all items and save

Pick all Save Cancel

If the order was incomplete and items are still on back order, when stock arrives press "Receive stock" again. Only the pending items will be displayed.

Pick stock

Sales order: 3 Picked date: 13/02/2025 Picked time: 2:14:10 PM Reference:

Itemid	Description	Quantity	Back Order Quantity	Order Quantity
1005357H	Unknown Whisper MS 0.014x190		2	4

Pick history

Select Pick history to view picking list history.

Sales order details

Pick stock history

Itemid	Quan...	Picked Date	Picked Time	Picked By	Picked Reference
10.0Fx10CM	10	13/02/2025	2:09 PM	stockie Administrat	