

Stockie - User guide

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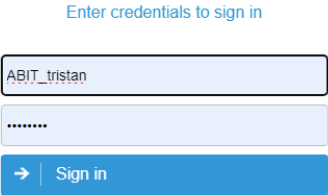
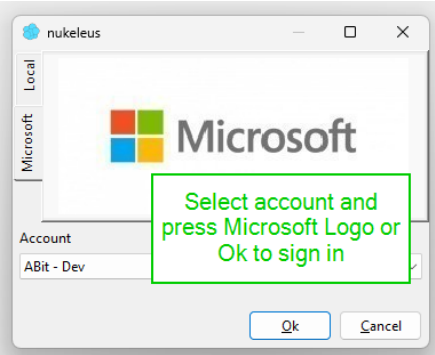
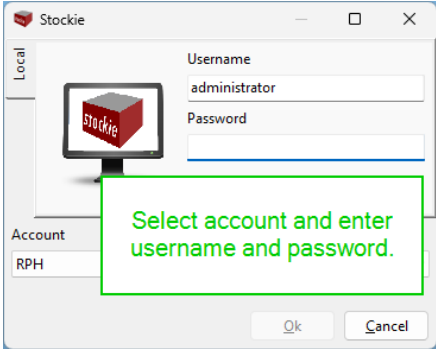
User interface

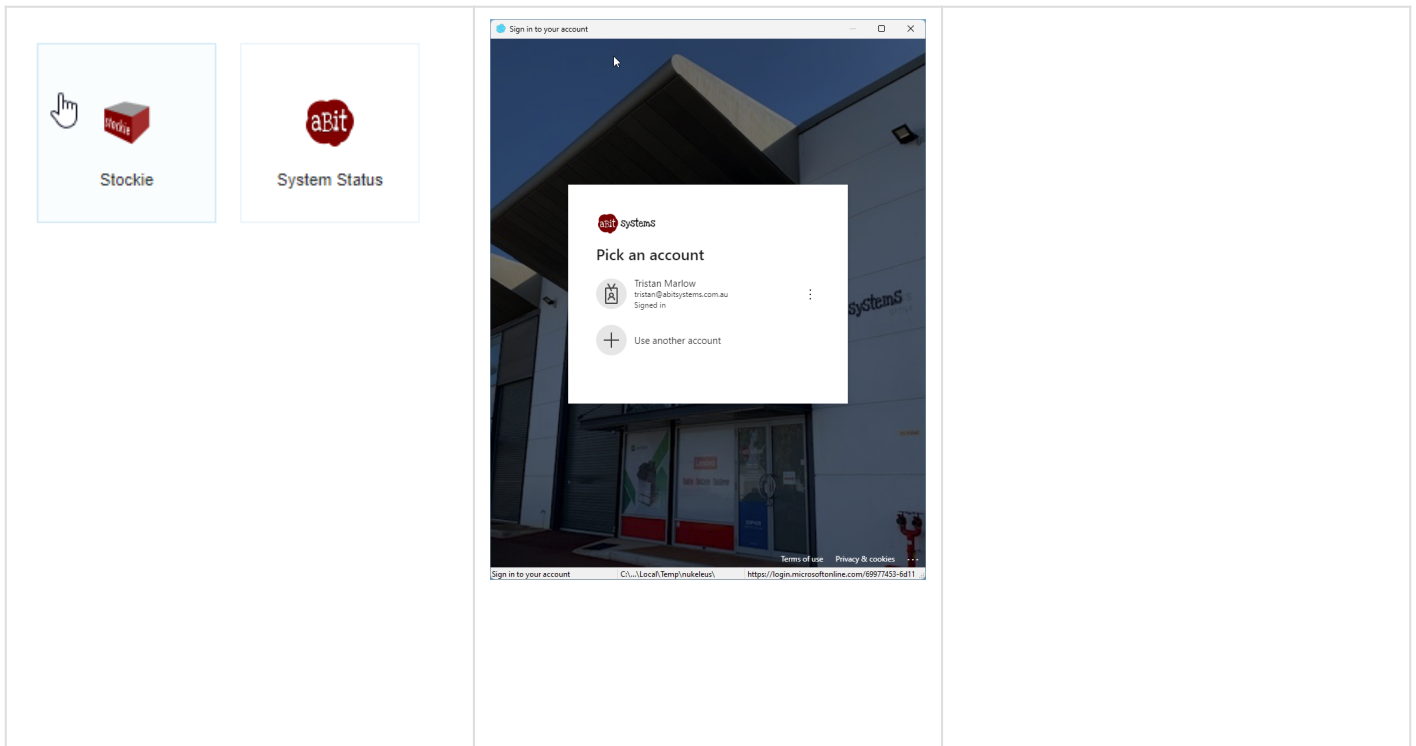
Overview

This is a general overview of the user interface for Stockie

Login

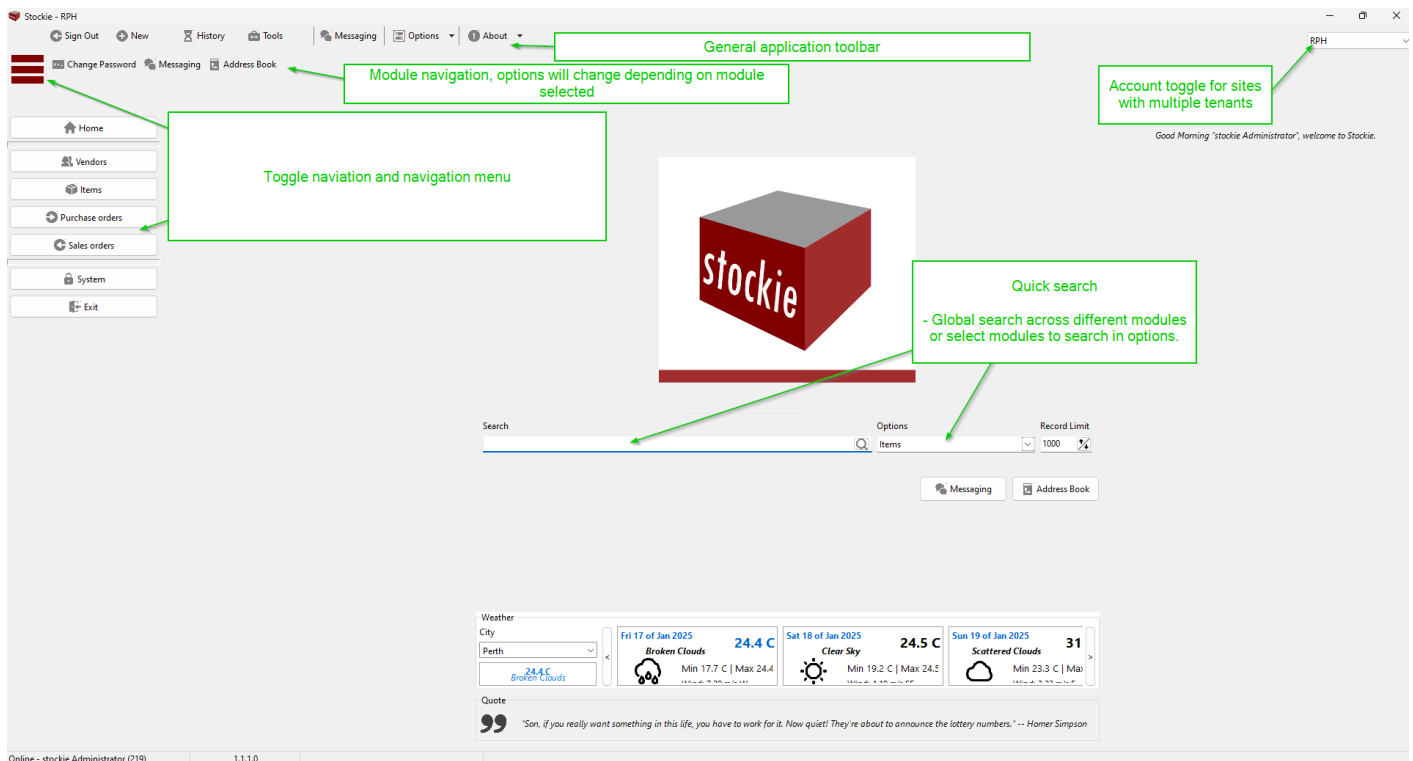
Login options may vary depending on the environment configured for your installation

Web hosted login	Microsoft SSO	Local or LDAP
 <p>A web browser window showing a login form. At the top, it says "Enter credentials to sign in". Below that are two input fields: the first contains "ABIT_tristan" and the second contains masked characters "*****". At the bottom is a blue button with a right arrow and the text "Sign in".</p>	 <p>A dialog box titled "nukeleus" with a sidebar showing "Local" and "Microsoft" options. The "Microsoft" option is selected. The main area displays the Microsoft logo and the text "Select account and press Microsoft Logo or Ok to sign in". Below this is a list of accounts with "ABit - Dev" selected. At the bottom are "Ok" and "Cancel" buttons.</p>	 <p>A dialog box titled "Stockie" with a sidebar showing "Local" and "Account" options. The "Local" option is selected. The main area shows a "Stockie" logo and input fields for "Username" (containing "administrator") and "Password". A green box highlights the text "Select account and enter username and password." Below the inputs are "Ok" and "Cancel" buttons.</p>
After login, select "Stockie"	Login to Microsoft Entra	Login complete



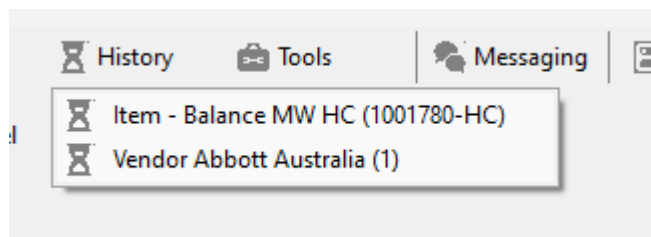
Home page and navigation

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 with several annotations in green boxes. The grid displays a list of vendors with columns for 'Vendor Name' and 'Vendor Code'. Annotations include: 'Show or hide columns by selected drop down arrow' pointing to a dropdown arrow in the 'Vendor Name' column header; 'Customise grid columns' dialog box showing a list of fields to be displayed; 'Resize columns' pointing to a vertical line between columns; and 'Drag a column to move it's position and change column order' pointing to a column header. The grid footer shows 'Last update: 17/01/2025 8:12:14 AM', '1:827', and 'Duration: 0.015 sec.'.

Vendor Name

Vendor Code

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

St Jude Medical SJM

Customise grid columns

Check all Uncheck all Invert selection

Fieldname Title

☒ vendor_name Vendor Name

☒ vendor_code Vendor Code

☒ active Active

☒ vendorid Vendorid

☒ email_address Email Address

☒ mobile_phone Mobile Phone

☒ business_phone Business Phone

☒ business_phone_extension Business Phone Extension

☒ business_facsimile Business Facsimile

☒ website Website

☒ postal_address_street Postal Address Street

☒ postal_address_suburb Postal Address Suburb

☒ postal_address_postcode Postal Address Postcode

☒ postal_address_state Postal Address State

☒ postal_address_country Postal Address Country

☒ street_address_street Street Address Street

☒ street_address_suburb Street Address Suburb

Vendor Code AA

Vendor Code AT

Vendor Code BM

Vendor Code BE

Vendor Code BT

Vendor Code BS

Vendor Code BR

Vendor Code CO

Vendor Code DT

Vendor Code DD

Vendor Code IM

Vendor Code JJ

Vendor Code LH

Vendor Code MA

Vendor Code MY

Vendor Code MVA

Vendor Code MTA

Vendor Code PY

Vendor Code SJM

Vendor Name

Vendor Code

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

St Jude Medical SJM

Drag a column to move it's position and change column order

Resize columns

Show or hide columns by selected drop down arrow

Last update: 17/01/2025 8:12:14 AM

1:827

Duration: 0.015 sec.

Grid footer options

A screenshot of the grid footer area with several annotations in green boxes. The footer contains: 'Last update: 17/01/2025 8:12:14 AM', '1:827', 'Duration: 0.015 sec.', and a set of navigation buttons. Annotations include: 'Last date and time grid data was refreshed.' pointing to the last update text; 'Current record position and total records in grid' pointing to the record count; 'How long it took to gather data' pointing to the duration; 'Quick search of data in the grid' pointing to the search buttons; and 'First, prior, next or Last quick navigation' pointing to the navigation buttons.

Last date and time grid data was refreshed.

Current record position and total records in grid

How long it took to gather data

Quick search of data in the grid

First, prior, next or Last quick navigation

Last update: 17/01/2025 8:12:14 AM

1:827

Duration: 0.015 sec.

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.

The screenshot shows the 'Item Search' panel with various input fields and controls. Annotations in green boxes provide additional information:

- Enter search information:** Points to the 'Description' and 'Part number' input fields.
- Limits the results returned on a search. If you are hitting the limit add other criterias.** Points to the 'Record limit' dropdown set to 1000.
- The search will happen automatically after changing search settings.** Points to the 'Auto search' checkbox, which is checked.
- Create or edit entries returned:** Points to the '+ New' button.

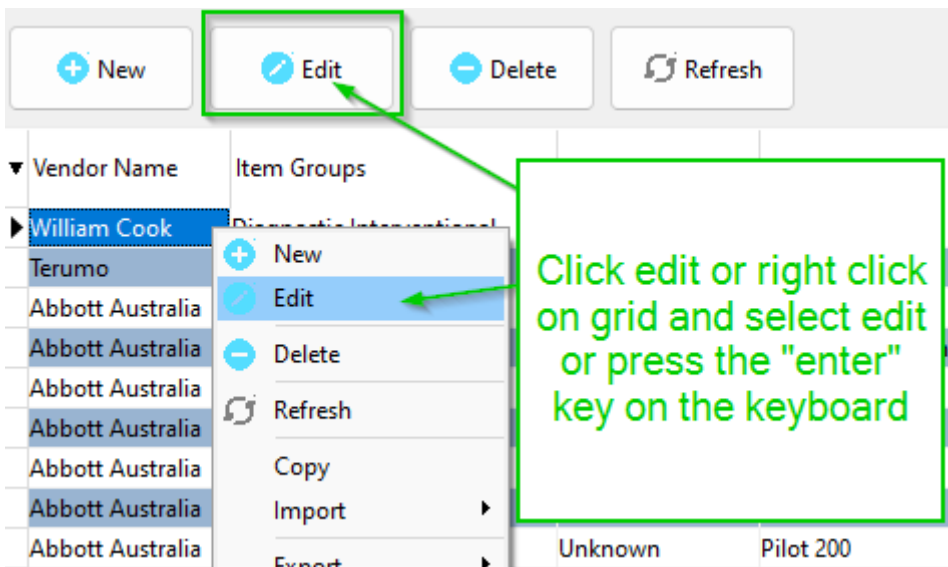
The panel includes a 'Quick Filter' dropdown set to 'Active items', and buttons for 'View', 'Delete', and 'Refresh'. The 'Search' button is also present.

Creating new entries

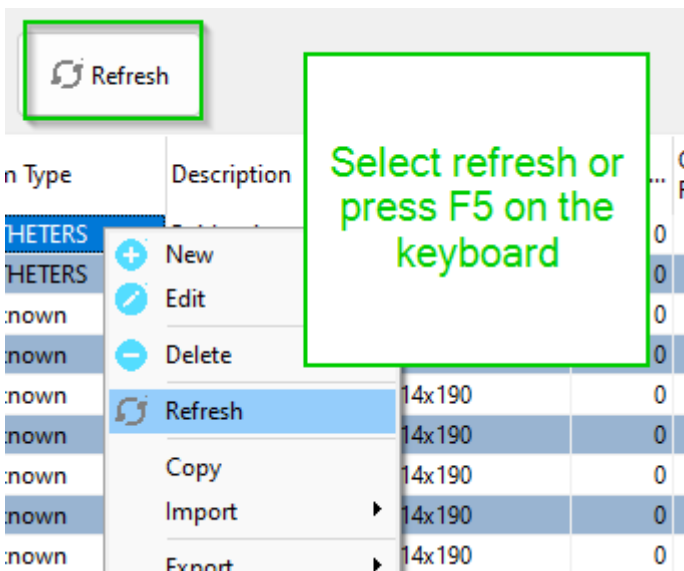
The screenshot shows the '+ New' button highlighted with a green box. A context menu is open, showing options: 'New', 'View', 'Delete', 'Refresh', 'Copy', 'Import', and 'Export'. A green box with text points to the 'New' button in the context menu:

Click new or right click on grid and select new or press the "insert" key on the keyboard.

Editing existing entries

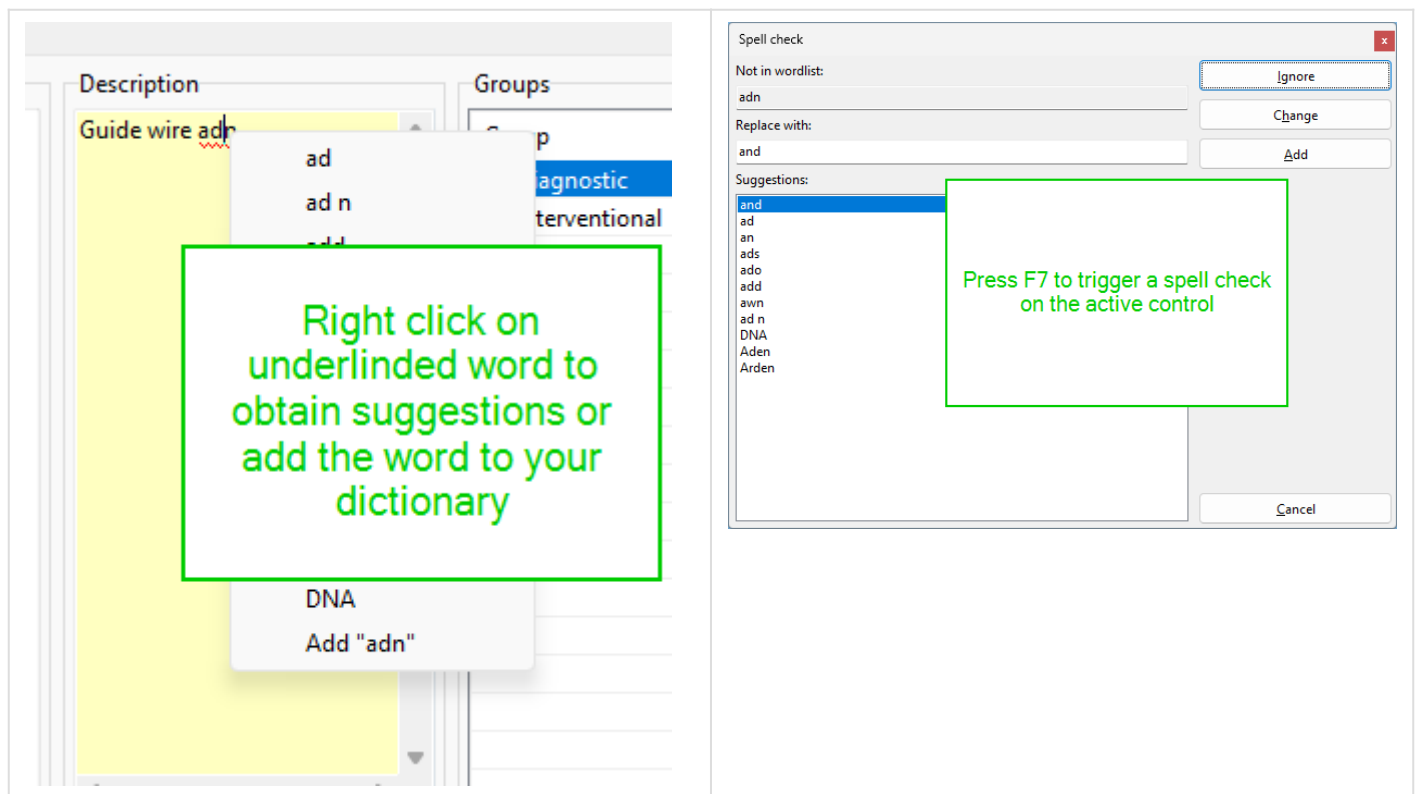


Refresh data



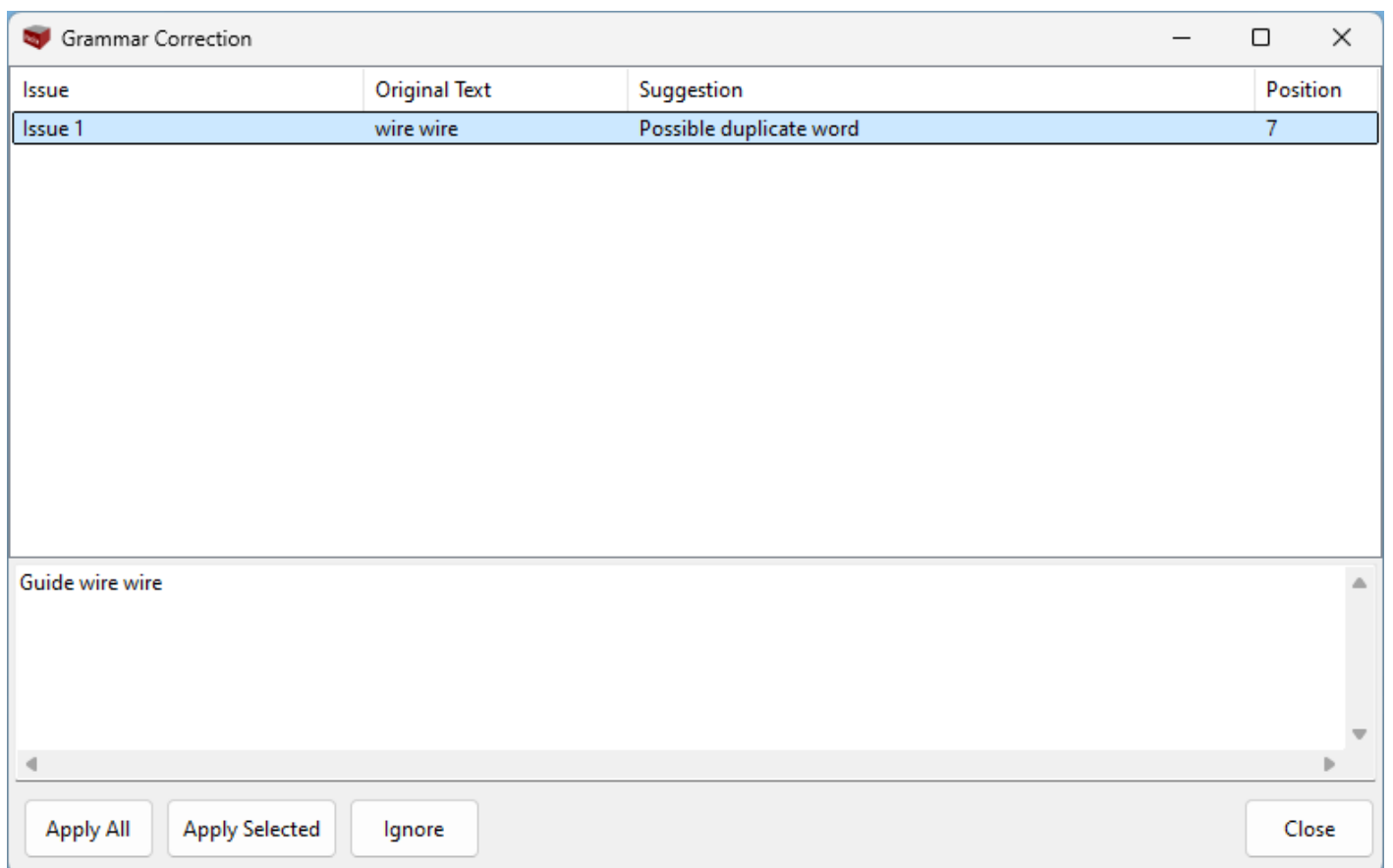
Spell checking

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.



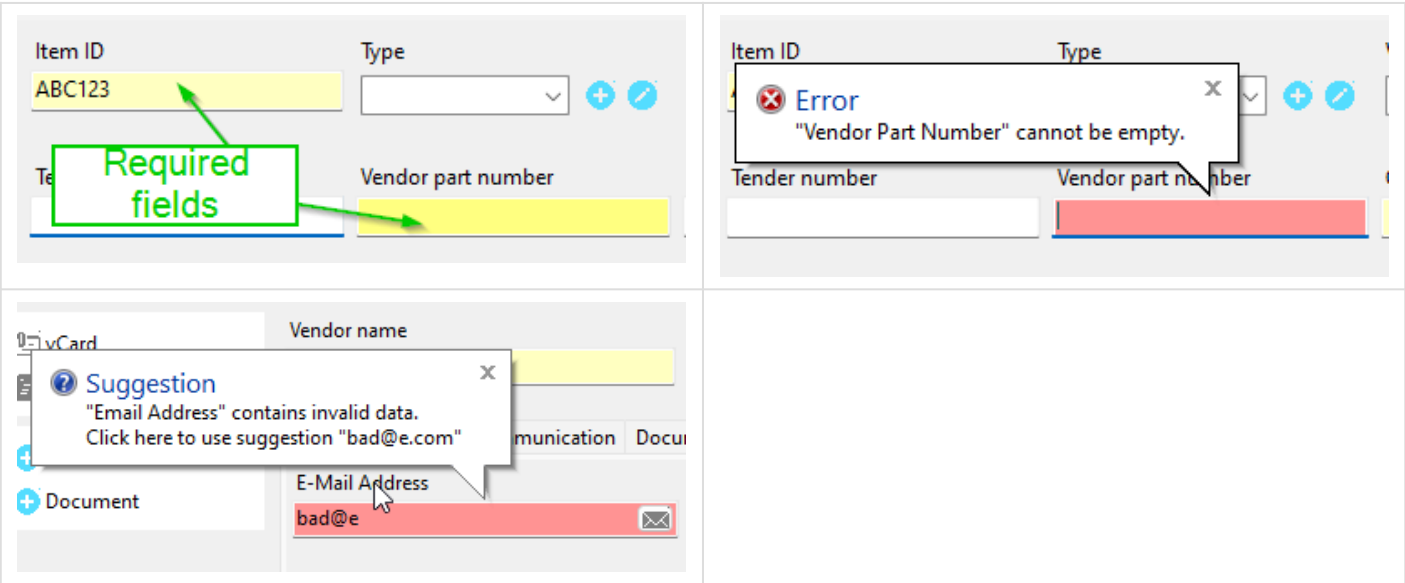
Grammar checking

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

ViewExport

TStockieltems 0.035"

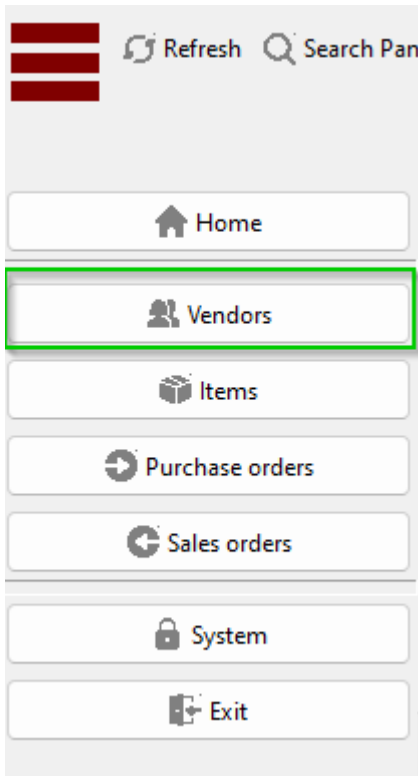
Audit Field Name	Audit Field Old Value	Audit Field New Value	Audit Notes	Fullname	Staffid
description	Guide wire wire	Guide wire		stockie Administrat	1
last_updated	17/01/2025 10:44:43 AM	17/01/2025 10:44:47 AM		stockie Administrat	1
last_updated	17/01/2025 10:42:12 AM	17/01/2025 10:44:43 AM		stockie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

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

Close

Vendors

Mange 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

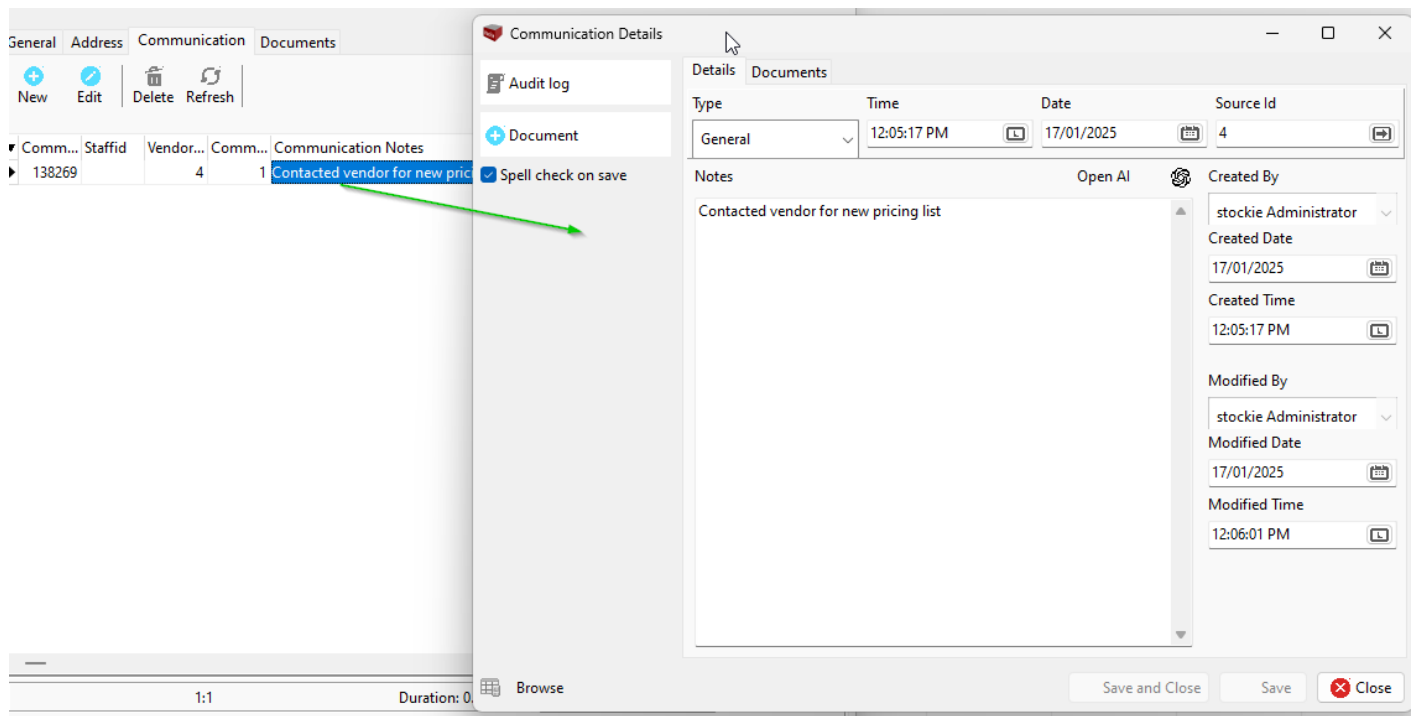
Save and Close

Save

Close

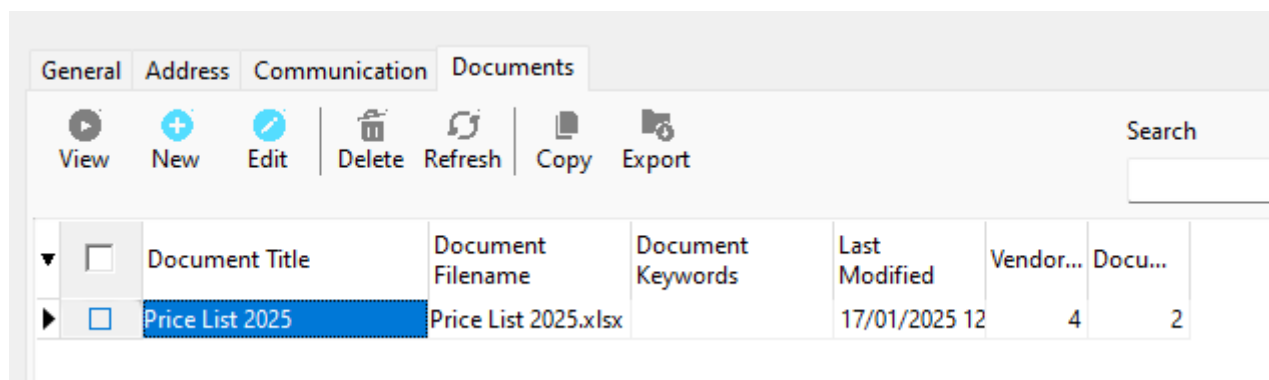
Communication

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



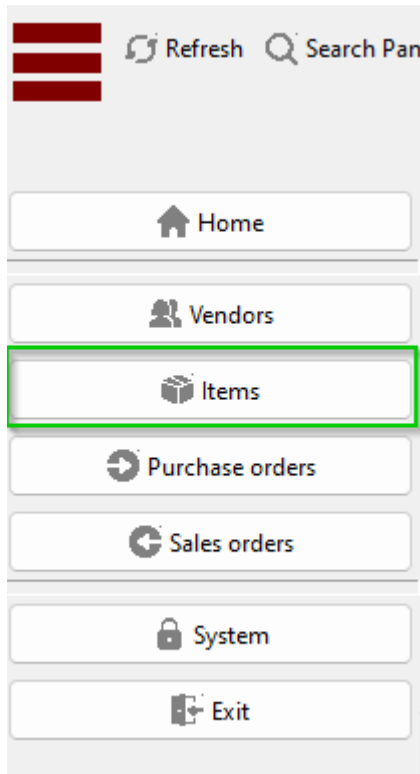
Documents

Store documents related to each Vendor



Items

Manage items in the items module



Entry 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					
Details Documents					
<div> <div>View</div> <div>New</div> <div>Edit</div> <div>Delete</div> <div>Refresh</div> <div>Search</div> </div>					
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 the 'Items' section of the software. The 'Items' button in the left sidebar is highlighted with a green box. In the top bar, the 'Stocktake' button is also highlighted with a green box. A context menu is open over the grid, and the 'Stocktake' option is highlighted with a green box. A text box on the right explains the steps:

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' window. On the left is a sidebar with 'Audit log', 'Close stocktake', 'Cancel stocktake', and 'Add items'. The main area has fields for 'Stocktake ID' (3), 'Stocktake date' (20/01/), 'Closed date', and 'Cancelled date'. Below these is an 'Items' section with a table header: 'Item ID', 'Quantity reported', and 'Quantity on hand'. The first row shows '1005357H' with '1' in the 'Quantity reported' column. A dropdown menu is open for 'Item ID', listing various items including '10.0Fx10CM', '1001780-HC', '1001782-HC', '1005357H' (highlighted), '1009664', '1010480-H', '1010481-H', '1010482-H', '1011834H', '1011842', '1011880J', '1012067-03', '1013319', '1014652', '110100483', and '12673'. A blue bar at the bottom of the table has a search icon and a '0' in the 'Quantity on hand' column. To the right of this bar are 'Save', 'Cancel', and 'Delete' buttons. At the bottom of the window are 'Insert', 'Save and Close', 'Save', and 'Cancel' buttons. Green annotations with arrows point to the 'Quantity reported' field (labeled 'Copy the value from item quantity on hand to quantity reported'), the 'Quantity on hand' field (labeled 'Current item quantity on hand'), and the blue bar (labeled 'Add items to the stocktake, and update the quantity reported').

Stocktake details

Audit log

Close stocktake

Cancel stocktake

Add items

Stocktake ID: 3

Stocktake date: 20/01/

Closed date:

Cancelled date:

Items

Item ID	Quantity reported	Quantity on hand
1005357H	1	

10.0Fx10CM

10.0Fx10CM

1001780-HC

1001782-HC

1005357H

1009664

1010480-H

1010481-H

1010482-H

1011834H

1011842

1011880J

1012067-03

1013319

1014652

110100483

12673

Save

Cancel

Delete

Insert

Save and Close

Save

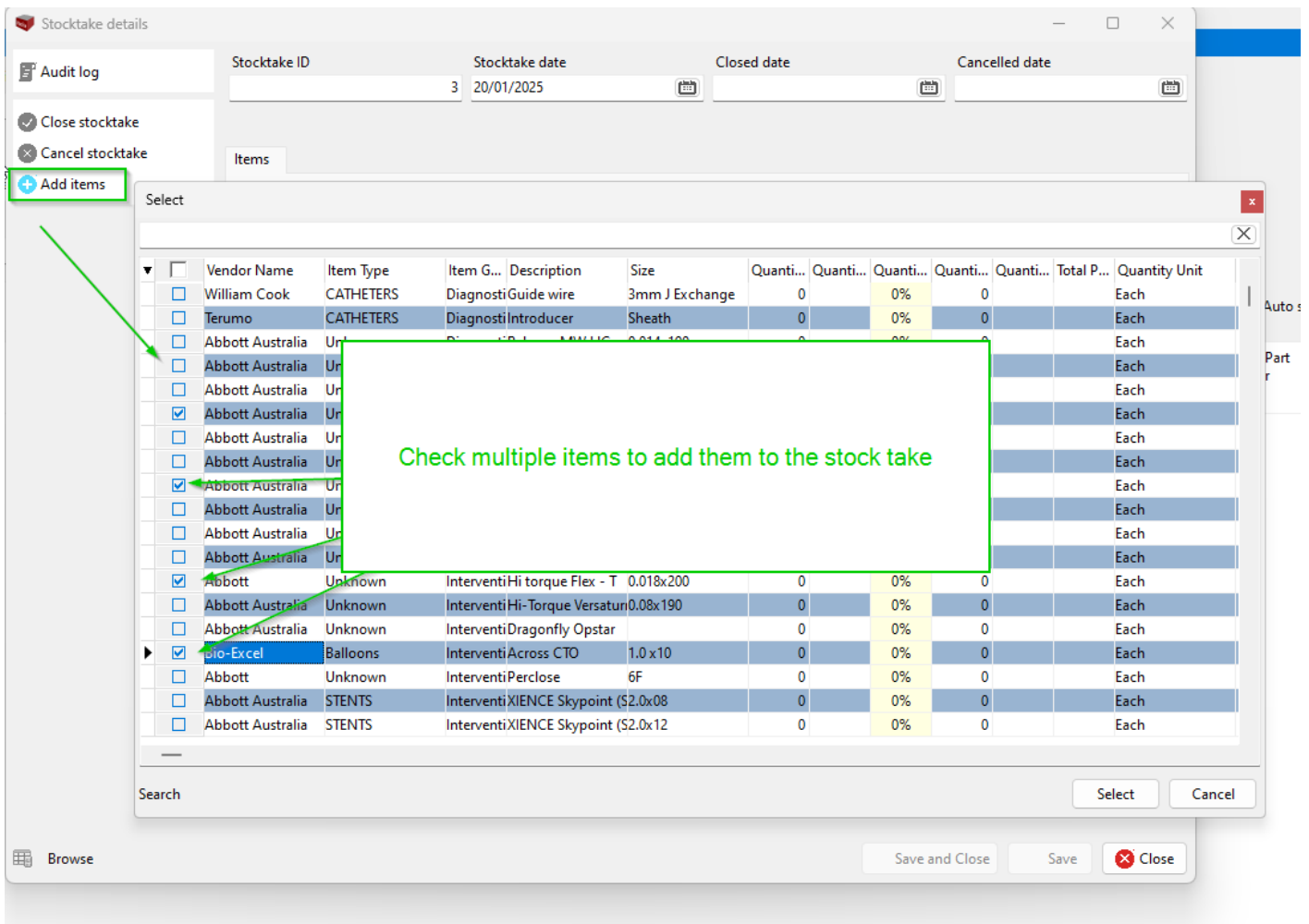
Cancel

Copy the value from item quantity on hand to quantity reported

Current item quantity on hand

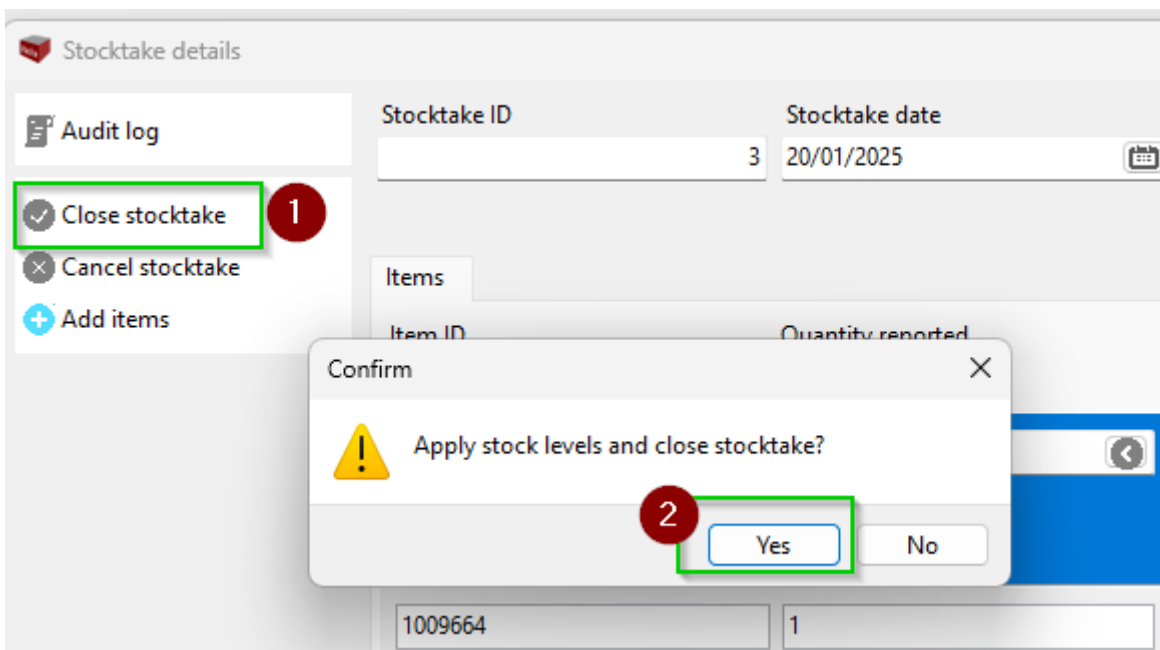
Add items to the stocktake, and update the quantity reported

Option to bulk add items



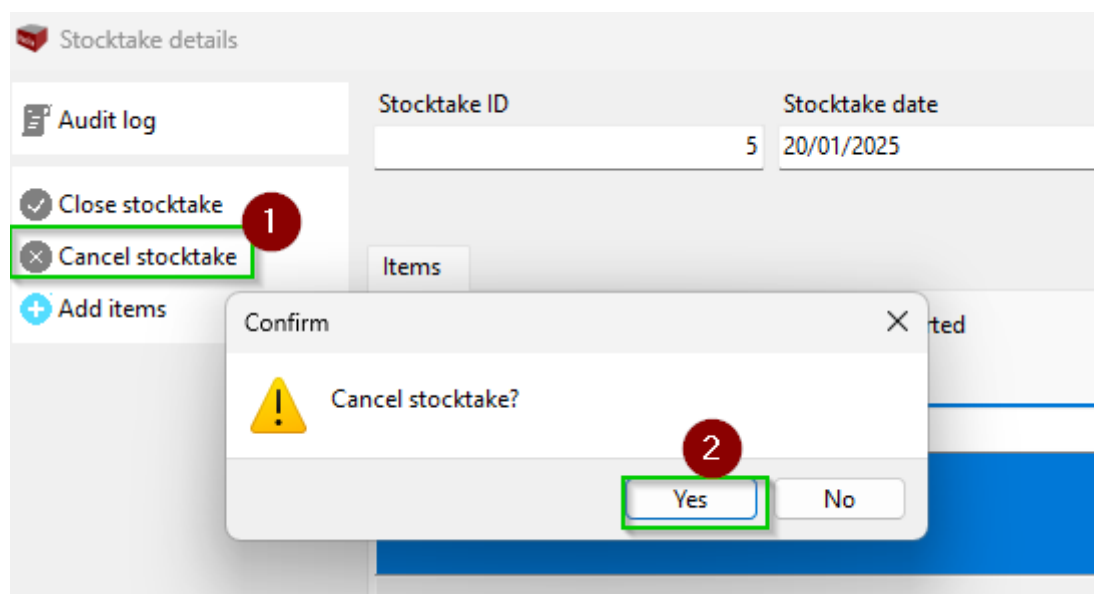
Close a stocktake

Closing a stocktake will apply the new stock levels and close the stocktake.



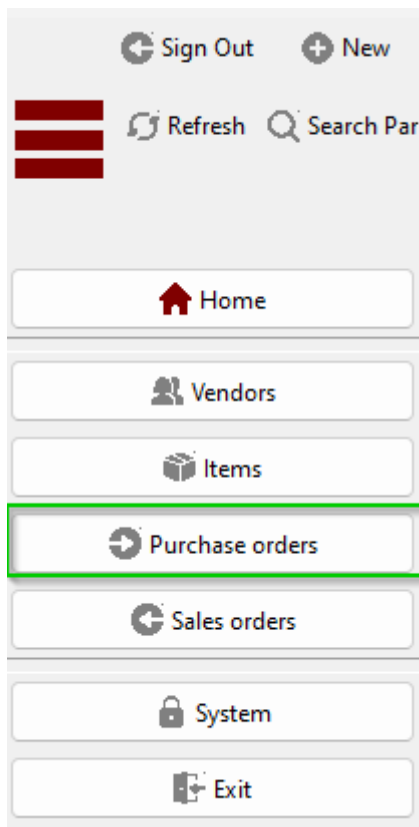
Cancel a stocktake

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: No selection Type:

Item ID: Size:

Record limit: 1000 ☒ Auto search

Search for existing orders or create a new entry

▼ 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

☒ Receive stock ☒ Receive history

Items Documents

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

Select vendor and add items to the order

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

Total items: 7 Total price: 0.00

Print purchase order



Supplier Abbott Australia	Ordered by stockie Administrator	Ordered date 10/02/2025	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.

Print

Audit log

Receive stock

Receive history

Reference

Order date

Vendor

10/02/2025

Abbott Aus

Receive stock

Purchase order number

Received date

Received time

Reference

5

11/02/2025

3:22:29 PM

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

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.

Receive stock

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

Save

Cancel

Receive stock history

Select Receive history to view stock receipt history.

Purchase order details

Print

Audit log

Receive stock

Receive history

Reference

Order date

10/02/2025

Receive stock history

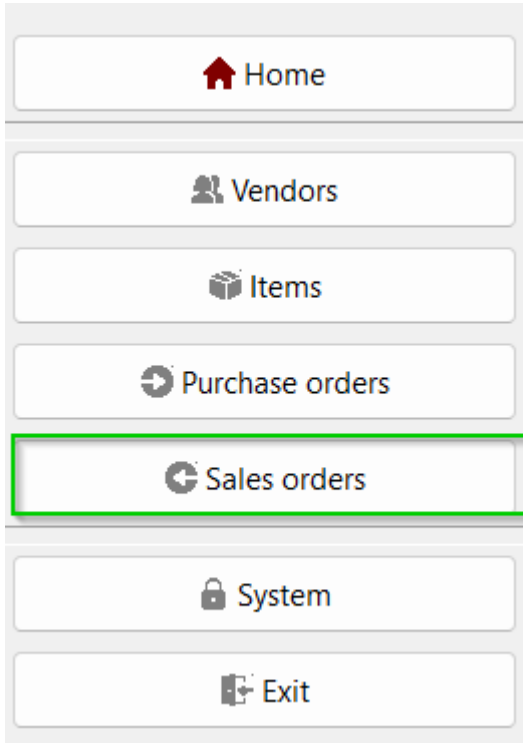
Refresh

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

Reference

Item ID

None

Search for existing or create a new entry

+ New

✎ Edit

✖ Delete

↻ Refresh

Record limit

1000

☒ Auto search

🔍 Search

↺ Reset

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

Print

Audit log

Pick stock

Pick history

Reference

Order date

Order by

Order number

13/02/2025

3

Items

Documents

Item ID

Qua

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

10.0Fx10CM

1

Save

Cancel

Delete

10.0Fx10CM

1001780-HC

1001782-HC

1005357H

1009664

1010480-H

1010481-H

1010482-H

Print sales order

Sales Order: 3

Reference

Orderedby

stockie Administrator

Ordereddate

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.

The screenshot shows a 'Pick stock' window with a header bar containing 'Sales order', 'Picked date', 'Picked time', and 'Reference'. Below this is a table with columns: 'Itemid', 'Description', 'Quantity', 'Back Order Quantity', and 'Order Quantity'. The first row shows '10.0Fx10CM', 'CATHETERS Introducer Sheath', '5', '10', and '10'. The 'Quantity' field '5' is highlighted in yellow, and the 'Back Order Quantity' field '10' is highlighted in blue. A green box with an arrow pointing to the yellow field contains the text: 'Click on quantity entry to automatically apply the back order quantity. Adjust this value as needed.' Another green box with an arrow pointing to the 'Pick all' button at the bottom left contains the text: 'Quickly pick all items and save'. The bottom bar contains three buttons: 'Pick all' (with a green checkmark icon), 'Save' (with a green checkmark icon), and 'Cancel' (with a red X icon).

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

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 all

Save

Cancel

Pick history

Select Pick history to view picking list history.

Sales order details

Print

Audit log

Pick stock

Pick history

Pick stock history

Refresh

Close

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