

# Stockie - User guide

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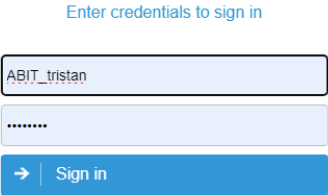
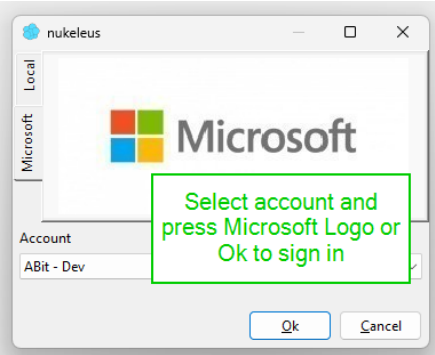
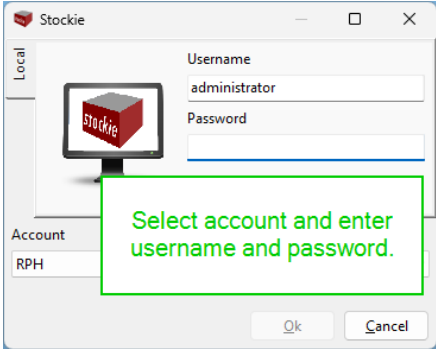
# User interface

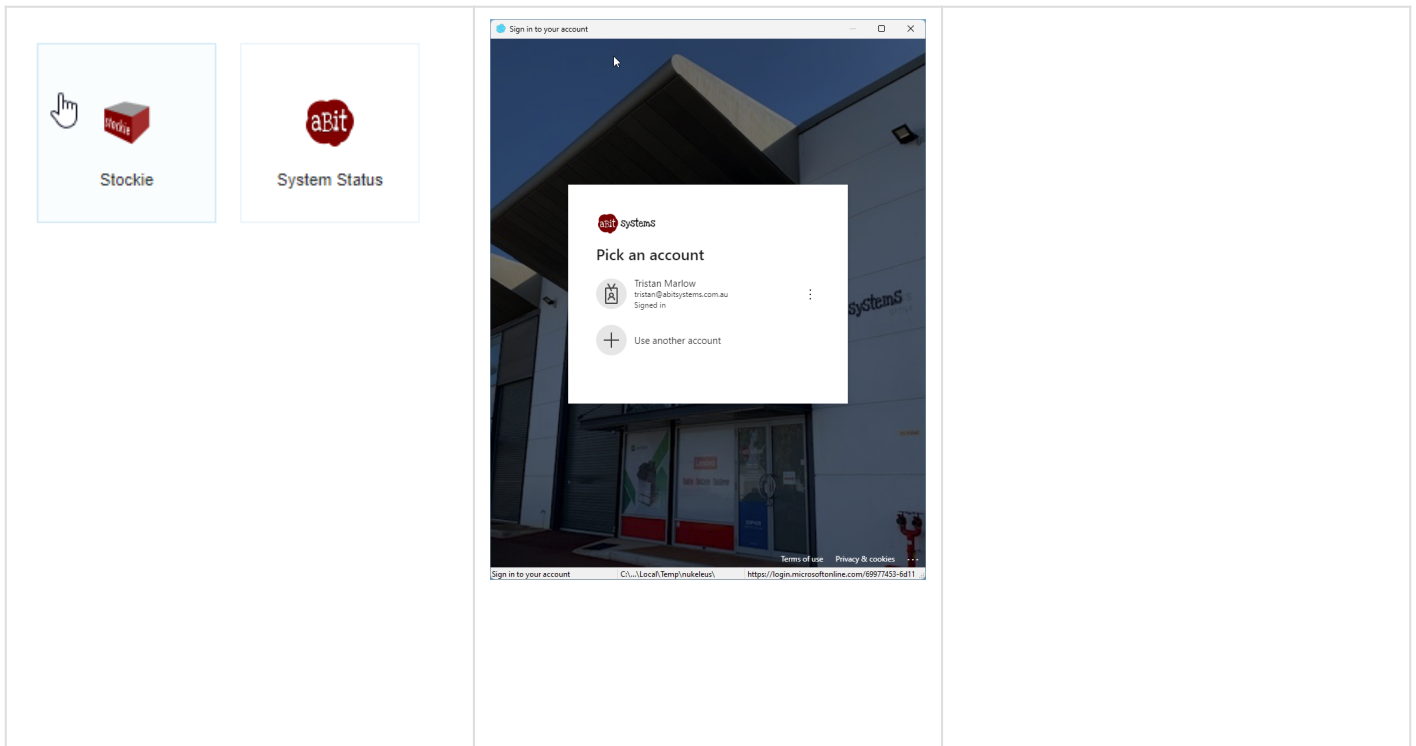
## Overview

This is a general overview of the user interface for Stockie

## Login

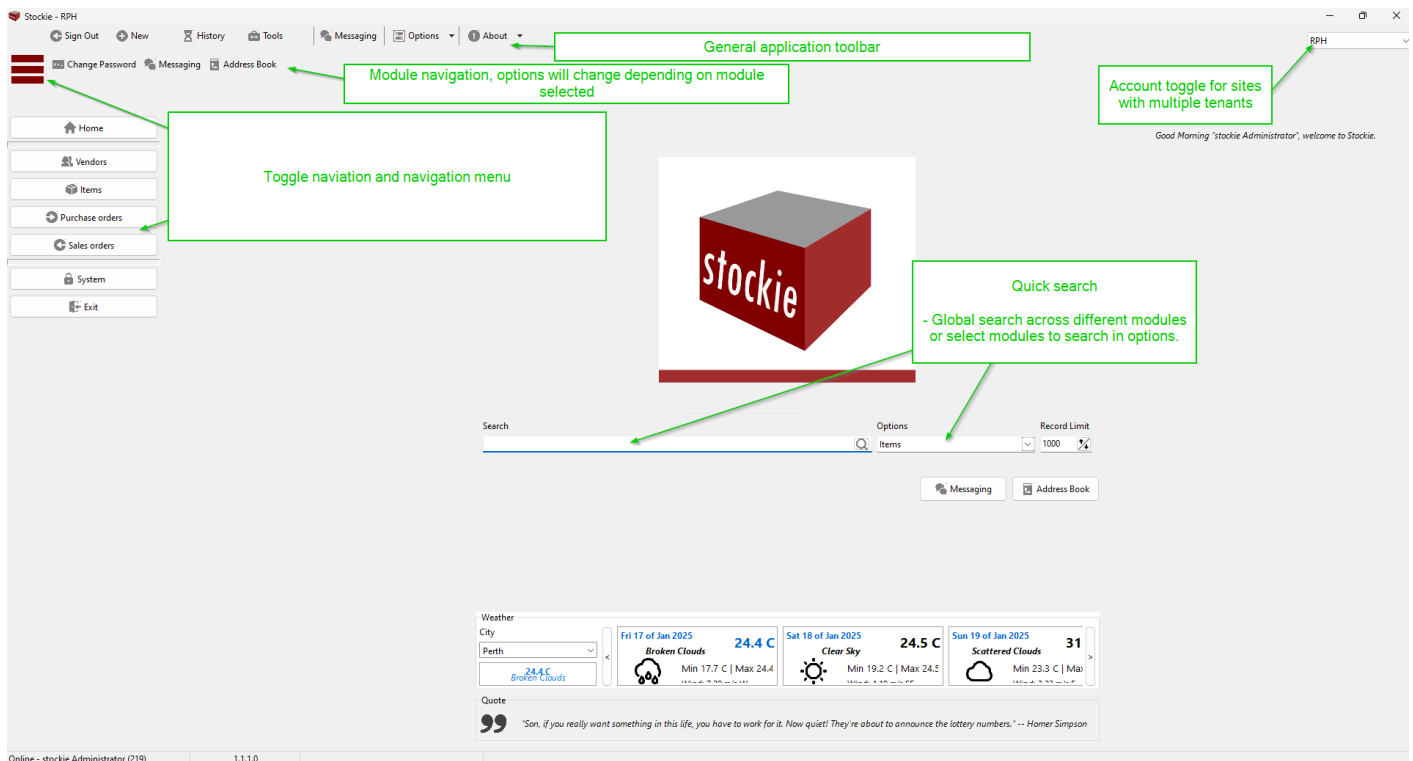
Login options may vary depending on the environment configured for your installation

Web hosted login	Microsoft SSO	Local or LDAP
 <p>A web-based login form with the heading "Enter credentials to sign in". It contains two input fields: the first for a username (containing "ABIT_tristan") and the second for a password (masked with dots). Below the fields is a blue "Sign in" button with a right-pointing arrow.</p>	 <p>A Windows-style dialog box titled "nukeleus". It has tabs for "Local" and "Microsoft". The "Microsoft" tab is selected, showing the Microsoft logo and a list of accounts under the heading "Account". One account, "ABit - Dev", is listed. A green callout box points to the Microsoft logo and the "Ok" button, containing the text: "Select account and press Microsoft Logo or Ok to sign in".</p>	 <p>A Windows-style dialog box titled "Stockie". It has tabs for "Local" and "Account". The "Local" tab is selected, showing a "Stockie" logo on a monitor. The "Account" tab is also visible, showing fields for "Username" (containing "administrator") and "Password". A green callout box points to the "Local" tab and the input fields, containing the text: "Select account and enter username and password.".</p>
After login, select "Stockie"	Login to Microsoft Entra	Login complete



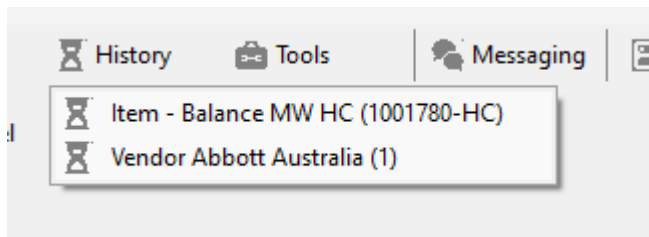
# Home page and navigation

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.

Show or hide columns by selected drop down arrow

Customise grid columns

Check all Uncheck all Invert selection

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

Vendor Code Active

AA

AT

Resize columns

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

## Grid footer options

The screenshot shows the 'Grid Data' window with several callouts explaining its components:

- Last date and time grid data was refreshed.** Points to the 'Last update' field showing '17/01/2025 8:12:14 AM'.
- Current record position and total records in grid** Points to the '1:827' indicator.
- How long it took to gather data** Points to the 'Duration: 0.015 sec.' indicator.
- Quick search of data in the grid** Points to the search bar containing '17/01/2025 8:12:14 AM'.
- First, prior, next or Last quick navigation** Points to the navigation buttons (X, back, forward, end).

# 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 search criteria and action buttons. Annotations in green boxes provide additional information:

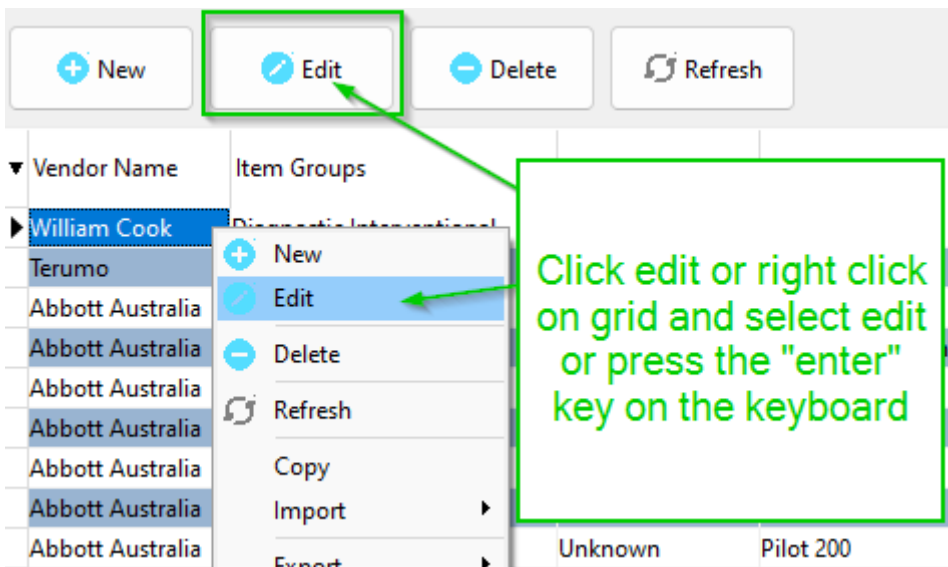
- Enter search information:** Points to the 'Location' dropdown menu.
- Limits the results returned on a search. If you are hitting the limit add other criterias.** Points to the 'Record limit' input field, which is set to 1000.
- The search will happen automatically after changing search settings.**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

The panel includes fields for Quick Filter (Active items), Description, Part number, Vendor (No selection), Type (No selection), Location (No selection), Item ID, Size, and Tender number. Action buttons include New, View, Delete, and Refresh. A Search button and a Reset button are also present.

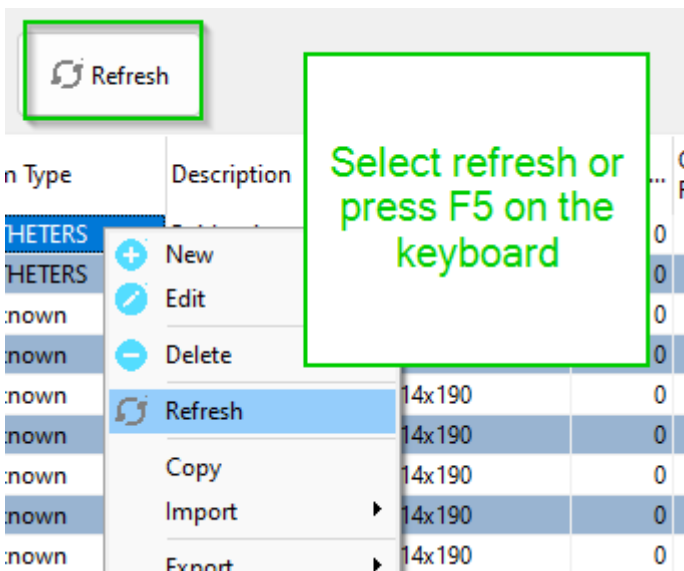
## Creating new entries

The screenshot shows the 'Item Search' panel with the '+ New' button highlighted. A context menu is open, showing options: New, View, Delete, Refresh, Copy, Import, and Export. An annotation in a green box states: 'Click new or right click on grid and select new or press the "insert" key on the keyboard.'

## Editing existing entries

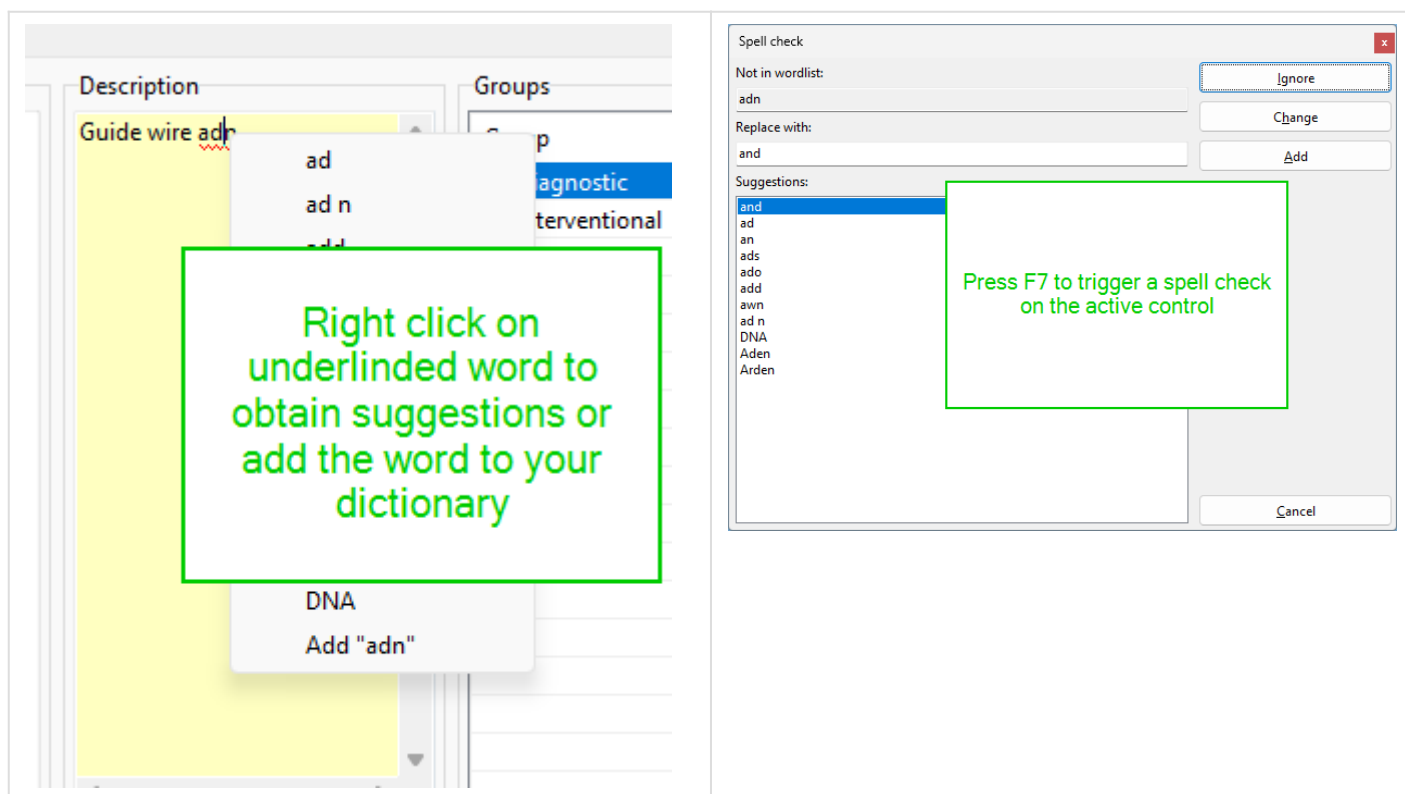


## Refresh data



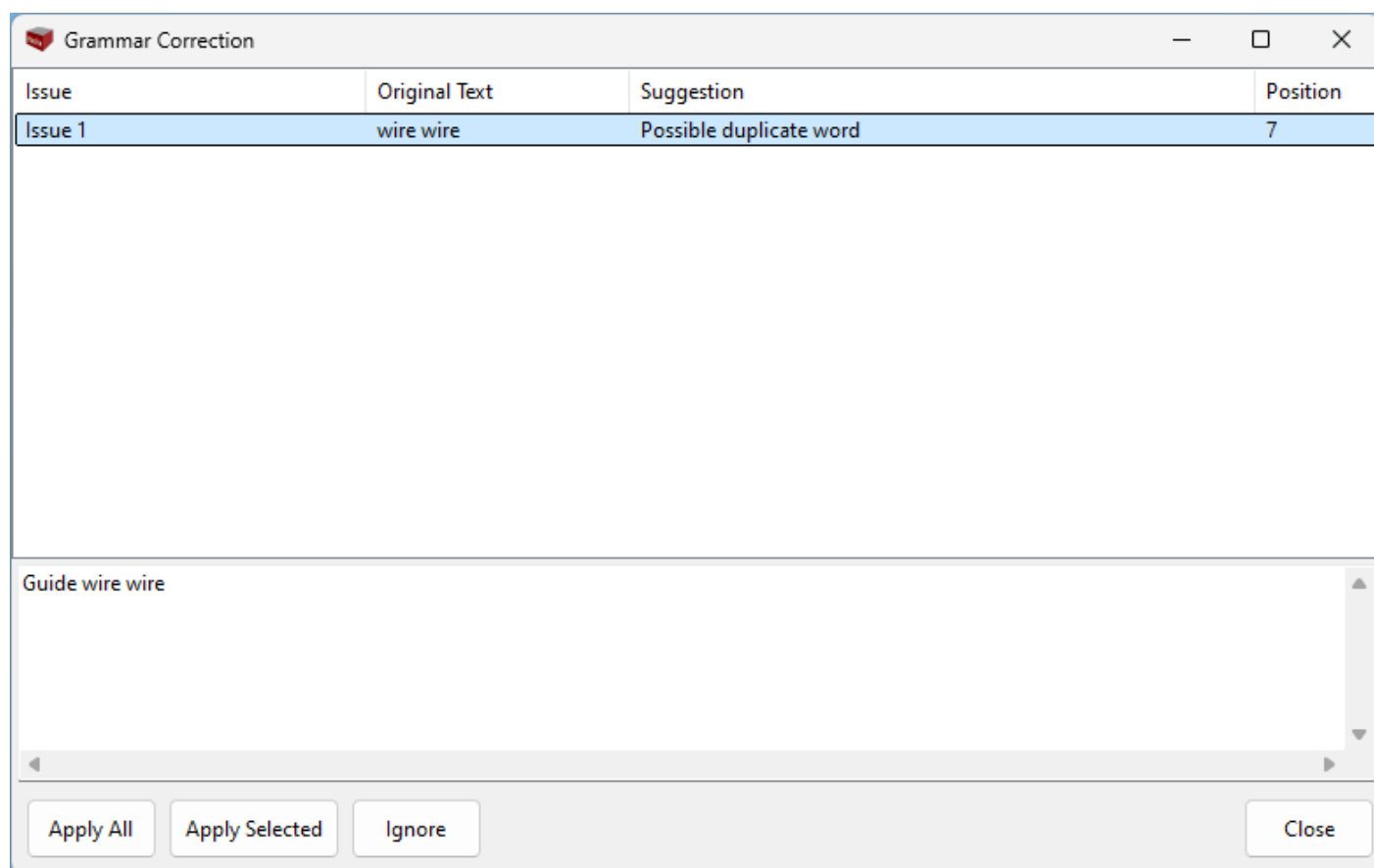
## Spell checking

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.



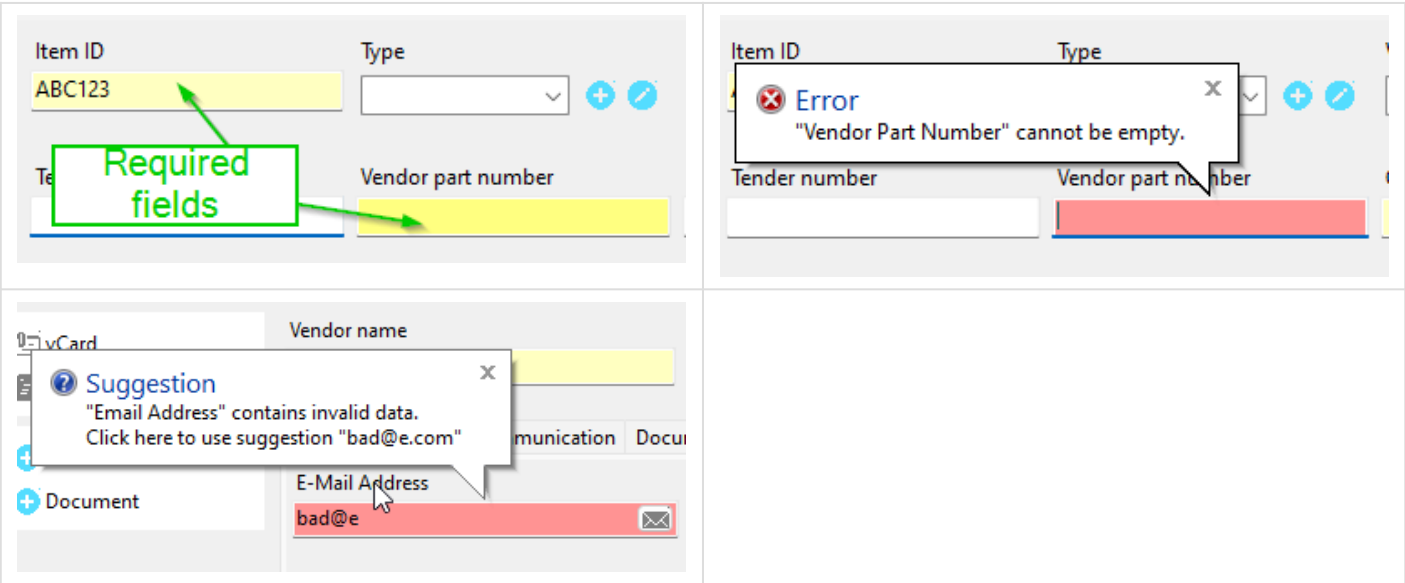
## Grammar checking

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"

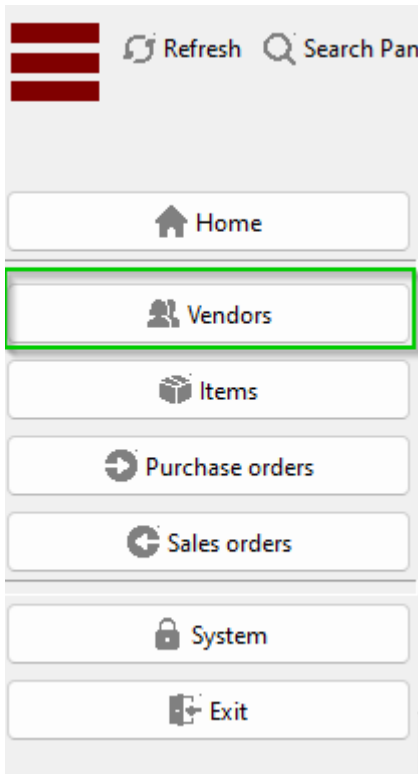
Audit Field Name	Audit Field Old Value	Audit Field New Value	Audit Notes	Fullname	Staffid
description	Guide wire wire	Guide wire		stockie Administrat	1
last_updated	17/01/2025 10:44:43 AM	17/01/2025 10:44:47 AM		stockie Administrat	1
last_updated	17/01/2025 10:42:12 AM	17/01/2025 10:44:43 AM		stockie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

GeneralAddressCommunicationDocuments

NewEditDeleteRefresh

Comm...StaffidVendor...Comm...Communication Notes

13826941Contacted vendor for new pricing

Audit logDocument

Spell check on save

DetailsDocuments

TypeTimeDateSource Id

General12:05:17 PM17/01/20254

NotesOpen AICreated By

Created DateCreated TimeModified ByModified DateModified Time

stockie Administrator17/01/202512:05:17 PMstockie Administrator17/01/202512:06:01 PM

Contacted vendor for new pricing list

1:1Duration: 0

BrowseSave and CloseSaveClose

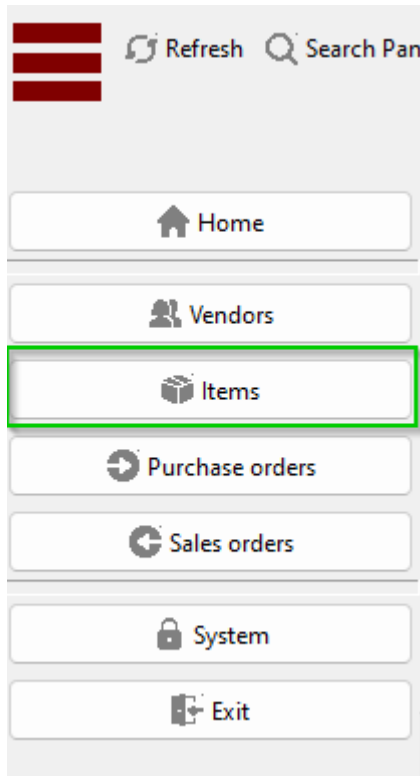
## Documents

Store documents related to each Vendor

GeneralAddressCommunicationDocuments						
ViewNewEditDeleteRefreshCopyExportSearch						
	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"

# Stocktake

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

The screenshot displays the Stocktake application interface. On the left is a navigation sidebar with buttons for Home, Vendors, Items (highlighted with a green box), Purchase orders, Sales orders, System, and Exit. The top header includes a Refresh button, a Search Panel, and a Stocktake button (highlighted with a green box). The main area features an 'Item Search' section with filters for Quick Filter (set to 'Active items'), 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 a Stocktake button (highlighted with a green box). A table with columns Vendor Name, Item Groups, Item Type, Description, Size, and Quantity is shown. A right-click context menu is open over the table, 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 text box on the right contains the instruction: '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, listing various item IDs, with '1005357H' selected. To the right of the table is a 'Quantity on hand' input field with the value '0'. At the bottom right are 'Save', 'Cancel', and 'Delete' buttons. Annotations in green boxes with arrows point to specific elements: 'Copy the value from item quantity on hand to quantity reported' points to the 'Quantity reported' field; 'Current item quantity on hand' points to the 'Quantity on hand' input field; and 'Add items to the stocktake, and update the quantity reported' points to the dropdown menu.

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	

1005357H

1005357H

1009664

1010480-H

1010481-H

1010482-H

1011834H

1011842

1011880J

1012067-03

1013319

1014652

110100483

12673

Quantity on hand: 0

Save

Cancel

Delete

Insert

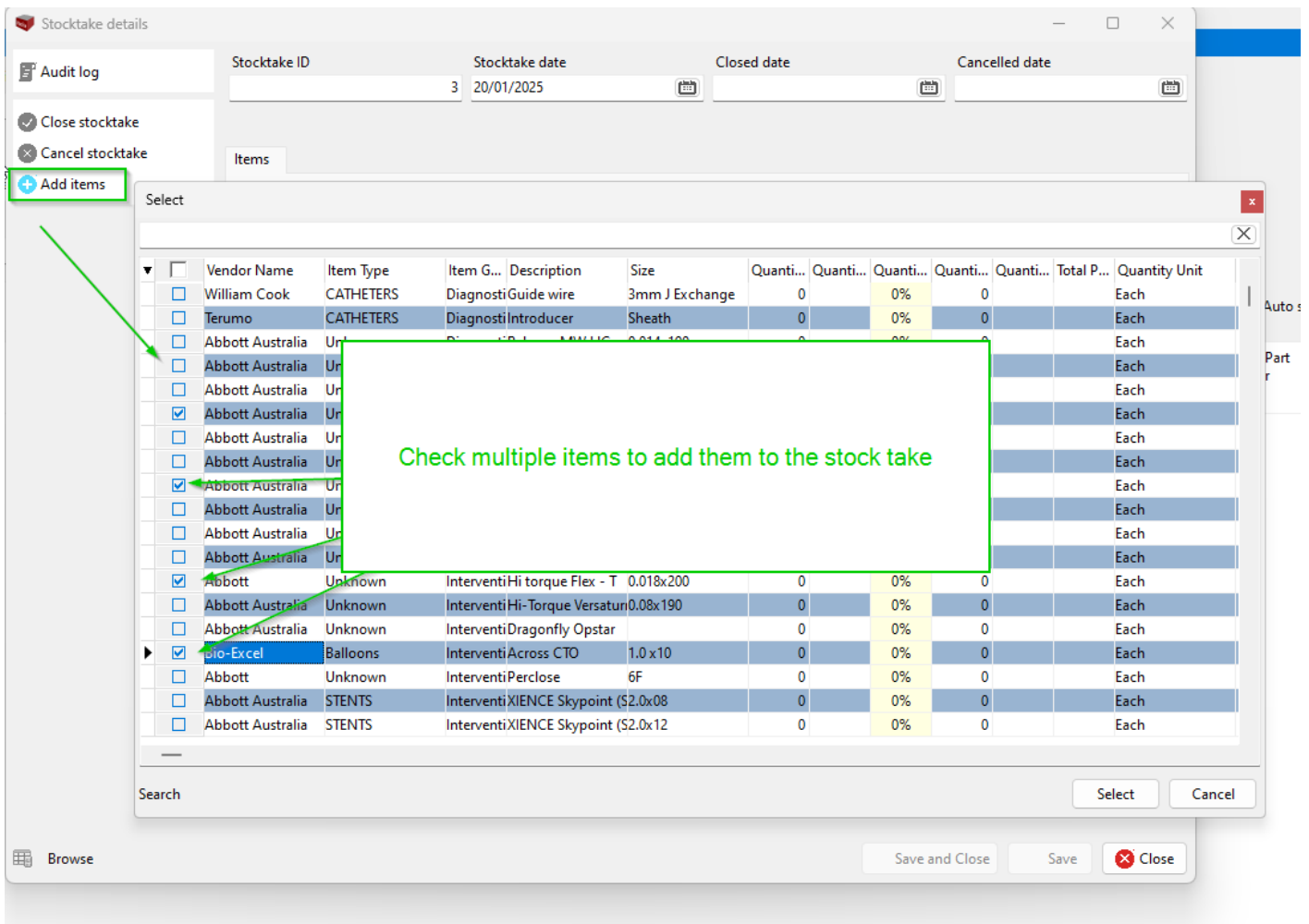
Save and Close

Save

Cancel

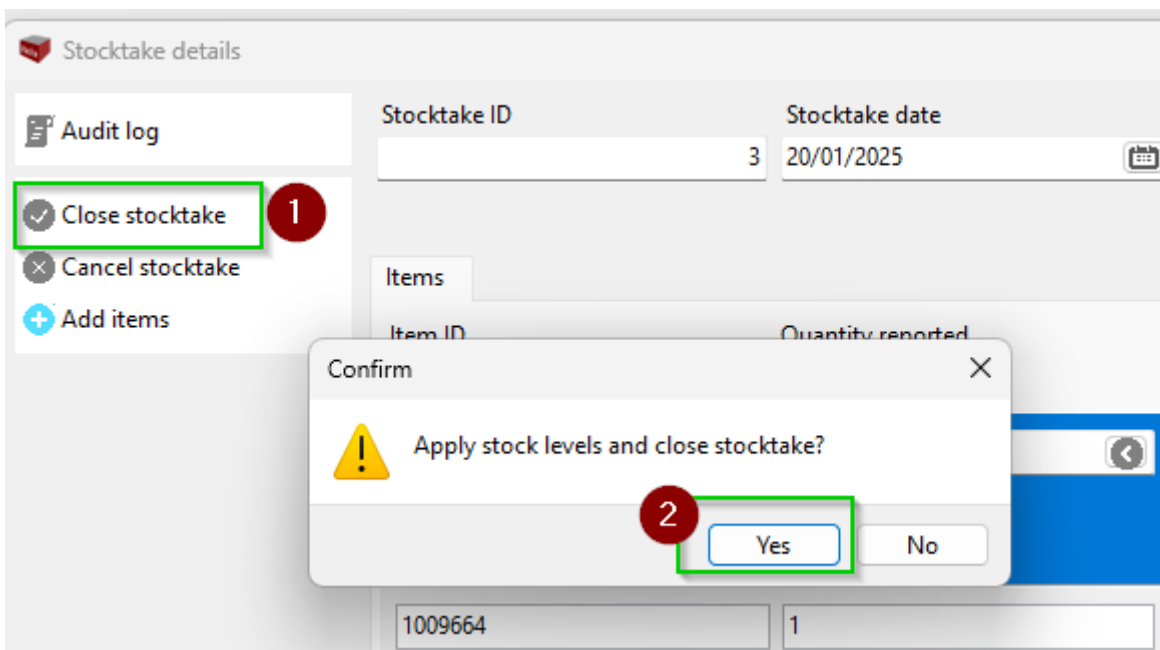
Option to bulk add items





## 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.

