

# Stockie - User guide

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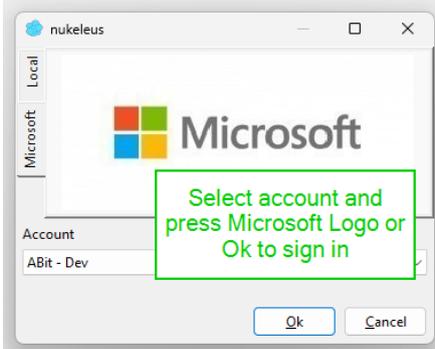
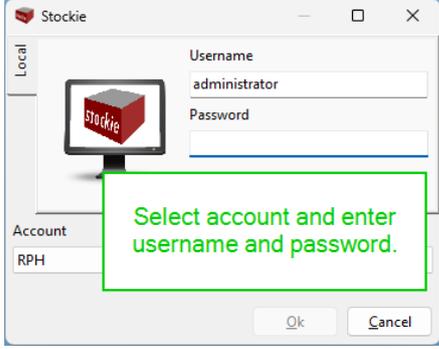
# User interface

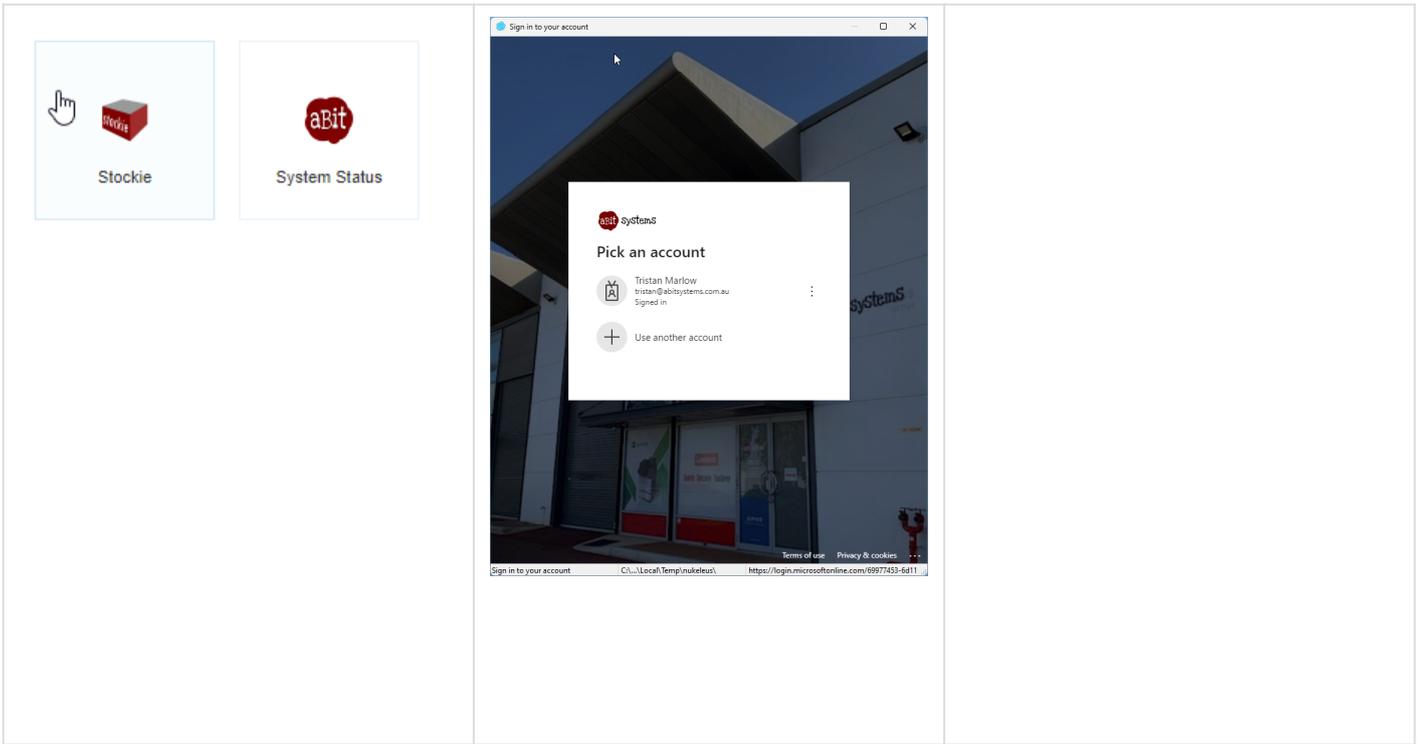
## Overview

This is a general overview of the user interface for Stockie

## Login

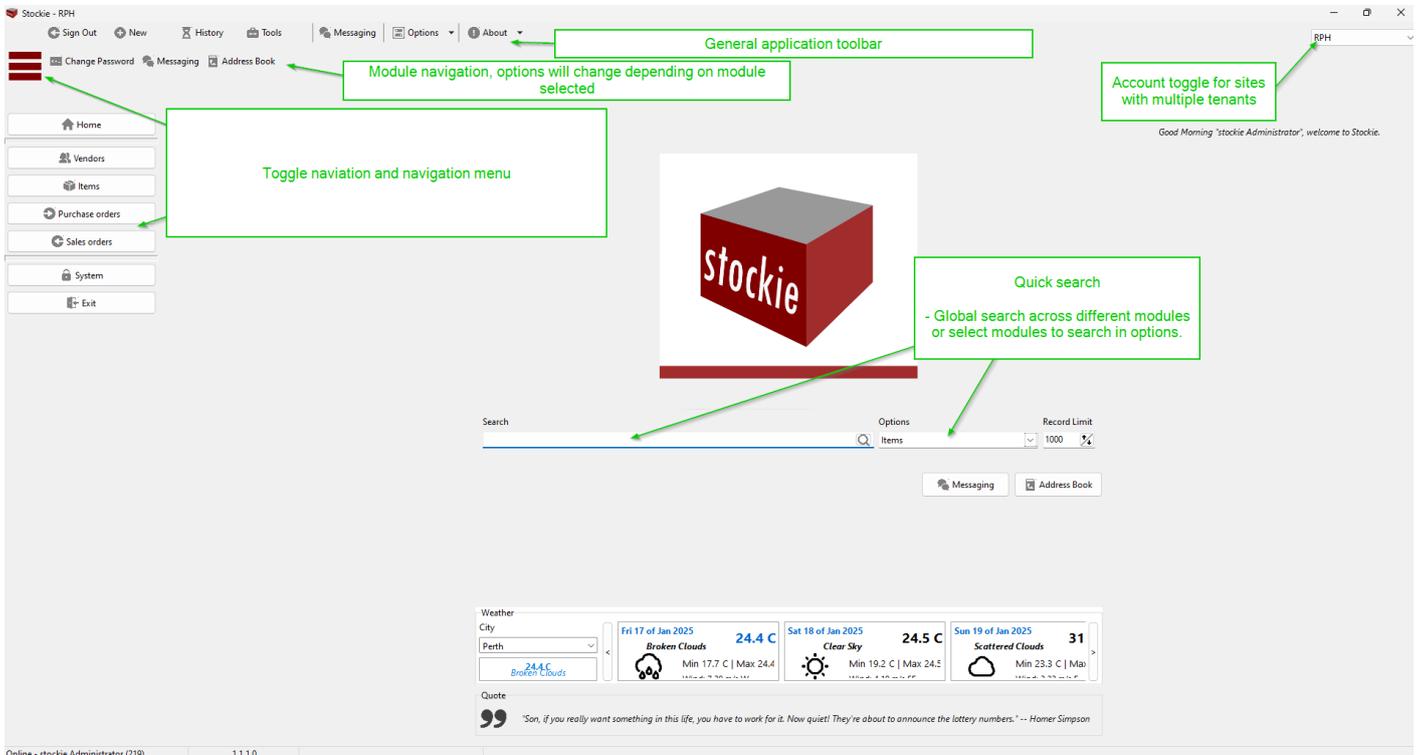
Login options may vary depending on the environment configured for your installation

Web hosted login	Microsoft SSO	Local or LDAP
 <p>Enter credentials to sign in</p> <input type="text" value="ABIT_tristan"/> <input type="password" value="....."/> <input type="button" value="Sign in"/>	 <p>Select account and press Microsoft Logo or Ok to sign in</p>	 <p>Select account and enter username and password.</p>
After login, select "Stockie"	Login to Microsoft Entra	Login complete



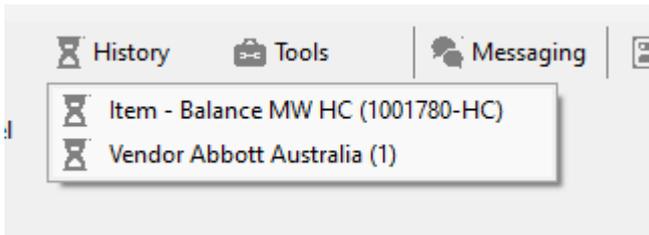
# Home page and navigation

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.

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

- Show or hide columns by selected drop down arrow:** Points to a dropdown arrow in the grid header.
- Resize columns:** Points to a vertical line between columns in the grid header.
- Drag a column to move it's position and change column order:** Points to a column header being dragged.

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

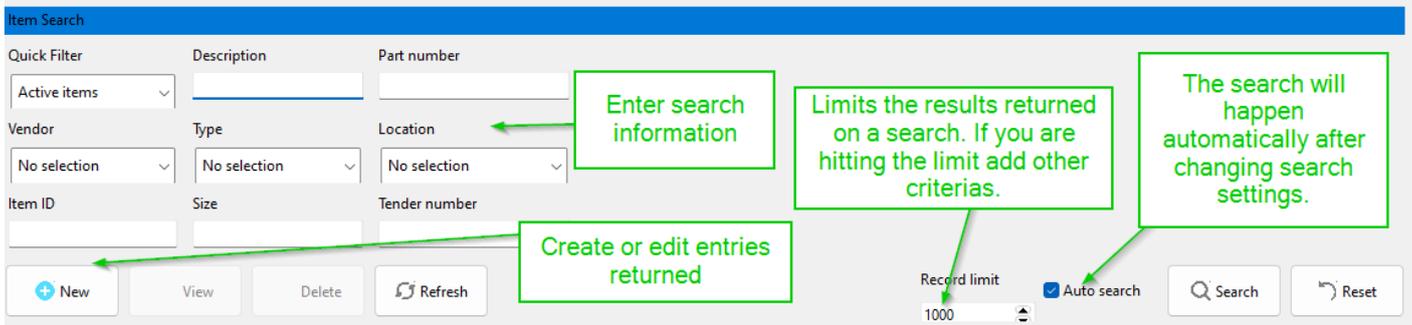
### Grid footer options

A screenshot of a data grid footer with several annotations in green boxes:

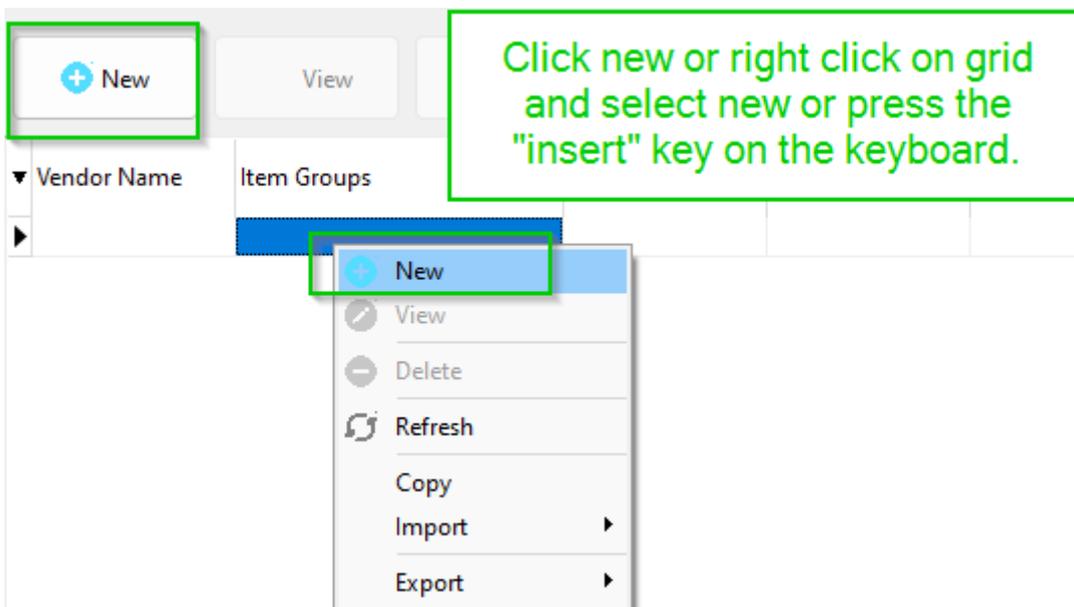
- Last date and time grid data was refreshed:** Points to the footer text 'Last update: 17/01/2025 8:12:14 AM'.
- Current record position and total records in grid:** Points to the footer text '1:827'.
- How long it took to gather data:** Points to the footer text 'Duration: 0.015 sec.'.
- Quick search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

# Search panels

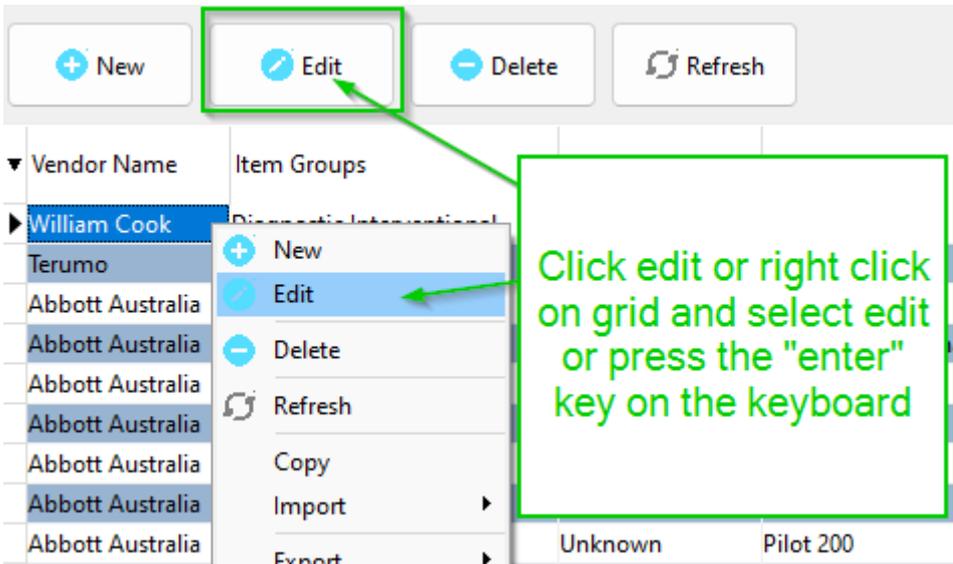
When a search panel is available it will allow quick search of information. The panel may also automatically search when fields are modified.



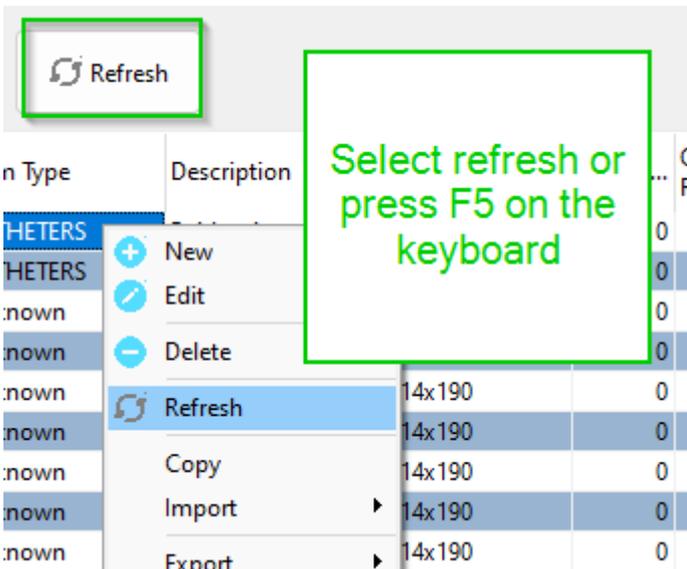
# Creating new entries



# Editing existing entries

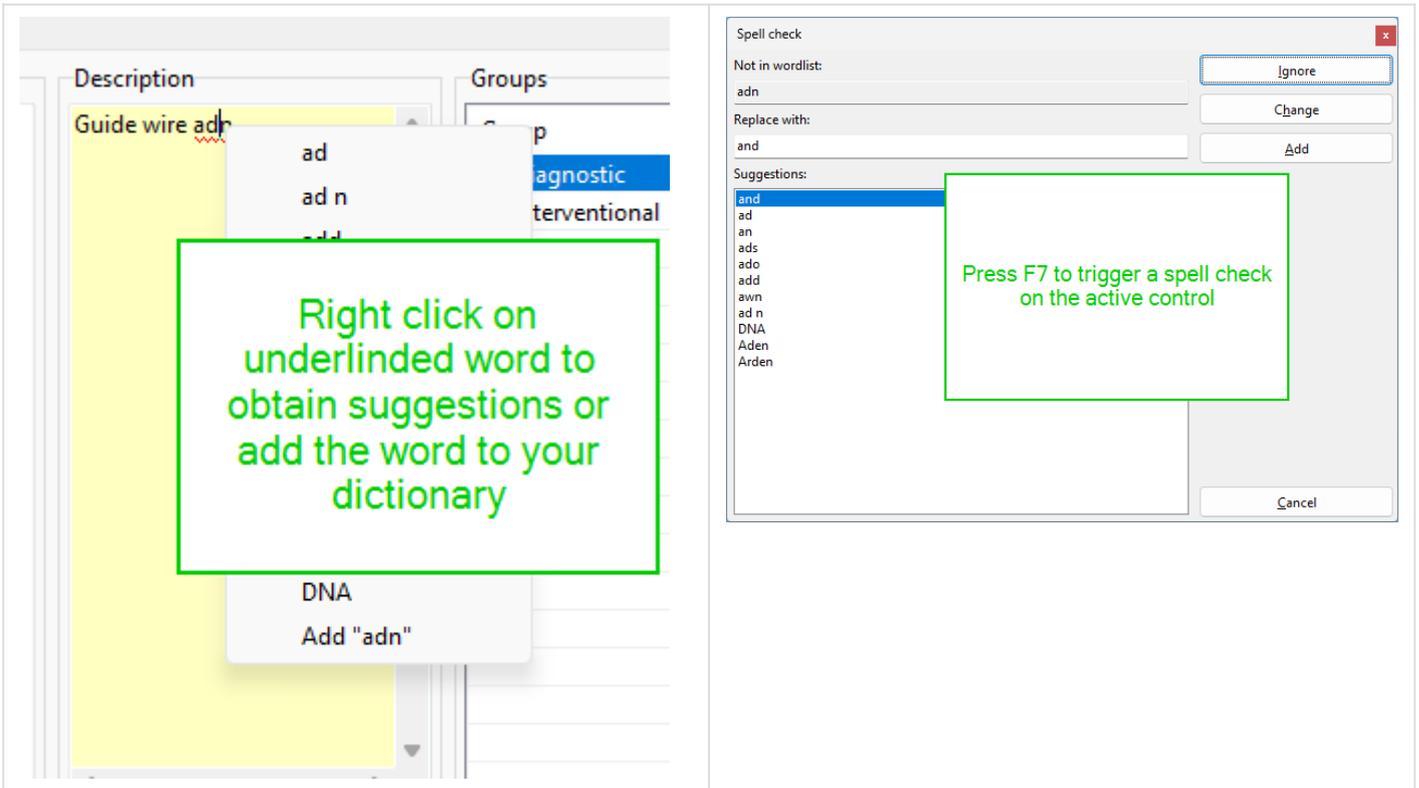


## Refresh data



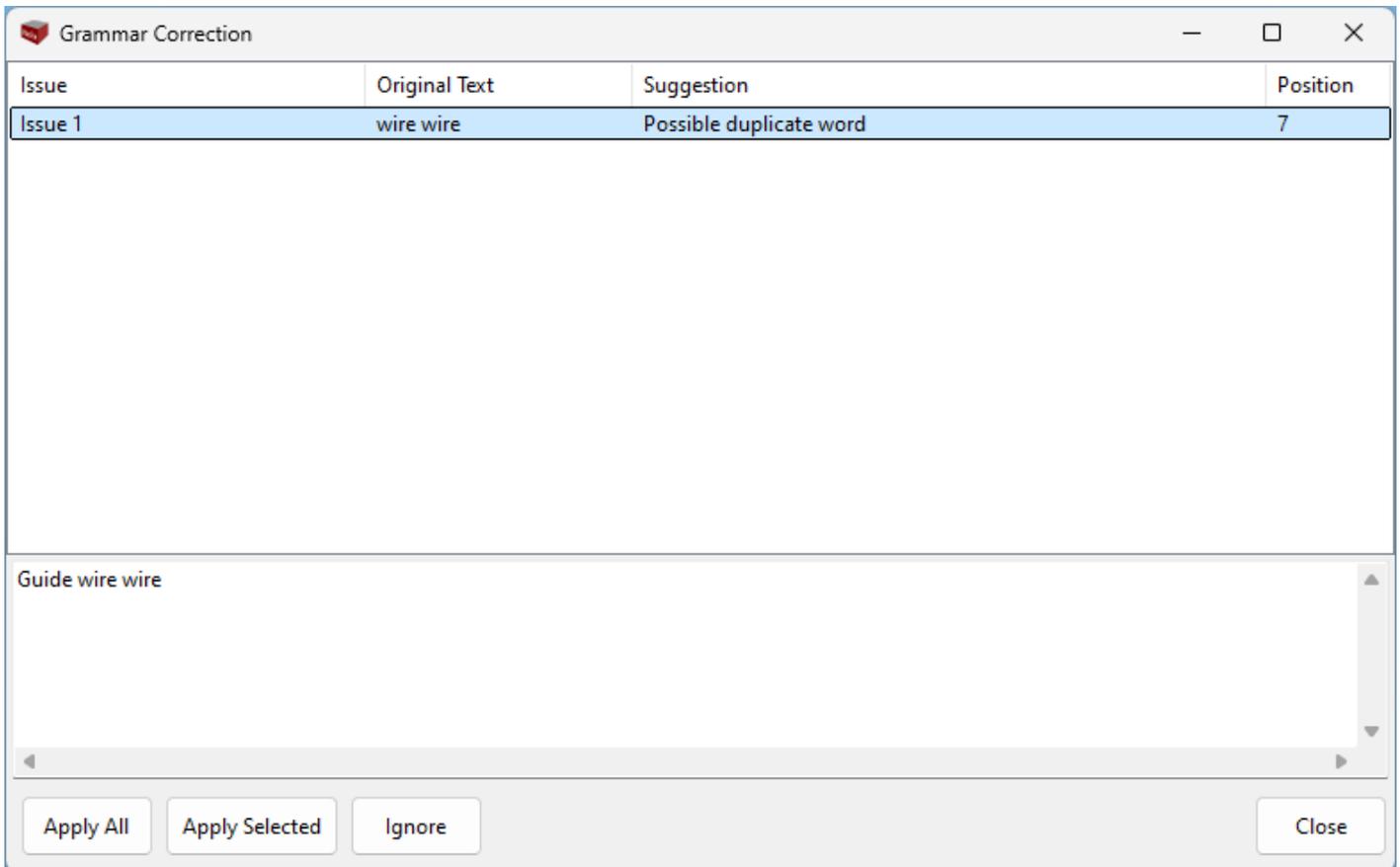
## Spell checking

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.



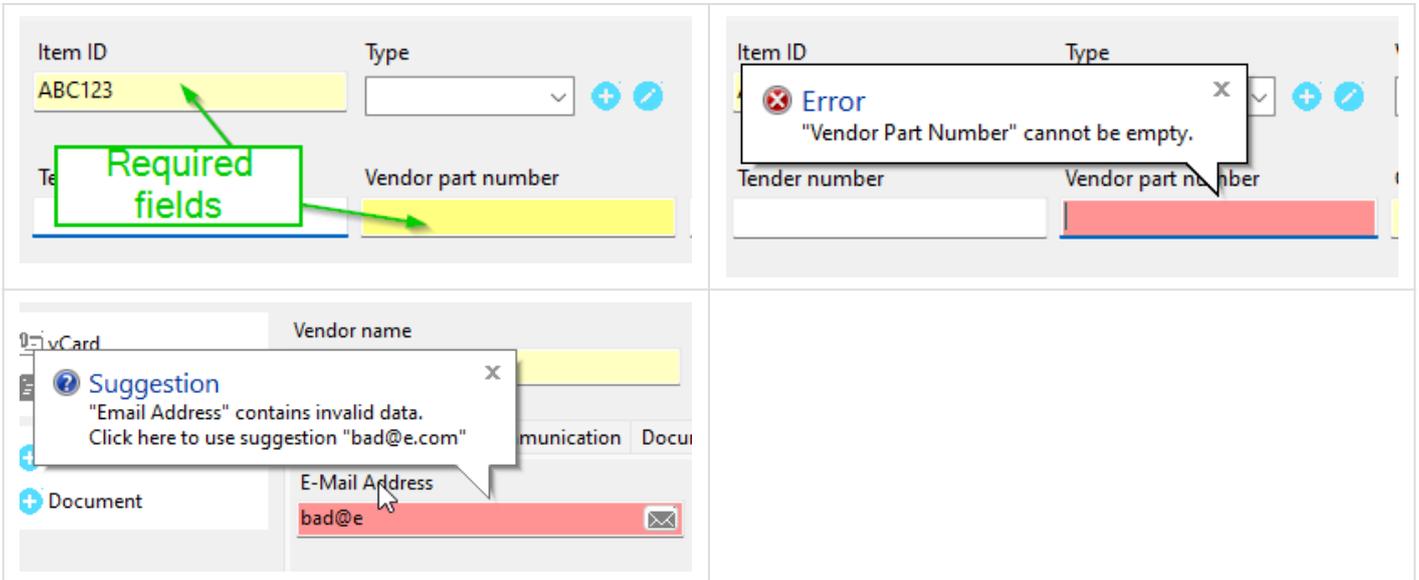
# Grammar checking

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"

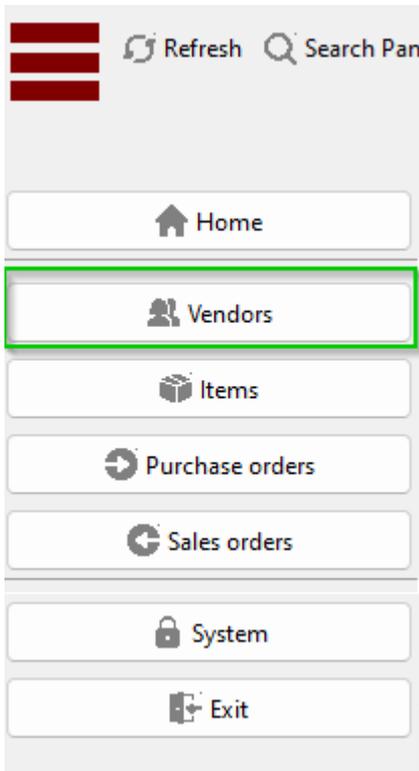
Audit Field Name	Audit Field Old Value	Audit Field New Value	Audit Notes	Fullname	Staffid
description	Guide wire wire	Guide wire		stockie Administrat	1
last_updated	17/01/2025 10:44:43 AM	17/01/2025 10:44:47 AM		stockie Administrat	1
last_updated	17/01/2025 10:42:12 AM	17/01/2025 10:44:43 AM		stockie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

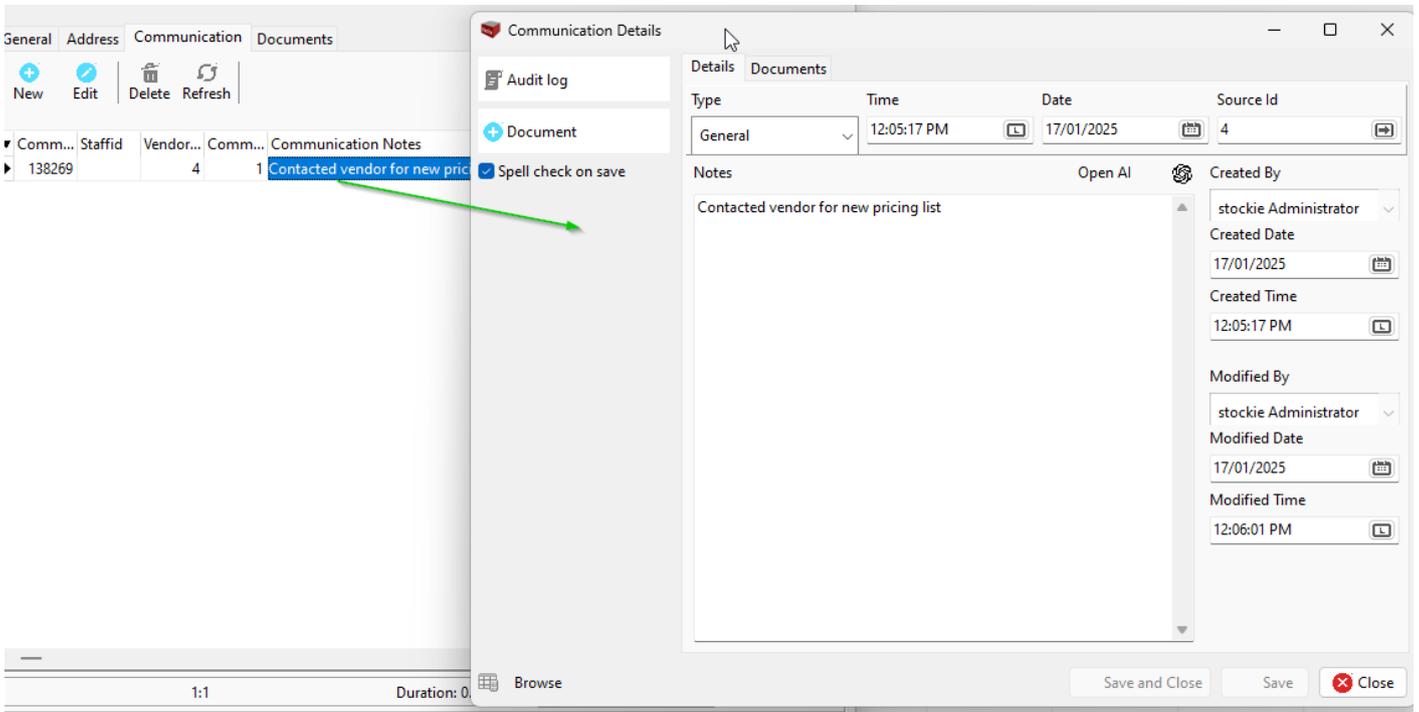
E-Mail Address:      Mobile Phone:     Business Phone:     Facsimile:

Website:  

Browse    Save and Close    Save    Close

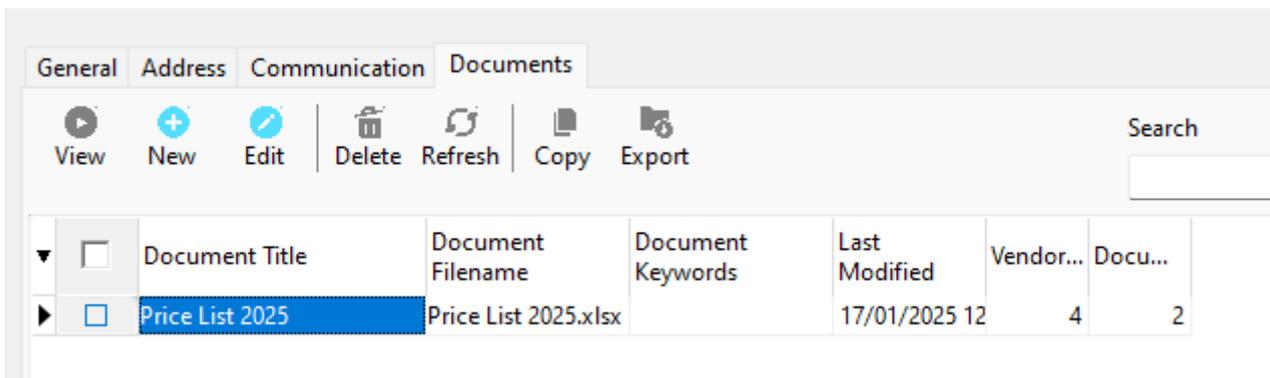
## Communication

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



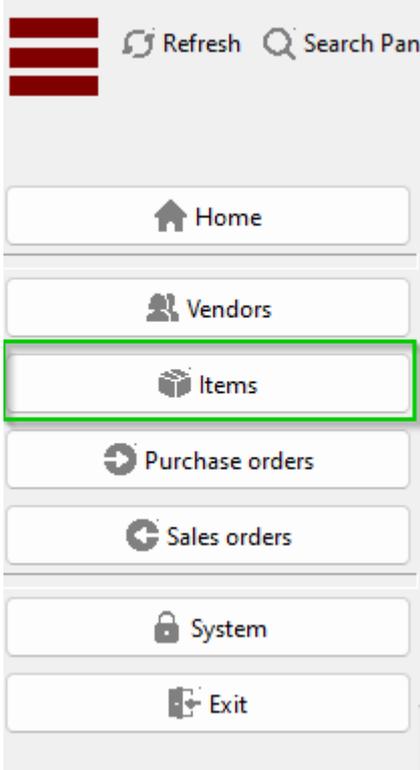
## Documents

Store documents related to each Vendor



# 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

Quantity on hand  
0

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

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 with a sidebar on the left containing navigation buttons: 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 with columns 'Vendor Name', 'Item Groups', 'Item Type', 'Description', 'Size', and 'Quantity' is visible. 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 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

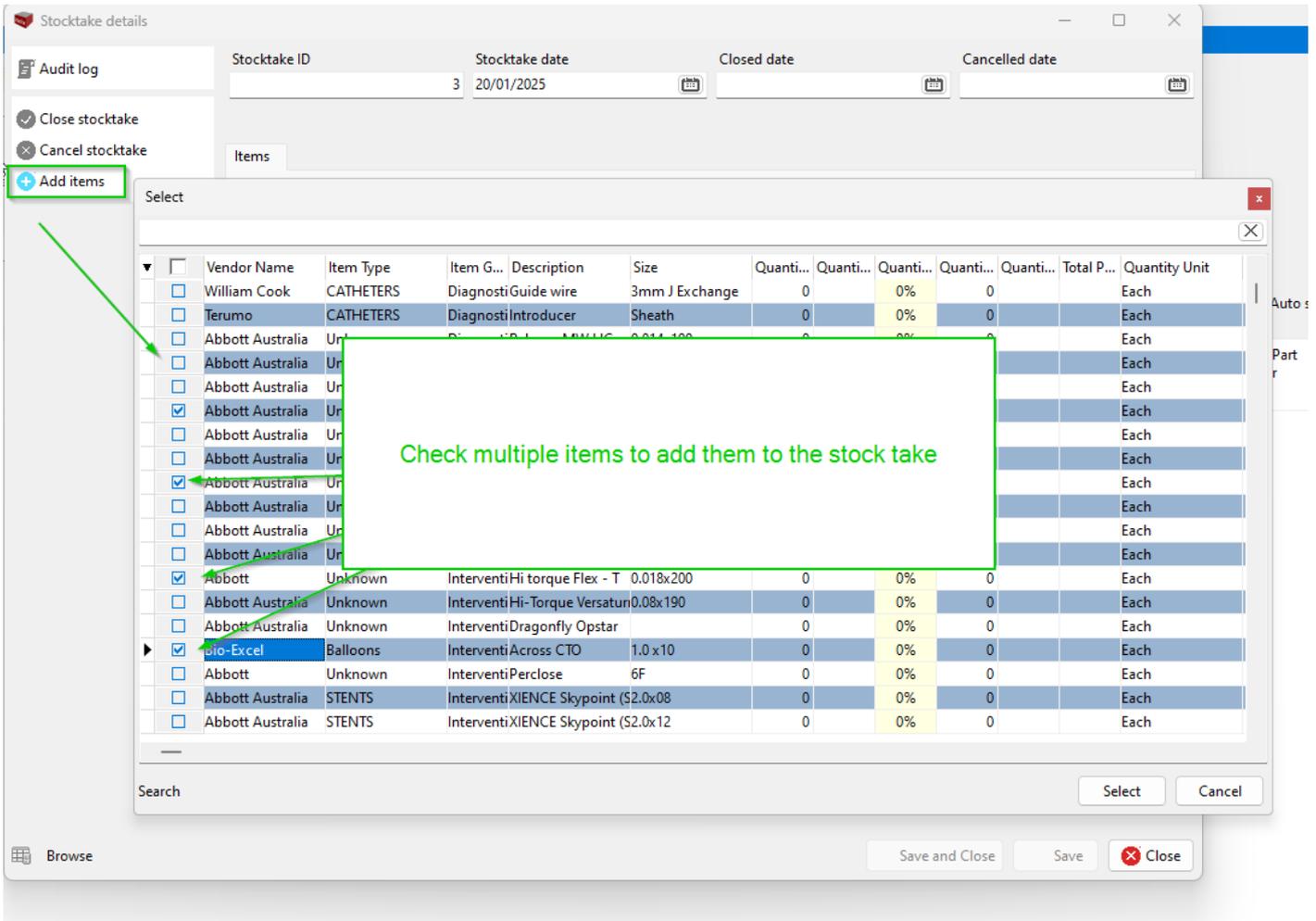
Add items to the stocktake and update stock values

The screenshot shows the 'Stocktake details' window with the following elements:

- Stocktake ID:** 3
- Stocktake date:** 20/01/
- Closed date:** (empty)
- Cancelled date:** (empty)
- Items Table:**

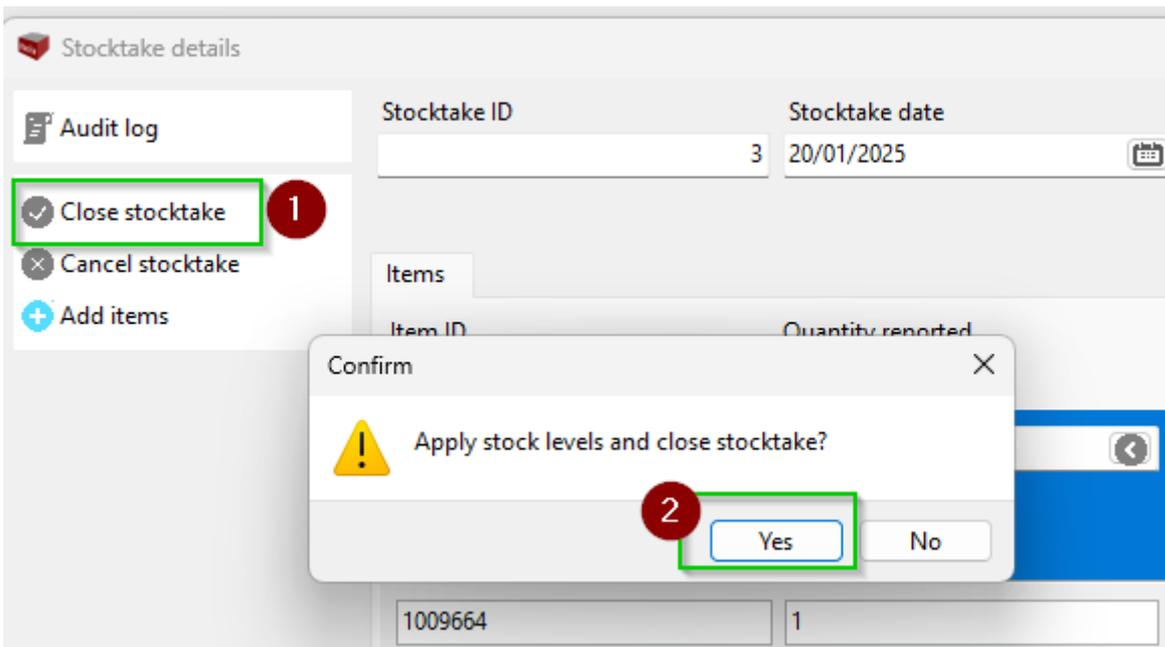
Item ID	Quantity reported	Quantity on hand
1005357H	1	
- Dropdown Menu:** Opened, showing a list of item IDs including 10.0Fx10CM, 1001780-HC, 1001782-HC, 1005357H, 1009664, 1010480-H, 1010481-H, 1010482-H, 1011834H, 1011842, 1011880J, 1012067-03, 1013319, 1014652, 110100483, and 12673.
- Annotations:**
  - 'Copy the value from item quantity on hand to quantity reported' points to the 'Quantity on hand' column.
  - 'Current item quantity on hand' points to the 'Quantity on hand' field for item 1005357H.
  - 'Add items to the stocktake, and update the quantity reported' points to the 'Quantity reported' field for item 1005357H.
- Buttons:** 'Save', 'Cancel', and 'Delete' are visible in the bottom right of the table area.

Option to bulk add items



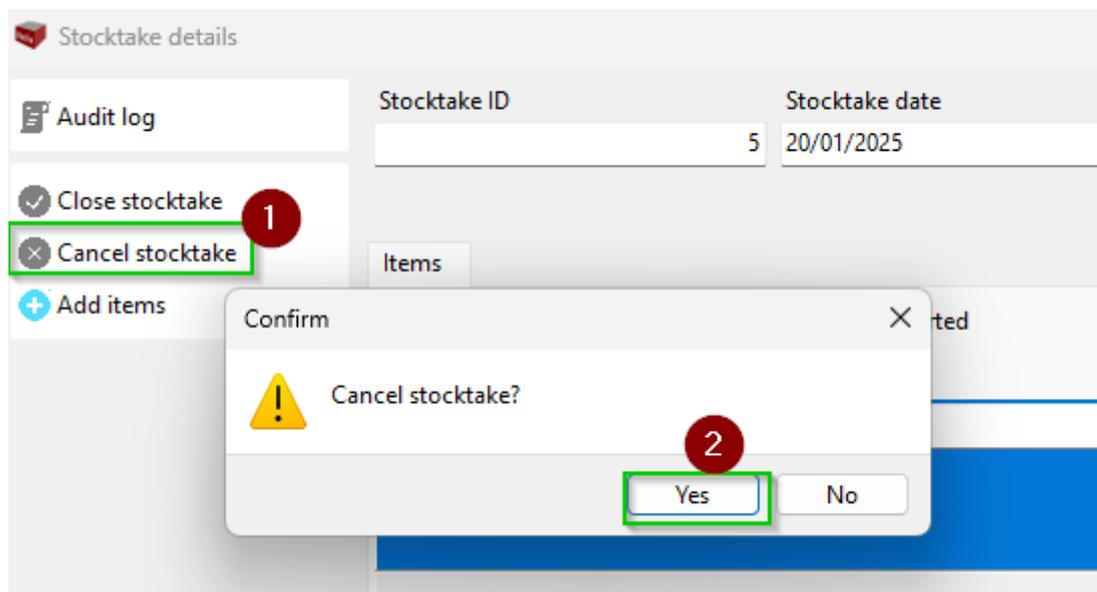
# Close a stocktake

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



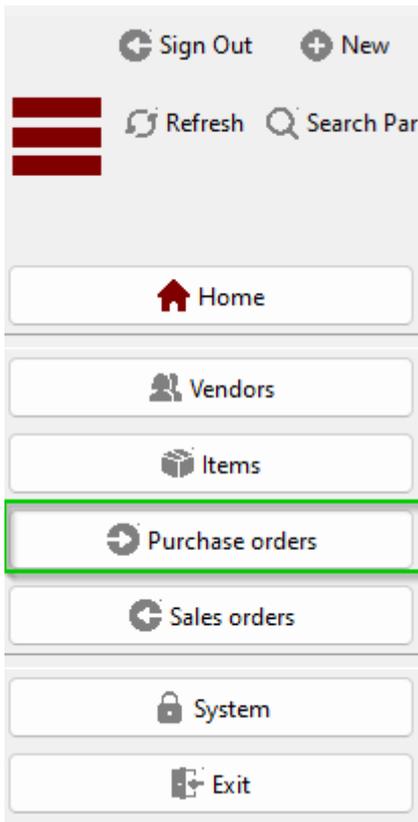
# Cancel a stocktake

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:  Type:

Item ID:  Size:

Record limit: 
 Auto search

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

Search for existing orders or create a new entry

Select vendor and add purchase order items

### Purchase order details

Reference:  Order date: 10/02/2025 Vendor:  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**

**DeliveryAddress**

Qty	Partnumber	Details	Requisition	Comments	Total
1	1014652	Unknown Dragonfly Opstar			0.00
5	1005357H	Unknown Whisper MS 0.014x190			0.00
<b>Total</b>					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: 10/02/2025

Vendor: Abbott Aus

**Receive stock**

Purchase order number: 5

Received date: 11/02/2025

Received time: 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.

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

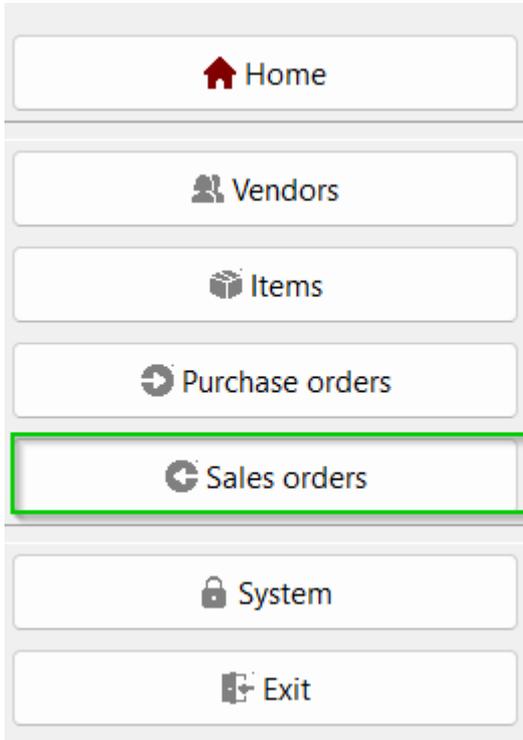
Reference: [ ] Order date: 10/02/2025

Receive stock history

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

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

Items Documents

Item ID:  Qty:

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**

- 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	