

Stock It Easy 8 - User Guide



Stock It Easy is a stock management software for small and medium-sized enterprises.

Its didactic and pleasant ergonomics makes it easy to take control, it is easy to quickly start managing its stocks using the software.

Basic use allows simple encoding of stock or inventory management, a database of items, its customers, and suppliers. If your job requires more accurate setting or encoding, Stock It Easy's settings and many features should respond to most stock management usage cases.

You can through the program manage more than one warehouse, so reports, rankings, documents, inventories will be usable per warehouse, but you will still be able to have an overall view of your stock situation.

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1 Installing Stock It Easy

1.1 Install Stock It Easy for a single computer

1.1.1 How to install Stock It Easy for individual use

Stock It Easy Lite only works in single-station mode (one user on a single computer).

Stock It Easy works in single-position or multi-station mode.

Read also: Make an installation to use Stock It Easy on multiple networked computers connected to the same database.

Download the software (choose the Windows 32 or 64-bit version depending on your computer's OS) and save the installer to your computer.

- Launch the installer, authorize its execution (you must have administrator rights to complete the installation).
- Choose the installation language
- Accept the license to use
- Select installation directory
- Accept the installation of shortcuts and start the program

1.1.2 Update

If a newer version is detected, Stock It Easy will notify you and invite you to update.

Always preferably use the latest current version.

When you start the program, you are asked to select the database (examples or your base).

1.2 Install Stock It Easy in network

Stock It Easy allows use to multiple users connected simultaneously to the same database.

First installation

1. install Stock It Easy's reference program on a server
2. install the database on a server accessible by the various "customer" computers that will use Stock It Easy
3. install the Stock It Easy program on every "customer" computer

Updating an existing facility

1. install Stock It Easy's reference program on a server
2. When Stock It Easy is launched on a customer post, the update will be automatically applied

The server can be a computer (Windows) of the network

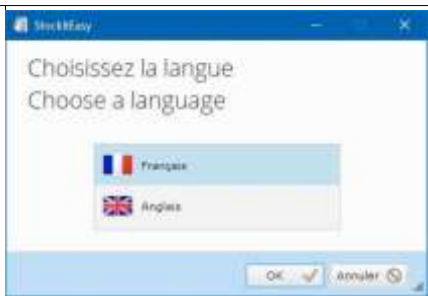


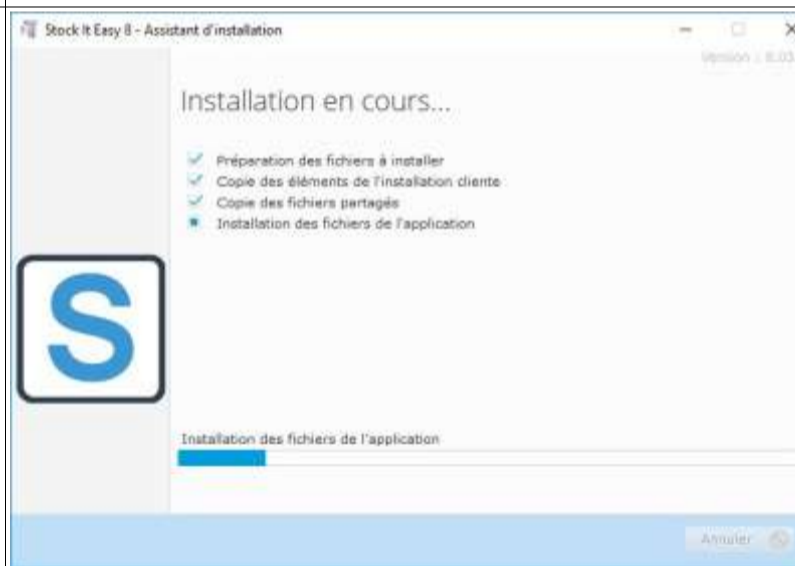
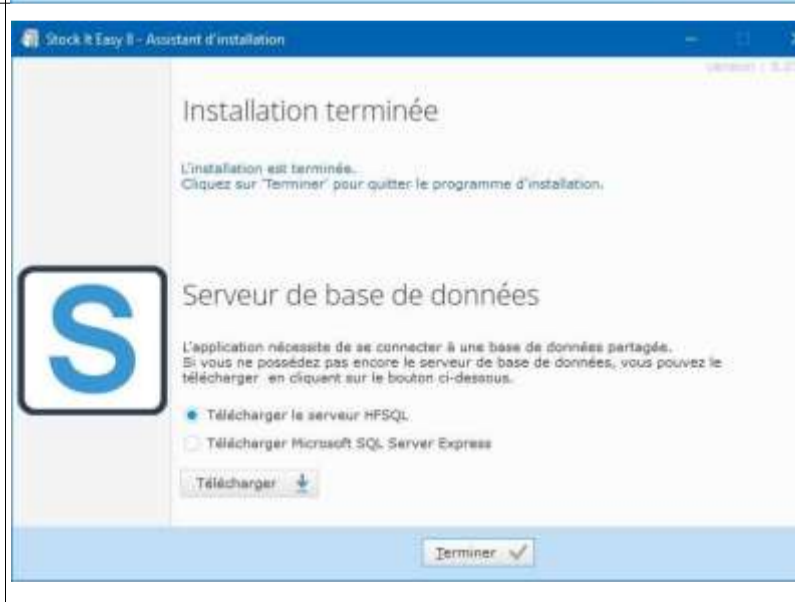
1.2.1 Install Stock It Easy Reference Program

The reference program is the program that will be installed from your server on your customer posts.

Download the installation program from the download page..

Choose the 32- or 64-bit installer. If your "server" and all your "client" posts are 64 bits, take the 64-bit version, if not, choose the 32-bit version.

Launch the installer, authorize its execution (you must have administrator rights to complete the installation)

<p>Select the language of installation</p>	
<p>Accept the license to use</p>	
<p>Select the directory where to install the reference installation, that is, the installer that will install the program on customer positions</p> <p>This directory must be accessible by all customer posts</p> <p>Click next</p>	
<p>The installation is underway...</p>	
<p>If you don't have a database server yet, select the type of server to install and click download.</p> <p>If you've already installed your database server, the reference installer installation is complete.</p> <p>If you haven't installed Stock It Easy on customer posts yet, do so by following this article, otherwise, the installation is complete, the update of the customer posts will be done when they launch the program on their computer.</p>	

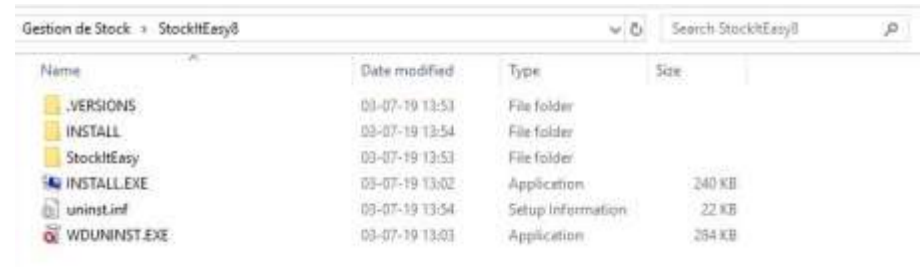
1.2.2 Install Stock It Easy on "customer" stations

From the Windows Explorer, from the client computer on which to install Stock It Easy, go to the directory where you installed the reference version.

In this directory, double click installs. EXE, this installation program is the one that allows the customer station to be installed for the first time.

After that, customer updates will be automatic if you have installed the reference installation update.

Once INSTALL. EXE launched, the rest of the installation is identical to the installation for a single computer.



1.2.3 Updated reference version

If a newer version is detected, Stock It Easy will notify you and invite you to update.

Download the installer of the reference version either directly from Stock It Easy or from our download page.

Make the installation as described in this article. Customer posts will be updated automatically when they are next launched.

1.3 Install database server

For networked use of Stock It Easy, the database must be shared via a database server.

During the first network installation, you will need to download and install the "engine" of one of these two databases.

Stock It Easy can operate on two different types of databases.

1.3.1 HFSQL

This database is the easiest to install if you don't have specific requirements or database management skills. With just a few clicks it will be installed on one of your servers (or computer accessible on your corporate network).

1.3.1.1 Install the HFSQL database server

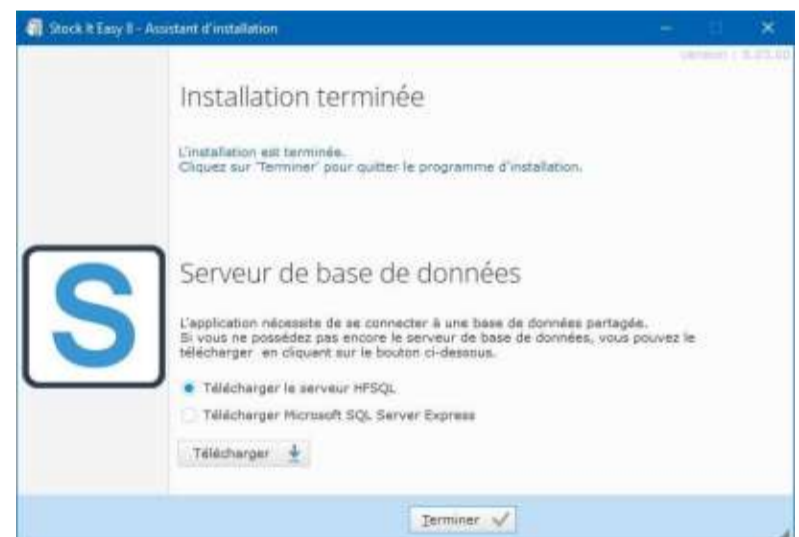
You have chosen to use Stock It Easy in a network with its native database.

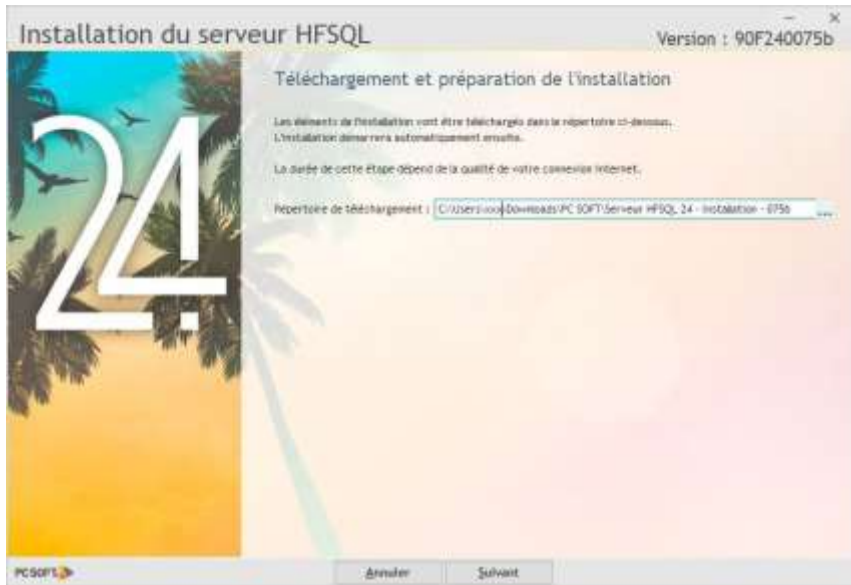
You downloaded the HFSQL server installer to your network as described in the final step of installing the reference version of Stock It Easy.

To install the server, you will need to be an administrator of the machine on which to install it.

This machine will ideally be a server with enough memory to ensure the speed of Stock It Easy, in case of small structure with a light load of the program, a computer will do the trick.

The server must be Windows-type.





Double click on the previously downloaded installation program.
The next assistant opens. Select a temporary directory or download the tools needed for installation, then click "Next"

Accept the terms of the license and click next



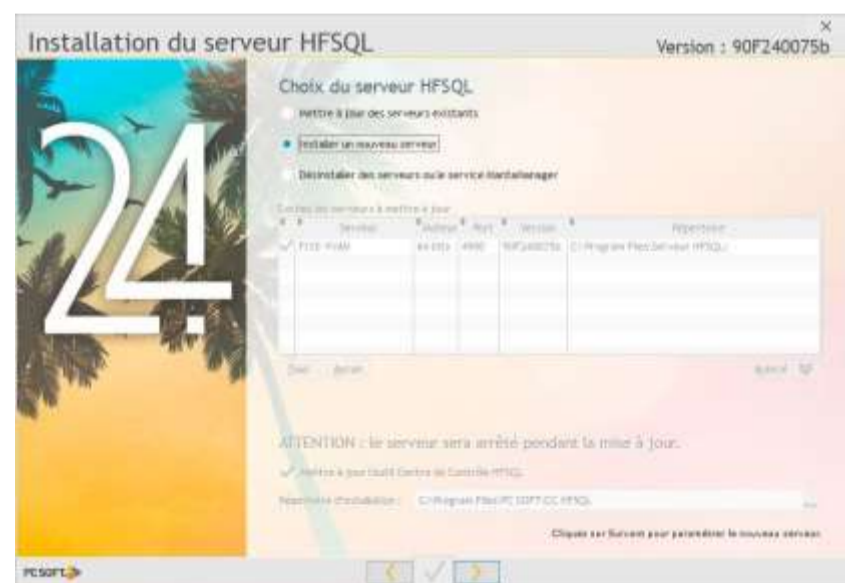
Choose where to install the server.

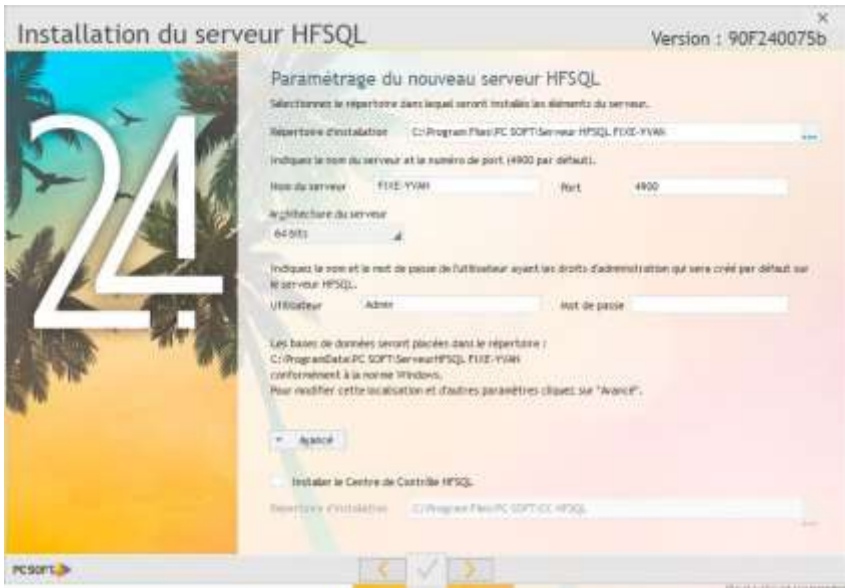


Choose to install a new server.

Note: You can also go through this assistant to update an existing server.

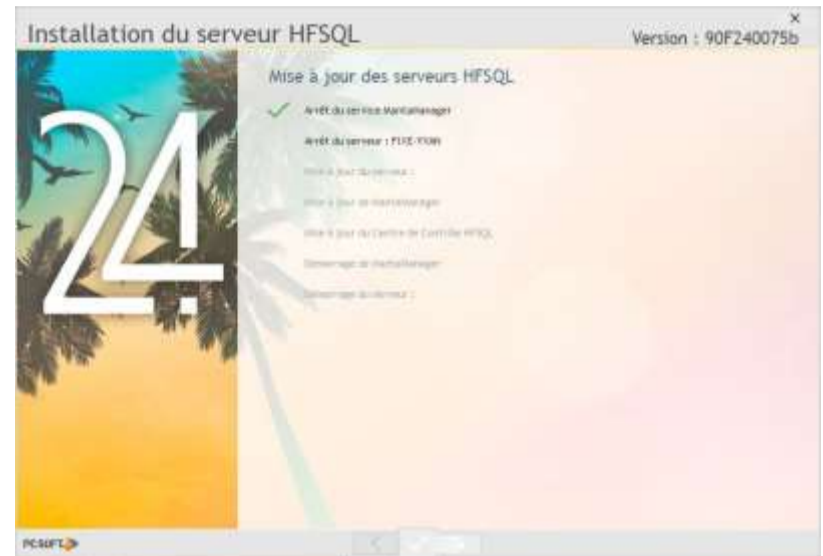
I advise you to leave the settings proposed by default.





For the connection to the server, the default user is Admin without a password. This is the user who will need to indicate in the login window to the Stock It Easy database. At first, leave it so and secure more afterwards if necessary when the installation is functional.

Also note



that the default port is the 4900. The most common problem when not connecting to a database is the port blocked by the firewall, and also the antivirus. Remember to check these 2 points in case of non-connection, both on the server and on the client post.

Click next until the installation is launched.

The installation is complete. You can connect a Stock It Easy "customer" post to this new database server.

To find out more about the HFSQL server administration, check out the online help:

https://doc.pcsoft.fr/?3540001&name=centre_controle_hfsql_presentation

Don't forget to set up a regular backup of your database.

1.3.1.2 Creating the database

The database will be created automatically when a Stock It Easy customer post is first launched.

By default, the name of the "StockItEasy8" database will be offered in the login window. It's up to you to give the base another name.



A user named admin without a password is created in the HFSQL database server (not to be confused with the username of the Stock It Easy program). You can use this username to log in to the base. You can also create another user on the HFSQL server via the control center (a shortcut is created on your server's desktop) and secure it with a password, note that that user must have rights identical to those of the admin user

1.3.2 Microsoft SQL Server

This database is very efficient, you may already be using it in your business for other applications. There's no need to download an installer, just follow the process of creating the database on that server via Microsoft Management Studio.

If you don't have a Microsoft SQL Server, you can download and install the Express version (free and enough for Stock It Easy) from the link available in the last installation assistant window.

At the end of the installation of the reference version, you can choose the server to download. Select it and click "Download."

1.3.2.1 Install SQL Server Express database server

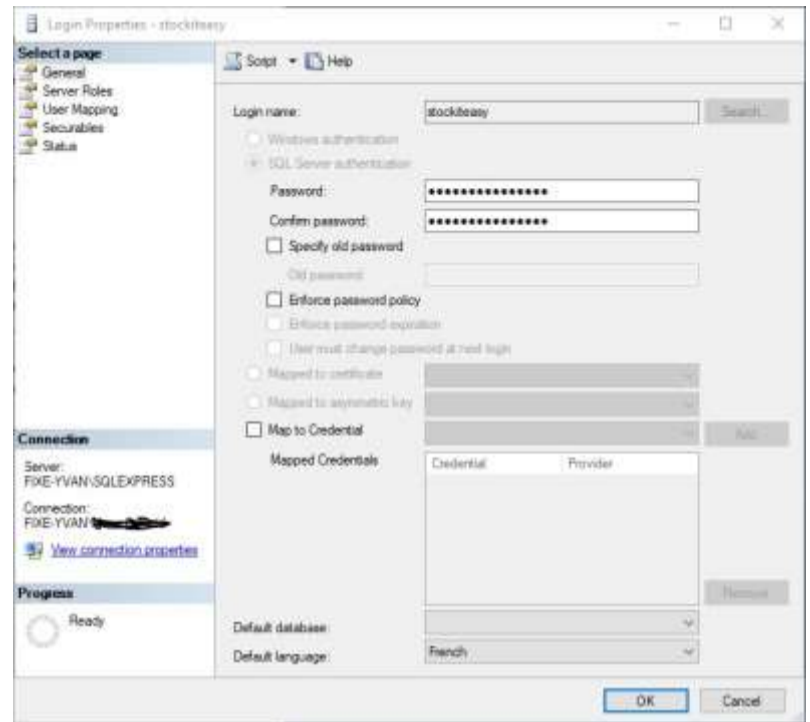
You have chosen to use Stock IT Easy in a network with a Microsoft SQL Server database.

You downloaded the SQL Express server installer to your network as described in the final step of installing the reference version of Stock It Easy or you already have a Microsoft SQL Server in your corporate network.

To install the server, you will need to be an administrator of the machine on which to install it.

This machine will ideally be a server with a healthy memory to ensure the speed of Stock It Easy, in case of small structure with a light load of the program, a computer will do the trick.

The server must be Windows-type.



1.3.2.2 Creating the database

You need to create the database on the server via SQL Server Management Studio before the first launch of a Stock It Easy customer post.

Give your base a name, such as StockItEasy8, leave the settings offered by the default assistant.

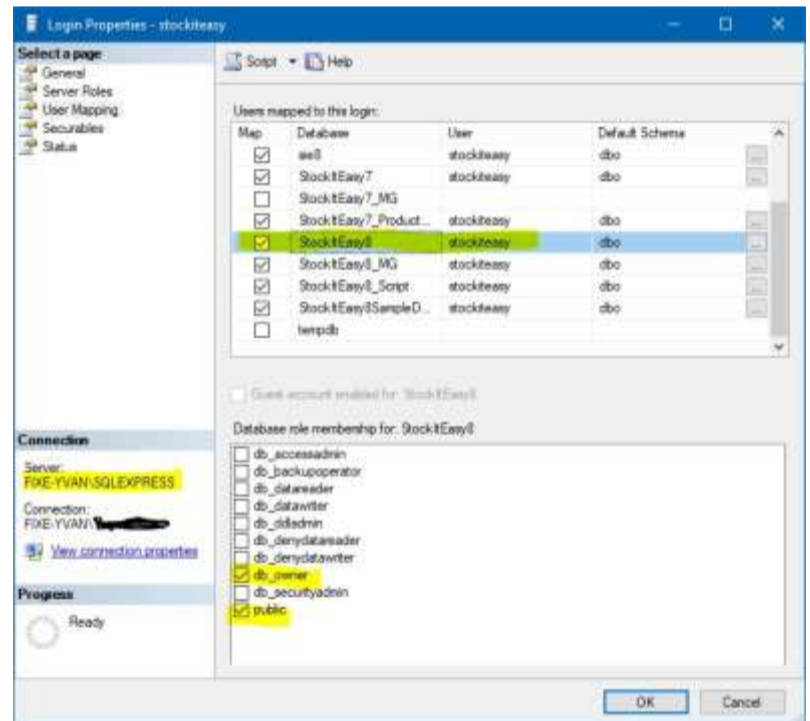
Then create a user who will be the user to log in to the database.

Create a user with authentication

SQL-Server, i.e. with a name and password, or with Windows identification, in this case you will have to check in the login window of Stock It Easy "Connection by Active Directory".

Give this user the db-owner rights on the database

StockItEasy8



Now launch Stock It Easy on a customer post, the login window will then open.

Select the SQL-Server type, encode the base name, server name, server user's name and password.



1.4 Move Stock It Easy from an old computer to a new one

If you use a single-station version of Stock It Easy

It's very easy to move Stock It Easy Lite from one PC to another, if you always have a backup of your database or access to your old PC.

- Save your database on a support that's accessible from your new PC
- Copy the backup on the new PC
- Install the latest version of Stock It Easy on the new PC
- At the first launch of Stock It Easy, choose whether you want to open Stock It Easy classic
- From the main menu, click the "Restoration «button.

If you use a network version of Stock It Easy

There is no actual transfer, as the database is already on a server, just install the Stock It Easy client on another PC and at the first launch, specify the criteria for access to the database you want to connect.

2 Database

2.1 Select a database

When Stock It Easy is first launched, it will ask you to select the database to connect to.

In Lite or single-station versions, you can choose from:

1. Connect to the local sample database
2. Connect to your local database

In WMS or CRM, you can choose from:

1. Connect to the local sample database
2. Connect to other databases created by you, locally or networked

This window opens when the program is launched if:

- This is the first launch on the computer
- The box "Always offer the list of connections" is checked.
- You press the "shift" button on your keyboard when launching

You can also add connections to other databases (except in Lite version).

2.2 Add a database

Stock It Easy allows you to connect to different databases.

Connecting to multiple databases can be helpful, for example, if you want to have a test or pre-production database, or isolate in different databases different strong inventory managements, such as your company's computer hardware on the one hand, and everyday consumer items on the other. There is no shortage of cases in the day-to-day management of a business or the need to manage a stock is necessary, but in strong purposes and different activity sector.

To add a database.

When Stock It Easy is launched, press the Pause button before the database selection window opens (if this is your first program launch or the checkbox "always offer the list of connections" is checked, there's no need to press Pause).

The default database is still the last database used from the computer used.

If the base you want to reach is not listed in the "Select a Connection" list, you need to create it.

To do this, press the "O" button.

You have to name the connection you're going to create, it's going to be the name that's next in the list, use a unique name for the connection and that evokes the base you want to connect, for example "Computer Stock," or "Desktop Consumers."

Then select the type of database.

You have 3 choices, either a traditional database, a HFSQL database or an SQL-Server database.

2.2.1 Add a classic database

This choice is used for a database used only on the current computer, which will not be shared among multiple users.

Enter the local directory or create the database, as well as a directory or automatic backup will be made.



Validate by the green window button, your new local database is automatically created empty, a login window opens, the ADMIN user is selected by default, validate the login by clicking the green button without introducing a password. You can then start encoding or importing your data.

2.2.2 Add a connection to a client/server database

This is a choice if you want to use a database shared between multiple users from multiple computers.

Depending on which database server you want to connect to, you'll need to choose HFSQL or SQL-Server.

Note that in the case of SQL-Server, the database must be created beforehand on the server, as well as the user who will be used to connect to it, with the db-owner rights on the basis.

Then encode the name of the database as defined on the server, the username that has the login rights to it, and its password.

Click the green button.

2.2.3 Delete a connection

Select the connection to remove from the list, then click the button -

Note that the database is not deleted, only the definition of the connection to it is broken.

The connection to the "EXAMPLES" database cannot be deleted.

2.2.4 Duplicate a connection

From the menu (top left), you can by selecting the appropriate option duplicate the current connection. This can be useful to make it easier to create a new connection that shares many parameters, so you only need to enter the differences.

2.3 Save the database

2.3.1 If you use a single-station version of Stock It Easy

A database backup can be created in two different ways:

2.3.1.1 Automatically

When the program closes, the database is archived in the C directory: ProgramData-StockItEasy-ARCHIVES (You can change this directory by default via the database selection window.).

The last 10 backups are kept, fit his number can change via the general settings, if you don't need backup, type 0.

2.3.1.2 Manually from the backup window

Via the main menu, click the "Save" button.

Choose which directory to back up the database, or, check that you want to email the backup, it will be sent to the recipient of the backupends up in the general settings.



2.3.2 If you're using a networked version of Stock It Easy

For these versions of Stock It Easy, the database is managed by a database server, either HFSQL, or Microsoft SQL Server, refer using these products to perform regular backup of your database.

However, it is possible to make a backup of the database directly from Stock It Easy. To do this, you must have made the "Backup" menu visible in your user profile ("Menu" tab).

To perform a backup, you must be the only user logged into the program (either through the desktop app or the mobile app).

Click on the "Backup" menu, enter a message allowing you to find this backup later (for example: "Backup at the beginning of the warehouse forklift operator training module").

This backup can then be restored via the "Restore" menu.

2.4 Restoring the database

2.4.1 If you use a single-post version of Stock It Easy

Via the main menu, click the "Restoration" button.

An earlier version of the database can be restored, if the version of the database predates the current version, it will be automatically updated.

During a restoration, the restored database crushes the current database.

- Select the source to be restored, either from an automatic archive or from a directory in which you made a manual backup.
- Click the "Validate" button.
- At the end of the restoration, Stock It Easy will restart.

2.4.2 If you're using a networked version of Stock It Easy

For these versions of Stock It Easy, the database is managed by a database server, either HFSQL, or Microsoft SQL Server, refer using these products to restore the backup of your database.

However, it is possible to restore the database directly from Stock It Easy. To do this, you must have made the "Restore" menu visible in your user profile ("Menu" tab).

To perform a restore, you must be the only user logged into the program (either through the desktop app or the mobile app).

Click on the "restore" menu, and select the backup you want to restore. Restoring will permanently overwrite the database in use.

2.5 Delete the database

Only for Stock It Easy used on a single computer

Are you using Stock It Easy Lite or a single-post version of Stock It Easy?

Want to delete your database?

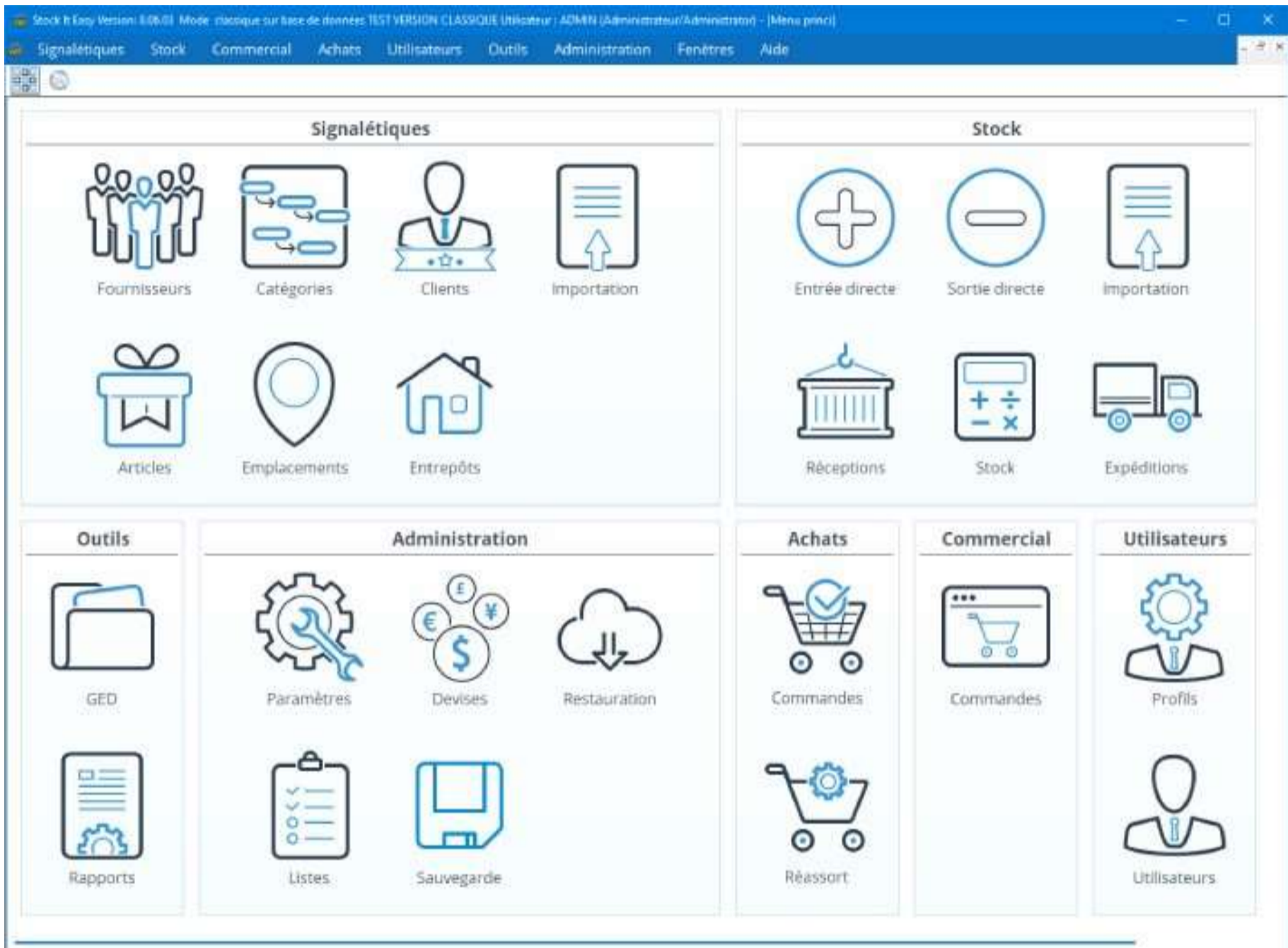
- At the start of the program, from the database selection window, copy the database directory for the STOCK IT EASY CLASSIC connection
- close the program
- search for the directory via the Windows Explorer
- Delete the latter
- Relaunch the program


Note that if you haven't backed up beforehand, the deleted base is permanently lost.

3 General ergonomics


3.1 The main menu - the starting point

From the main menu, open all windows accessible from the buttons grouped by theme (signs, purchases, stock, ...), or also from the options of the top menu.



Once a window is open, you can return to the main menu by clicking the button  or typing the ctrl-M keys, or by selecting the "Windows/Main Menu" option from the top menu.

In this way, simultaneously open several windows, such as the list of items, the stock, the list of suppliers, etc. Find the list of all open windows in the main menu option "Windows." To scroll through the open windows, type the ctrl-tab keys. The "Lists" windows will open in the main menu as described above. Then, from this list, open the cards, such as the item sheets, and then, slide those cards out of the main menu, for example on another screen, open several of them simultaneously.


From the  main menu button, or by tapping the ctrl-T keys, or by selecting the "Windows/Dashboard" option from the top menu, you can open a widgets window. These small utilities, like a currency converter, will fill this table with Stock It Easy updates.

3.2 Search for information in a window

Search by the head of a column

When a search is possible on a table column in a window, an icon representing a filter or magnifying glass is visible in the column title. Then, via a right click on the column head, you can change the type of search, one again, remove the previously defined filter.


Filter search

 Clicking on this icon allows you to enter characters in the column header. The search criterion is "contains...". The table will be filtered on all the entries in the table whose contents in the column contain the seized characters.

To undo the filter, make a right click on the filter icon is select "delete the filter."

Via a right click on the filter icon, you can change the filter's search criteria, for example "Start with... "Is equal to ... », ...

Search magnifying glass

 Clicking on this icon allows you to enter characters in the column header. The search criterion is "contains...". If an entry in the column contains the entered characters, that line will be selected.

Search with barcode reading

Is a barcode reader plugged into the computer? Make it clear via the general settings:



In lists that manage barcode searches, a barcode playback field appears in the top right corner of the window:



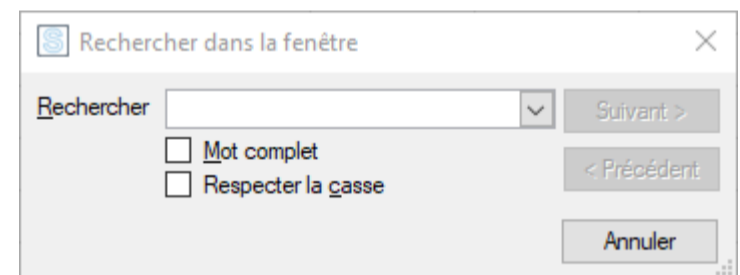
Make sure the cursor is in this field before scanning the barcode to be searched (type F2 to eventually return).

Scan the barcode, if it is found, the corresponding sheet opens.

Generic research

In any software window, type ctrl-F and the search window in the window opens:

Then enter your search, fine-tune if your search is about a full word or a set case, and then click next. The search will cover all the corresponding occurrences (accessible with the Next and Previous buttons) in the current window. Indeed this trick and tip is very simple but fast for a first search.




3.3 Using the tables

Stock It Easy displays data in tables. Most of the time, the following features are available on these tables:

- Sorting columns through the header arrows
- Filter or magnifying glass search
- Move by click and then swipe drop
- Export by right click in the table, option "Export to Excel"
- Printing with a right click in the table, "Print" option
- Copy by making a right click in the table, option "Copy ... »
- Viewing or hiding certain columns with a right click in the table, "Select columns" option

3.4 Properties of an item


Who created or modified what and when?

On a window, if you see the following button:  Just click on it to show the user's name, the date and time the item was created, as well as the user's name, the date and time of the last change.



3.5 History of an item

What are the previous values of an item?

On a window, if you see the following button:  Just click on it to open a window containing the item's previous values, as well as the user's name, date and time of each change.

Historique des modifications Du tarif de l'article

Limiter au 100 premiers Tous

Code fournisseur	Nom fournisseur	Référence fournisseur	Prix d'achat	Code ISO	Unité commande fournisseur	UCF	Cond
SAMSUNG	Samsung	GalaxyS8White	200,00	EUR	1,00	1,000000	Boite
SAMSUNG	Samsung	GalaxyS4White	200,00	EUR	1,00	1,000000	Boite
SAMSUNG	Samsung	GalaxyS4White	200,00		1,00	1,000000	

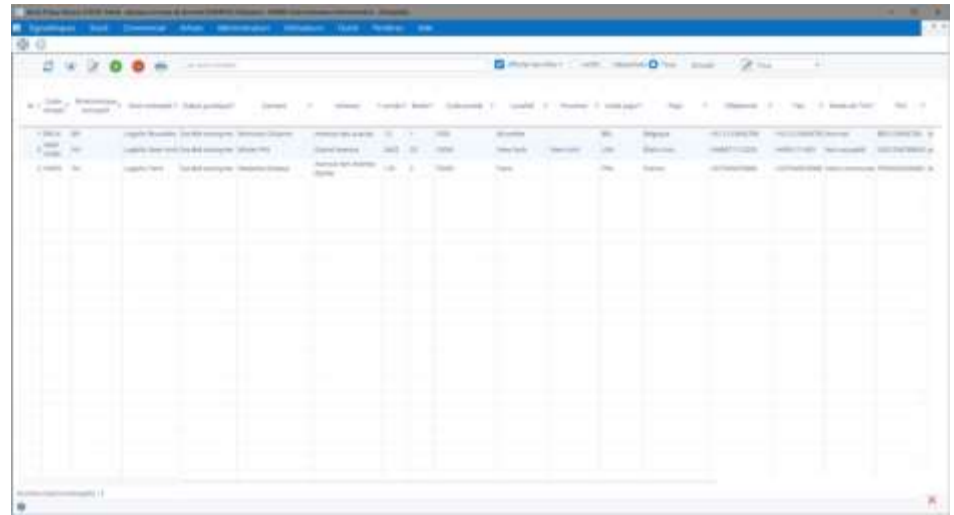
Lines are ranked in descending historical order (the last changes at the beginning). A value on a dark blue background indicates the "after" value, a value on a light blue background indicates the "before" value.

4 The warehouses

Stock It Easy allows you to manage multiple warehouses, each description is complete and customizable. A warehouse is a place where you want to isolate the management of a stock, most of the time it is a location at a specific address, but it can also be a room, a cabinet, a concept, it ultimately depends on your need.

The warehouse may also be the company that will be responsible for the billings. You can choose from a single warehouse or decide that each warehouse is a company as such. This this setting from the general settings..

From the main menu, click the "Warehouses" button.



4.1 Select warehouses

From the warehouse list, you can view and refine a selection of warehouses, changing the following selection criteria:

- Select a warehouse group
 - you can manage groups from the Edit button to the left of the drop-down list
- enter text in the "name contains" field
- filter on disabled warehouses
 - deactivated warehouses are picked up on a red background in the list
- filter on a column header

At the top left, you can select the default sort to apply, it will be remembered for subsequent uses.

The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").

The maximum number of warehouses displayed in this selection will always be limited by the maximum number set in the general settings. In e and for databases containing a large number of warehouses, it makes more sense to filter your selection to see a result faster than to display a very long list, slower to appear, and then search in that list. This maximum number must be adapted according to your needs, the speed of your network and your PCs.

From the warehouse list, you can perform the usual manipulations possible on the tables in Stock It Easy.

4.2 Warehouse management



The top ribbon allows you to perform the following actions on the warehouses:

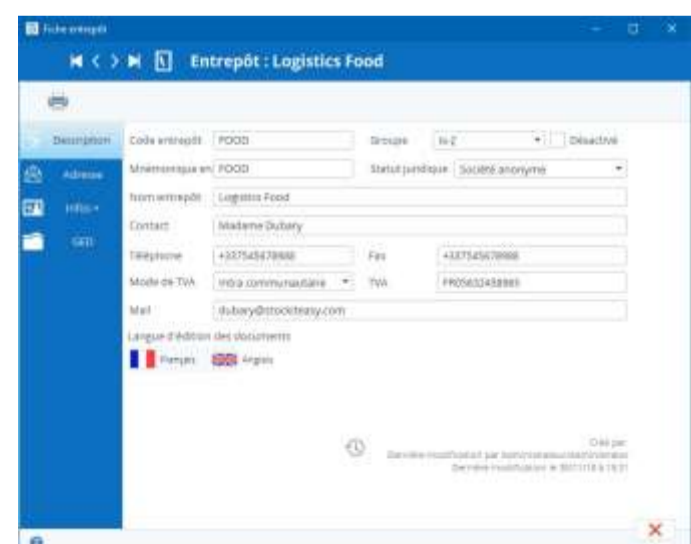
4.2.1 See a warehouse

Click the "See" button, the warehouse sheet opens in visualization. You can open several sheets at the same time.

In the top right corner of the plug, 4 arrows allow you to navigate the open list in the background without having to close and open a plug again.

4.2.2 Add a warehouse

From the warehouse list, click the "Add" button, an empty plug opens, fill in the information you need, and click the "Validate and Close the Window" or "Apply without closing the window" button.



4.2.3 Changing a warehouse

To modify a warehouse, i.e.:

- Click in the top right corner of the open edition sheet on the Edit button, you can then enter your changes
- From the warehouse list, select this one and click the "Edit" button

Then encode your updates and click the "Validate and Close the Window" or "Apply without closing the window" button.

If you don't want to save your changes, click the "Cancel" button.

4.2.4 Delete a warehouse

From the warehouse list, select the item and click the "Delete" button, a message asks you to confirm if you want to disable the warehouse, answer in the affirmative.

If the warehouse has not had any stock movement, it will be permanently removed, otherwise it will be considered disabled.

Additional information

You can add personalized info for your warehouses.

4.2.5 Importing warehouses

It is possible to import warehouses from an Excel file. The warehouses will either be created or updated.

The easiest way is to start from a list that Stock It Easy can generate for you:

- refine the selection of warehouses you want to update if necessary (even an empty list can be generated to allow you to have a blank file template)
- Click the "print" button in the list that opens, select the option "Export in updated file format"
- Use this file to make changes directly in Excel
- import this file from the import window by clicking on the "import" button on the warehouse list ribbon

4.2.6 Print the warehouse list

Click the "print" button in the list that opens, select the "Print list" option (learn more about printable document templates).

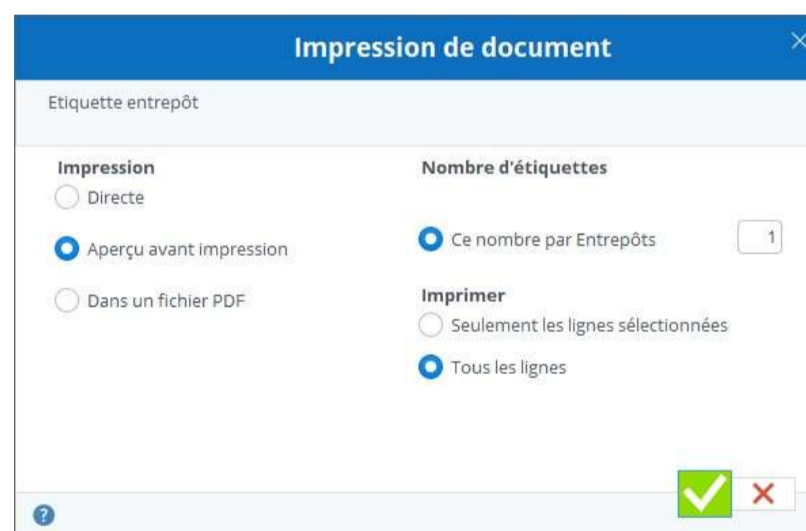
4.2.7 Print warehouse labels

Click the "Print" button, if you've set more than one label template in the general settings, select the desired model in the window that opens.

In the list that opens, select the "Print Labels" option (learn more about printable document templates.).

If you have set more than one warehouse label model in the settings, a selection window for the print model opens, then select the desired model and then validate.

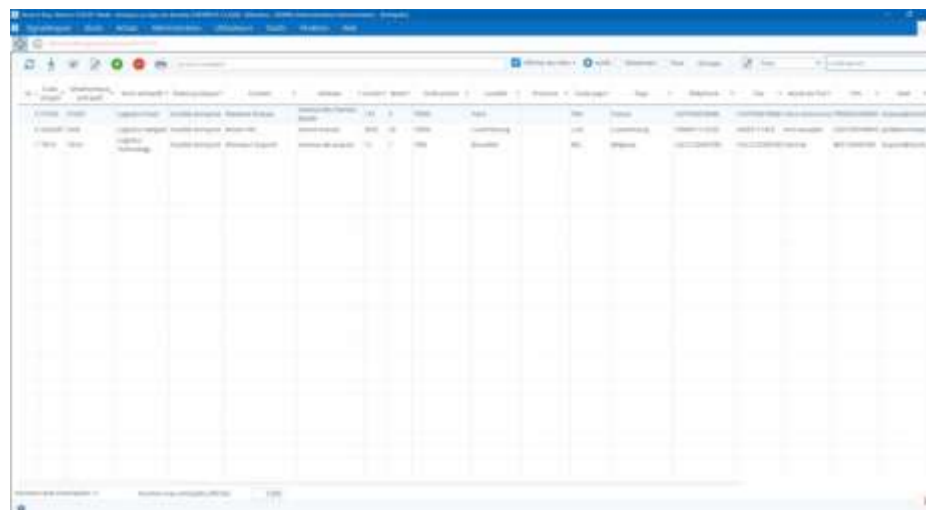
Choose what you want to print as well as the print output.



5 The suppliers

If you manage the supply of your items, you will create suppliers from whom to buy these items. Each description is complete and customizable.

From the main menu, click the "suppliers" button.



5.1 Select suppliers

From the list of suppliers, you can view and refine a selection of these by changing the following selection criteria:

- Select a supplier group
 - you can manage groups from the Edit button to the left of the drop-down list
- enter text in the "name contains" field
- filter on disabled providers
 - deactivated suppliers are picked up on a red background in the list
- filter on a column header

At the top left, you can select the default sort to apply, it will be remembered for subsequent uses.

The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").

The maximum number of vendors displayed in this selection will always be limited by the maximum number set in the general settings. Indeed, for databases containing a large number of vendors, it makes more sense to filter your selection to display a result faster than to display a very long list, slower to appear, and then search in that list. This maximum number must be adapted according to your needs, the speed of your network and your PCs.

From the list of suppliers, you can perform the usual manipulations possible on the tables in Stock It Easy.

5.2 Supplier management

The top ribbon allows  you to do the following actions on the suppliers:

5.2.1 See a supplier

Click the "See" button, the vendor's sheet opens in visualization. You can open several sheets at the same time.

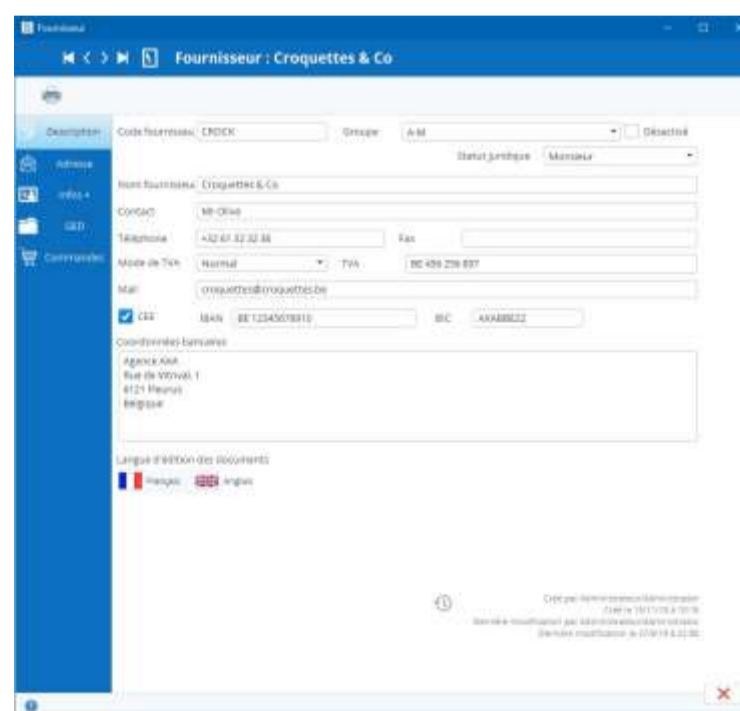
In the top right corner of the plug, 4 arrows allow you to navigate the open list in the background without having to close and open a plug again.

Additional information

You can add personalized info for your suppliers.

5.2.2 Add a supplier

From the list of vendors, click the "Add" button, an empty plug opens, fill in the information you need, and click the "Validate and Close the Window" or "Apply without closing the window" button.



5.2.3 Changing a supplier

To modify a supplier, i.e.:

- click in the top right corner of the open edition sheet on the "Edit" button
- From the list of suppliers, select this one and click the "Edit" button

Then encode your updates and click the "Validate and Close the Window" or "Apply without closing the window" button.

If you don't want to save your changes, click the "Cancel" button.

5.2.4 Delete a supplier

From the list of vendors, select it and click the "Delete" button, a message asks you to confirm if you want to disable it, answer it in the affirmative.

If the supplier has not had any purchase orders, it will be permanently removed, otherwise it will be considered disabled.

5.2.5 Importing suppliers

Suppliers can be imported from an Excel file. Suppliers will either be created or updated.

The easiest way is to start from a list that Stock It Easy can generate for you:

1. refine the selection of vendors you want to update if necessary (even an empty list can be generated to allow you to have a blank file template)
2. Click the "print" button in the list that opens, select the option "Export in updated file format"
3. Use this file to make changes directly in Excel
4. import this file from the import window by clicking the "import" button on the sales list ribbon

5.2.6 Print the list of suppliers

Click the "print" button in the list that opens, select the "Print list" option (learn more about printable document templates).

5.2.7 Print supplier labels

Click the "Print" button, if you've set more than one label template in the general settings, select the desired model in the window that opens.

In the list that opens, select the "Print Labels" option.

If you have set more than one warehouse label model in the settings, a selection window for the print model opens, then select the desired model and then validate.

Choose what you want to print as well as the print output.



5.3 Supplier and purchase order criteria

All fields related to this supplier's purchase orders allow these fields to be automatically pre-filled in the purchase order placed with that supplier. For example, you encode that the Franco is 250 euros for a supplier, any order created for the supplier in question will be with a Franco of 250 (you can obviously change in the order if necessary).

Documents and e-mail from the supplier's purchase order can be customized. You can create general models, or create a model per vendor, or general models and some exceptions for some vendors.

6 Items

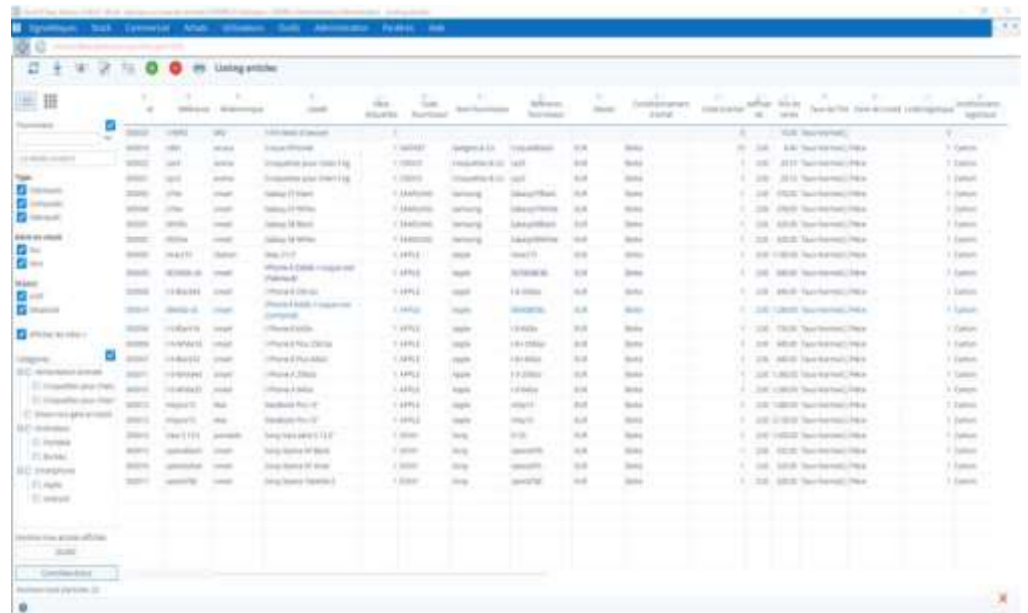
Stock It Easy allows you to manage items efficiently, their description is complete and customizable.

From the main menu, click the "Items" button.

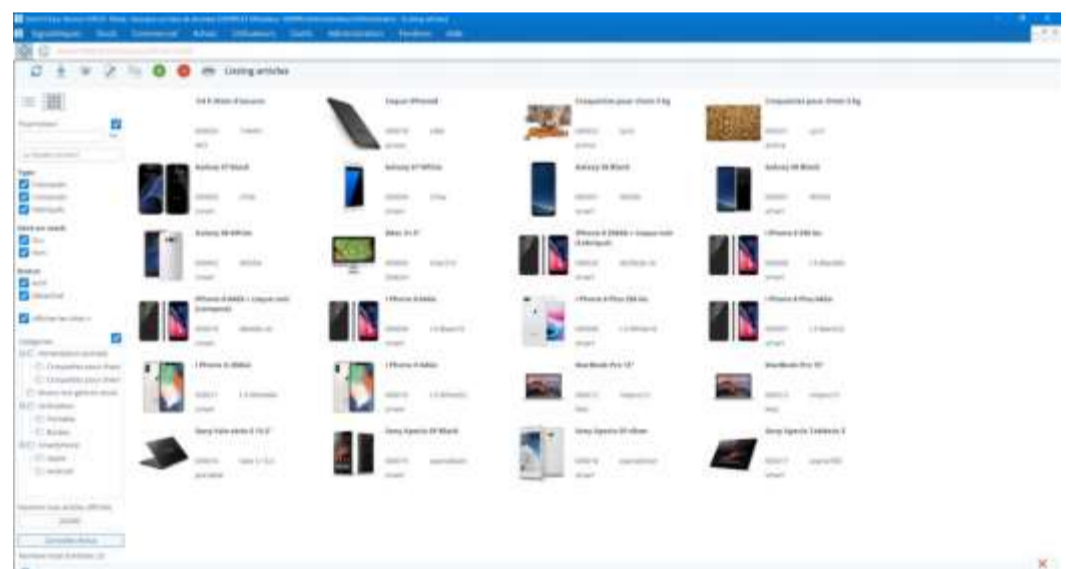
6.1 Select items

From the list of items, you can view and refine a selection of items, changing the following selection criteria:

- Select a supplier or check the box all suppliers
- compound/manufactured items (compound items are included in navy blue in the list the manufactured items are included in light blue in the list)
- Select an item category or check the "all categories" box
- enter text in the "contains" field
- Click the "fallen controls" button
- filter on deactivated items (deactivated items are picked up on a red background in the list)
- distinguish between items managed in stock and those managed in stock



By clicking on the list or thumbnail button at the top left, you can switch from the table view mode to the more visual one based on the photos of the items.



Also at the top left, you can select the default sort to apply, it will be remembered for the following uses.

The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").

The maximum number of items displayed in this selection will always be limited by the maximum number set in the general settings.

Indeed, for databases containing many items, it makes more sense to filter your selection to display a result faster than to display a very long list of items, slower to appear, and then search in that list. This maximum number must be adapted according to your needs, the speed of your network and your PCs.

6.2 Item management

The top ribbon allows the following actions to be performed on the items

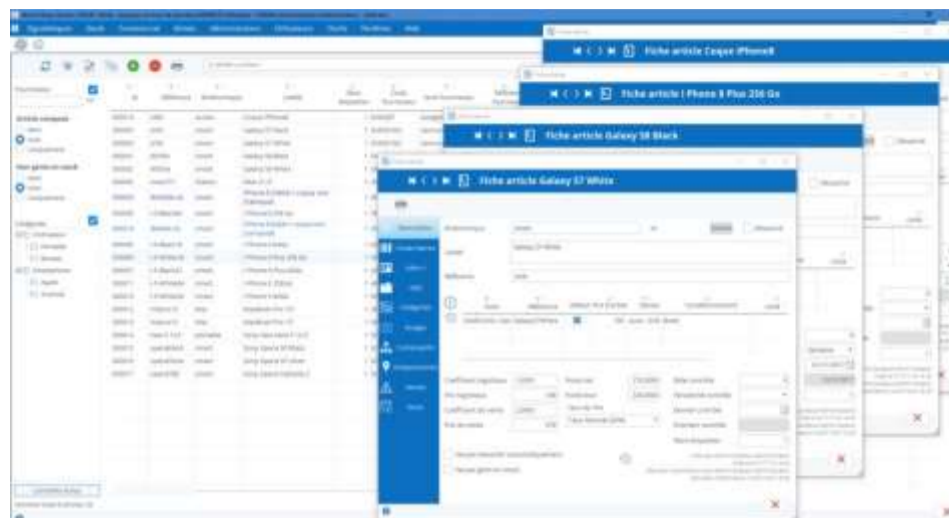


6.2.1 See an item

Click the "See" button, the item sheet opens in visualization.

You can open several sheets at the same time.

In the top right corner of the plug, 4 arrows allow you to navigate the open list in the background without having to close and open a plug again.



6.2.2 Add an item

From the list of items, click the "Add" button, an empty plug opens, fill in the information you need, and click the "Validate and Close the Window" or "Apply without closing the window" button.

6.2.2.1 Prices for items

An item can be purchased from different suppliers.

The tariff is the terms of the purchase of an item from a supplier.

At least encode the default supplier (or "priority" supplier of the item) here, as well as a few details.

In display lists or a reference and a vendor are offered, it is always the default vendor data that Stock It Easy will display.

It is possible to order the item from each supplier referenced to it in its tariff.

Do you want your item to be ordered by all suppliers?

In this case, choose the "undefined" supplier as a supplier, so the item will be accessible by all suppliers in the purchase order by selecting the list of "secondary" items.

This can be particularly useful for unmanaged items in stock, such as an order fee. There is no need to create as many tariffs as suppliers, what is more, the purchase price is always changeable in the order itself.

Additional information

You can add personalized info for your items. Learn more about managing the news.

6.2.2.2 Where an item is stored

For each item, you can encode several storage locations per warehouse. This location must first be created in the list of locations.

Each location can have maximum storage capacity for this item, and a priority order must be assigned to them.

To understand the impact of storage capacity and priorities, I invite you to read the article on direct inputs and direct outputs..

6.2.2.3 Assign the item to categories

You can manage the categories. Categories are a hierarchical classification as is often found on e-commerce sites.

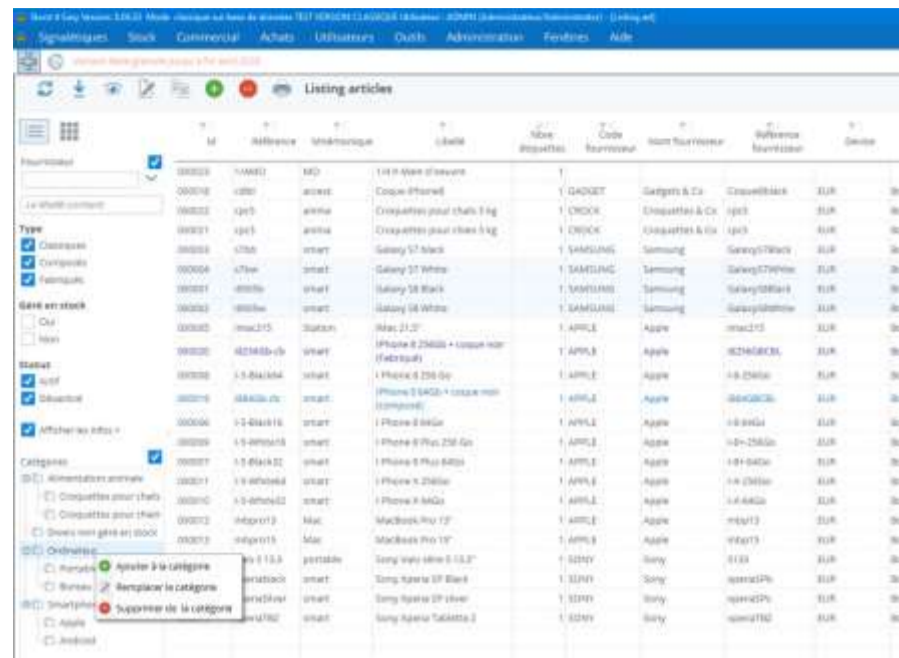
To assign one or more categories to an item, open the category tab and select a category. Click the "Add" button, the category will appear on the right side. To remove it, select it in the right part and click the "Delete" button.

When you assign an item to a parent category, it will also be the default category of all its child categories.

6.2.2.4 Assign a selection of items to a category

If you need to assign (or edit or delete) multiple items to a category

From the list of items, hold the ctrl button down and select the desired items. Then, in the side panel, click right on the desired category, and click the option of your choice in the menu that opens.



6.2.3 Duplicate an item

From the list of items, select the item and click the "Duplicate" button, a copy sheet of the selected item opens, change the information you need, and click the "Validate and Close the Window" or "Apply without closing the window" button.

6.2.4 Edit an item

To edit an item, i.e.:

Click in the top right corner of the open edition sheet on the Edit button, you can then enter your changes

From the list of items, select the item and click the "Edit" button

Then encode your updates and click the "Validate and Close the Window" or "Apply without closing the window" button.

If you don't want to save your changes, click the "Cancel" button.

6.2.5 Delete an item

From the list of items, select the item and click the "Delete" button, a message asks you to confirm if you want to disable the item, answer in the affirmative.

If the item is not present in a purchase order, sales order, shipment, or invoice that is still to be processed, it is possible to permanently delete it.

To do this, either:

Select the arrow to the right of the "delete" button and select the "Delete permanently" menu (you can do this for a selection of items, useful for mass deletion). If the item is not present in a purchase order, sales order, shipment or invoice that is still to be processed, it will be deleted, if not, it will be deactivated, you can permanently delete it when all actions are processed.

Start by deactivating it, then, open its edit file, in the top banner of the card appears a "Delete permanently" checkbox, check this box and click on the "Validate and close window" button, a message asks you to confirm if you want to permanently delete the article, answer in the affirmative.

6.2.6 Importing items

It is possible to import items from an Excel file. Items will either be created or updated.

The easiest way is to start from a list that Stock It Easy can generate for you:

1. refine the selection of items you want to update if necessary (even an empty list can be generated to allow you to have a blank file template)
2. Click the "print" button in the list that opens, select the option "Export in updated file format"
3. Use this file to make changes directly in Excel

4. import this file from the import window signs

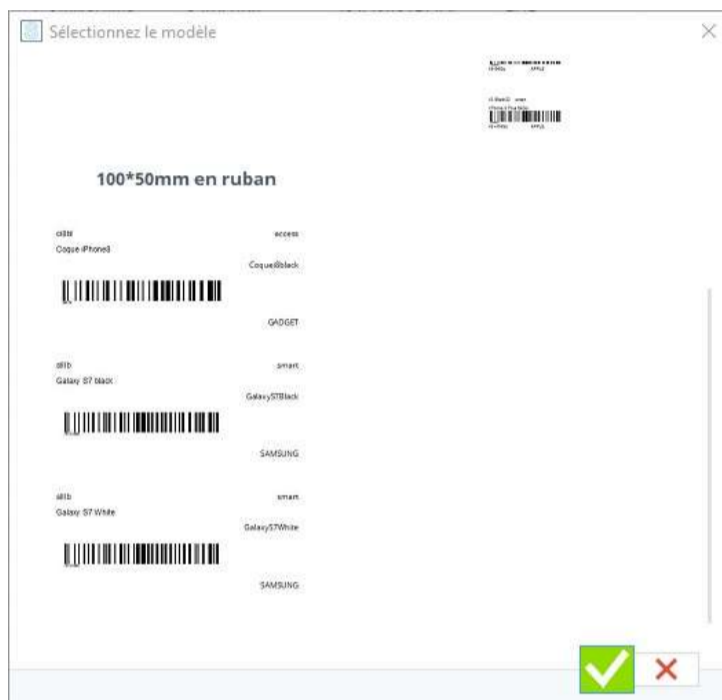
6.2.7 Print the list of items

Click the "print" button in the list that opens, select the "Print list" option (learn more about printable document templates).

6.2.8 Print item labels

Click the "print" button in the list that opens, select the "Print Labels" option(learn more about printable document templates.).).

If you've set more than one label pattern in the general settings, select the desired model in the open window.



Selecting a template document to print



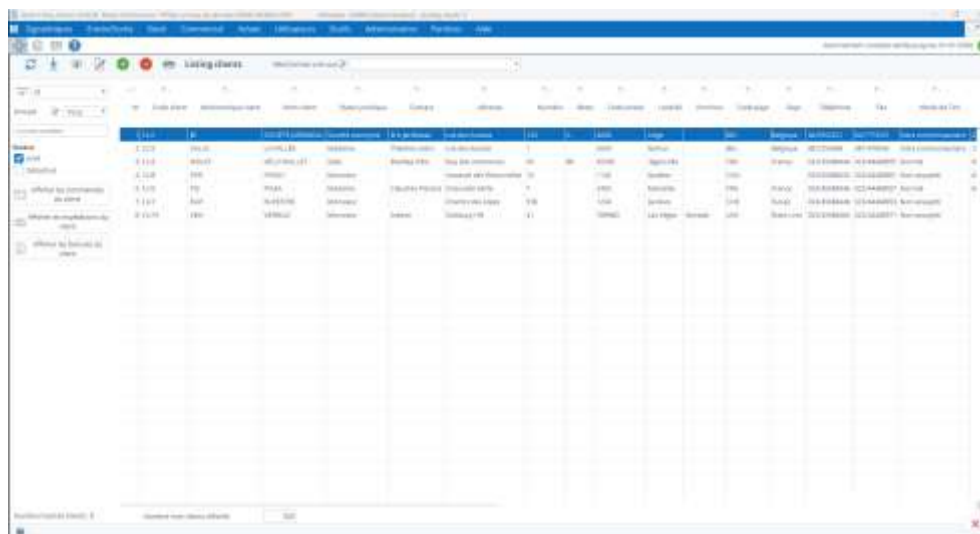
Choose what you want to print as well as the print output.

For a label print whose barcode contains the tracking and tracking information of the item, you must print these labels either from the stock view or from the received purchase order.

7 Customers

Stock It Easy lets you manage your customers; each description is complete and customizable. A customer represents the entity for which you want to write a commercial offer, encode an order, ship items, establish an invoice ...

From the main menu, click the "Customers" button.



7.1 Select customers

From the client list, you can view and refine a selection of customers, changing the following selection criteria:

- Select a customer group
 - you can manage groups from the Edit button to the left of the drop-down list
- enter text in the "name contains" field
- filter on disabled customers
 - disabled customers are picked up on a red background in the list
- filter on a column header

The maximum number of customers displayed in this selection will always be limited by the maximum number set in the general settings. Indeed, for databases with a large number of customers, it makes more sense to filter your selection to display a result faster than to display a very long list, slower to appear, and then search in that list. This maximum number must be adapted according to your needs, the speed of your network and your PCs.

From the customer list, you can perform the usual manipulations possible on the tables in Stock It Easy.

From the selection window (or from the customer file), it is possible to directly open the list of orders or shipments or invoices of the selected customer by clicking on the button concerned.

7.2 Customer management

The top ribbon allows you to perform the following actions on



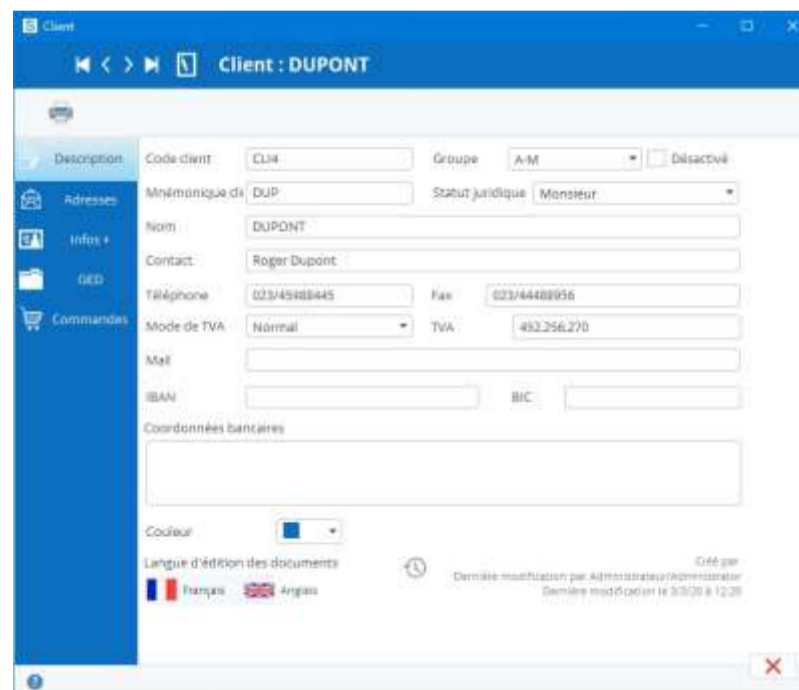
7.2.1 See a customer

Click the "See" button, the client's card opens in visualization. You can open several sheets at the same time.

In the top right corner of the plug, 4 arrows allow you to navigate the open list in the background without having to close and open a plug again.

At the top left, you can select the default sort to apply, it will be remembered for subsequent uses.

The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").



For each customer you can specify in addition to the billing address, a choice of delivery addresses that will be usable in order shipments.

Additional information

You can add personalized information for your customers.

7.2.2 Add a customer

From the client list, click the "Add" button, an empty plug opens, fill in the information you need, and click the "Validate and Close the Window" or "Apply without closing the window" button.

7.2.3 Changing a customer

To change a customer, i.e.:

- click in the top right corner of the open edition sheet on the "Edit" button
- From the client list, select this one and click the "Edit" button

Then encode your updates and click the "Validate and Close the Window" or "Apply without closing the window" button.

If you don't want to save your changes, click the "Cancel" button.

7.2.4 Delete a customer

From the client list, select the customer and click the "Delete" button, a message asks you to confirm if you want to disable that customer, answer in the affirmative.

If the customer has not had any stock movement, it will be permanently deleted, otherwise it will be considered disabled.

7.2.5 Importing customers

It is possible to import customers from an Excel file. Customers will either be created or updated.

The easiest way is to start from a list that Stock It Easy can generate for you:

1. refine the selection of customers you want to update if necessary (even an empty list can be generated to allow you to have a blank file template)
2. Click the "print" button in the list that opens, select the option "Export in updated file format"
3. Use this file to make changes directly in Excel
4. import this file from the import window by clicking the "import" button on the customer list

7.2.6 Print the customer list

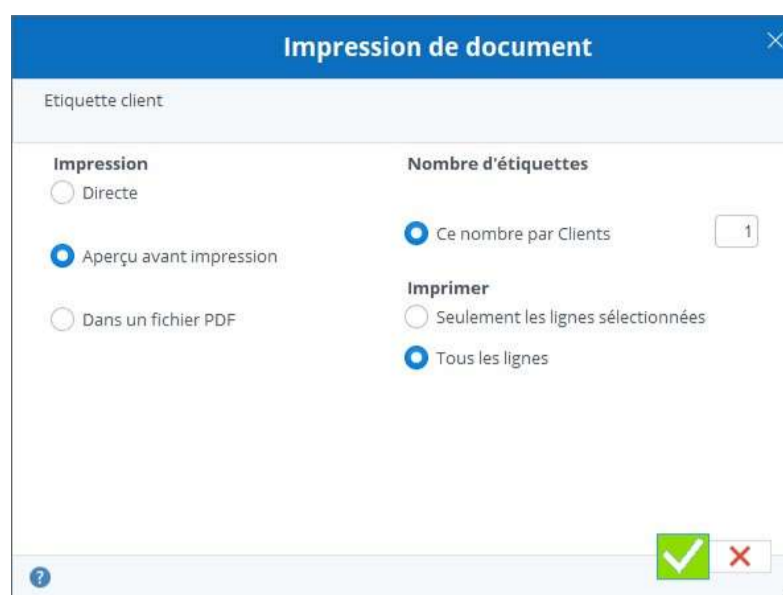
Click the "print" button in the list that opens, select the "Print List" option.

7.2.7 Print customer labels

Click the "Print" button, if you've set more than one label template in the general settings, select the desired model in the window that opens.

In the list that opens, select the "Print Labels" option.

If you have set more than one customer label model in the settings, a selection window for the print model opens, then select the desired model and then validate.



7.3 The default command data

Encode the data on any customer order here. This data will be pre-filled by default in an order for that customer.

8 View and manage stock

To open the stock analysis window in the main menu, click the "Stock" button on the "Stock" block.

This window allows you to:

- to look at the stock situation according to many criteria
- change the stock

The consultation window is divided into three parts:

1. The top ribbon allows you to launch actions on the selection
2. The side panel on the left allows you to define the detail information of the stock you want as well as the criteria for selecting this stock
3. The central part that takes up in a table the situation of the stock of the selection made in the side panel

ID	Nom	Localisation	Quantité	Prix	Statut
100001	Item 1	Local 1	100	10.00	OK
100002	Item 2	Local 2	200	20.00	OK
100003	Item 3	Local 3	300	30.00	OK
100004	Item 4	Local 4	400	40.00	OK
100005	Item 5	Local 5	500	50.00	OK
100006	Item 6	Local 6	600	60.00	OK
100007	Item 7	Local 7	700	70.00	OK
100008	Item 8	Local 8	800	80.00	OK
100009	Item 9	Local 9	900	90.00	OK
100010	Item 10	Local 10	1000	100.00	OK

In the ribbon, click (in order of the image from left to right):



- "Settings" button to open stock settings window
- "Refresh" button or type F5 to update the stock chart
- The "Import" button to open the import window for stock files (or live scan playback)
- The "print" button to print the selection labels
- selector or stock/see movements
- The "See the movements behind the selected stock" button to open a window that breaks down the movements of the selected line
- "Correct the weighted average price" button to correct the PMP of the item in the selected line
- The "Correct Quantity" button to update the amount of the item in the warehouse of the selected line
- "Update warehouse" button to update the warehouse of the selected line
- The "Update Location" button to update the item's location in the warehouse of the selected line
- the "Update Location and Quantity" button to transfer a quantity of the item to the warehouse and the location of the given selected row to another location
- The "Update and Track" button to update the tracking data (lot, DLC, ...) of the item in the warehouse of the selected line
- The "Stock Entry" button
- "Out of Stock" button

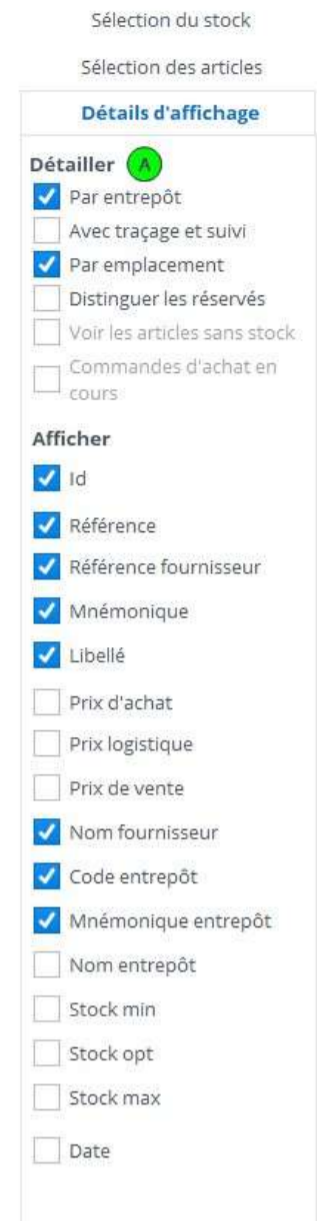
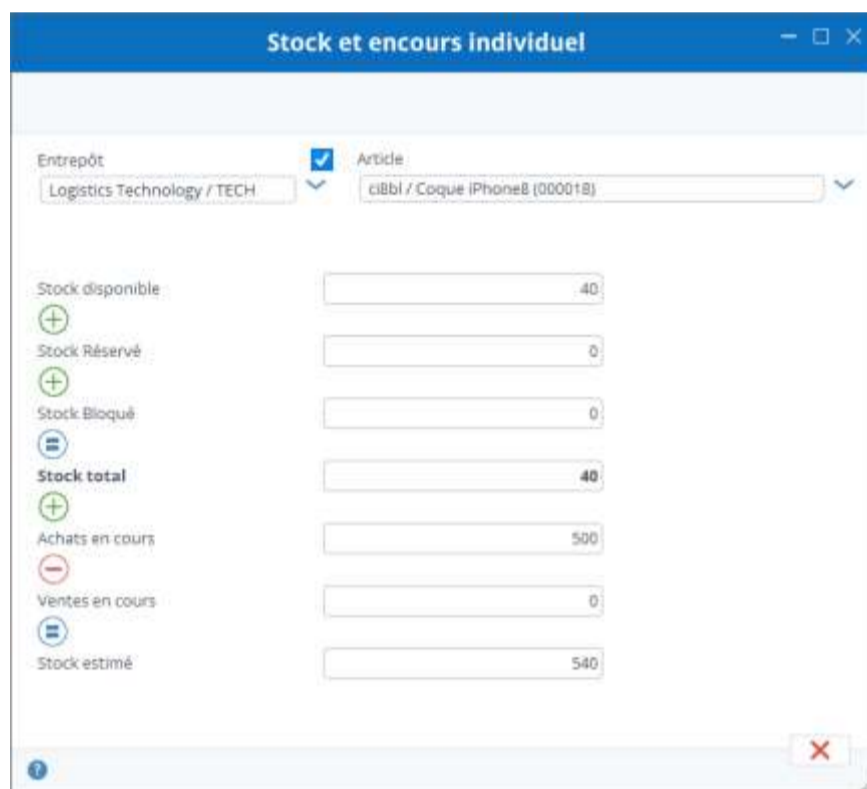
The side panel allows you to fine-tune your selection. It is divided into 3 tabs.

8.1 View the individual stock of an item

The individual stock is the stock of an item in a warehouse or in all warehouses, as well as the sum of its quantities in validated purchase orders and its quantities in validated sales orders, i.e. the expected entries and exits but which have not yet impacted the stock.

To view this view, there are several paths:

- From the dashboard via the "Individual Stock" widget
- From the description of an item in the "stock" tab via the "check individual stock" button (the window opens by default on the item in the current listing and the warehouse selected from the stock sheet)
- From the purchase order via the "check individual stock" button (the default window opens on the item of the selected order line and the warehouse of that order)
- From the sales order via the "check individual stock" button (the default window opens on the item of the selected order line and the warehouse of that order)

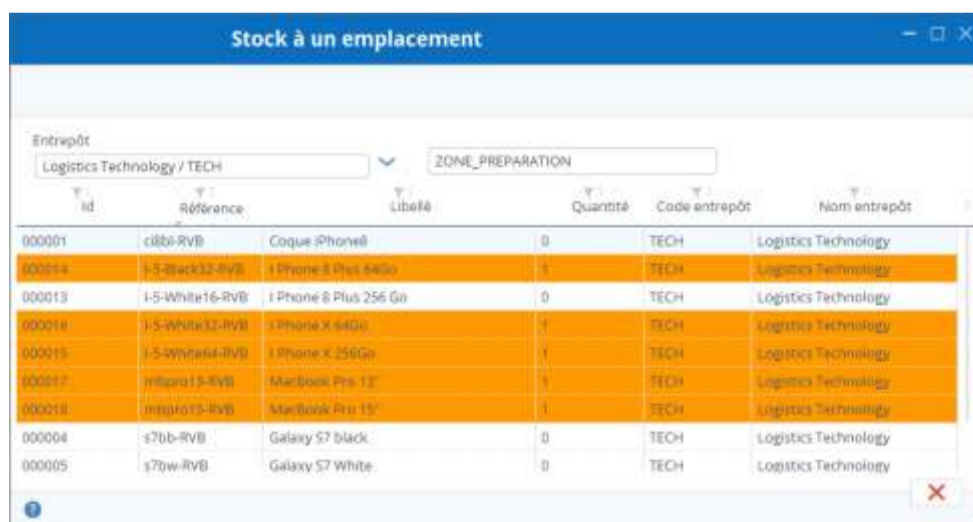


8.2 View an individual stock of a location

Stock by location is the stock of all items in a warehouse in a location.

To view this view, there are several paths:

1. From the dashboard via the "Stock location" widget
2. From the dashboard via the Bar Code widget, just scan the barcode of a location in this Widget



Either you use a barcode on the pc, just scan the barcode of the location.

Either you select the warehouse and then the location and stock appear.

Reserved stocks are displayed on an orange background, stocks blocked on a red background.

8.3 Display details tab

Depending on the selections you make in the "Detail" section, options will appear in the "Show" section. Each option in the "Show" part is a column that you can add to the stock table by checking it.

8.4 Stock selection tab

From this tab, you can specify:

on which warehouse or stock on what date (possible to consult a stock in the past) on which date range (useful for a selection of movements) according to the tracking criteria (or is such a lot, what are my items with an outdated DLC, ...) on a specific storage location

8.5 Section selection items

From this tab, it is possible to filter the selection by item, supplier, category, type of item, ...

Following your selection, do not forget to click the "Refresh" button to update the stock view

8.6 Weighted average price (WAP)

The stock is valued at the weighted average price, in the defined global currency, and for all warehouses.

The calculation of the WAP is done this way:

All outputs are done at the WAP, so an output does not affect the WAP of an item. By output we mean:

3. Shipping a sales order
4. Shipping a purchase order return
5. Shipping a transfer to another warehouse
6. A direct exit
7. A stock correction down

All entries are made at the logistic price, an entry affects the WAP of an item. By entry we mean:

8. Receiving a purchase order
9. Receiving a return of a sales order
10. Receiving a transfer from another warehouse
11. Direct entry
12. A stock correction up

The logistic price is the one set in the item sheet. If the logistic price is not set, the software will check whether a logistics coefficient and a purchase price for the default supplier are defined, if this is the case, the purchase price multiplied by this coefficient will be priced, otherwise, if there is no coefficient but a purchase price, it is this one that will be taken into account.

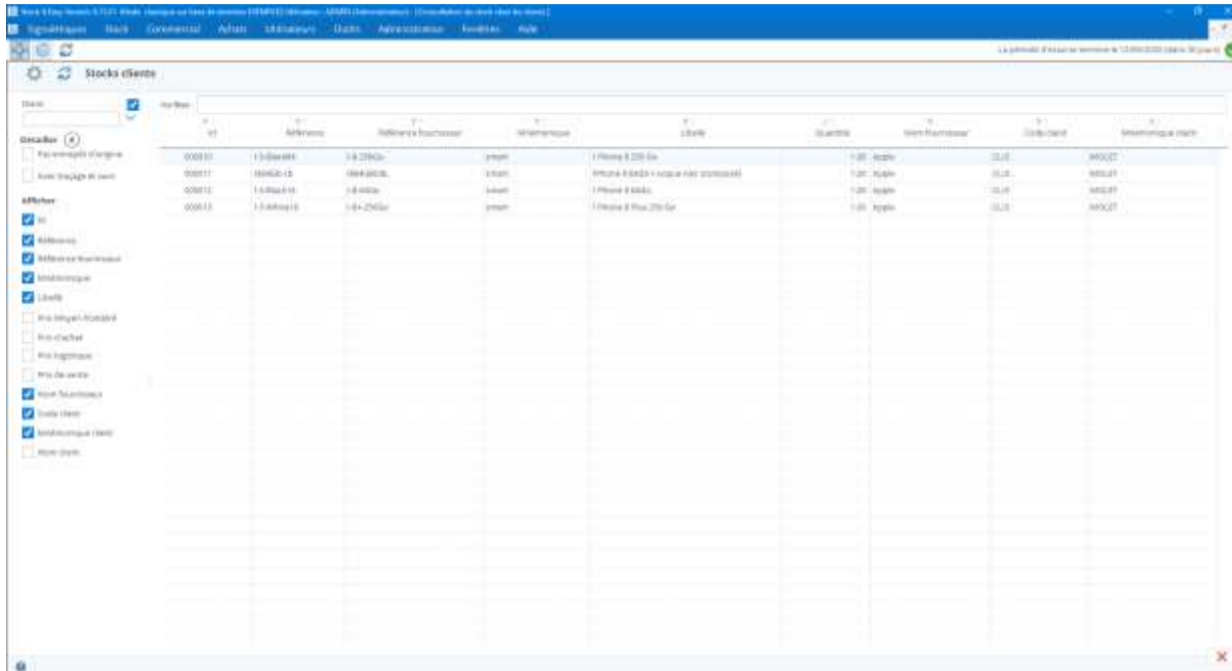
In the case of a purchase order, if the item can be purchased from different suppliers at different rates, the logistic price considered will be the purchase price of the supplier concerned multiplied by the logistics coefficient.

Example of the evolution of a WAP

Movement	Amount	Logistics prices	Stock	Movement value	Stock value	Weighted average price
				<i>Movement price X movement value</i>	<i>Previous value - movement value</i>	<i>Stock value/quantity of stock</i>
Entry	1000	2,5	1000	2500	2500	2,5
Entry	1000	2	2000	2000	4500	2,25
Output	500		1500	-1125	3375	2,25
Output	1500		0	-3375	0	0
Entry	1000	2,5	1000	2500	2500	2,5

9 Check your customers' stock

To open the customer inventory analysis window in the main menu, click the "Customer Stock" button in the "Stock" block.



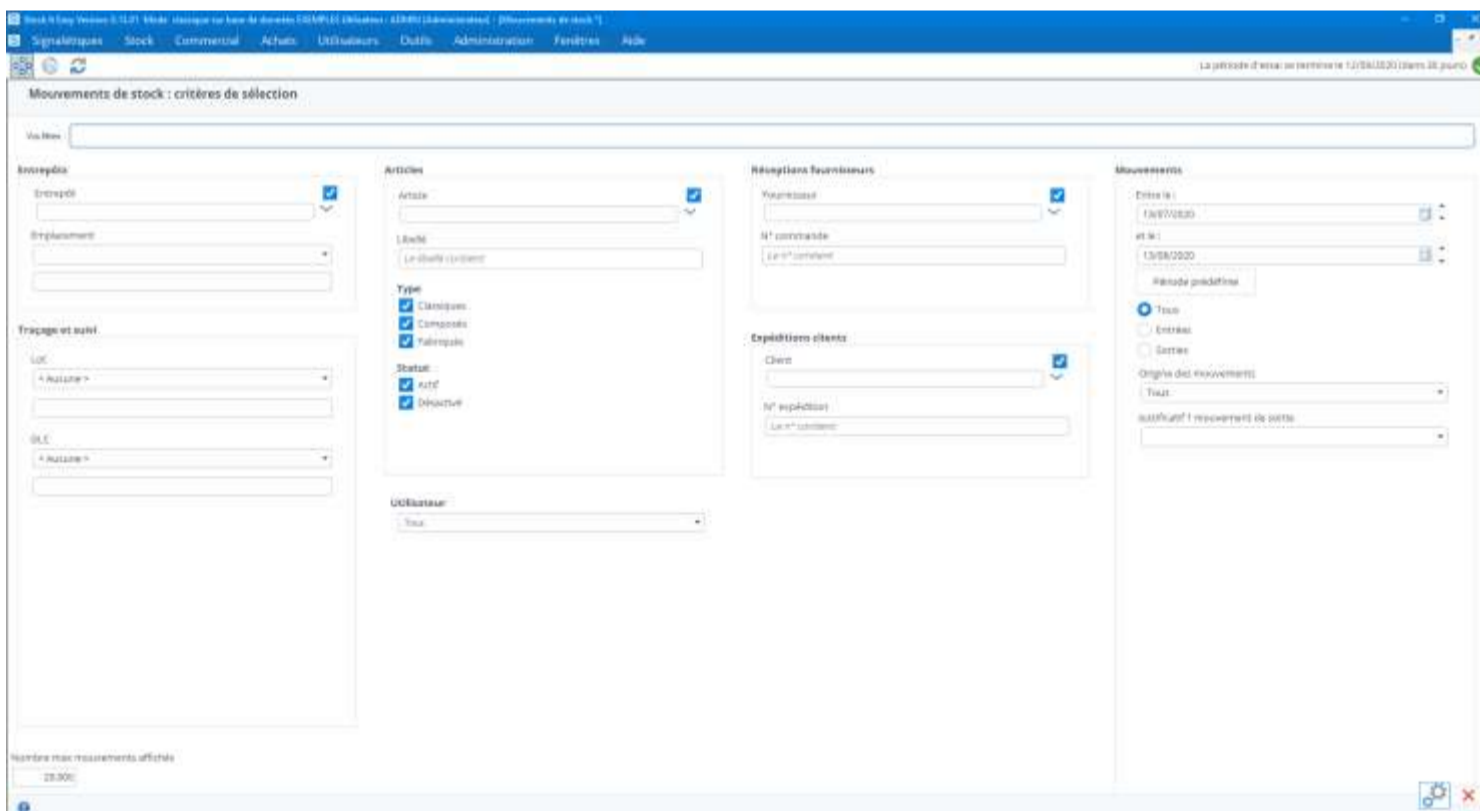
Refine your search by encoding your selection criteria in the side panel and then click the "Refresh." button.

Customer inventory is the sum of shipments sent to a customer minus any returns.

A customer order not yet shipped will therefore not be included in this stock.

10 View and analyze movements

To open the motion analysis window in the main menu, click the "Movements" button on the "Stock" block.



The window opens on a screen to select the criteria for the movements you're looking for.

You can limit the number of moves displayed by entering a number in the lower left field.

Once you've encoded, click the "Show" button at the bottom right of the screen.

The window then flips over to a result screen and displays the movements that match your selection criteria, from the newest to the oldest.

You can adapt the visible columns with a right click on the board/select the columns.

The order of the columns can also be changed by clicking moving them.

To return to the selection screen, click the arrow back to the bottom right.

You will notice in front of certain lines of movement, in the first column, a small clock. This means that this line of motion has been changed, for example by correcting the tracking and tracking information. By clicking on the clock image, you then open the window containing the previous values of this line of motion.

The screenshot shows the 'Mouvements de stock' window in the Stock It Easy software. The table contains the following columns: Date, Sens des mouvements, ID, Référence, Alimétronique, Libellé, Quantité, Origine des prix, Code fournisseur, Num.fournisseur, Code entrepôt, Métronomie entrepôt, Nom entrepôt, Code client, and Métronomie de. The data rows list various electronic devices such as iPhones, Samsungs, and MacBooks, with their respective quantities and prices. A small clock icon is present in the first column of several rows, indicating a change in tracking information.

Date	Sens des mouvements	ID	Référence	Alimétronique	Libellé	Quantité	Origine des prix	Code fournisseur	Num.fournisseur	Code entrepôt	Métronomie entrepôt	Nom entrepôt	Code client	Métronomie de
12/08/2020	Sortie	00001	i-5 White16	smart	iPhone 8 Plus 256 Go	-1.00	Prix moyen pondéré			TECH	TECH	Logistics Technology	CL18	MOULET
12/08/2020	Sortie	00001	i-5 Black16	smart	iPhone 8 64Go	-1.00	Prix moyen pondéré			TECH	TECH	Logistics Technology	CL18	MOULET
12/08/2020	Sortie	00001	i-5 Black16	smart	iPhone 8 256 Go	-1.00	Prix moyen pondéré			TECH	TECH	Logistics Technology	CL18	MOULET
12/08/2020	Entrée	00002	xperiaT02	smart	Sony Xperia Tablet Z	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00002	xperiaSP	smart	Sony Xperia SP slim	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00002	xperiaSP	smart	Sony Xperia SP Black	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00003	Vao 5 15.3	portable	Sony Vao série 5 15.3"	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00004	mbp15	Mac	MacBook Pro 15"	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00007	mbp12	Mac	MacBook Pro 12"	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00004	i-5 White32	smart	iPhone 8 64Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00001	i-5 White16	smart	iPhone X 256Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00004	i-5 Black32	smart	iPhone 8 Plus 64Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00001	i-5 White16	smart	iPhone 8 Plus 256 Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00002	i-5 Black16	smart	iPhone 8 64Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00001	i-5 Black16	smart	iPhone 8 256Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00001	i-5 Black16	smart	iPhone 8 Plus 256 Go	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00008	i256Go-03	smart	iPhone 8 256Go + coque noir (transparent)	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00008	mbp12	Station	Mac 21.5"	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00007	g950w	smart	Galaxy S8 White	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00008	g950b	smart	Galaxy S8 Black	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00008	s7	smart	Galaxy S7 White	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00004	s7b	smart	Galaxy S7 Black	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00002	xperiaT02	smart	Sony Xperia Tablet Z	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00002	xperiaSP	smart	Sony Xperia SP slim	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00002	xperiaSP	smart	Sony Xperia SP Black	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00004	Vao 5 15.3	portable	Sony Vao série 5 15.3"	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00004	mbp15	Mac	MacBook Pro 15"	1.00	Prix logistique			TECH	TECH	Logistics Technology		
12/08/2020	Entrée	00007	mbp12	Mac	MacBook Pro 12"	1.00	Prix logistique			TECH	TECH	Logistics Technology		

11 Historize the stock

The historization of the stock consists of taking a "photo" of the stock at a specific time. This is very useful to analyze the evolution of your stock over a period. In this way, you will be able to analyze rotations, evolution, trends, dormant items and so on.

Before being able to exploit the historical data, it must be configured, by default, the stock is not historized.

The screenshot shows a 'Consolidation' window with a table of stock history. The table has columns for 'Date', 'Article', 'Warehouse', 'Stock', 'PMP', 'PV', and various financial metrics. The data is organized into sections for 'Purchases', 'Sales', and 'Summary'. The 'Summary' section at the bottom provides totals for 'Total', 'Average', 'Minimum', and 'Maximum' for each column.

From the main menu click on "History" in the "Stock" menu block.

If you have already set the history and calculated several dates, these will appear in the start and end date selectors.

Make your selection, refining if necessary to a warehouse and / or a selection of items, and click on "Refresh".

You will then have a summary of your stock:

- 1 Per article
- 2 On the selected start date
- 3 On the end date
- 4 On average (end stock – start stock) / 2
- 5 Ditto for PMP and PV values
- 6 Purchases over the period (depending on your history settings)
- 7 Sales over the period (according to your historization parameters)
- 8 Turnover rate
- 9 The average storage times

The table also displays at the bottom, the sum, average, minimum, and maximum for each value.

12 Direct Stock Entries

Direct item entries correspond to entries you make directly in a warehouse, without a purchase order or customer return.

12.1 Add an item entry

To add an item entry, from the main menu, click "Direct Entry."

Depending on the setting of Stock It Easy, you will need to encode at least 2 information, namely the item and the quantity.

Below is the logical and comprehensive follow-up of the data to enter to enter an item

- Select the default warehouse, the warehouse you encoded in your user signage is selected
- Select the item
- Select the proofs
 - Entry proofs are displayed in the window if you have specified it in the general settings Entry proofs are mandatory if you have specified it in the general settings
- Select tracking and tracking criteria
 - The tracking and tracking criteria (Lot, second criterion, DLC and DLUO) are displayed in the window if you specified in the general settings
 - Tracking and tracking criteria are mandatory if you have specified it in the general settings
 - **ASTUCE** : si vous entrez une marchandise avec des critères de traçage et suivi déjà existant dans le stock, double cliquez sur la ligne actuellement en stock concernée et ces critères de traçage et suivi seront automatiquement reportés dans les champs correspondant pour la nouvelle entrée
- Select the entry mode the default input mode in the general settings is pre-selected the input modes checked in the general settings are available
- Select location
 - Only if your entry mode is "Selecting location"
- Encode the quantity
- Change the date and time of the movement
 - Only if you want the movement to be identified in the past or future
- Validate click "Apply" to validate and keep the window open for other entries click "Validate" to validate and close the window

12.2 Different ways of entering

Depending on your selection in the general settings, your items can be stocked in different ways.

Always select at least the warehouse, the item, a quantity, plus the other information you need (justifications, lot, ...).

Then depending on the entry mode:

12.2.1 Stock entry without location

This is the easiest way to enter. The item entered with its various criteria entered, in the warehouse, without storage location information.

12.2.2 Stock entry by location selection

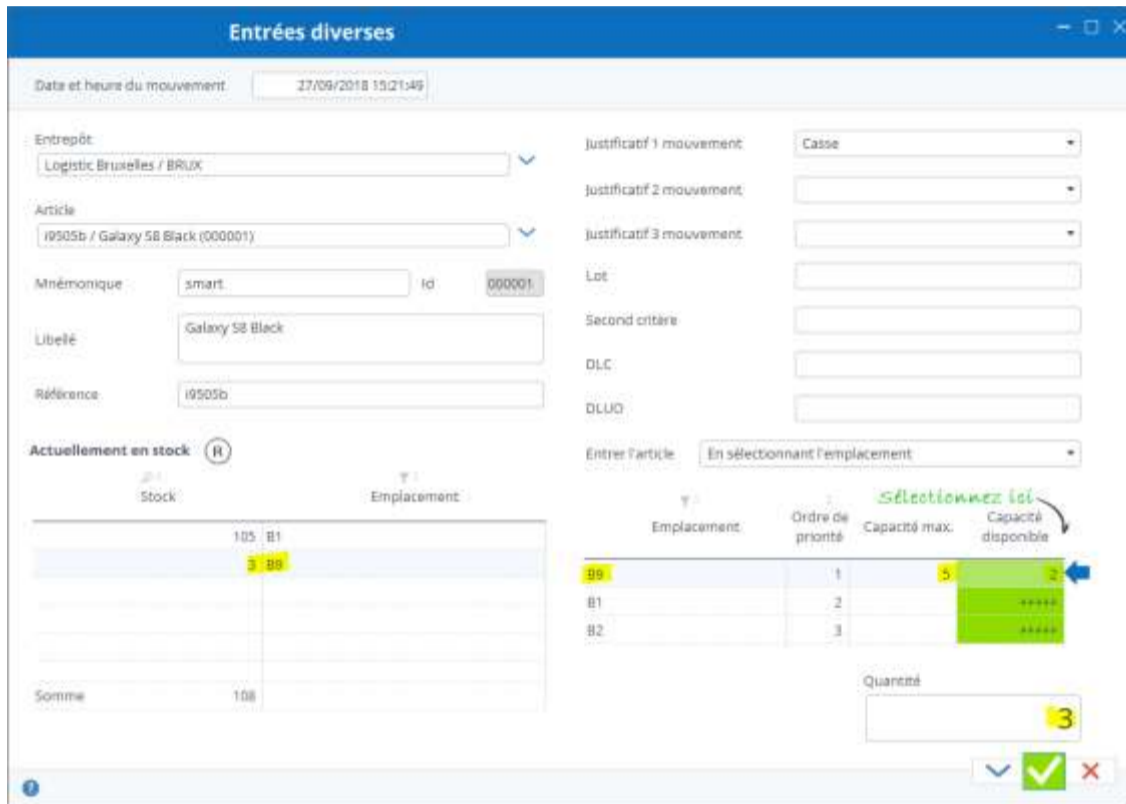
You choose from the list of locations where you want to enter the item.

The maximum capacity you may have encoded for this item in this warehouse is displayed.

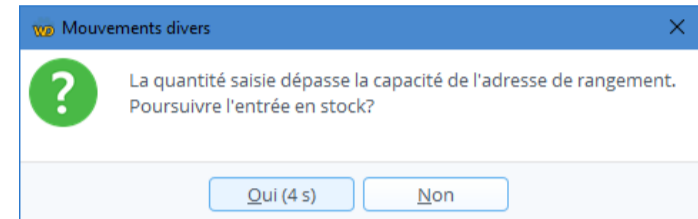
The available quantity is replaced by a series of signs - if no maximum capacity is set.

If you enter more than the available capacity of the selected location, a message asks you to confirm the amount or change your selection.

In the example above, at location B9, I find that I have a stock of 3, that the maximum capacity is 5, and therefore I have an available capacity of 2.



If I enter 3, I must respond to the following

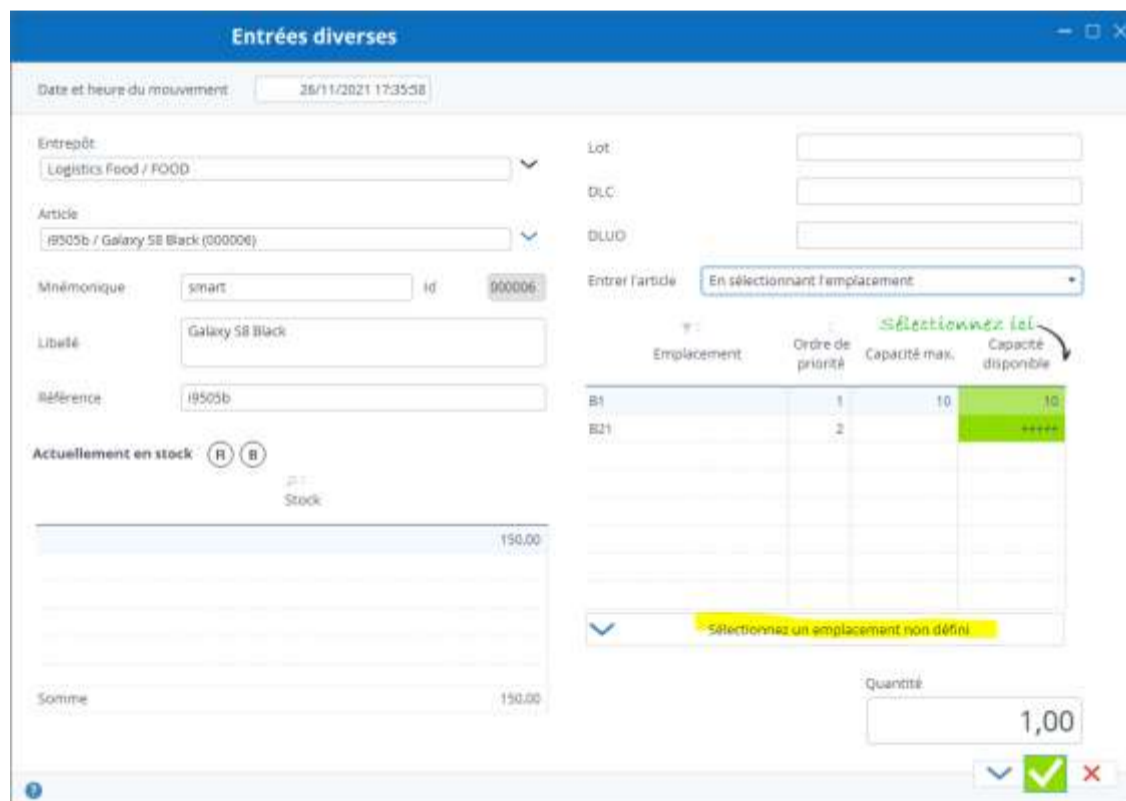


message:

By validating this warning, I make my entry into stock: the maximum capacity of the site is exceeded, the available capacity will be negative (23-1).

Emplacement	Ordre de priorité	Capacité max.	Capacité disponible
B9	1	5	-1
B1	2		++++
B2	3		++++

It is also possible in this input mode to enter an item in a location that is not defined in its item card, just click on the "Select an undefined location" button and the list of locations of the warehouse concerned opens to allow you to select the destination location of your choice.



12.2.3 Stock entry by location priority

In an item's listing, you can set one to multiple storage locations for this item, for each warehouse.

For each of these locations, set a priority order, and optional, maximum capacity to store that item.

In this entry mode, a distribution of quantities will be made on the locations according to their available capacity and priority.

Actuellement en stock (R)

Stock	Emplacement
5	B1
Somme	5

Entrer l'article: Automatiquement selon la priorité/capacité des emplac

Emplacement	Ordre de priorité	Capacité max.	Capacité disponible
B1	1	10	5
B2	2	15	15
B9	3		+++++

Quantité:

Buttons: [Dropdown] [Checkmark] [Close]

In the example above, we see that I have 3 set storage slots for this item in this warehouse. A maximum capacity is set on the first 2 locations.

I will encode an entry greater than the available capacities of the first 2 locations in order of priority, i.e. 50 pieces.

After validation, we find that the quantities are distributed in the order of priority of the locations according to the available capacities:

Actuellement en stock (R)

Stock	Emplacement
10	B1
15	B2
30	B9
Somme	55

Entrer l'article: Automatiquement selon la priorité/capacité des emplac

Emplacement	Ordre de priorité	Capacité max.	Capacité disponible
B1	1	10	0
B2	2	15	0
B9	3		+++++

Quantité:

Buttons: [Dropdown] [Checkmark] [Close]

When maximum capacity is set for all locations, and the amount entered exceeds that, entry will be limited to available capacity. It is therefore important to leave a location without maximum capacity as a last priority.

12.3 Direct entries report

When each entry of a direct entry, the result is one to several input movements, for example a distribution on various locations as in the previous example.

With each of your validations, a window is complete with all the movements made. If you are planning to physically make these entries because of encoding, it is useful to print this report to accompany you in the stock when storing.

Then click the "PDF" button to print a report.

Id	Libellé	Date	Sens des mouvements	Origine des mouvements	Nom entrepôt	Quantité	Prix Moyen Pondéré	Prix	Origine des prix	Emplacement	Lot	DLC
000001	Coque iPhone8	08/07/2024 08:53	Entrée	Direct	Logistics Food	10	4,2000	4,2000	Prix logistique	B38	AZERTY	01/10/2028 00:00
000003	Croquettes pour chien 5 kg	08/07/2024 08:54	Entrée	Direct	Logistics Food	100	10,0500	10,0500	Prix logistique		QWERTY	01/10/2025 00:00
Somme						110						

Buttons: [Print] [PDF] [Close]

You can also print the labels of the items concerned by these entries, with the criteria for tracing and tracking these items in the barcode (for example, the barcode will contain the item's ID, its batch number and its use-by date). This can be very useful if you use the mobile application at the same time, because when reading this barcode, the application will know directly which batch and DLC it is. To print the labels, click on the "Print" button.

12.4 Direct entry of a compound item

When you enter a compound item, each of its components also enters in proportion to its quantity in the compound.

The input mode applies to the compound and all its components.

Note, however, that the input location of the components differs depending on the input mode:

- in entry mode by location selection, entry into the selected location for the compound and each of its components
 - optimal when the compound item exists physically and is an item composed of its components (pack of 2 component items for example)
- in location priority entry mode, entered the compound locations for the compound and the component for each component
 - optimal when the compound item is a "virtual" item used to quickly enter a series of components

12.5 Direct entry of a manufactured item

An item is made from its components, so a manufactured item entry corresponds to its manufacture from its components.

A manufactured item entry - output of each of its components.

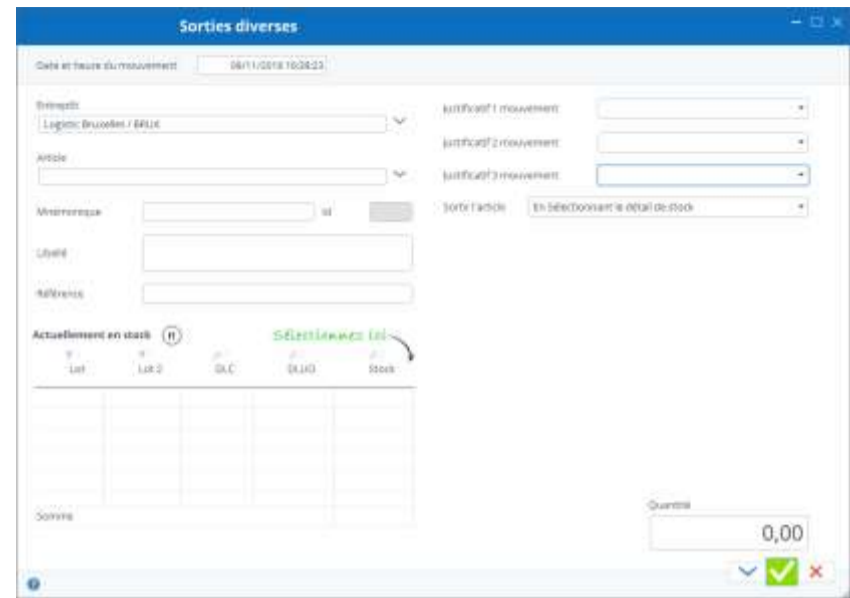
You need to set the output mode for components from the general settings.

13 Direct stock outflows

Direct outputs of items correspond to the outputs you make directly in a warehouse, without an order delivery or stock transfer.

13.1 Add an item output

To add an item output, from the main menu, click "Direct Exit."



Depending on the setting of Stock It Easy, you will need to encode at least 2 information, namely the item and the quantity.

Below is the logical and comprehensive follow-up to the data to be entered to release an item

- Select the default warehouse, the warehouse you encoded in your user signage is selected
- Select the item
- Select proofs
 - The proofs are displayed in the window if you have specified it in the general settings
 - The proofs are mandatory if you have specified it in the general settings
- Select output mode the default output mode in general settings is pre-selected the output modes checked in the general settings are available
- Select location and tracking and tracking criteria
 - The tracking and tracking criteria (Lot, second criterion, DLC and DLUO) are displayed in the window if items in stock exist with these criteria
 - Only if your output mode is "Selecting stock detail"
- Encode the quantity
- Change the date and time of the movement
 - Only if you want the movement to be identified in the past or future
- Validate click "Apply" to validate and keep the window open for other outputs click "Validate" to validate and close the window

When validating the output, you can via the stock settings, define whether a warning should be displayed when the stock falls below the minimum stock of the item.

13.2 Different ways to get out

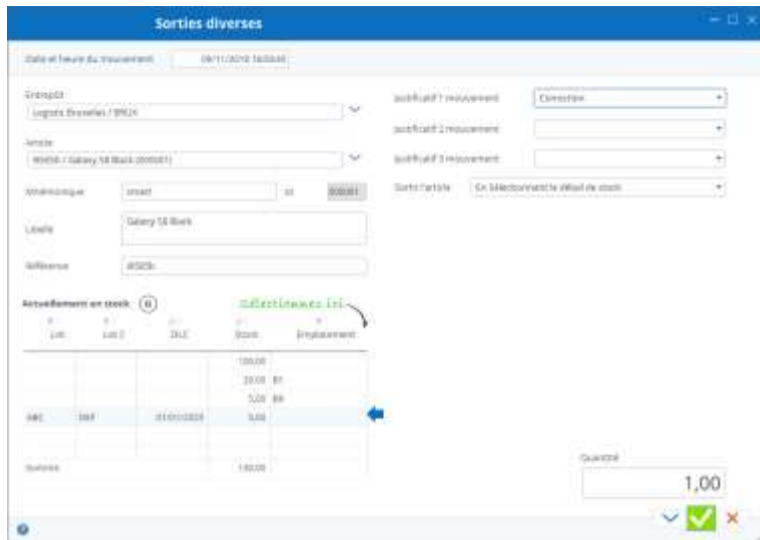
Depending on your selection in the stock settings,, the stock release of your items can be done in different ways.

Always select at least the warehouse, the item, a quantity, plus the other information you need (justifications, lot, ...).

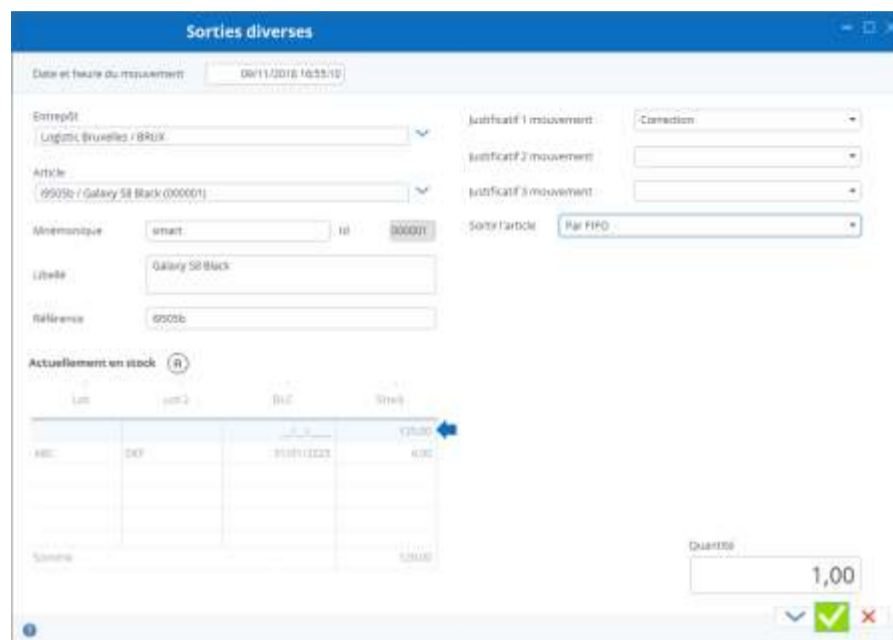
Then depending on the output mode:

13.2.1 Stock release by stock retail selection

You choose in the table on the left the combination of location/ tracing criteria and tracking criteria that you want to get out of the stock.



In the example opposite, I will take 1 piece of the i9505b item out of the unspecified location with the ABC and DEF lot criteria and a DLC at 01/01/2025 from the Brussels stock. The amount I want to get out must be less or equal to that available in this stock detail.



13.2.2 Stock release by FIFO

By selecting this output mode, Stock It Easy will select the locations of the items to be released on the first entry first released principle.

In the example above, imagine that 10 of the 125 items without tracing criteria entered on 1/10/18, the other 115 entered on 1/11/18, and the 4 items with tracing entered on 15/10/18.

You're asking for 20 items to be released.

Stock It Easy will release the 10 items entered on 1/10/18 and then the 4 items entered on 15/10/18 and in n 6 items entered on 1/11/18.

13.2.3 Stock output according to location priority

You can specify for each couple item/warehouse storage locations and a priority order as well as maximum capacity of these locations, this is explained in the item How to encode your direct stock entries..

Exiting according to this principle will empty the locations according to their upward priority order (from the highest priority to the least priority).

13.3 Direct Exit Report

When each entry of a direct output, the result is one to several exit movements, for example a distribution from various locations as in the previous example.

With each of your validations, a window is complete with all the movements made. If you plan to physically do these outings as a result of encoding, it is useful to print this report to accompany you in the stock when you are picking up.

Then click the "PDF" button to print a report.

Id	Libellé	Date	Sens	Nom entrepôt	Quantité	Prix Moyen Pondéré	Prix	Origine du prix	Justificatif 1 mouvement	Justificatif 2 mc
000001	Galaxy S8 Black	09/11/2018 17:07	Sortie	Logistic Bruxelles	75,00	210,0000	210,0000	PMP	Correction	
000001	Galaxy S8 Black	09/11/2018 17:07	Sortie	Logistic Bruxelles	1,00	210,0000	210,0000	PMP	Casse	
Somme					76,00					

13.4 Direct output of a compound item

When you release a compound item, each of its components also comes out in proportion to its quantity in the compound.

The output mode applies to the compound; however the output mode of the components is set at the general parameters level.

13.5 Direct output of a manufactured item

The direct output of a manufactured item is identical to the direct output of a classic item.

14 Inventory management

Inventory is used to correct existing stock in the database following a physical count of goods in the warehouse.

Access to the inventory is done from the main menu: stock / inventory

An inventory is always done on a warehouse to be selected.

The inventory will always be done on the finest granularity according to the configuration of your stock: if you manage storage locations and/or tracing and tracking criteria (batch, use-by date, etc.), the inventory displayed will always correspond to what exists in the database and according to the most precise level of detail.

You can filter the area to be inventoried on the locations, specifically on their name, for example, my location "starts with", or "Contains".

id	Référence	Matérielle	Libellé	Quantité	Inventorié	Réservé	Bloqué	Emplacement	Lot	SLC
000001	cpbl	access	Coque iPhone6	100		0	0	B18		
000001	cpbl	access	Coque iPhone6	10		0	0	B38	AZERTY	01/10/2028
000002	cpcat	anima	Croquettes pour chats	0		0	20	B45	H22	01/01/2026
000002	cpcat	anima	Croquettes pour chats	195		0	0		LOT123	31/12/2023
000003	cpdog	anima	Croquettes pour chien	200		0	0		LOT124	31/12/2023
000003	cpdog	anima	Croquettes pour chien	100		0	0		QWERTY	01/10/2025

In the screen above, the inventory of the FOOD warehouse has been requested without any additional filters.

You can either encode the inventoried quantity directly in the inventory column (in the green head) or print the inventory on paper to carry out the count and then come back to encode it.

Each encoding is immediately applied, there is no confirmation needed unless you encode zero.

The inventoried quantity cannot be less than the sum of the reserved and blocked quantities for this level of detail, if this is the case, you must first correct the reservation (you will not be able to ship the reserved quantity since it does not exist in full) or the block.

The correction of a manufactured item, if the inventoried quantity is > to the displayed quantity will "enter" the difference of manufactured items and "take out" its components proportionally, if the components are not in sufficient available stock, an error message will be displayed, and the inventory of the manufactured item will not be carried out.



The correction of a compound item will modify the "virtual" quantity of it and will impact (in or out) the inventory of its components in the level of detail (as a result, it is not necessarily appropriate to make an inventory per compound item but rather to do it for each of the components).

14.1 Printing inventory

When you print the inventory, you can choose to print or hide the existing quantity in the database, so as not to influence the person who will count.

The count must be done at the finest level of granularity, i.e. the one printed on the document.

INVENTAIRE

Entrepôt : Logistics Food

Référence	Libellé	Emplacement	Lot	DLC	Quantité	Inventaire
ci8 bi	Coque iPhone8	B18			100	
ci8 bi	Coque iPhone8	B38	AZERTY	01/10/2028	10	
cpcat	Croquettes pour chats 5 kg	B45	H22	01/01/2026	20	
cpcat	Croquettes pour chats 5 kg		LOT1 23	31/12/2023	200	
cpdog	Croquettes pour chien 5 kg		LOT1 24	31/12/2023	200	
cpdog	Croquettes pour chien 5 kg		QWERTY	01/10/2025	100	

The document contains in the header the description of what to inventory (the filters you have applied).

INVENTAIRE



Entrepôt : Logistics Food
 Catégorie : Nourriture animaux
 Emplacement Commence par B

Finally, a block at the end of the document allows the inventor to sign his inventory.


Inventaire réalisé par :
Le :
Signature :

If your computer is equipped with a handheld scanner to read QR-Code barcodes, it is quite possible to read this barcode from the "quick access" tool, the inventory window will open and automatically select all the criteria you had previously chosen.

4
?

Accès rapide

Code-barres



15 Purchasing order management

Purchase orders allow the replenishment of goods in warehouses managed in Stock It Easy.

Access to purchase orders is from the main menu: purchases/orders

A purchase order is sent to a supplier for delivery to a warehouse.

A purchase order follows a process characterized by its statutes.

The purchase order lines are received from the "Receptions" menu.

The purchase order can be created manually or from an automatic restocking proposal.

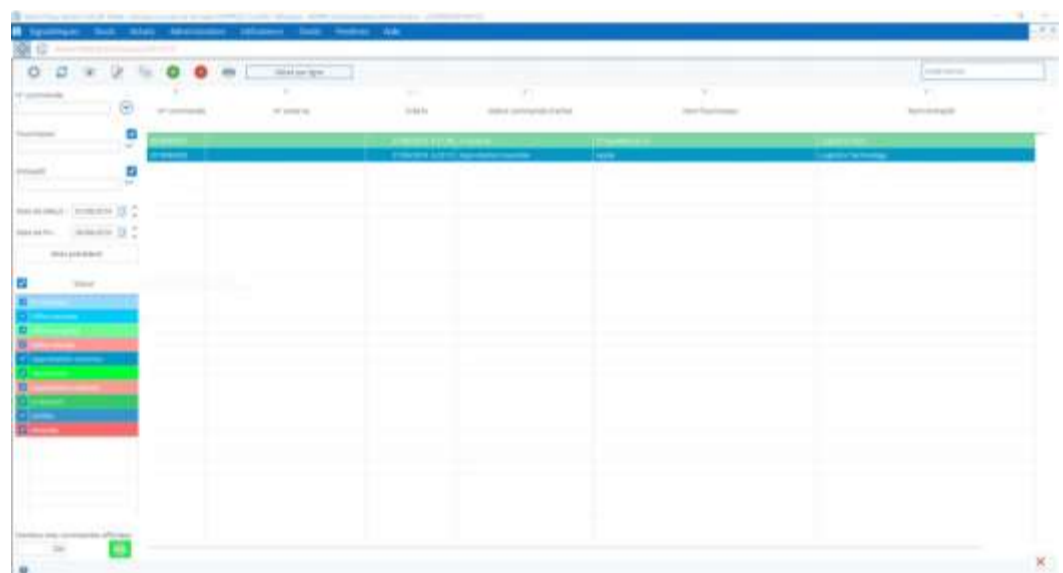
If you want to return a purchase order to the supplier, see "Create a Shipment / The Recipient is a Supplier."

15.1 Selecting purchase orders

Purchase orders are selected according to many criteria

To fine-tune the order selection, you can filter on the following criteria:

- The supplier
- The reception warehouses
- A range of date of creation of the order
- The status of the order
- The order number (or part of the number).
Click the button to the right of the command number to ignore the other selection criteria.
- A direct selection by scanning the barcode on the purchase order
- View selection by command line or command header



The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").



From the ribbon of the purchase orders, you can:

1. Access to purchase order settings
2. Refresh the selection
3. View an order
4. Import orders from an Excel file
5. Edit an order
6. Duplicate an order
7. Create a command
8. Delete a command
9. Receive an order
10. Print order documents

15.2 Create a purchase order

Click the "Add" button, the next window opens.

The first two things to do when you create your purchase order are:

1. choose which supplier to place the order with
2. choose where you want to have this order delivered.

Once you've selected the supplier, the details of the orders from its signage sheet are filled, but you can always adapt them if necessary.

Once these two things are done, you can **add your command lines**. Click the "Add" button to the left of the screen.

A command line is added to the screen. **Select the item** by clicking on the "supplier reference" field.

You can add priority or secondary items from the order provider.

The list of priority items opens. Double click on the item you want to order. If you are looking for an item for which this provider is not the primary supplier click on the "Secondary" selector in the background of the screen.

Then add a quantity by clicking the "Add" button in the center of the window.

By default, the quantity is the unit, but if you have set purchase units in the item's listing, you can choose to order from the purchase unit to the supplier. For example, for a defined item, the purchase unit is 5 and the purchase package is "box." When you order this item, you check the "purchase unit" box (either at the command head, or at the control line, or at the supplier's signage sheet). If you order 2, the system will order 2 purchase units or 2 - 5 boxes. On the purchase order, the mention 2 boxes will appear in the quantity column, and the purchase price will be the unit purchase price multiplied by 5.



A command line can be divided into several desired reception dates.

Include the desired order date and quantity, plus a possible comment on the receiving line.

The confirmed date can be easily completed later when you have received the supplier's request.

Repeat for each item to order and for each desired delivery date.

Navigation arrows on the left make it easy to navigate from one line to another, like the mouse scroll.

You can also click the "Summary View" button for a quick overview of your command lines.

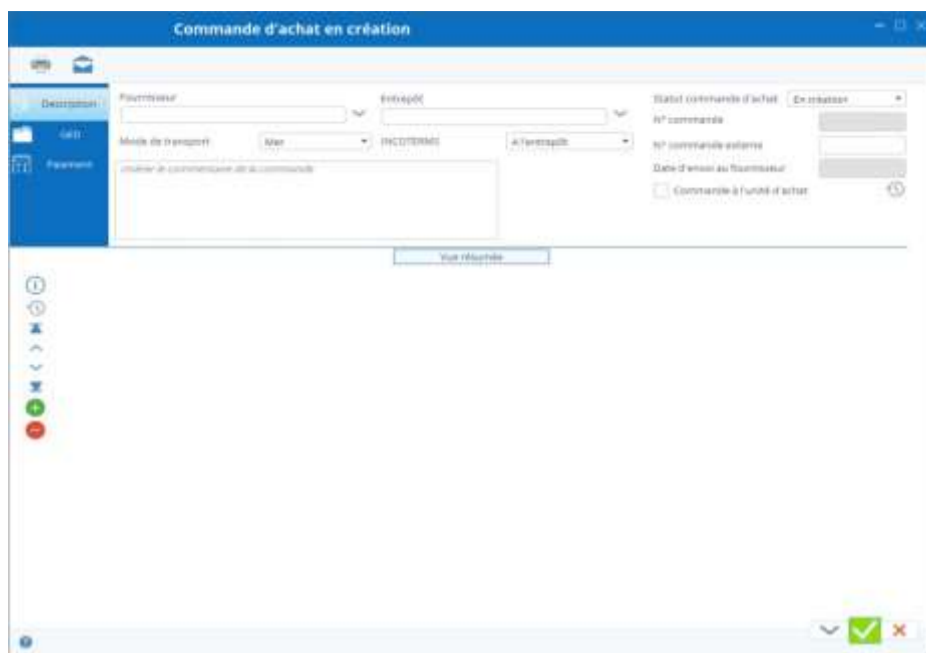
It is possible to save the order and continue it later.

15.2.1 Confirmation of receipt dates

You can use the handy feature of encoding the receipt dates confirmed by the order provider.

For each order line, you have encoded a desired date of receipt, but the supplier will (depending on the case) confirm these dates.

To do this, click on the order ribbon on the "confirm receipt dates" button, the next window opens:



Id	Référence	Référence fournisseur	Mnémonique	Libellé
000005	imac215	imac215	Station	iMac 21.5"
000006	I-5-Black16	I-8-64Go	smart	I Phone 8 64Go
000007	I-5-Black32	I-8+-64Go	smart	I Phone 8 Plus 64Go
000008	I-5-Black64	I-8-256Go	smart	I Phone 8 256 Go
000009	I-5-White16	I-8+-256Go	smart	I Phone 8 Plus 256 Go
000010	I-5-White32	I-X-64Go	smart	I Phone X 64Go
000011	I-5-White64	I-X-256Go	smart	I Phone X 256Go
000012	mbpro13	mbp13	Mac	MacBook Pro 13"
000013	mbpro15	mbp15	Mac	MacBook Pro 15"
000014	i864Gb-coq	i864Gb-coq	smart	iPhone 8 64Gb + coque

Fournisseur Apple / APPLE : Articles Prioritaires Secondaires

Confirmation des dates de réception					
Id	Référence fournisseur	Libellé	Quantité commandée	Date souhaitée	Date confirmée
000021	cpc5	Croquettes pour chien 5 k	725,00	04/07/2019	
000022	cpc5	Croquettes pour chats 5 k	1.800,00	04/07/2019	

Date confirmée  

If each line is received on the same date, simply encode that date in the field to the left of the validate button and the date will be copied on all lines. Otherwise, encode each date on the relevant line.

The receipt button appears when the order is in received status, i.e. when you sent it to the supplier.

15.3 The statutes of the order and the various possible actions according to the statutes

A purchase order will follow a process from its creation to its receipt. Depending on your settings, the process can be time-consuming.

The minimum statute steps are, in order:

- In creation: the order is created or in the process of being created, but not yet sent to the supplier, you can still change it
- Validated: the order is sent to the supplier, you can only change it under certain conditions
- Received: the order is fully received

The maximum statute steps are, in order:

- In creation: the order is created or in the process of being created, but not yet sent to the supplier, you can still change it
- Offer submitted: a price request is sent to the supplier
 - Offer accepted offer refused
- submitted approval: An application for approval is sent to a user who has the right to approve an order
 - approval accepted approval denied
- Validated: the order is sent to the supplier, you can only change it under certain conditions
- Received: the order is fully received
- cancelled: the order is cancelled

The next possible actions to change the status of an order are displayed in the top ribbon of the command.



To "advance" the status of an order, you must open it in edition and click the action button on status.

These buttons will be different depending on the current status of the order and the settings of the purchase orders or the supplier.

Possible actions will be, in order:

- submit the offer (optional)
- accept the offer refuse the offer
- submit approval (optional)
- accept approval refuse approval
- Send the order
 - a. Once the order is sent, a button appears and allows you to go to the list of receipts by filtering on the receipt of that order
- Solder order (optional)

Switching to a new status automatically switches the control from an editing mode to a visualization mode.

To take several steps, you will have to click the command editing button after each action.

15.4 Importing orders

Purchase orders can be imported from an Excel file. Orders will only be created (no update via import).

Import the file by clicking the "import" button on the ribbon on the order list.

For details of importing purchase orders, see "Import purchasing orders from an Excel file."

15.5 Print order or receipt

By clicking on the "print" button on the ribbon, you open a menu offering to print the order or receipt of the ribbon.

The document to be printed is the one set in the general settings in the model tab.

In addition, for your purchase orders, you can prepare many standard messages, for the printed document and/or for the accompanying email of this document.

Depending on the status of the order, the title of the purchase order document will change:

Status offer submitted – Offer Request

Approved Status Submitted - Application for Approval Status to Be Received - Order

15.5.1 Automatic document creation

When actions submit the offer, submit approval and send the order, you are offered to create a document (based on your models). This document can be saved in the GED of the order. These documents will be the memory of the evolution of the order.



These documents, you can print and/or email them directly from Stock It Easy.

15.6 Full one-click reception

Depending on the reception settings you've set, it may be possible to receive an order with one click. That is, if

- You have not defined any obligation to enter an entry document
- You have not set any tracking and tracking management (lots etc)
- You set a different entry mode to "manually select the location"

Then a "Receive" button will appear in the headband and allow you to validate the receipt of the remaining balance of all the command lines displayed.

15.7 The different rights on purchase orders

Since managing user skills, you can fine-tune the rights to purchase orders.

The most basic right is to be able to see, edit or delete an order.

If you want your purchase orders to be approved, you must set at least two prouser threads, one that will not have permission to approve (the one that encodes the order in general) and the one that has that right (a supervisor for example).

Access to purchase order settings is subject to permission from the profile.

The right to change the head data can be removed, in e and, you probably want the head data (payment terms, Franco ...) to be managed only via the provider card (because it is copied from the supplier card in the creation of the order), without the possibility of changing in the order, except for a user with a profile with this right.

	Option	Visualiser	Editer	Supprimer	Autoriser
Achats					
Commandes d'achat		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Droit d'approuver une commande d'achat					<input checked="" type="checkbox"/>
Super utilisateur commande achat					
Droit de modifier les données de l'entête					<input checked="" type="checkbox"/>
Droit de modifier les paramètres des commandes					<input checked="" type="checkbox"/>

The super user right is not enabled by default, this right allows you to manually change the status of the command lines and command. Normally you shouldn't need it, but you never know!

16 Automatic stock replenishment

The screenshot shows a software interface with a table of items. The table has columns for 'Item', 'Warehouse', 'Quantity', 'Unit Price', 'Total Price', and 'Status'. The 'Quantity' column is highlighted in green, indicating that the software is automatically generating purchase orders to replenish stock based on set levels. The interface also includes a left-hand navigation pane and a top menu bar.

You can automatically generate purchase orders to replenish the stock based on the levels you set.

Stock It Easy then offers you a list of items to order that you can edit and then generate those commands with a click.

- From the main menu click the "Restock" button from the "Buys" block.
 - The left panel allows you to determine which warehouses or suppliers or items you want to restock for.
 - Then you select the criteria for restocking items, such as items under their minimum stock, zero-stock items, etc.
1. You decide to consider the reserved or blocked quantities.
 - You decide to consider current orders.
 - Finally, you determine the level of stock to be reached, either reach a level defined in the item sheet according to the warehouse (stock min, max or optimal), or reach a ratio in parts or percentage.
 - Then click the "Refresh" button.
 - You can change the amounts proposed in the column on a green background. You can also uncheck the lines you don't want to order, it's possible via a right click in the head of the column to check or uncheck all at once.
 - Click the "Validate" button, orders are generated, and you find them in the list of purchase orders, all you must do is send them to the suppliers.

17 Receiving goods

17.1 Select receptions

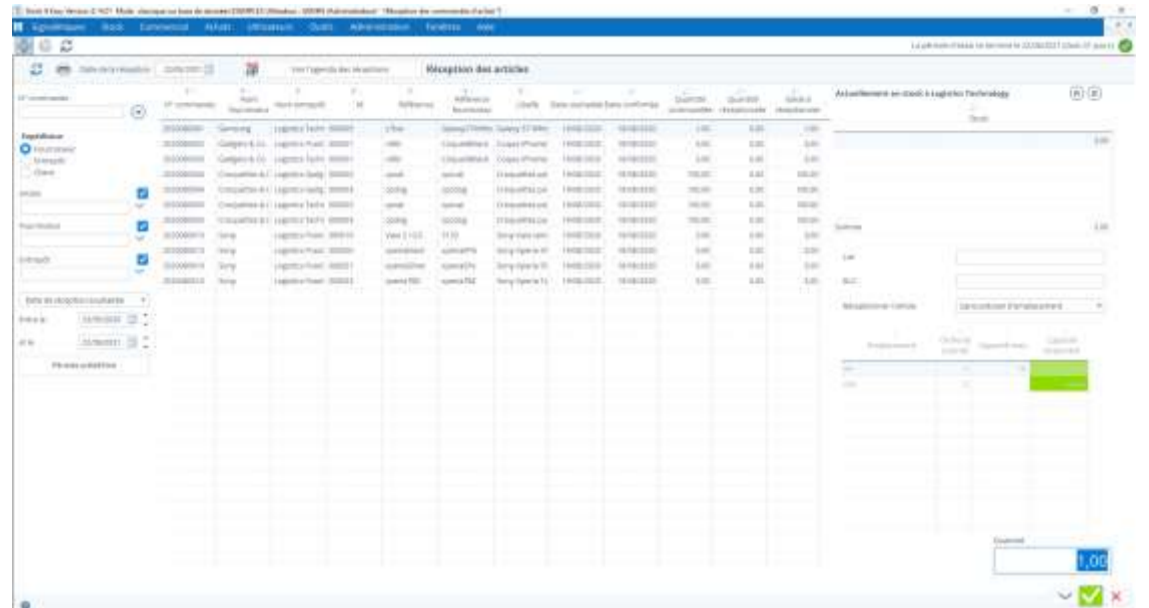
The reception selection window opens and displays the list of goods to be received. For a line to be displayed in the list, it is imperative:

1. If it is a purchase order, whether its status as well as that of the order is "To be received"
2. If it is a customer return, the return status must be "validated"
3. If it is a transfer between warehouses, that the status of the shipment from the original warehouse must be "Shipped" or "Billed"

All the criteria on the left side of the screen are used to filter the list of receptions more accurately.

You can filter on the type of shipper of the goods (supplier, customer, or warehouse) an order number or part of an order number, an item, a supplier, a warehouse, a range of dates, a type of date (reception desired, closed or when the order was created).

The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").



17.2 Encode a reception

Click on the line to be received. Information about a possible stock of the item is complete in the upper right of the screen. This allows you to see where there is already existing stock of this item to eventually group it together.

View the current stock of the item to be received



17.2.1 Reception information

When you receive, depending on the settings, various fields will appear under the item's stock block to the right of the screen.

The criteria are the proofs, the tracking and tracking information, and the way the item is received in relation to its locations.

17.2.1.1 Optional reception criteria based on your stock settings

Select the criteria and then adjust the amount received if necessary.

By default, the amount displayed is the balance to be received from the selected line, but you could receive more, or less than that amount.

Also, if you manage the tracking and tracking of the stock, you may encode a lot number at the front desk, so there will be several receiving actions to do (one per batch).

Or you may receive on various locations that you will select manually. It is also possible in this input mode to enter an item in a location that is not defined in its item card, just click on the "Select an undefined location" button and the list of locations of the warehouse concerned opens to allow you to select the destination location of your choice.



Once the quantity is encoded, click the "Apply" button, the stock entry is made, and the list of receipts is updated. The reception checks and automatic actions on the command line are then carried out.

ID	Label	Date	Desc	Num articles	Quantite	Pts	Mises	Stock	Pts	Ordre	Num	Emplacement	Justif	movement
00001	Galaxy S8 Black	27/09/2018 15:42	Receiv	Logistic Bruxelles	5		210.000	210.000	PL2		81			Casse
00001	Galaxy S8 Black	27/09/2018 15:42	Receiv	Logistic Bruxelles	15		210.000	210.000	PL2		82			Casse
00001	Galaxy S8 Black	27/09/2018 15:42	Receiv	Logistic Bruxelles	30		210.000	210.000	PL2		84			Casse
Somme					50									

17.2.1.2 Full one-click reception

Depending on the reception settings you've set, it may be possible to receive an order with one click. That is, if

- You have not defined any obligation to enter an entry document
- You have not set any tracking and tracking management (lots etc)
- You set a different entry mode to "manually select the location"
- In the display of the lines to be received you have only one visible command

Then a button to the left of the validation button will appear and allow you to validate the receipt of the remaining balance of all the lines of the order displayed.

17.3 Print receptions

As you enter, the entries report is completed in a window that you can swipe on the side or on another screen.

The list of movements is completed as you go.

You can print out the list of movements made before you close the reception window if you still must physically go to your warehouse to do them.

18 The management of sales orders

Sales orders or customer orders represent requests for goods from a warehouse managed in Stock It Easy.

Access to sales orders is from the main menu: commercial /orders

A sales order is issued on behalf of a customer for shipment from a warehouse.

Encoding an order is independent of the stock availability of the items that compose it. It is during the shipment of this one that the availability will be checked. The order is shipped from the "Expeditions" menu.

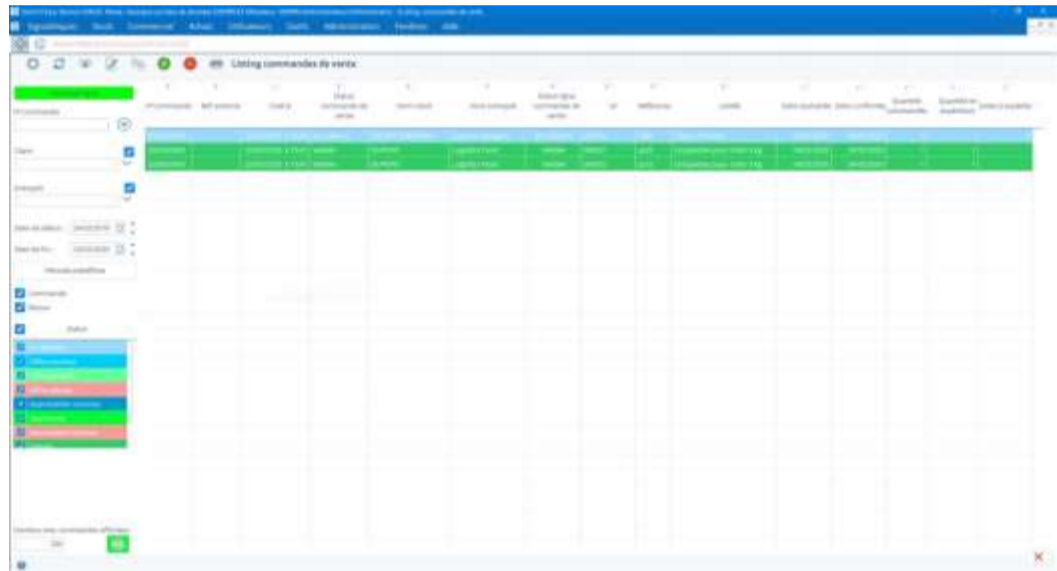
An order may be the subject of a customer offer prior to its validation, it may also be subject to the approval of a user with the right to approve a sales order.

18.1 Selecting orders

There are many criteria for selecting sales orders.

To fine-tune the order selection, you can filter on the following criteria:

- The customer
- Shipping warehouse
- A range of date of creation of the order
- The status of the order
- If it is an order or a return
- The order number (or part of the number)
 - Click the button to the right of the command number to ignore the other selection criteria
- A direct selection by scanning the barcode on the purchase order
- View selection by command line or command header



The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").



From the customer orders ribbon, you can:

- Access sales order settings
- Refresh the selection
- View an order
- Import orders from an Excel file
- Edit an order
- Duplicate an order
- Create a return of an order
- Create a command
- Delete a command
- Print order documents
- Validate an order selection (all selected creative orders will be validated)
- Create a selection of orders (all selected validated orders will have their corresponding shipment created)

18.2 Create a sales order

Click the "add" button, the following window opens:

The first two things to do when you create your order are:

1. choose which **customer** to place the order for
2. choose from which **warehouse** to ship this order

Once you've selected the customer, their order details from their signage are filled, but you can always adapt them if necessary.

Once these two things are done, you can **add** the command lines.

Click the "Add" button to the left of the screen.

A command line is added to the screen.

Select the item by clicking on the "reference" field.

You can filter the selection of items for a faster search

Then add the **quantity** the customer's desire.

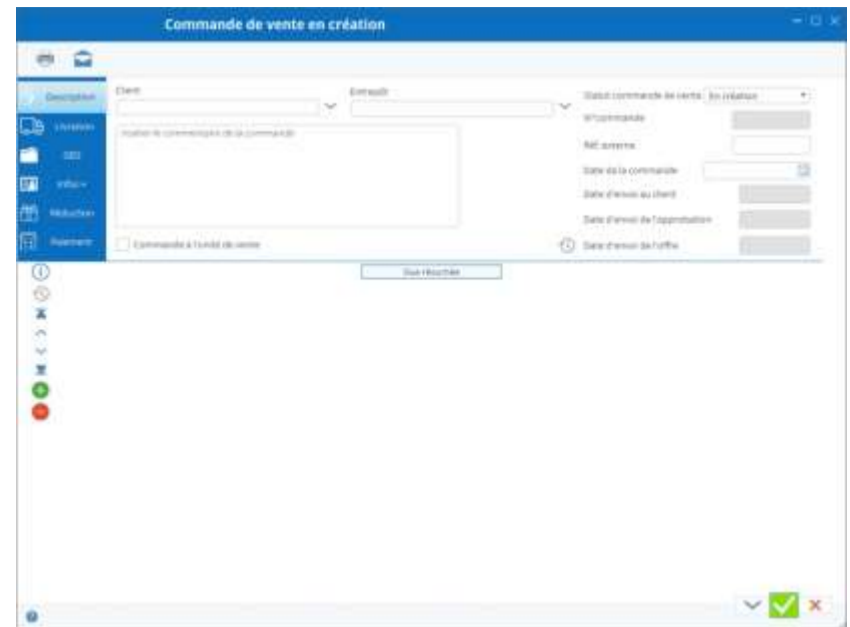
By default, the quantity is the unit, but if you have set sales units in the item's listing, you can choose to sell to the sales unit to the customer. For example, for a defined item, the sales unit is 5 and the sales package is "box." When you encode the order for this item, you check (either at the control head or at the command line) the "sales unit" box. If you order 2, the system will order 2 sales units or 2 - 5 boxes. On the purchase order, the mention 2 boxes will appear in the quantity column, and the selling price will be the unit price of sale multiplied by 5.

A command line can be divided into several desired shipping dates.

Include the desired date and the amount (by default the next day's date is displayed), plus a possible comment about the order shipping line.

The confidentiality date can be easily completed later.

Repeat for each item to order and for each desired shipping date.



Le libellé contient

Id	Référence	Référence fournisseur	Mnémonique	Libellé
000001	i9505b	GalaxyS8Black	smart	Galaxy S8 Black
000002	i9505w	GalaxyS8White	smart	Galaxy S8 White
000003	s7bb	GalaxyS7Black	smart	Galaxy S7 black
000004	s7bw	GalaxyS7White	smart	Galaxy S7 White
000005	imac215	imac215	Station	iMac 21.5"
000006	I-5-Black16	I-8-64Go	smart	I Phone 8 64Go
000007	I-5-Black32	I-8+-64Go	smart	I Phone 8 Plus 64Go
000008	I-5-Black64	I-8-256Go	smart	I Phone 8 256 Go
000009	I-5-White16	I-8+-256Go	smart	I Phone 8 Plus 256 Go
000010	I-5-White32	I-X-64Go	smart	I Phone X 64Go

Navigation arrows on the left make it easy to navigate from one line to another, like the mouse scroll.

You can also click the "Summary View" button for a quick overview of your command lines.

It is possible to save the order and continue it later.

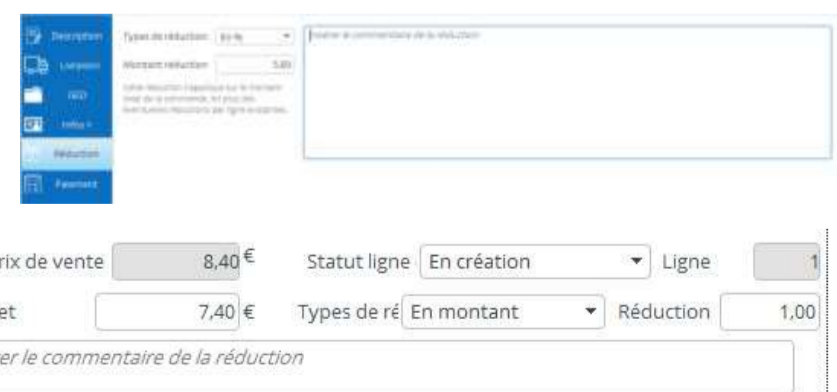
18.2.1 Discount encoding/promotion/discount

You can offer a discount to your customer. This reduction will be expressed either as an amount or as a percentage.

The reduction will apply to the head of the order, i.e. on the entire order, or be specific to a line of command.

The header and line reductions are cumulative.

For each discount, a comment can be entered.



18.2.2 Shipping dates

You can use the handy feature of encoding confirmed shipping dates (when you've controlled stock availability, for example).

To do this, click on the order ribbon on the "confirm shipping dates" button, the next window opens.



18.2.3 Encoding shipping dates

If each line is shipped on the same date, simply encode that date in the field to the left of the validate button and the date will be copied across all lines. Otherwise, encode each date on the relevant line.

The shipping button appears when the command is in creation status or to be validated.

18.3 The statutes of the order and the various possible actions according to the statutes

A sales order will follow a process from its creation to its closing. Depending on your settings, the process can be time-consuming.

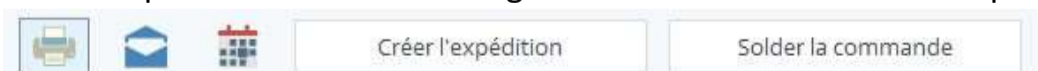
18.3.1 The minimum statute steps are, in order:

- in creation: the order is created or in the process of being created, but not yet confirmed to the customer, you can still change it
- validated: the order confirmed to the customer, you can only change it under certain conditions
- closed: the order is fully shipped

18.3.2 The maximum statute steps are, in order:

- in creation: the order is created or in the process of being created, but not yet sent to the customer, you can still change it
- Submitted offer: an offer is sent to the customer
 - offer accepted
 - offer declined
- submitted approval: An application for approval is sent to a user who has the right to approve an order
 - approval accepted
 - approval denied
- validated: the order confirmed to the customer, you can only change it under certain conditions
 - a. When validating a customer order, depending on your choice in the sales order settings, you can directly create the corresponding shipment
- closed: the order is fully shipped
- Billed: The order is fully charged
- cancelled: the order is cancelled

The next possible actions to change the status of an order are displayed in the top ribbon of the command.



To "advance" the status of an order, you must open it in edition and click the action button on status.

These buttons will be different depending on the current status of the order and the settings of the sales orders or the customer.

18.3.3 Possible actions will be, in order:

- submit the offer (optional)
 - accept the offer
 - Refuse the offer
- submit approval (optional)
 - accept approval
 - Refuse approval
- Validate the order
- Create shipping
- Solder order (optional)
- Charge

1. Create a return of an order

If your customer wants to return all or part of his order, you will create a good return that you will send to the customer. Then, this return, you can receive it via the "Receptions" menu.

From the sales order menu, select the order you need to pick up (in whole or in part), and click the "Return Order" button.)

The following window opens and allows you to select items and quantities to recover:

2020080001 : Sélectionner les quantités à retourner						
Id	Référence	Libellé	Quantité commandée	Quantité en expédition	Q. expédiée	Qté à retourner
000010	I-5-Black64	I Phone 8 256 Go	1,00	1,00	1,00	1,00
000011	I864Gb-cb	IPhone 8 64Gb + coque noir (composé)	1,00	1,00	1,00	1,00
000012	I-5-Black16	I Phone 8 64Go	1,00	1,00	1,00	1,00
000013	I-5-White1t	I Phone 8 Plus 256 Go	1,00	1,00	1,00	1,00

You can change the quantities to be returned if they are not greater than the quantities actually shipped. Enter 0 if you do not want to retrieve a line.

Click the "Validate" button, the return is created, you will not be able to delete or add a line.

Then you just must validate it and send the voucher back to your customer.

To enter these items in your stock, you must proceed from the "Reception" menu.

18.4 Importing orders

It is possible to import sales orders from an Excel file. Orders will only be created (no update via import).

Import the file by clicking the "import" button on the ribbon on the order list.

For details of the import of sales orders, see the "Importing Sales Orders from an Excel File".

18.5 Print the order

By clicking on the "print" button on the ribbon, you open a menu offering to print the order.

The document to be printed is the one set in the general settings in the model tab.

In addition, for your sales orders, you can prepare many standard messages, for the printed document and/or for the accompanying email of this document.

Depending on the status of the order, the title of the order document will change:

Status submitted offer - Offer

Status submitted - Application for approval

Status to be received - Order

18.5.1 Automatic document creation



When submitting the offer, submitting approval and validating the order, you are offered to create a document (based on your models). This document can be saved in the GED of the order. These documents will be the memory of the evolution of the order.

These documents, you can print and/or email them directly from Stock It Easy.

18.6 The different rights to sales orders

From user profile management, you can fine-tune the rights to customer orders.

Commercial				
Facturation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Commandes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Droit de modifier les paramètres de commandes de				<input checked="" type="checkbox"/>
Droit d'approuver une commande de vente				<input checked="" type="checkbox"/>
Super utilisateur commande de vente				
Droit de modifier les données de l'entête				<input checked="" type="checkbox"/>

The most basic right is to be able to see, edit or delete an order.

If you want your sales orders to be approved, you must set at least two user profiles, one that will not have permission to approve (the one that encodes the order in general) and the one that has that right (a supervisor for example).

Access to sales order settings is subject to permission from the profile.

The right to change the head data can be removed, in effect, you probably want the head data (payment terms, Franco ...) to be managed only via the customer card (because it is copied from the customer card in creation of the order), without the possibility of changing in the order, except for a user with a profile with this right.

The super user right is not enabled by default, this right allows you to manually change the status of the command lines and command. Normally you shouldn't need it, but you never know!

19 Shipping management

Access to shipments is from the main menu: stock /shipments

A shipment is edited on behalf of a recipient for shipment from a warehouse.

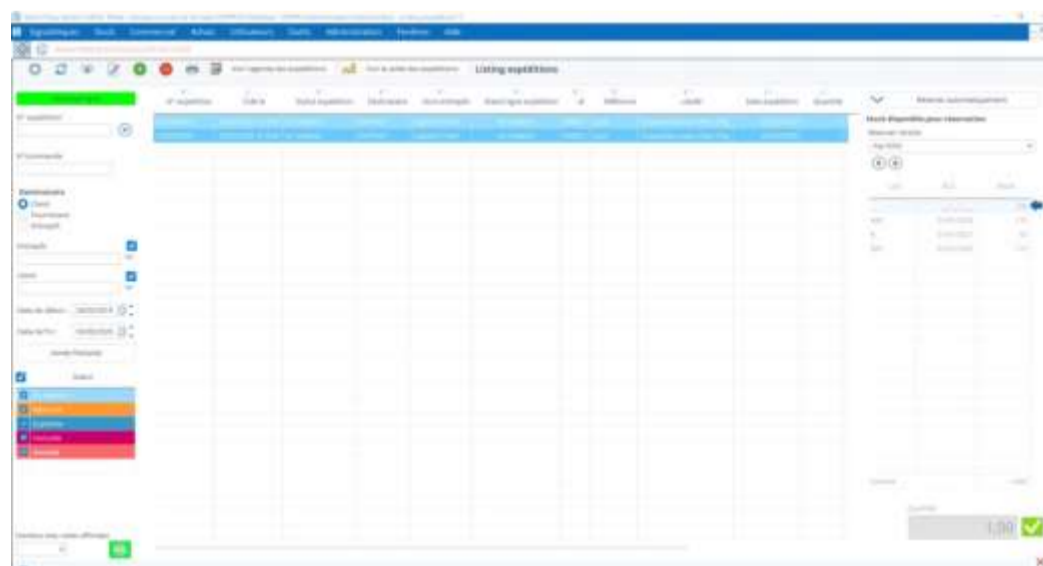
Encoding a shipment is independent of the stock availability of the items that compose it. It is when booking the shipment that availability will be checked.

The shipment will then be booked and shipped.

19.1 Selecting expeditions

To fine-tune the selection of shipments, you can filter on the following criteria:

- The type of recipient (customer/warehouse/supplier)
- The recipient
- Shipping warehouse
- A shipping creation date range
- The status of the expedition
- The order number to be shipped if the type of recipient is a customer or supplier
- The shipping number (or part of the number)



- Click the button to the right of the no.
- The external reference of the shipment (if you have completed it)
- A direct selection by scanning the barcode on the shipping document
- View selection by shipping lines or header

The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").

The banner of possible actions on shipments



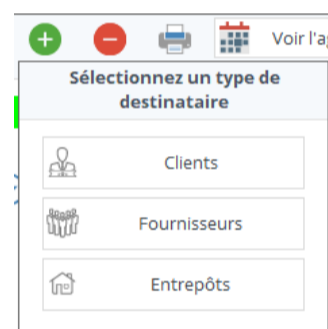
From the shipments banner, you can:

- Access shipping settings
- Refresh the selection
- View an expedition
- Edit an expedition
- Create an expedition
- Delete a shipment
- Print shipping documents
- See an expedition diary
- View the balance of shipments
- Automatically reserve the selection of shipments in creation status
- Ship the selection of shipments to reserved status

19.2 Create an expedition

Click the "add" button, the following window opens:

Select the type of recipient



The first two things to do when you create your expedition are:

- choose the type of recipient
 - customer (sales order delivery)
 - supplier (return of purchase order)
 - Warehouse (transfer between warehouses)
- choose from which warehouse to ship

Once you've selected the recipient, their delivery details from their signage sheet are filled, but you can always adapt them if necessary.

Once these two things are done, you can add your shipping lines. Click the orange "Add from a command" button or the green "Add" button to the left of the screen.

19.2.1 The recipient is a customer

If the recipient is a customer, there is a good chance that you will ship an order from that customer.

If you ship an entire order, the easiest way is to create shipping from the customer order. Just click the "create shipping" button on the top of the validated sales order. The number of the created shipment appears, so you find this shipment in the list, it represents all the items managed in stock of the original order.

If you ship one order or more orders in a single shipment, it may be easier to create the shipment and then import the remaining customer order lines to ship into it. To do this, use the orange "Add from an order" button, the next window opens:

- check the lines to ship and possibly change the amount in the balance column to ship
- then validate, the lines are added to the shipment.

N° de commande	Ref. externe	Date de la commande	Date soustable	Date confirmée	Quantité commandée	Quantité en expédition	Solde à expédier	U.
382000002		09/03/2020	09/03/2020		1	0	1	
382000002		09/03/2020	09/03/2020		1	0	1	

You can also ship items that aren't from an order, in which case, add them manually by clicking the green "Add" button.

19.2.2 The recipient is a supplier

If the recipient is a supplier, chances are you will return purchase order lines (non-compliant, defective, etc.).

To do this, use the orange "Add from an order" button, the next window opens.



- check the lines to ship and possibly change the amount in the balance column to return
- then validate, the lines are added to the shipment.

You can also ship items that aren't from an order, in which case, add them manually by clicking the green "Add" button.

19.2.3 The recipient is a warehouse

In this case, add them manually by clicking on the green "Add" button.

19.2.4 Manual addition of shipping lines

A line is added to the screen. Select the item by clicking on the "reference" field.

You can filter the selection of items for a faster search

Then add the amount the recipient's desired

Repeat for each item to be shipped.

Navigation arrows on the left make it easy to navigate from one to another, like the mouse scroll.

You can also click the "Summary View" button for a quick and simplified overview or entry of your shipment lines (and switch from simplified to full encoding if necessary).

It is possible to register the shipment and continue it later.

Le libellé contient

Id	Référence	Référence fournisseur	Mnémonique	Libellé
000001	i9505b	GalaxyS8Black	smart	Galaxy S8 Black
000002	i9505w	GalaxyS8White	smart	Galaxy S8 White
000003	s7bb	GalaxyS7Black	smart	Galaxy S7 black
000004	s7bw	GalaxyS7White	smart	Galaxy S7 White
000005	imac215	imac215	Station	iMac 21.5"
000006	I-5-Black16	I-8-64Go	smart	I Phone 8 64Go
000007	I-5-Black32	I-8+-64Go	smart	I Phone 8 Plus 64Go
000008	I-5-Black64	I-8-256Go	smart	I Phone 8 256 Go
000009	I-5-White16	I-8+-256Go	smart	I Phone 8 Plus 256 Go
000010	I-5-White32	I-X-64Go	smart	I Phone X 64Go

line

19.3 The status of the expedition and the various possible actions according to the statutes

An expedition will follow a process from its creation to its closing.

19.3.1 The minimum statute steps are, in order:

- in creation: the shipment is created or in the process of being created, but not yet booked or shipped, you can still edit it
- reserved: the items of the shipment are reserved in the stock; you can only change it under certain conditions
- shipped: the shipment is fully carried out

19.3.2 The maximum statute steps are, in order:

- in creation: the shipment is created or in the process of being created, but not yet booked or shipped, you can still edit it
- booked: the items of the shipment are reserved in the stock; you can only change it under certain conditions

- prepared: the items are all reserved, you spread them over one to several shipping units which will then constitute the SSCC documents and the packing list.
- shipped: the shipment is fully carried out
 - b. When validating a shipment, depending on your choice in the shipping settings, you can create the corresponding invoice directly.
- Billed: You billed this shipment
- cancelled: shipping is cancelled

The next possible actions to change the status of an expedition are displayed in the top of the expedition.



To "advance" the status of an expedition, you must open it in edition and click the action button on status. These buttons will be different depending on the

current status of the shipment and the stock settings.

19.3.3 Possible actions will be, in order:

- Book items
 - this button only appears if the default output mode of items is different from "Selecting stock detail"
- Prepare
- Ship items
- Bill shipping (optional)

19.4 Booking lines to ship

Before shipping items, they must be available in stock. Depending on how you release stock in the stock settings, automatic booking will be possible.

When automatic booking is possible, a "Book" button appears in the shipping ribbon in creation and next to the shipping line selected in the list of shipments.

19.4.1 Shipping display by line or header: influence on booking

If you view shipments by line (the "detail by line" button, when you select a "created" line, a side panel appears on the right. This sign allows you to book the shipping line.

The options available are dependent on your stock settings.

The top "Book automatically" button will book all shipping lines based on the default output mode of stock settings. as with the "Book" button in the shipping window.

The block below allows you to book only the selected shipping line, so to see this block display the shipments in "Detail by line."

The "By selecting stock detail" booking method allows you to pick manually, and possibly book in different locations by adjusting the quantity.

Réservé pour cette ligne d'expédition

Lot	DLC	Stock	Dé-réserver
XYZ	01/01/2025	1	✖

In case of automatic booking, the booking is made up to the available stock.

By selecting a reserved line, it is possible to deregulate it.

Click on the Unbook cross to delete a reservation.



19.5 Preparing the shipment

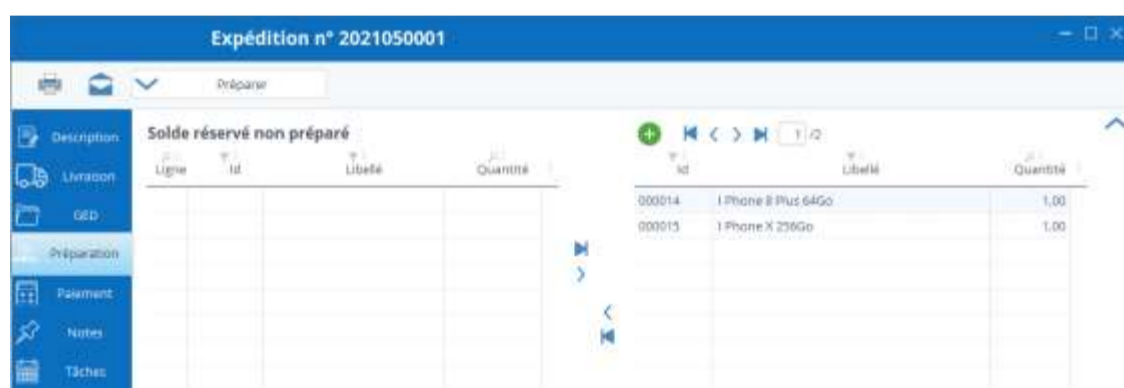
Between booking and shipping, you can distribute the lines and quantities of the order over one or more shipping units. This optional step is activated from the shipping settings.

From the shipping sheet, after booking all the lines of it, the "Prepare" button appears in a header, as well as a complementary "preparation" tab.



The preparation tab distributes the lines and quantities of the shipment over one to several shipping units.

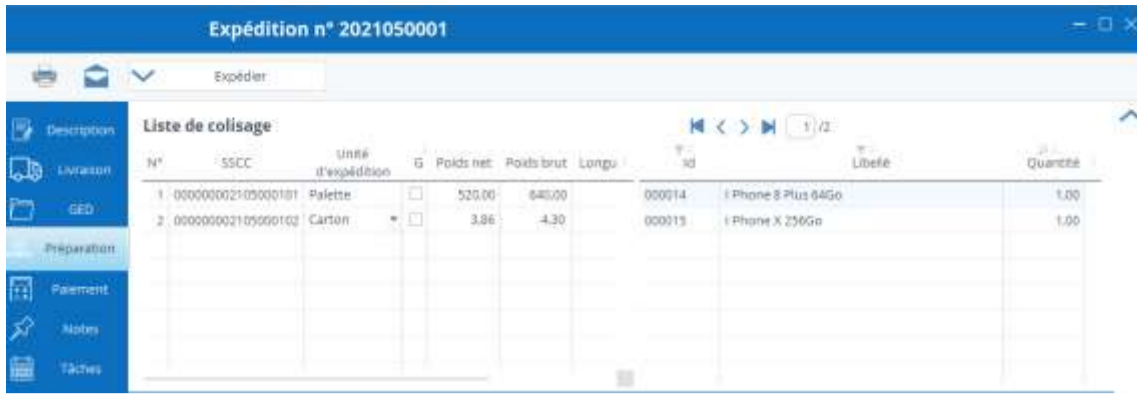
Simply move the lines of your choice from the left to the right table using the buttons in the center. To remove the package, do the opposite. You can change the quantity in a package (as long as you don't exceed the total amount of shipping). To add another shipping unit, click the "Add" button.



Above, the lines are spread over 2 shipping units.

When all quantities are affected, you can click the "Prepare" button.

If you have set through the shipping settings that you want to move the items to a preparation location, and you have encoded more than one location of this type for the warehouse concerned, a window opens and asks you to select the location of your choice.



From then on, your CCSS will be assigned to each shipping unit.

If you have set defaults in the shipping settings, the shipping unit and its dimensions will be pre-completed, and the net and gross weights of each will be prefilled by the item sheet's weights.

You can change all this information (except the SSCC), and you can return to the calculated weight by clicking right into the weight column of the line of your choice.

In your print choices, you will be able to print the CCSS and parcel lists.

19.6 Ship shipping

From an expedition or from the list of shipments, if the shipment is reserved in its entirety a "send" button is displayed.

Click this button ships all the shipping lines, so the stock outputs are final.

19.6.1 See the diary / see the balance of shipments

These 2 buttons accessible from the banner of the list of shipments allow you to see the shipment schedule and the balance of customer orders to ship. These are validated command lines that are not yet either booked or shipped.

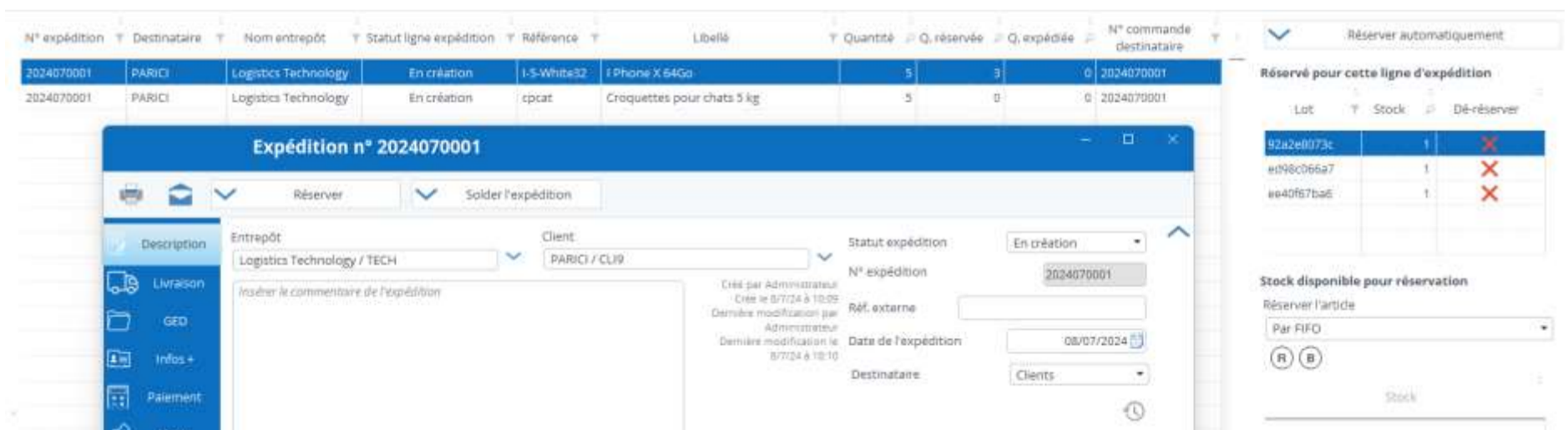
19.6.2 Partial Shipment of a Customer Order

It may happen that you do not have the stock available to ensure the entire order, so you can ship what is reserved only.



In the example above, we have two order lines to ship, the first one is not fully booked (3 out of 5), and the second one is not booked at all due to a lack of goods.

When I open the shipment, I notice that I have a "Sell shipment" button that appears:



To consider this partial shipment to be shipped as is, click the "Balance Shipping" button.

The shipment (or the transition to the preparation status according to your settings) is carried out, then the message below is displayed.



Choice 1 will create a new shipment with the remainder of the order, this is the most obvious case if you think that the missing stock to fulfil the order will come in.

Choice 2 is to be selected if you know that the missing stock will never arrive.

Choice 3 allows you to decide later, you can always create a backorder shipment or close the order.

19.7 Print documents

By clicking on the "print" button on the ribbon, you open a menu offering to print the shipping documents, namely:

- The preparation vouchers
- The send-off note
- The RMC

The document to be printed is the one set in the general settings in the model tab.

In addition, for your sending notes, you can send by email the printed document and/or for the accompanying email of this document.

19.7.1 Automatic document creation

Documents can be saved in the shipping GED if the shipment is opened in edition when you request printing. These documents will be the memory of the evolution of the expedition.

These documents, you can print and/or email them directly from Stock It Easy.

19.8 Different rights to shipments

From user profile management, you can fine-tune the rights to shipments in the Stock section.

The most basic right is to be able to see, edit or delete an expedition.

Access to the shipping settings is subject to permission from the profile.

The right to change the head data can be removed, in fact, you probably want the head data (payment terms, Franco ...) to be managed only via the customer card (because it is copied from the customer card in creation of the order or shipping), without possibility to change in the shipment, except for a user with a profile with this right.

The super user fee is not enabled by default, this right allows you to manually change the status of the expedition or its lines. Normally you shouldn't need it, but you never know!

19.9 The balance to be shipped

It is necessary to have a clear view of what you have to ship. Click the "See the balance" button in the stock ribbon.

You can fine-tune your selection by encoding criteria in the left panel.

Then click the "Show" button.

The list of what is yet to be shipped then appears.

20 Billing management

Goods and services sold through Stock It Easy may be charged.

Services will be referred to when it comes to unmanaged items in stock, and goods for inventory-managed items.

Access to billings is from the main menu: commercial /invoices

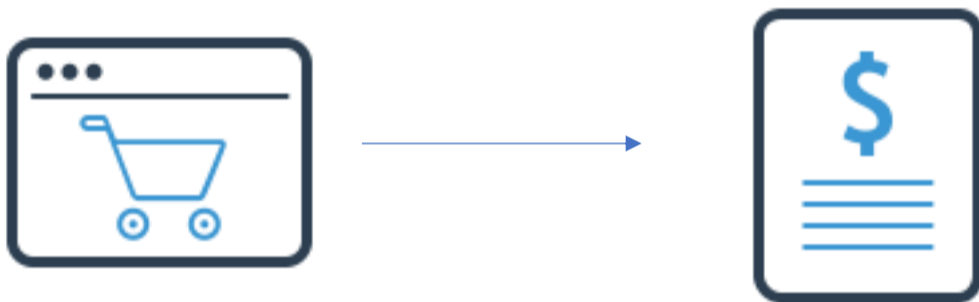
An invoice is edited on behalf of a recipient from a warehouse.

20.1 Warehouse "issue" the invoice

Through the billing settings, you indicate whether each warehouse is a company, or you designate a warehouse as the sole issuer of all invoices.

20.2 Goods and services (items managed in unmanaged stock)

A billable service is an unmanaged item in stock ordered via a sales order.

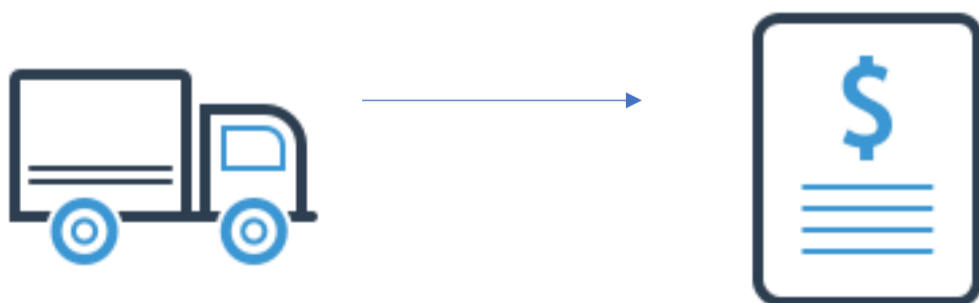


A billable property is an item managed in stock, i.e.:

ordered via a sales order, then sent to the customer via shipping.



Transferred between warehouses via shipping.



ordered via a purchase order, then returned to the supplier via shipping.



20.3 1-click billing

In some cases, it is possible to charge in 1 click. There may be two scenarios:

Your order only includes services.

When the command is validated, a "Bill" button appears in the top ribbon of the actions.

Click this button, the corresponding invoice is created, your order and all its lines go into billed status.

Your order has property.

When the command is validated, a "Ship" button appears in the top ribbon of the actions.

Click this button, the shipment is created.

From the expedition, book the items and ship them.

A "Bill" button appears in the top ribbon of the expedition's actions.

Click this button, the corresponding invoice is created, your order and shipping (as well as all lines) go into billed status.

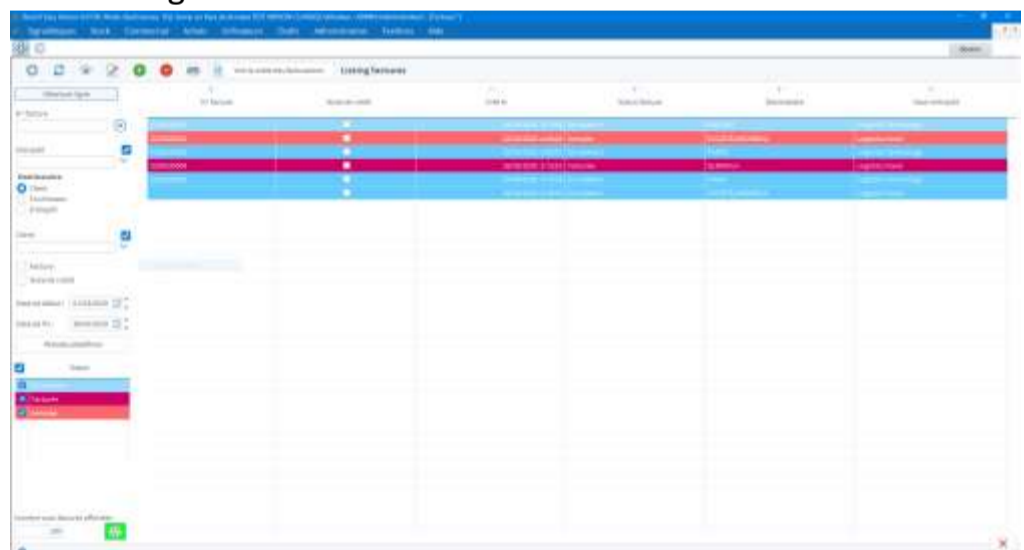
Reductions

In 1-click billing cases, the discounts encoded in the order are repeated as is in the corresponding invoice. In all other cases the discounts will have to be re-encoded in the invoice.

20.4 Selecting invoices

To fine-tune the selection of invoices, you can filter on the following criteria:

- The type of recipient (customer/warehouse/supplier)
- The recipient
- The transmitter warehouse
- The type (bill or have)
- A range of date of creation of the invoice
- The status of the invoice
- The order number charged if the type of recipient is a customer or supplier
- The shipping number charged if the type of recipient is a customer or supplier
- The invoice number (or part of the number)
 - Click the button to the right of the no.
- The external reference of the invoice (if you have completed it)
- A direct selection by scanning the barcode on the invoice document
- View selection by bill lines or header



The sorting and order of the columns of the selection is managed via the views (read the chapter "The views").

The banner of possible actions on shipments



From the invoicing ribbon, you can:

- Access billing settings
- Refresh the selection
- View an invoice
- Edit an invoice
- Duplicate an invoice
- Create an invoice
- Delete an invoice
- Print an invoice
- See the balance of items to be charged

20.5 Create an invoice

- Click the "Add" button
- Select the type of recipient
 - Customer (sales order billing)
 - Supplier (haveon a purchase orderreturn)
 - Warehouse (transfer billing between warehouses)
- Select the type of document
 - Bill
 - Have
- Encode the issuer and recipient of the invoice
- Adds your bill lines
 - Click the orange "Add from an Expedition" button or the green "Add" button to the left of the screen
 - You can also click the "Summary View" button for a quick and simplified overview or entry of your invoice lines (and switch from simplified to full encoding if necessary).

20.5.1 The recipient is a customer

If the recipient is a customer, there is a good chance that you will ship an order from that customer.

If you ship an entire order, the easiest way is to create the invoice from the customer order in the case of an order for unmanaged items in stock, or from its shipment in the case of stock-managed items (or a mix of both). Just click the "Bill" button on the top of the validated sales order or shipped shipping.

If you charge a part of order/shipment or multiple orders/shippments in a single invoice, it may be easier to create the invoice and then import into it the remaining customer order/shipping lines to be billed. To do this, use the orange "Add from a Shipment" button, the next window opens (this window lists the shipping lines not yet charged for that recipient):

- check the lines to be billed and possibly change the amount in the balance column to be billed
- then validate, the lines are added to the bill.

If the payment terms behind these lines differ from those of the invoice being issued, a message will let you know in front of each line concerned. It is up to you to import them or group them into other invoices.

	Solde à facturer	N° de commande	Ref. externe	N° expédition	Date de la commande	Date confirmée	Quantité commandée	Quantité
<input type="checkbox"/>	1.00	2020540002		2020540004	01/04/2020 09:04	01/04/2020	1.00	0.0
<input type="checkbox"/>	2.00	2020540002		2020540004	01/04/2020 09:04	01/04/2020	2.00	0.0
<input type="checkbox"/>	2.00	2020540002		2020540004	01/04/2020 09:04	01/04/2020	2.00	0.0

You can also charge for items that aren't from shipping, so you can add them manually by clicking on the «Add» green button.

20.5.2 The recipient is a supplier

If the recipient is a supplier, chances are you will publish a credit following the return of the purchase order lines (non-compliant, defective, ...).

To do this, use the orange "Add from an Expedition" button, as shown in the window below.

- check the lines to be billed and possibly change the amount in the balance column to return
- then validate, the lines are added to the bill.

You can also charge for items that aren't from shipping, in which case, add them manually by clicking the green "Add" button.

20.5.3 The recipient is a warehouse

To do this, use the orange "Add from an Expedition" button, as shown in the window below.

- check the lines to be billed and possibly change the amount in the balance column to return
- then validate, the lines are added to the bill.

You can also charge for items that aren't from shipping, in which case, add them manually by clicking the green "Add" button.

Note that this option is only possible if in your billing settings you have defined that each warehouse was its own billing company.

20.6 Composing an invoice

It is likely that you will not always ship all items from an order at the same time, but you still want to charge as you ship. Or on the contrary, you want to ship multiple orders before charging your customer. In this case, you will compose your bill manually, selecting the order lines (for services) and shipping lines (for goods) to be billed to the customer.

Depending on the assembly of the bill lines and the original order, you will need to be careful to bill for any discounts.

	Only unmanaged items in stock	Only items managed in stock	Mix managed and unmanaged items in stock
No discount	Bill orders in 1 time or by splitting or grouping	Bill shipments once or by splitting or grouping	Bill shipments and orders in 1 time or by splitting or grouping
With overall reduction (and possible line reduction)	Bill the order in 1 time	Ship the order in one go Bill shipping in 1 time	Ship the order in one go Bill shipping in 1 time
With line reduction (without overall reduction)	Bill orders once or by splitting or grouping by full order line	Bill shipments once or by splitting or grouping by full order line	Bill shipments and orders in 1 time or by splitting or grouping by full order line

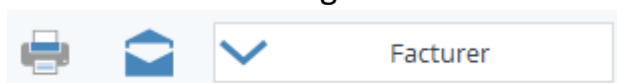
20.7 The statutes of the invoice and the various possible actions according to the statutes

A billing will follow a process from its creation to its closing.

20.7.1 The statute steps are, in order:

- in creation: the invoice is created or in the process of being created, but not yet finalized, you can still change it
- billed: the invoice number is assigned, you can no longer change the college
- cancelled: the invoice is cancelled

The next possible actions to change the status of an invoice are displayed in the top ribbon of the invoice.



To "advance" the status of an invoice, you must open it in edition and click the action button on status.

20.7.2 Possible actions will be, in order:

- Bill items

When you charge the bill, the final invoice number is assigned. The invoice will no longer be changeable (except with the super user fee of the invoice). During billing, the invoice document is generated. The system will also check for each invoiced line if a command or shipping line is linked, and, if necessary, will pass the status of these charged if all the original quantity is charged.

1. Send reminders

You can send up to 3 invoice reminders by email. To do this, your email management must be activated. Then, the invoice must have been invoiced and a due date must be set in this invoice and this date must be earlier than today's date.

From this moment on, you can open the invoice, click on the "Send by email" button, the program will see if it is the first, second or third reminder, and will select the corresponding message template. You will have previously defined this template in your billing settings.

An email will then be sent to the recipient with the message automatically completed and a copy of the invoice attached.

In the list of invoices, you will be able to see the number of reminders as well as the date of the last reminder.

20.8 Different billing fees

Since managing user profiles, you can fine-tune the billing rights in the commercial section.

The most basic right is to be able to see, edit or delete an invoice.

Access to billing settings is subject to permission from the profile.

The right to change the head data can be removed, in fact, you probably want the head data (payment terms, Franco ...) to be managed only via the customer card (because it is copied from the customer card in creation of the order or shipping), without the possibility of changing in the invoice, except for a user with a profile with this right.

The super user fee is not activated by default, this right allows you to manually change the status of the invoice. Normally you shouldn't need it, but you never know!

21 Managing settings

21.1 General settings

Many settings are accessible depending on the rights given to your user profile. By default, the Admin profile has all the rights.

The settings are divided according to their theme, the next chapter will describe the general settings, you can also manage settings for:

- Purchase orders and receptions
- Sales orders
- Expeditions
- Stock management
- Billing

21.1.1 "Generals" tab

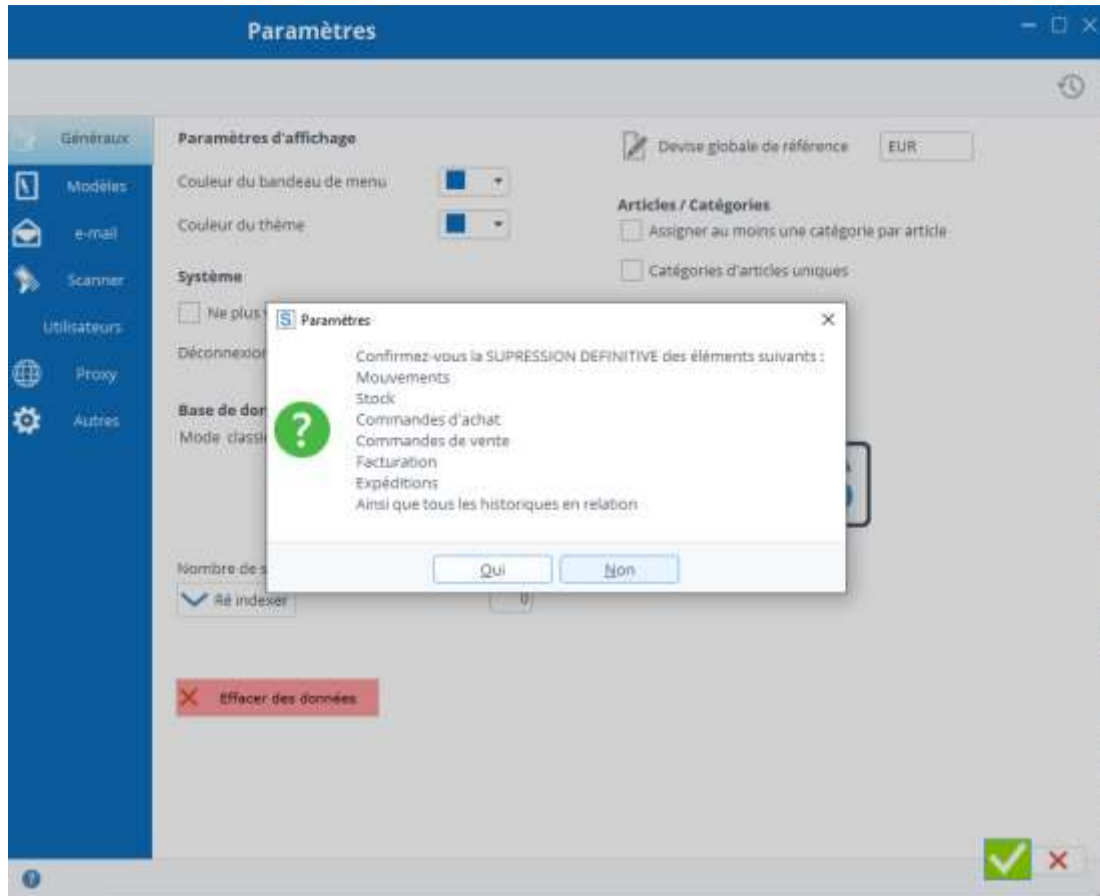
In this tab are the settings that cover the overall mechanisms of the application.

- Reset display settings: Allows you to deliver all display customizations such as the order and visibility of table columns, anchors in windows by default... → this option is now in the "help/reset display" menu bar.
- The color of the menu ribbon and the color of the theme: if glacier blue bothers you, switch to another color.
 - *Tip: if you manage multiple databases, it's a good trick to find your way around briefly too!*
- Don't check any more updates: although you are advised to always check them!
- An info on the type and name of the current database.
- Single-desktop versions allow you to manage base backups and restoration via the app, here determine how many maximum automatic backups you want to keep (Stock It Easy creates one every time you close the program).
- The "re-index" button gives back punch to your database (in single-post mode only)
- The logo you install here will be the logo of your company taken from the documents published by Stock It Easy
- The global reference currency is the currency on which your stock will be valued. In case you buy and sell in different currencies, this currency is very important because it will be the pivotal currency to calculate the weighted average price of each stock movement. Changing the global currency after starting your business with Stock It Easy is not recommended, there is no revaluation of average prices on a new currency.
- Assign at least one category per item: If you want to make selecting a category mandatory when you're creating an item
- Unique item categories: If you check this choice, in category management, you can decide that a category can only contain items in one copy
- Default printer: The printer that will be offered by default for a document published from Stock It Easy, this setting is unique to the current computer.

21.1.1.1 [Clear data](#)

If when you open the General Settings window, you simultaneously press the "alt" key located to the left and / or right of the spacebar, a "Clear Data" button will appear in the "General" tab.

This feature allows you to remove everything except signage and settings.



If you click "Yes", the program asks you one last time if you are sure to delete everything.

Then, it will check if no other user is currently logged into Stock It Easy, and then proceed to delete everything related to the stock, i.e. movements, stocks, purchases, sales, shipments and invoices.

Why and when to use this option?

Mainly in the context of training, the trainer can thus start a course session again on a blank stock without having to re-enter all his articles, locations, suppliers, customers etc.

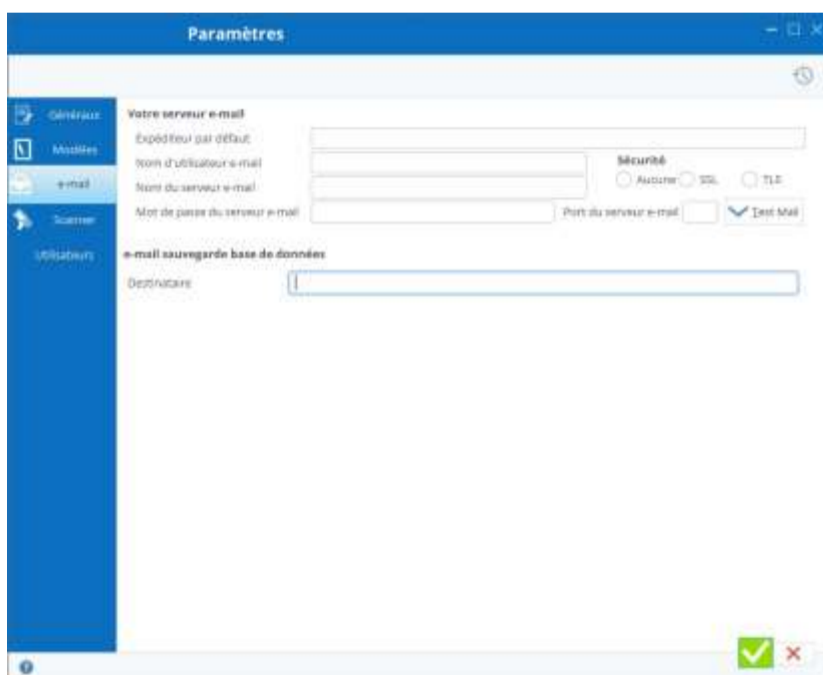
Also if you have created everything and done several tests of purchase / sale / shipping, the time to find the configuration that suits you, it allows you to start on a good basis.

21.1.2 "Models" tab

You can manage for each type of document, the default model to use, as well as the default printer.

21.1.3 "E-mail" tab

Stock It Easy allows you to send emails. To do this, it needs to know the connection settings of your email.



Email username: This is the UserName SMTP; it is the username of the SMTP account used by the email installed on the computer. You'll find this name in your email account settings.

Email Server Name: This is the name of the email server provided by your email access manager, or, your network administrator. You'll find this name in your email account settings.

Default sender: If you haven't specified an email address for the Stock It Easy user via user management, you can use a global address that will be set for all email shipments made by the app.

Email server user's password (optional): If a password is set on behalf of the user of the email server, insert it here.

E-mail server port (optional): If no port is specified, port 25 is taken by default, otherwise you must encode the port number of your email server here.

Test email settings: Click the "Test Mail" button, if the mail is successful, an email is sent from the "sender" address to the same address. In case of failure, a full message of the error is displayed.

21.1.4 "Proxy" tab

If your company uses a Proxy, please check the "use a Proxy" box and complete what is needed.

For the Proxy address, you can encode the URL (e.g. monproxy.fr) or the IP.

Test via the button.

Validate the window if OK.

Then, http calls such as:

- registering your subscription license
- search for the help page
- search for an update and download it
- document model search
- ...

will go through the specified Proxy.

21.1.5 "Scanner" tab

Type of barcode of tracking and tracking labels: if you use tracking and tracking data (lot, serial number, consumption deadline, optimal use date...), it may be useful to print a label that contains in addition to the item's identifier its tracking and tracking information. It is at this level that you define the type of labels that the program will print in these cases.

CB128

If you select this barcode, the label barcode will contain the item reference, batch, DLC and DLUO.

Please note that bar code 128 can only contain DLC and DLUO on 6 positions (e.g. AAMMJJ), as well as lots on up to 20 positions.

DATAMATRIX and QR-CODE

The Data matrix barcode may contain more information than the previous three, it can be used to manage tracking and tracking items. If you select this barcode, the label barcode will contain the item reference, batch, second tracking and tracking criterion, DLC and DLUO, without restriction on the size of each type of information. The Datamatrix and QR-CODE require a 2-dimensional barcode reader.

Tracking and tracking information in the barcode

Please note that this information can only be included in the barcode if the print is requested from a screen that has knowledge of the inventory detail you wish to print, i.e. the supplier order or from the detail of tracing and tracking the stock. In other cases of label printing (item sheet, item list), printing will only contain the item code, reading this label in Stock It Easy will nevertheless be possible but it will be considered without tracing criteria and tracking.

A scanner is plugged into this PC

This setting is set for the current computer. It specifies that the program must work with a barcode reader and therefore present a field of input of the readings by barcode reader in the windows provided for at this e and.

21.1.6 "Users" tab

In multi-station mode, you can see here the list of users connected to the app, as well as the list of blocked records.

If a user is in the list, you can force them to exit the application by selecting them and clicking on the "delete" button, within minutes that user will receive a message via Stock It Easy telling them that they are going to be logged out.

If a user is in the list but you know they're not actually there anymore (typically if the program crashed in their session or if they were on a mobile app and haven't left it but haven't been used for a long time), you can remove them from the list by selecting them and clicking the "delete" button twice in a row.

A blocked record is a record opened in edition by a user. For example, User A opens the X-file in edition, user B will not be able to edit it until User A has validated it. If a record is blocked by mistake, a user with access to that tab can unlock the record via a right-click and then "unlock."

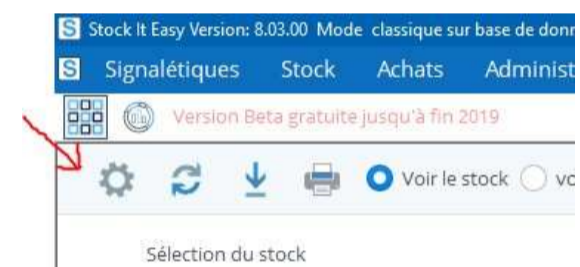
21.1.7 "Other" tab

From this tab, you can access other settings windows such as:

- Purchase orders and receptions
- Sales orders
- Expeditions
- Stock management
- Billing

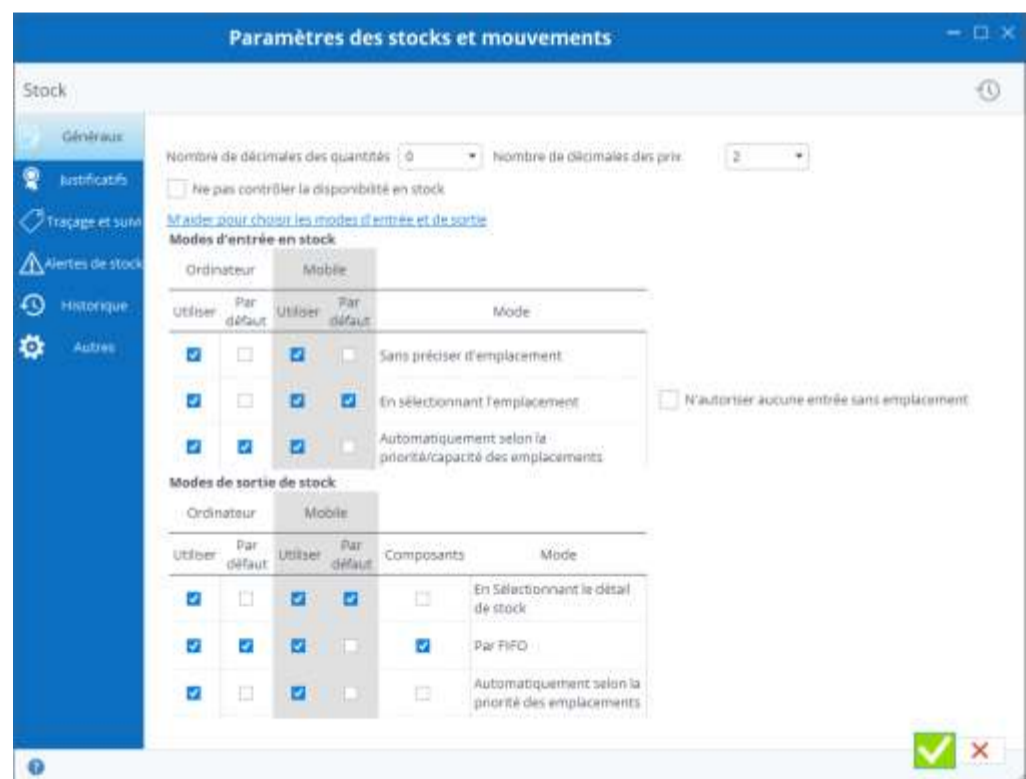
21.2 Stock settings

All stock management settings can be found here. To access this menu, open the stock window, then click the following button:



21.2.1 "Generals" tab

- Number of decimals of quantities: If you manage everything piecemeal, leave 0. If, on the other hand, you have (for example) 100M fabric coils and you take them out by the meter, it is better to manage your stock in decimal (1 piece - 1 reel of 100M, 1 meter sold - 0.01 each).
- Number of decimals of prices: refine your prices up to 6 decimals
- Stock entry modes: The entry modes checked in "use" will be those accessible to users, you must at least use one. The one that will be checked "By default" will be the one that Stock It Easy will present by default.
- Order of browsing locations: By default, the browse of the pitches (on the preparation vouchers and on the receipt slips) is defined on the basis of an alphanumeric sorting of the name of the locations. By checking the box above, you need to set the sort order of the locations (by warehouse) in the location editing window.



"Stock exit modes: the output modes checked in "use" will be those accessible to users, you should at least use one. The one that will be checked "By default" will be the one that Stock It Easy will present by default.

For concrete examples of how to enter and leave stock, read the article " how to encode your stock entries / exits "

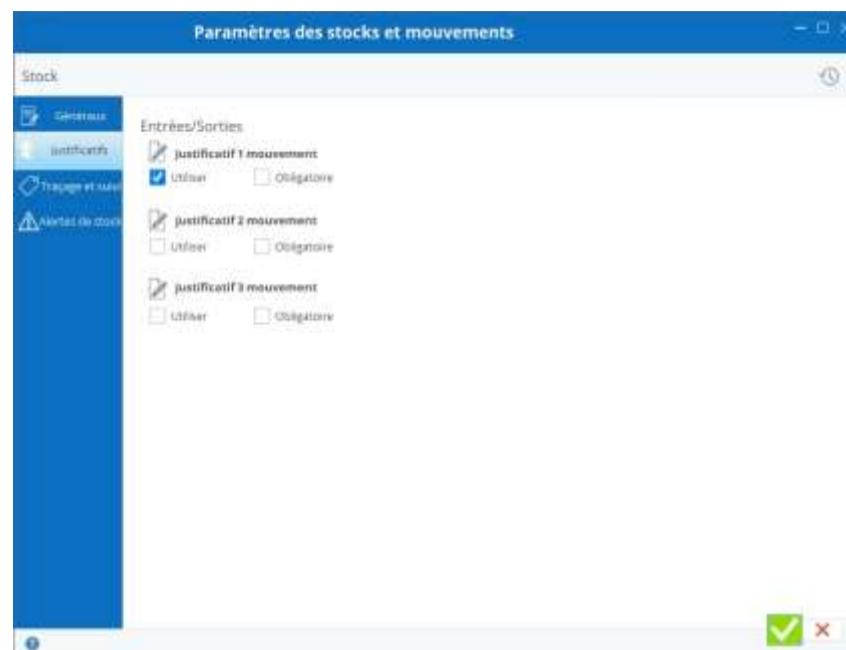
It is possible to set input and exit motion modes specifically for the mobile application, these can be different between the mobile application and the desktop application.

21.2.2 "Proof" tab

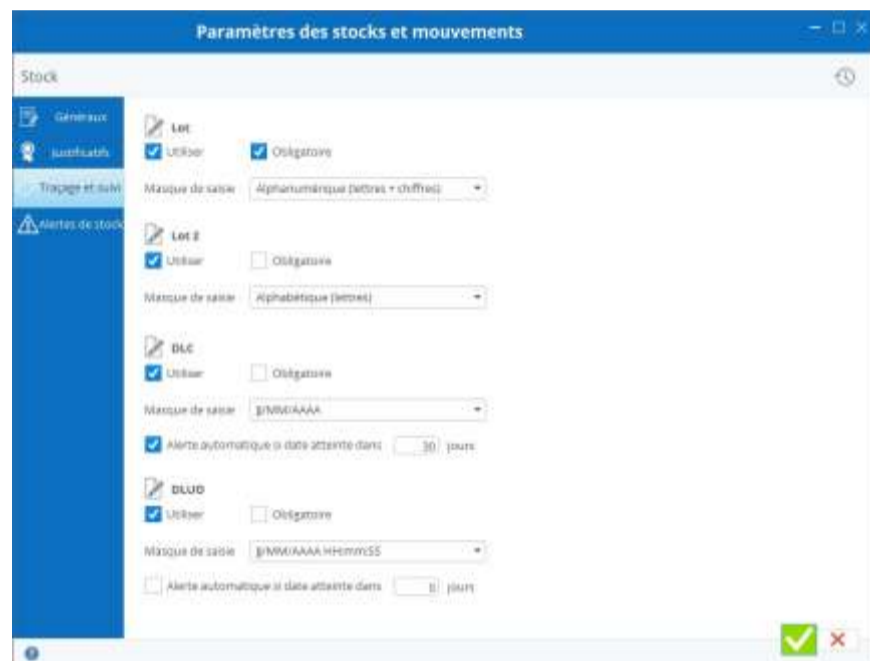
Each movement can be qualified by one, two or three proofs

Movement proofs are lists of information that you create from the "List" tool..

From this window, you can change the name of each voucher list, specify whether you want to use these lists, see make them mandatory.



21.2.3 "Tracing and tracking" tab



Manage 1 to 4 different tracking criteria per item (serial number, batch, DLC, DLUO ...)

In some cases, stock management of items requires accurate tracking and tracking of movements based on certain criteria.

Stock It Easy makes it easy to manage the tracking of items in the input, exit, order to customers and suppliers.

You can qualify a stock movement for a quantity of a given item by:

- An alphanumeric identifier
- A second alphanumeric identifier

- A date to choose from
- A second date to choose from

Setting tracking and tracking criteria

These criteria can be set, for example:

If you manage the storage of pharmaceutical items, you will certainly be interested in differentiating each inflow and outflow of stock by a manufacturing lot no.

In the case of the management of the stock of computer components, the serial number will be an important criterion for tracking. In food management, you would probably be interested in tracing the expiry dates, and why not in addition, the optimal use-by date?

Is your business only asking for the use of one tracking criterion, or two or three? You're the one who defines this choice in the app settings.

You prefer to use the term "Lot" or "Serial Number" or "Manufacturing Number", no problem, it is you who determines how each of the 4 possible tracking areas should be named throughout the application.

Do you prefer to enter the follow-up criteria of your choice for all movements? You set the controls yourself, so you don't forget to enter criteria, or you allow a more flexible entry of these criteria.

Alert based on expiry dates

Do you want to be alerted if items in your stock soon reach the date entered in DLC or DLUO?

You just have to check "Automatic Alert ... For each type of date on which you want an alert, and specify the number of days to be dated from the current day for which you wish to have an alert. Example: You want an alert if the date reached in 15 days. It's May 1st. At each opening of the program, a list will show the items with a date of May 15.

21.2.4 "Stock Alerts" tab

Be notified every day of any stock alerts

Every first Stock It Easy start of the day, for stock alerts checked in this tab, the program will generate the query and memorize it in the Electronic Document Management (GED) window. A stealth message appears to warn you that the calculation is available.

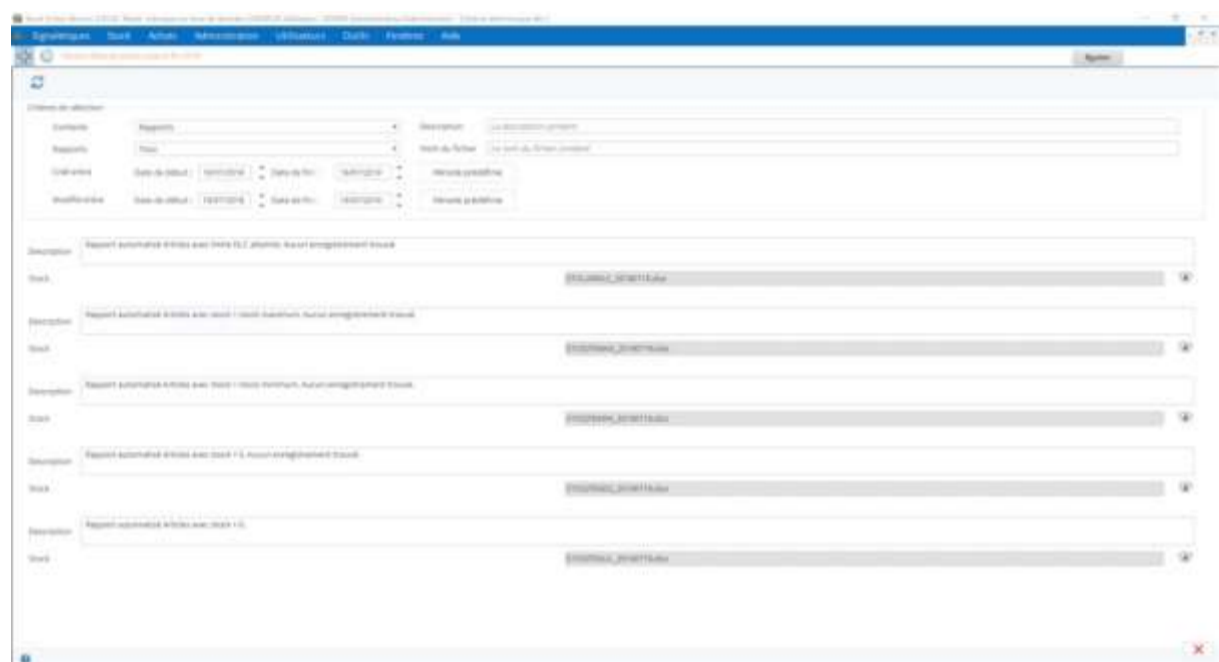
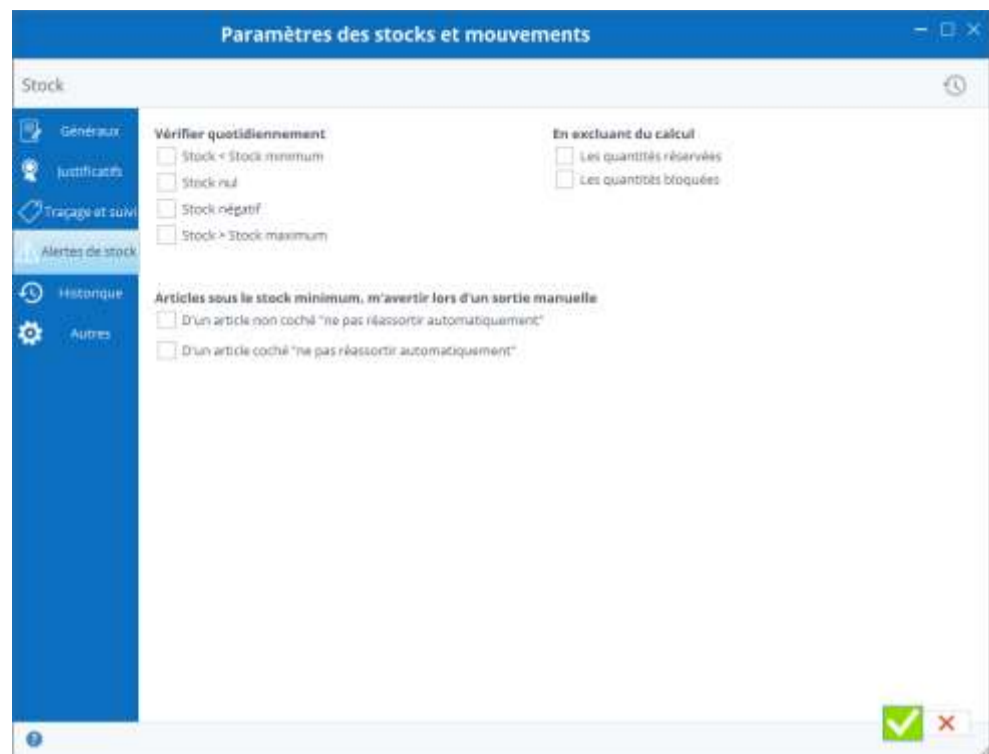
See the result of the alert

Via the "GED" button on the main menu, open electronic document management.

Make the right selection (by default, the creation dates being the date of the day, you shouldn't have to change anything).

Click the "Refresh" button or type F5

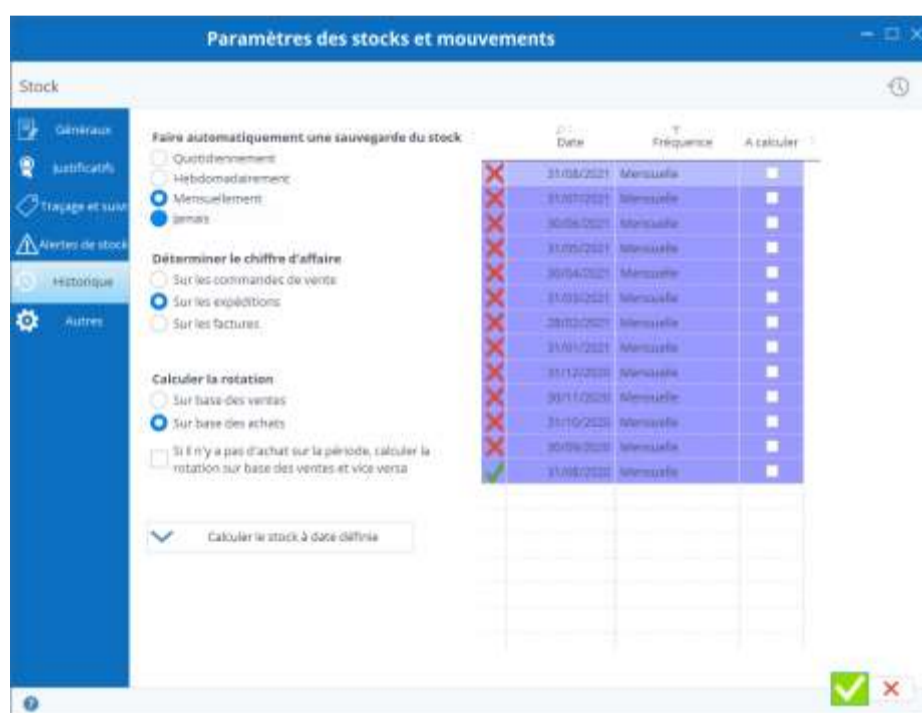
You'll find a list of the reports generated. If no alerts are encountered, no need to open the generated Excel file, the document description notifies you.



1. "History" tab

Configure the historization of your stocks. To learn more about historization, read the chapter "Historizing the stock".

To historize your stocks (take a "photo" at a time T of the stock), you must configure *the frequency of historization*.



You can do this:

1. Every month (photo on the last day of the month included) → the timeliest choice
2. Every week (photo on Sunday included)
3. Every day (requires a large space for data, useful only if your stock movements are numerous every day)

Stock It Easy will search for your first stock movement date as well as the last one.

Depending on the frequency selected, it will present all its occurrences between the minimum date and the maximum date of movement in your stock.

These dates will be displayed in the table on the right.

If in the left column a green arrow appears, it means that the historization on this date is already calculated. However, if a red cross is displayed, it means that the historization on this date is not yet calculated or recorded.

To calculate the stock on the dates not calculated, check these (column "To be calculated"), then click on the button "Calculate the stock on the defined date". Note that depending on the size of your database and the number of dates to calculate, this may take time and space. We advise you to do a test on one or two dates to see the time needed.

Subsequently, when starting Stock It Easy, the program will check if it is time to calculate one (or more) historizations according to the frequency you have set. If a delay of historizations exists, the program will automatically calculate up to 5 historizations from the most recent to the least recent, this calculation is not blocking but can slow down the program.

If a historization calculation seems incorrect to you, you can delete it by selecting it and right-clicking / Delete, you can then recalculate it.

To *determine the turnover*, you can choose on which data to base:

1. Sales Orders
2. Shipments
3. Bills

To *calculate the rotation*, we need to determine the purchases or sales over the period, but if the selected period is short, there may be no buying or selling, which is why you can also indicate whether the program should consider sales or purchases in case of no figure on one or the other.

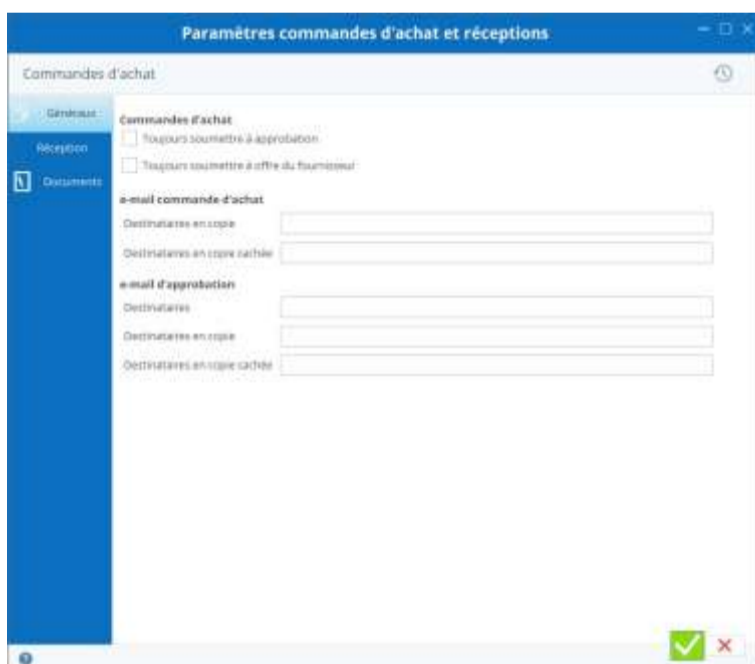
Don't forget to click on the green "Validate" button to remember your preferences (historical calculations are stored independently of the "Validate" button).

21.3 Purchase and receiving order settings

All the parameters for managing purchase orders and receipts can be found here. To access this menu, open the purchase controls window, then click the following button:



Open the purchase and receipt control window. This is where you determine the general parameters of your purchase orders and merchandise receipts.



21.3.1 "Generals" tab

Submit each purchase order for approval

If you need ALL your purchase orders to be subject to the approval of a user who has the rights to do so, check "always submit for approval." When the order is ready to be sent to the supplier, a button in it will allow it to advance from status to "Subject for Approval" status.

If you only want to use this option for orders to certain suppliers, then you may not check this setting here but check it in the affected vendors' listing.

Submit each purchase order to an offer from the supplier

If you need ALL your purchase orders to be submitted to a vendor offer, check "always submit to supplier's offer." When the order is ready to be sent to the supplier, a button in it will allow it to advance from status to "Offer-submitted" status.

If you only want to use this option for orders to certain suppliers, then you may not check this setting here but check it in the affected vendors' listing.

e-mail purchase orders

If you use emails via Stock It Easy, it is possible to indicate by default recipients (copy or hidden copy) to ALL your commands. This is very convenient for example if you want to be yourself in copy of all emails in order to file them in your office email.

The recipients of the emails can also be managed on a case-by-case basis when each email is sent.

21.3.2 "Reception" tab

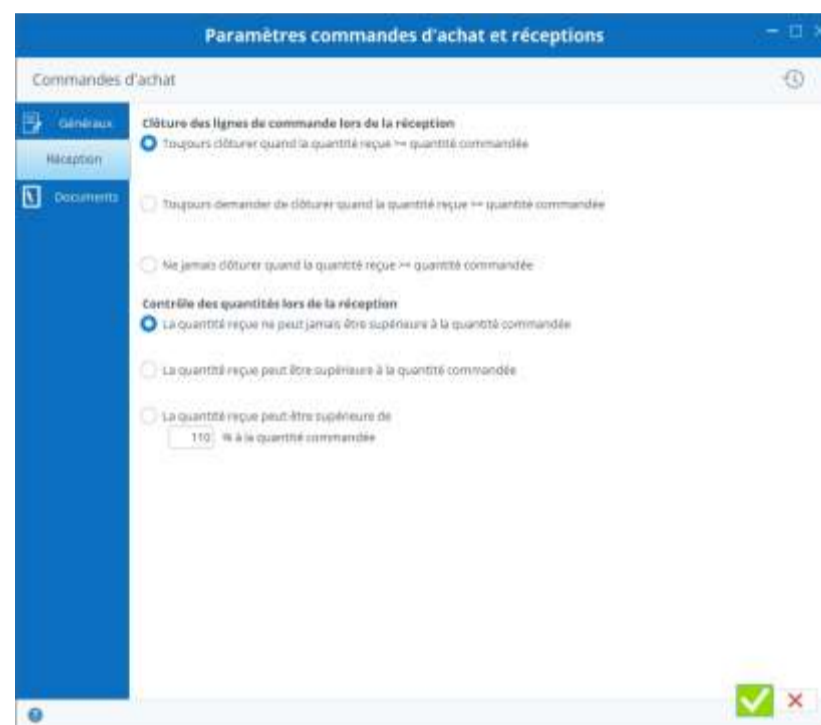
Set up the default behavior of all your merchandise receipts here.

When you receive an order, you select one command line after another during the receiving process.

The closing of the command line can be automated

Select the right mode:

- always close when the quantity received equal to or exceeds the quantity ordered
- always ask when the quantity received equal to or exceeds the amount ordered
- never close when the amount received equal to or exceeds the quantity ordered



The control of the quantity received in relation to the quantity ordered

Set here whether a receipt can be higher than the order, without limit, or by percentage, or, if the receipt can never be higher than the order.

Desired reception date

By default, a desired receipt date appears when creating a purchase order. You can indicate here how many days to add to the date of the day to start that desired date.

Confirmed date of receipt

By default, a confirmed receipt date appears when creating a purchase order. Here you can indicate the number of days to be added to the desired reception date to start that confirmed date, or also indicate that you do not want to automatically propose a confirmed date.

21.3.3 "Documents" tab

When you generate the purchase order document, an accompanying email message can be pre-defined.

From this tab, you manage messages for ALL purchase orders. If you want to have a different message per provider, or for some providers, the same tab is in each vendor sheet and if a specific message is assigned to it, it will be that message that will be selected in place of the general message.

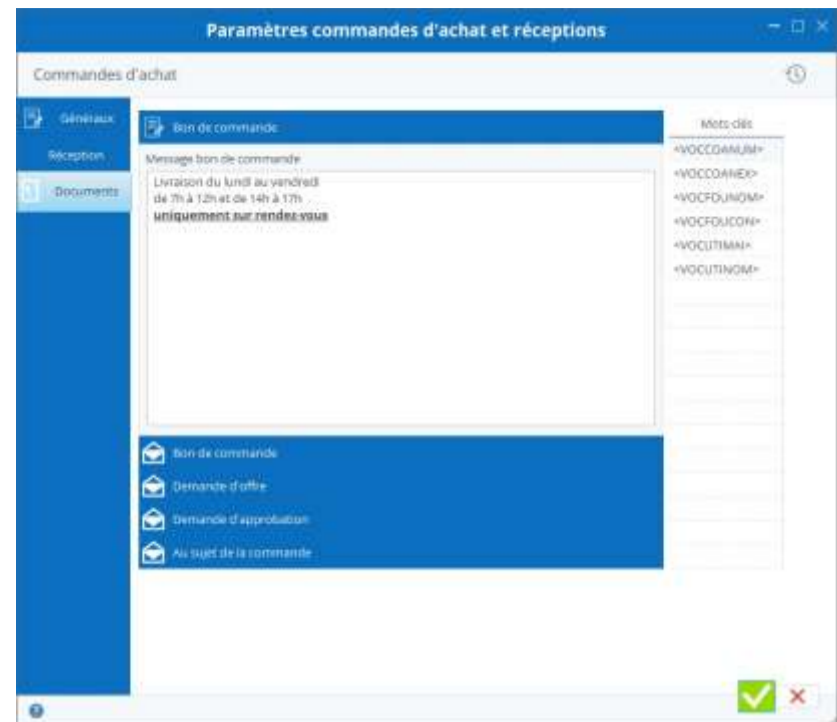
Create custom purchase orders and automate the content of your emails

Various content block

For the document, check it or the references of the article you want on the print.

You can also customize the separator, i.e. the character that will be printed between several types of reference.

The title of the purchase order that will be printed can be changed from this screen.



"Order voucher" message block

This block fills in the message included in the purchase order.

This is an information text that you can put on the page and that will be printed on each purchase order, at the place you have chosen via the template of the document.

E-mail blocks

The following 4 blocks (order order, offer request, request for approval, about the order) contain the default message corresponding to the status of the order when you send an email.

Message based on order status

For example, your order is under "Submitted Approval" status, when you click the email button to send a message about that command to the person responsible for approving the commands, the subject and body of the message will be prefilled with the text entered in that screen.

Keywords replaced by command values

In order to best customize your message, a series of tags such as 'VOCFOUNOM' on a column on the right can be slid into the subject and/or body of the message.

When the email is created, these tags will be automatically replaced by their value in the order, for example the tag will be replaced by the supplier's name.

By flying over each tag with your mouse's cursor, you'll read which control field the tag refers to.

21.4 Sales order settings

All sales order management settings can be found here. To access this menu, open the sales orders window, then click the following button:

This is where you determine the general parameters of



your sales/customer orders

21.4.1 "Generals" tab

Submit each purchase order to an offer to the customer

If you need ALL your sales orders to be offered first, check "always submit to the customer." When the order is ready to be sent to the customer, a button in it will allow it to advance from status to "Offered" status.

If you only want to use this option for orders to certain customers, then you may not check this setting here but check it in the affected customers' listing.

Submit each order to approval

If you need ALL your sales orders to be approved by a user who has the rights to do so, check "always submit for approval." When the order is ready to be sent to the customer, a button in it will allow it to advance from status to "Subject for Approval" status.

If you only want to use this option for orders to certain customers, then you may not check this setting here but check it in the affected customers' listing.

e-mail sales orders

If you use emails via Stock It Easy, it is possible to indicate by default recipients (copy or hidden copy) to ALL your commands. This is very convenient for example if you want to be yourself in copy of all emails in order to file them in your office email.

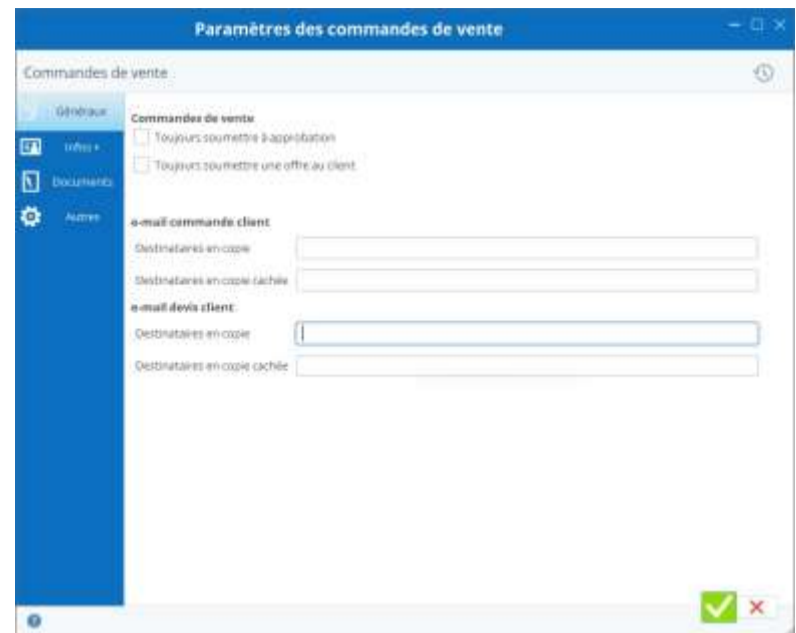
The recipients of the emails can also be managed on a case-by-case basis when each email is sent.

Desired shipping date

By default, a desired shipping date appears when creating a sales order. You can indicate here how many days to add to the date of the day to start that desired date.

Shipping date confirmed

By default, a confirmed shipping date appears when creating a sales order. Here you can indicate the number of days to be added to the desired shipping date to start that confirmed date, or also indicate that you do not want to automatically propose a confirmed date.



21.4.2 "Info" tab

Set up 4 additional lists available in your customer orders here

This allows, for example, to manage a list of salespeople and to attach a salesperson to an order, or to manage a list of construction sites and site managers, and to link this 2 information to an order.

To do this, simply check the area you want to use, then click the editing button to give it the name of your choice.

Commercial responsable
 Utiliser Obligatoire

Zone complémentaire 2 commande client
 Utiliser Obligatoire



21.4.3 "Documents" tab

When you generate the customer order document, an accompanying message for the email can be predefined.

From this tab, you manage messages for ALL sales orders.

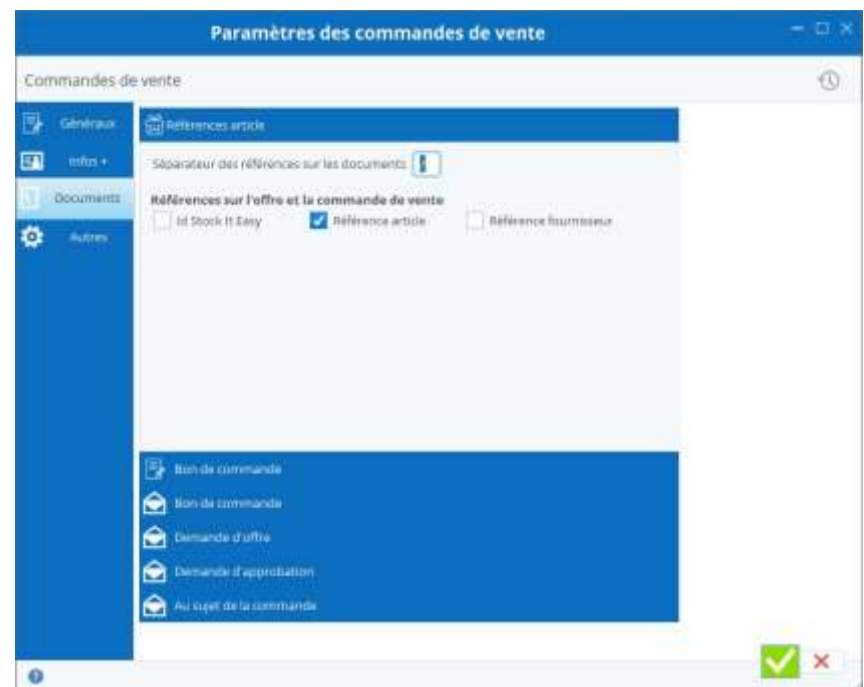
Create custom customer orders and automate your email content

Various content block

For the document, check it or the references of the article you want on the print.

You can also customize the separator, i.e. the character that will be printed between several types of reference.

The title of the purchase order that will be printed can be changed from this screen.



"Order voucher" message block

This block fills in the message included in the purchase order. This is an information text that you can put on the page and that will be printed on each purchase order, at the place you have chosen via the template of the document.

E-mail blocks

The following 4 blocks (order order, offer request, request for approval, about the order) contain the default message corresponding to the status of the order when you send an email.

Message based on order status

For example, your order is under "Submitted Approval" status, when you click the email button to send a message about that command to the person responsible for approving the commands, the subject and body of the message will be prefilled with the text entered in that screen.

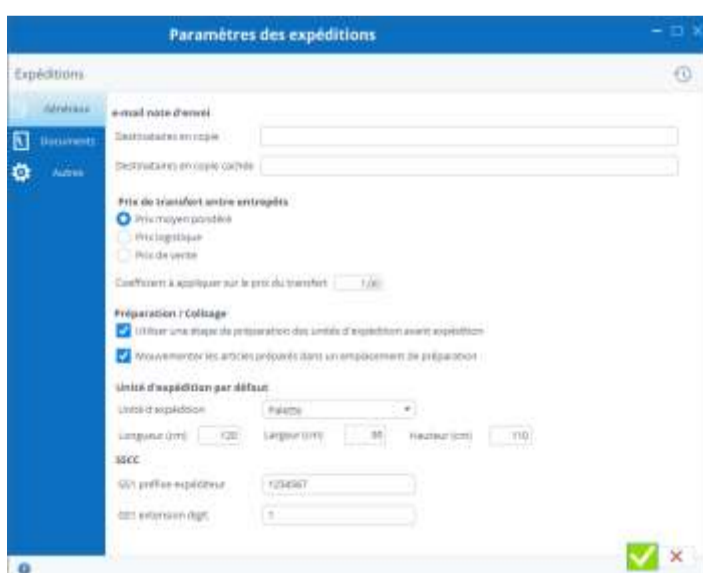
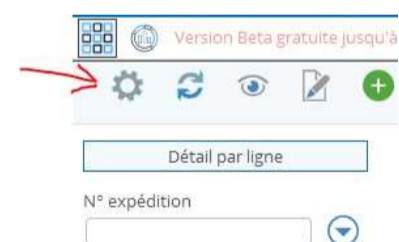
Keywords replaced by command values

In order to best customize your message, a series of tags such as 'VOCCLINOM' on a column on the right can be slid into the subject and/or body of the message. When creating the email, these tags will be automatically replaced by their value in the order, for example the tag will be replaced by the customer's name.

By flying over each tag with your mouse's cursor, you'll read which control field the tag refers to.

21.5 Shipping settings

All shipping management settings can be found here. To access this menu, open the expeditions window, then click the following button:



21.5.1 "Generals" tab

e-mail mailing note

If you use e-mails via Stock It Easy, it is possible to indicate recipients (copy or hidden copy) to ALL your shipments by default. This is very convenient for example if you want to be yourself in copy of all emails in order to file them in your office email.

The recipients of the emails can also be managed on a case-by-case basis when each email is sent.

Transfer prices between warehouses

Shipments allow, among other things, to transfer items from one warehouse to another, we speak of transfer.

Via this setting, we define the price at which the goods will be transferred, you can choose between:

- Weighted average price
- The logistics price
- The sale price

In addition, you can apply a coefficient on this price.

For example, a coefficient of 1 will not apply any change to the price, a coefficient of 1.20 will multiply the price by 1.20, and a costof0.9 will multiply the price by 0.9.

21.5.2 "Booking" tab

Select the action to be taken in case of insufficient quantity in stock when booking, i.e. either reserve what is available, or book nothing.

You can also choose the control of the quantities to be applied when booking, i.e. be strict about the quantity reserved compared to that ordered, or allow an exceed.

21.5.3 « Infos + » Tab

Set up to 4 additional lists available in your shipments here.

This makes it possible, for example, to manage a list of sales representatives and to attach a sales representative to a shipment, or to manage a list of sites and site managers, and to link these 2 pieces of information to an expedition.

To do this, simply tick the area you want to use, then click on the edit button to give it the name of your choice.

- Commercial responsable
 Utiliser Obligatoire
- Zone complémentaire 2 commande client
 Utiliser Obligatoire



21.5.4 "Preparation" tab

Preparation / package

By checking "Use a step of preparation... you will insert a step in the shipping process. See the "preparation for the expedition" chapter for more details.

Checking the box "Moving items prepared in a preparation location" allows, during shipping preparation, if you have defined one or more locations in the warehouse considered to be preparation locations, to allow you to assign the items of

the shipment to that location. If only one location of this type is set, it will be automatically selected, if several are set, they will be presented in a list so that you select one.

During the preparation, you create one to several **expedition units**. Here you can set different default values: the shipping unit, and its dimensions, useful if you often use the same units.

SSCC: The serial shipping container code is made up of two values that will be defined for your business, the digital extension and the sender prefix. Encode these two values here, they will serve as the basis for the root of your SSCC.

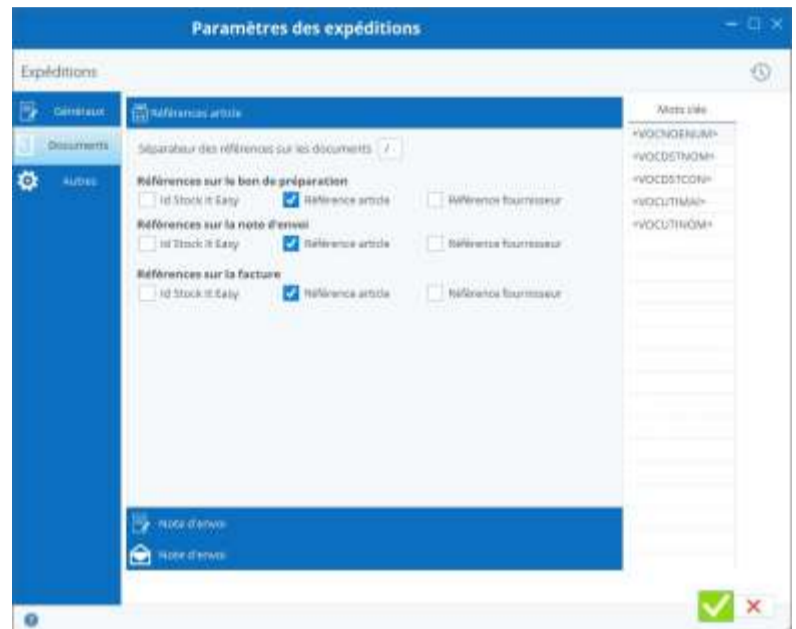
21.5.5 "Documents" tab

When you generate the shipping document, an accompanying message for the email can be pre-defined.

From this tab, you manage messages for ALL shipments.

Various content block

By type of shipping document, check it or the references to the item you want on the print.



You can also customize the separator, i.e. the character that will be printed between several types of reference.

The title of the shipping voucher that will be printed can be changed from this screen.

"Send Note" message block

This block fills in the message in the mailing note. This is an information text that you can put on the page and that will be printed on each shipping note, at the place you have chosen via the template of the document.

E-mail blocks

Keywords replaced by shipping values.

In order to best customize your message, a series of tags such as 'VOCDSTNOM' on a column on the right can be swiped into the subject and/or body of the message.

When creating the email, these tags will be automatically replaced by their value in shipping, for example the tag will be replaced by the recipient's name.

By flying over each tag with your mouse's cursor, you'll read which shipping field the tag refers to.

Other block

This block is present on each setting window and allows you to open another setting window from the current one.

21.6 Billing settings

21.6.1 "Generals" tab

e-mail invoices

If you use e-mails via Stock It Easy, it is possible to indicate by default recipients (copy or hidden copy) to ALL your invoices. This is very convenient for example if you want to be yourself in copy of all emails in order to file them in your office email.

The recipients of the emails can also be managed on a case-by-case basis when each email is sent.

Billing company

The billing company, if you intend to charge for goods and/or services, you can ensure that each warehouse from which the invoice is produced is a billing company, or that those warehouses are all under the same entity from an accounting point of view and that the selected warehouse is the sole billing entity.

VAT rate

VAT rates can be managed from the list window, or directly from this window by clicking the "edit" button on a sky-blue background, the rate editing window opens.

Two-rate VAT

VAT on one or two rates: for Quebec and Senegal, two VAT rates accumulate, choose this mode if you are concerned (not to be confused with managing more than one VAT rate ...)

How invoices are numbered

You can choose how to number invoices generated by Stock It Easy.

By default, the mode is the year - the current month followed by an incremental numbering on 4 characters with 0s left.

For example, the first invoice for May 2020 will be: 2020050001, the second will be 2020050002, and so on.

You can also choose to set a root from 0 to 7 characters, you encode that root, and then an incremental numbering of invoices fills the remaining 3 to 10 characters, with 0s left. When you change the root, the numbering starts again for the new root.

For example, you encode the FACT root- which is 5 characters, there are still 5 free characters for the index (i.e. 99,999 possible invoices for this root):

The first bill will be FACT-00001, the next FACT-00002, and so on.

This choice should be taken carefully, because each invoice number must be unique, so avoid reusing a root already used, or a numbering that would conflict with a previous choice of numbering mode.

You can finally manually enter the no.; no check is done except that it must be unique for all your invoices and make up to 10 characters. Also note that no check is done on the tracking of the numbering. In order to help you in the numbering, when entering the new Number, the list of the last 10 numbers appears in the entry window.

21.6.2 "Documents" tab

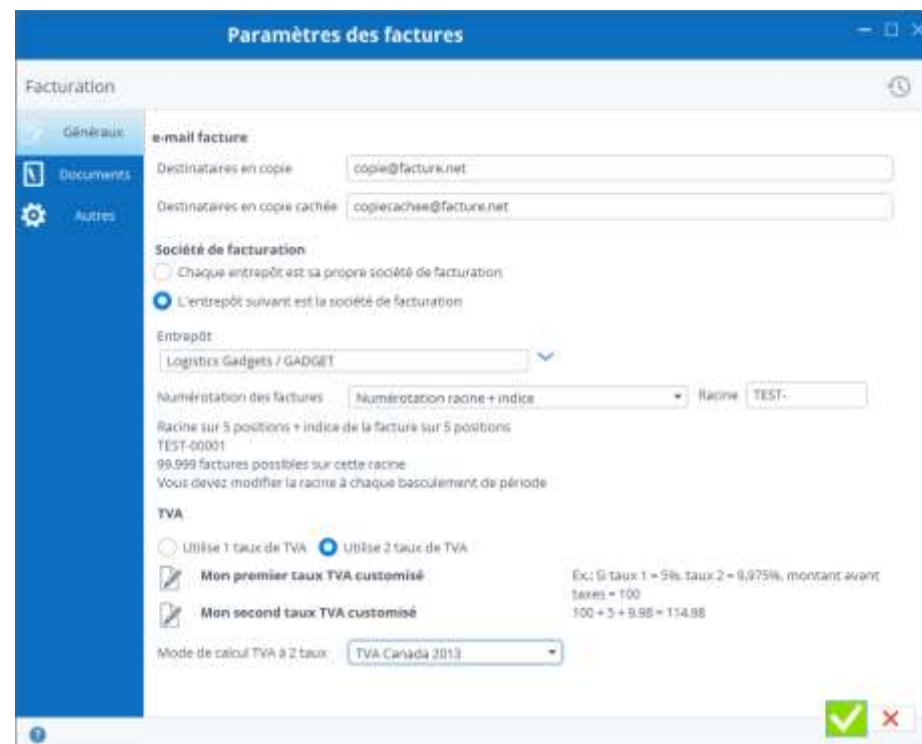
When you generate the invoice document, an accompanying email message can be pre-defined.

From this tab, you manage messages for ALL invoices.

Various content block

For the invoice document, check it or the references of the item you want on the print.

You can also customize the separator, i.e. the character that will be printed between several types of reference.



The title of the invoice that will be printed can be changed from this screen.

"VAT Phrases" message block

This block allows you to fill out a message on the VAT bill (non-subject, normal, intra-community). This is an information text that you can put on the page and that will be printed on each invoice, above the totals block.

Block message "terms and conditions of sale"

This block allows you to create the message of the CGVs taken from the invoice. This is an information text that you can put on the page and that will be printed on each invoice, at the place you have chosen via the template of the document. This block will always be preceded by a page break (so always starts at the beginning of the page).

"Bill" message block

This block fills in the message on the invoice. This is an information text that you can put on the page and that will be printed on each invoice, at the place you have chosen via the template of the document.

E-mail blocks

Keywords replaced by billing values.

In order to best customize your message, a series of tags such as 'VOCDSTNOM' on a column on the right can be swiped into the subject and/or body of the message.

When the email is created, these tags will be automatically replaced by their billing value, for example the tag will be replaced by the recipient's name.

By flying over each tag with your mouse's cursor, you'll read which shipping field the tag refers to.

Other block

This block is present on each setting window and allows you to open another setting window from the current one.

22 Managing user profiles

Access to the profiles is from the main user/profile menu.

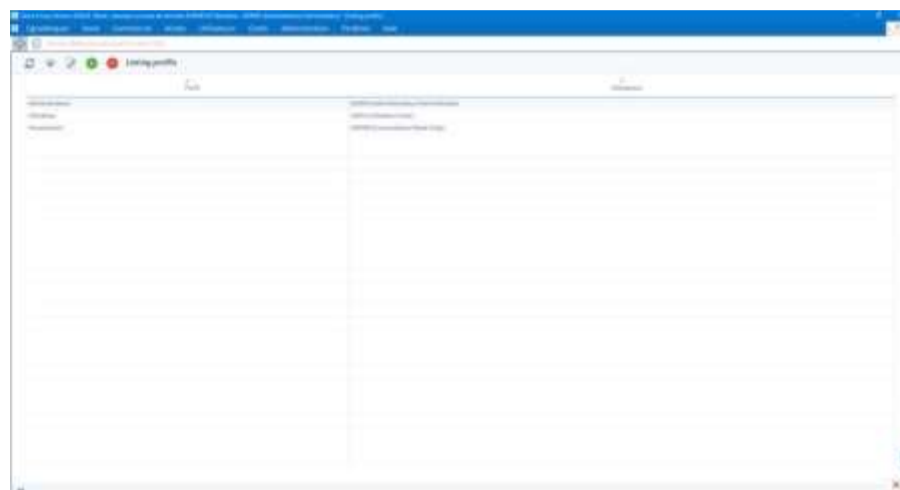
Profiles allow you to define, for a user group, the configuration of the main menu of the application and the management of the rights to access the various features of the program.

22.1 Selecting user's profiles



Possible actions on a profile

- Display
- Edit
- Add
- Duplicate
- Remove



22.2 Create a profile

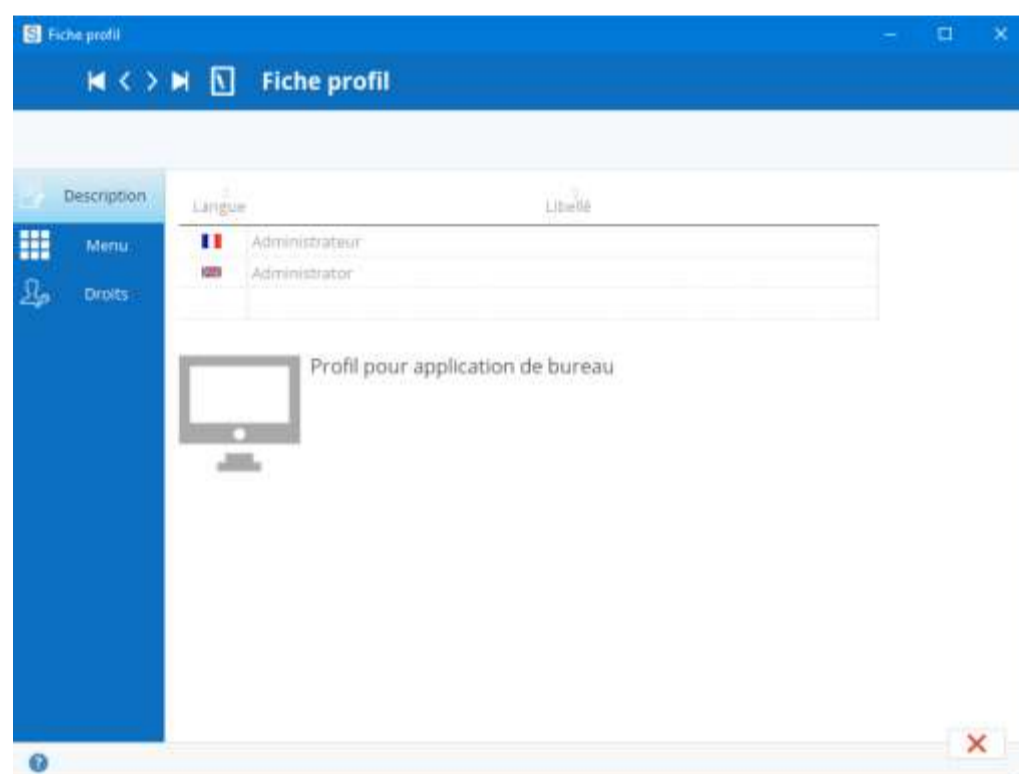
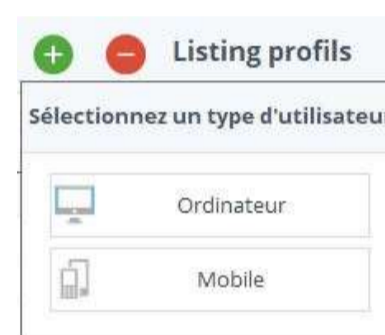
Click the "Add" button, the next window opens.

Choose whether you want to create a computer profile, i.e. a profile for the Stock It Easy app on Windows computer, or a profile for mobile apps, i.e. the Stock It Easy Mobile app on Android or IOS.

Give your profile a name.

Encode a name in French and English if necessary.

You can change the name later.



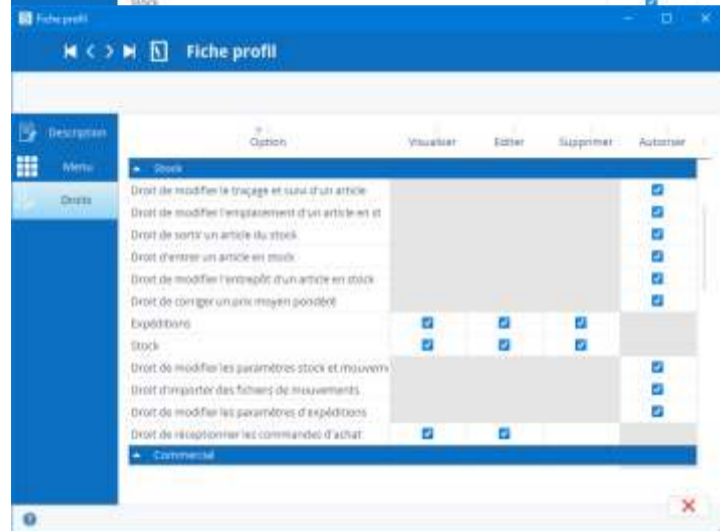
22.2.1 View main menu options

By checking "visible" you make each entry in the main menu visible.



22.2.2 Rights by option

For each option, you define whether the profile can view, edit, delete or be allowed to use the option.



23 User management

Access to users is done from the main user/user menu.

To access the program, you must do it from a user through their username and password.

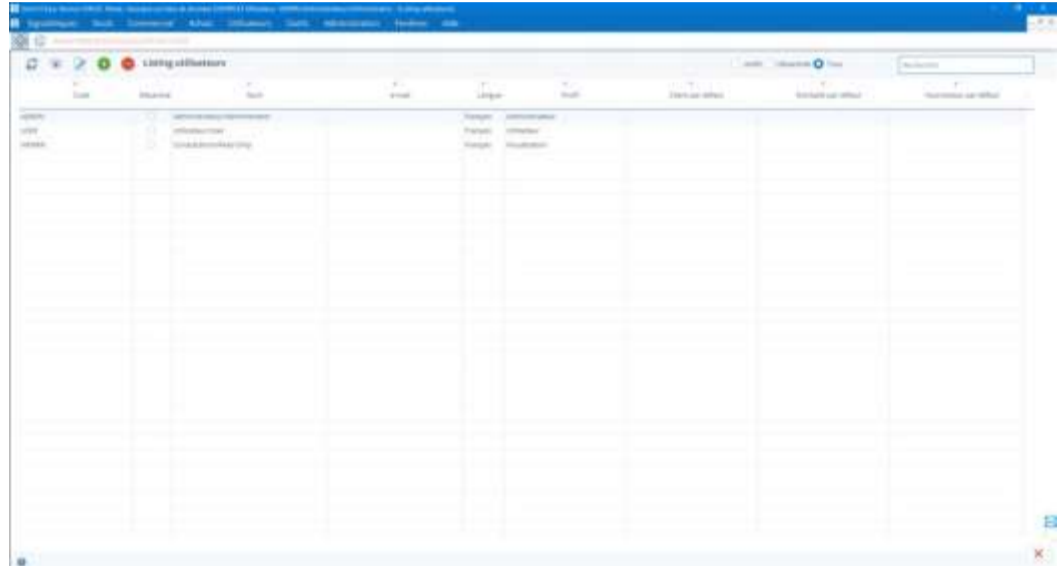
The ADMIN user is a super user created by default that cannot be deleted, it is associated with the ADMIN profile. You can however protect it with a password, by default this password is empty.

23.1 User selection

Possible actions on a user



- Display
- Edit
- Add
- Remove



23.2 Create a user

Click the "Add" button, the following window opens:

Choose whether you want to create a computer user, i.e. a user for the Stock It Easy app on Windows computer, or a mobile app user, i.e. the Stock It Easy Mobile app on Android or IOS.

A computer user must be associated with a computer profile and a mobile user must be associated with a mobile profile.

If for the same "person" you want to make them work on a computer AND on mobile, it will have to create 2 users, one per type.

Give your user a name. This name will be the one used to authenticate in the application.

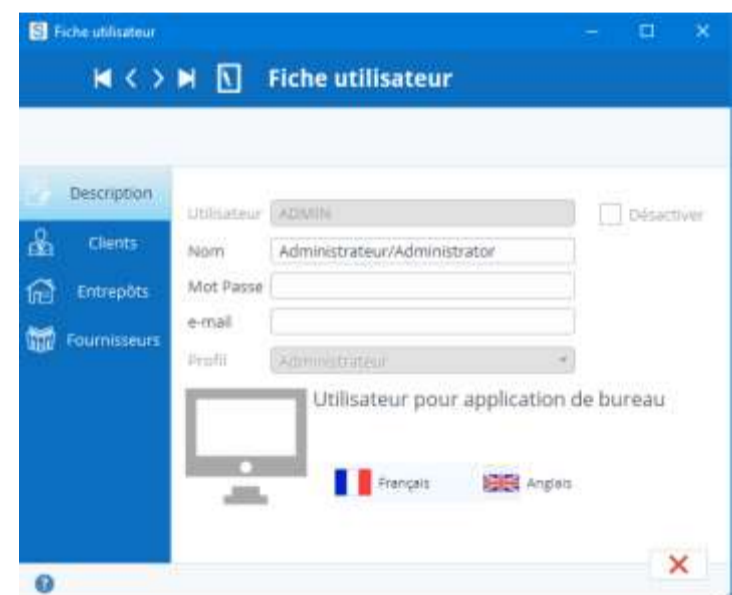
Encode a name and first name, possibly a password and email address.

Assign a profile which will guide all of that user's rights.

Select the use language of Stock It Easy for this user.

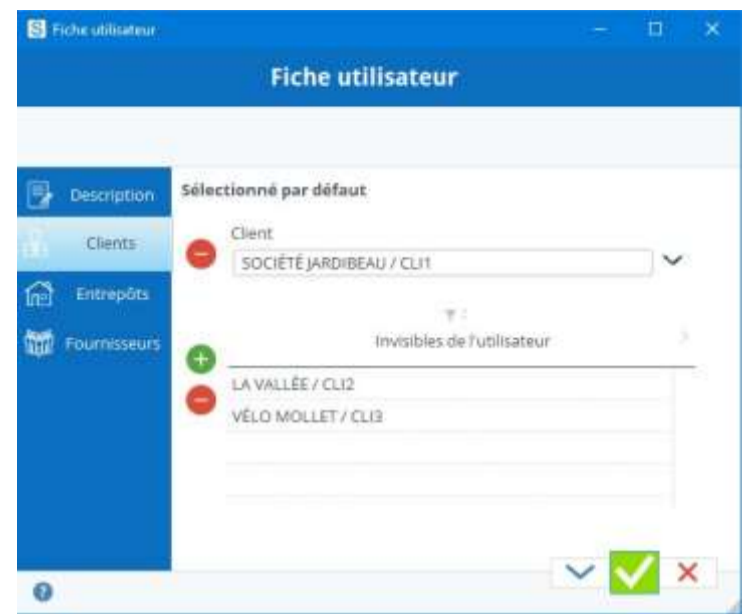


You can select which customer/warehouse/supplier will be pre-filled by default for that user.



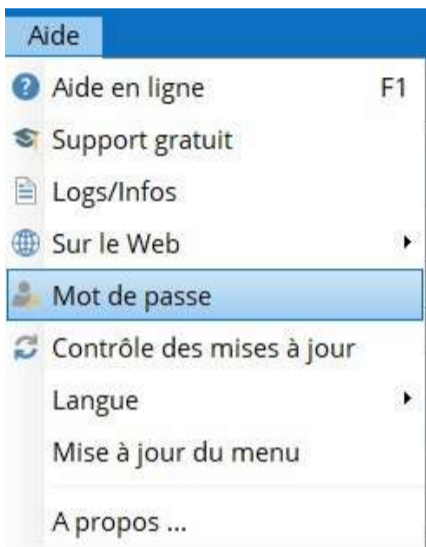
This is convenient for example if you only have a warehouse, no need to select it every time.

If a user can't see data about one or more customers/warehouses/providers, you can add it to the "user's invisible" table.

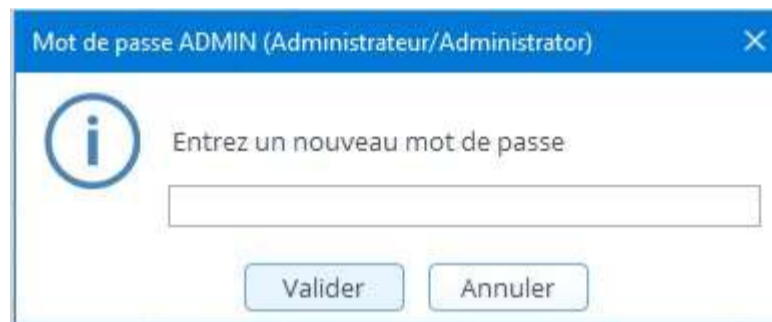


23.2.1 Change the user's password

Once in Stock It Easy, from the Help/Password menu, open the change window and validate your new password.



Beware, the password is sensitive to the lower case.



23.2.2 Authentication

Enter the username and password to log in to the user with the rights set in their profile.



A mobile user cannot authenticate on the Stock It Easy Windows app.

23.2.3 1 user - 1 session

The same user cannot connect to Stock It Easy multiple times at the same time. If he does, a message will alert him and suggest either:

to give up his connection

to close the open assignment to his username on another computer. This other user will be forced to leave his Stock It Easy assignment in a short time.

24 Subscription/licensing management

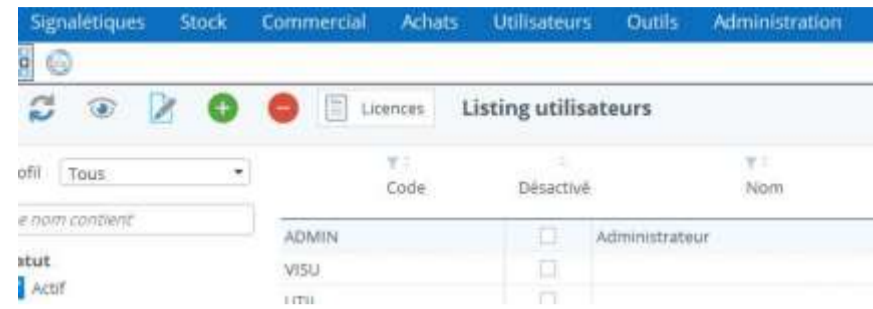
Beyond the trial period, each user must have a valid subscription to use Stock It Easy.

You have purchased one (or more) subscriptions and you need to activate them on your software.

Open Stock It Easy and go to the user menu.

Make sure you have created the users you want to assign subscriptions to beforehand.

In the top headband of the menu, click the license button.



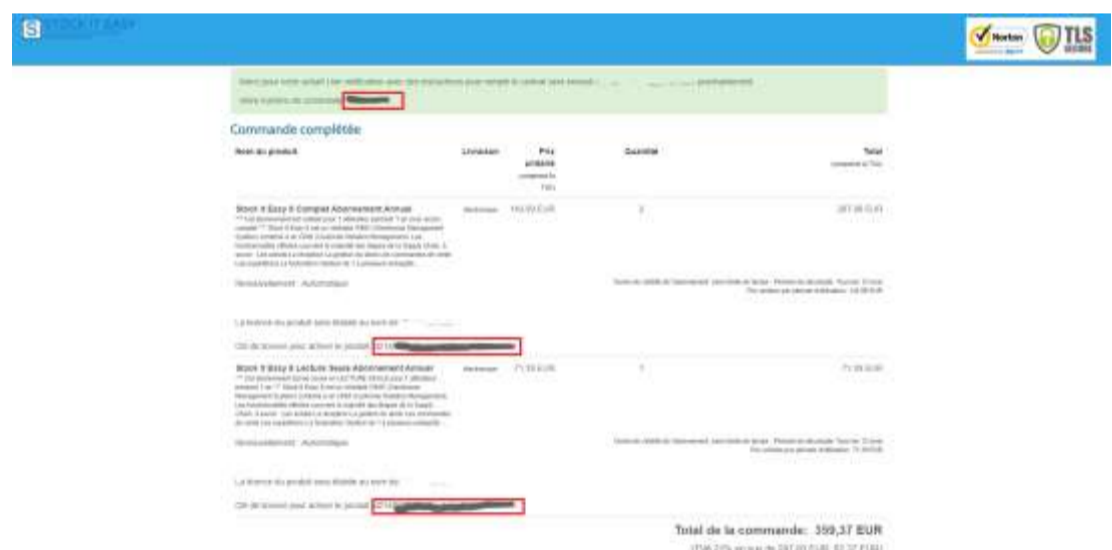
In the next window, you will find the subscription list and the user list.

24.1 Import ordered licenses

If it's a new subscription order, copy and paste your order number and license activation key and select the platform you placed the order on, most of the time it's MyCommerce Share-IT, if you bought your license directly from us then choose Just A Click.



Then click the Import your licenses button following your order. Confirmation of your order already shows the command number and activation keys to encode (if you ordered from the MyCommerce Share-IT portal).



In the order confirmation mail, you will also find the data to encode to import your licenses, as well as your purchase bill.

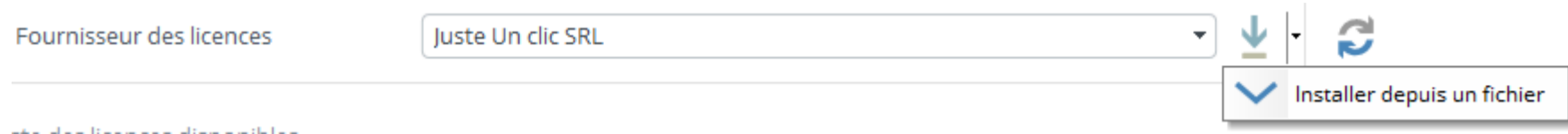
1. Import licenses via a license file

If your environment doesn't allow you to validate an online license, you can ask us for a file containing your licenses. This is only possible for annual licenses sold directly by Juste Un Clic.

To do this, you must give us the database ID on which you will encode your licenses (Stock It Easy must already be installed). Go to the "Settings" tab "Generals" menu and click the button next to "Database." The identifier will then be copied into your paper press. Send us back this ID by sticking it (right click/paste) in your message.

In return, we'll send you a file containing your license keys for your Stock It Easy installation.

Go to the "Users" menu and click the "Licenses" button. Click on the arrow to the right of the import button next to the license provider.

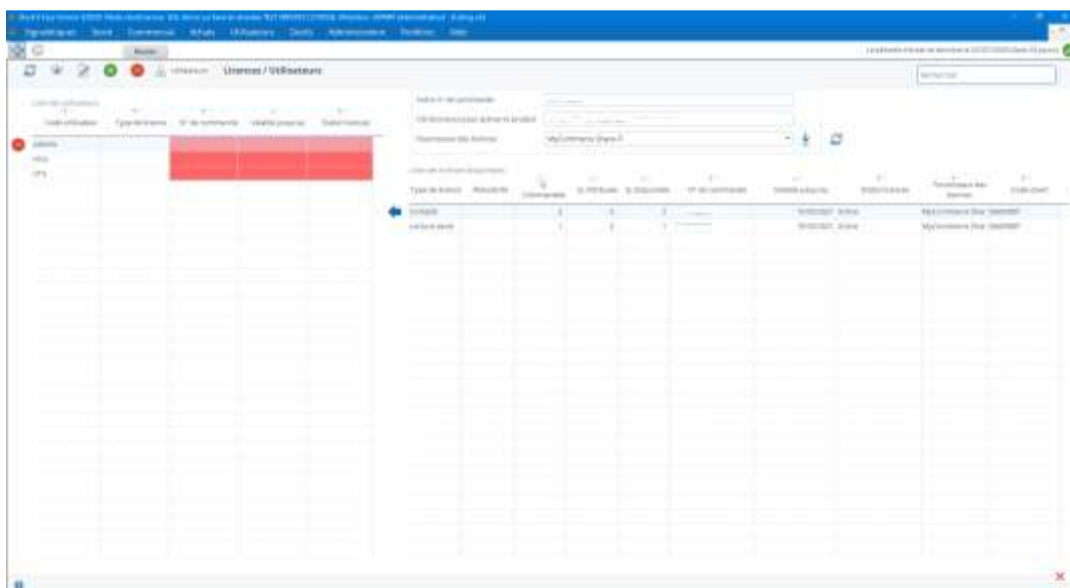


And select the license file you've previously registered on your local post.

24.2 Update existing licenses

If you have just renewed an existing subscription, click the "Update your existing licenses" button.

The window will list which licenses to assign to users.

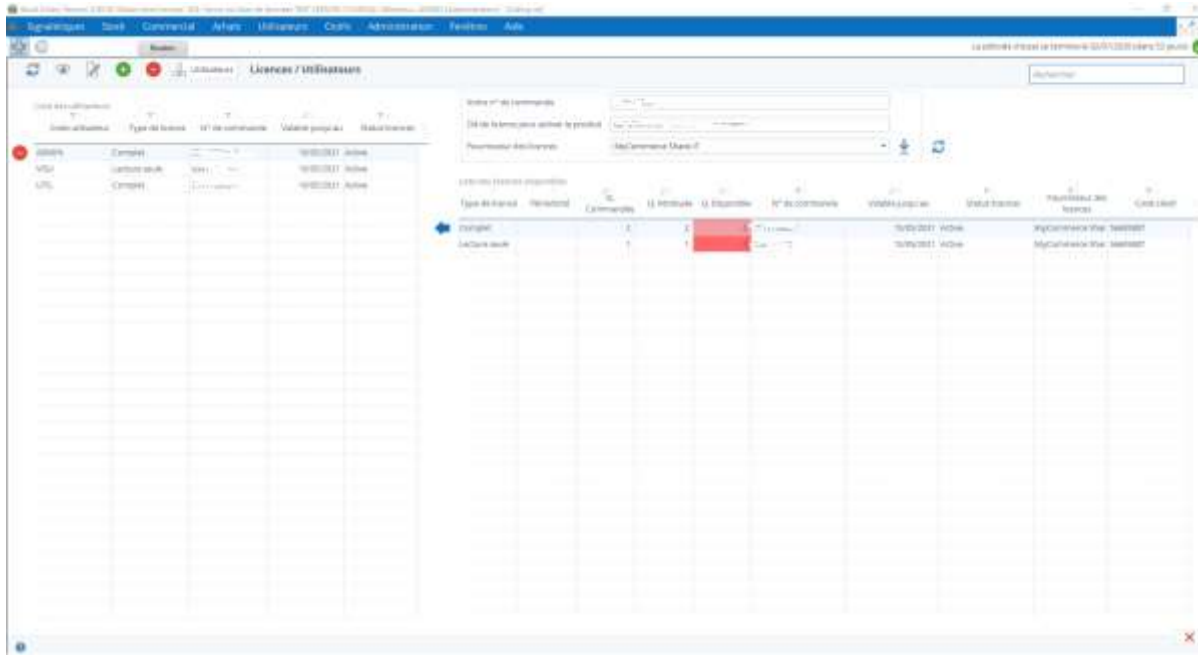


24.3 Allocate subscriptions to users

Each subscription must be assigned to a user. To do this, it is very simple:

- select the user from the left list
- select the subscription from the right list
- Click on the blue arrow to the left of the subscription line

If the user already had a subscription, it will be released (and therefore usable for another user) and replaced by the new one.



24.4 Subscriptions can be made from one user to another at any time

If you need to release a user's subscription (for example, assign it to another user), select the user and click the "Take away the license of the selected user" button. The available amount of this subscription will be directly incremented in the right list.

24.5 1 user - 1 subscription - 1 session

The same user cannot connect to Stock It Easy multiple times at the same time. If he does, a message will alert him and suggest either:

- to give up his connection
- to close the open assignment to his username on another computer. This other user will be forced to leave his Stock It Easy assignment in a short time.

25 Management of item categories

One category represents a set of items. The categories are hierarchically categorized, i.e. a category always depends on the category above itself.

The categories allow you to quickly classify and find items. Their use is not mandatory.

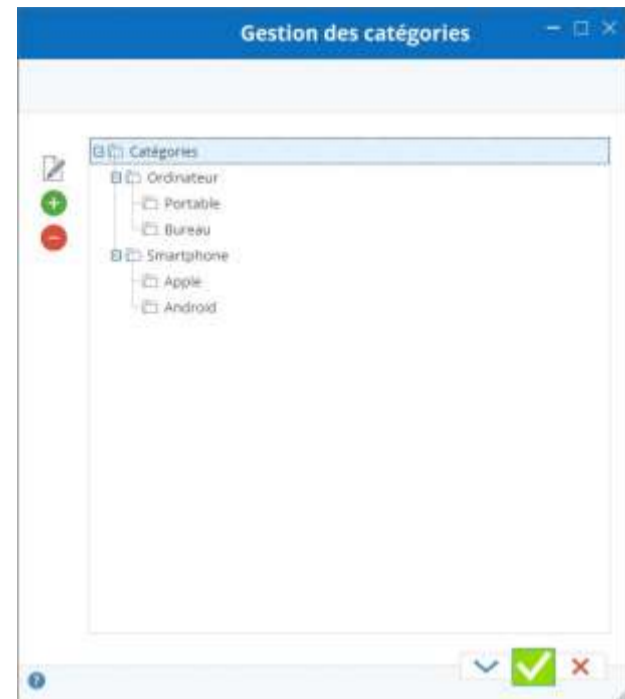
A category can be qualified as "unique items" and will contain only one-piece items in the stock.

To add a category, click on the parent category or you want to add it, then click the "Add" button.

To delete a category, click on the category and then click the "Delete" button.

To rename a category, click on the category and then click the Edit button, then encode its name in the languages of your choice.

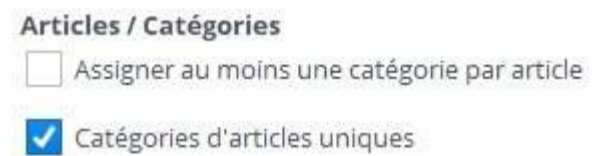
You can move one category by swiping it/depositing it on another parent category.



25.1 Unique item categories

When you edit a category, you enter the name of the category in French and/or English, and you can check the "unique items" box.

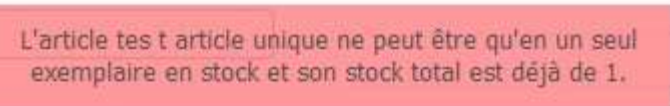
This option is only visible if in the general settings, you have activated the option.



Other option that can be activated from general settings

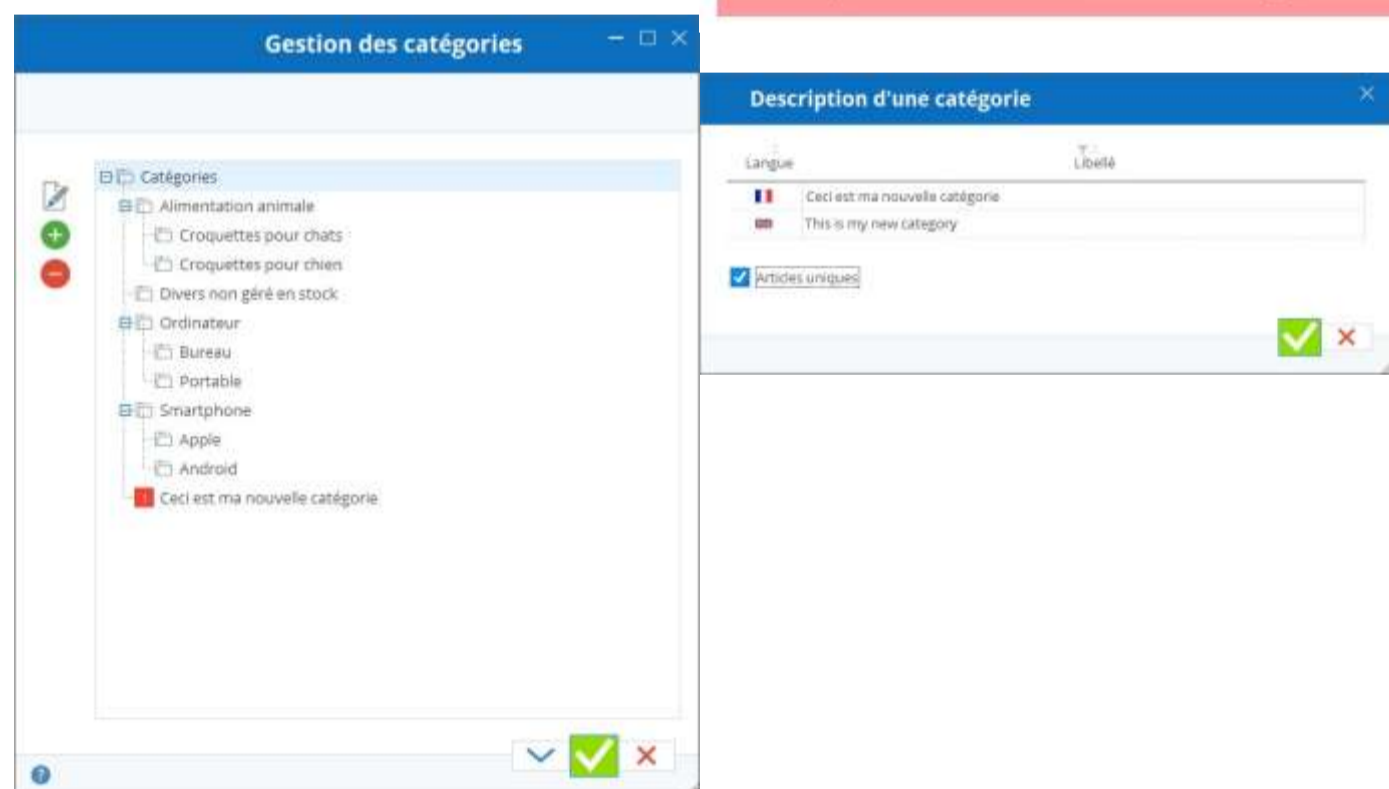
Through the "Assign at least one category per item" option, it is possible to make it mandatory to select a category when validating any item. This option is valid for all items maintained in the program.

The result of this checked box is that the items you assign to this category can only exist in one copy in the stock of all warehouses combined. As soon as you try to add more than one item in a single item category, a message will let you know that's not possible.



Name a category and determine if it will contain unique items

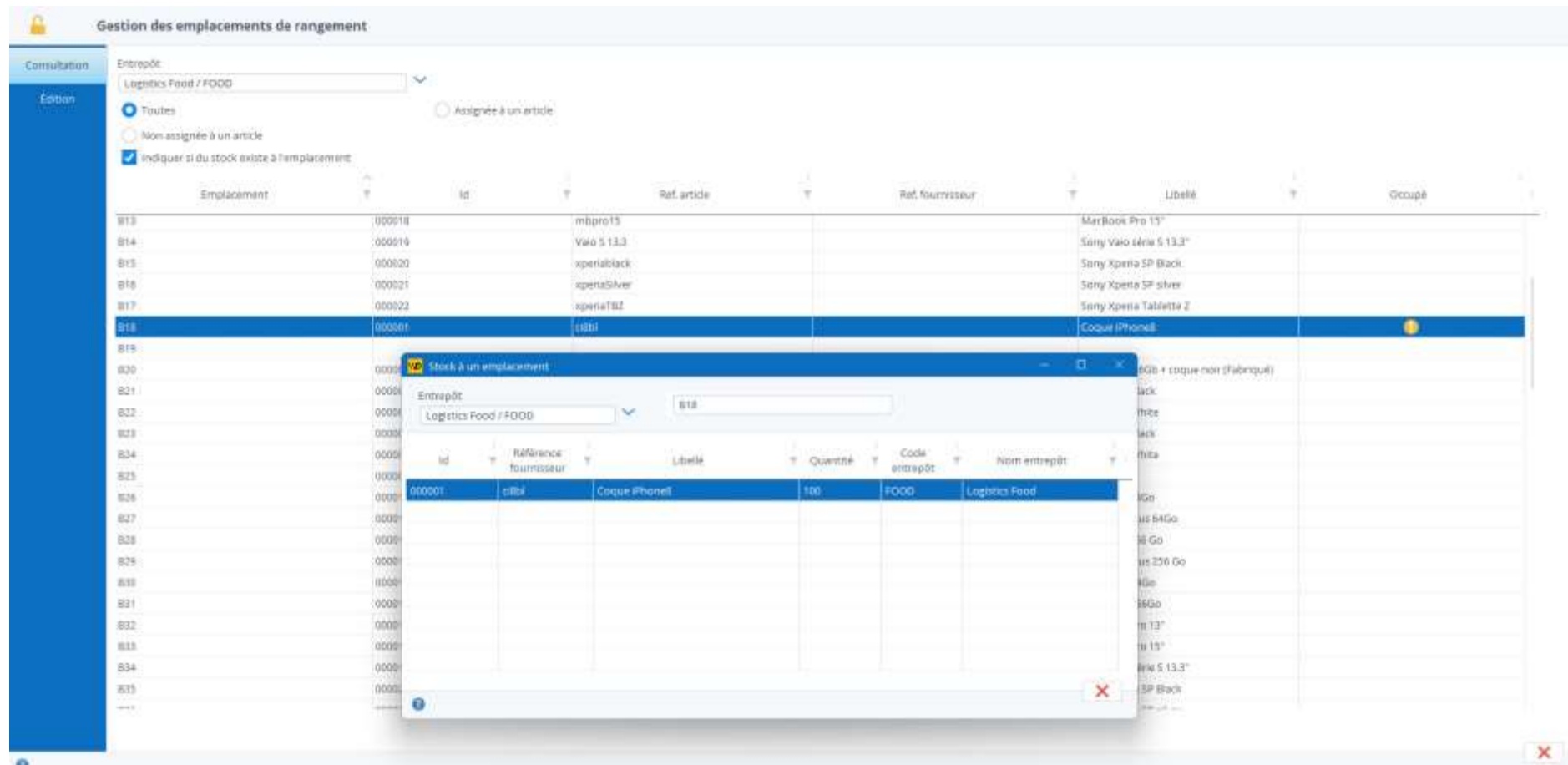
A category of unique items is represented with a "1" symbol.



26 Storage location management

From the main menu, click the Signals/Locations button

A location is where an item can be stored in a warehouse.



Each warehouse has its own list of locations.

For an item, you can assign multiple locations per warehouse. For each of them, you can indicate a maximum capacity of this item, and a priority order. Learn more about managing locations at the item level.

By default, the browse of the locations (on the preparation and receipt vouchers) is defined based on an alphanumeric sorting of the name of the locations. Via a parameter in the inventory settings, you can set the sort order of the locations (by warehouse) manually and more alphanumerically. When this parameter is activated, an explanatory message and a validation button are displayed in the edition of the locations, you just must sort them according to your needs.

26.1 Add, edit or delete a location

The consultation tab lets you see what the existing locations for the selected warehouse are.

You can fine-tune the selection on locations already assigned to one (or more) items, unassigned locations or all locations. You can also use the "Indicate if inventory exists at the location" checkbox to display an additional column in which an orange icon will appear on the location rows where inventory exists. Clicking on this icon opens and lists the content in that location, as shown in the image above.

If a location is assigned to more than one item, it will be repeated as many times as it is assigned to the list.

The editing tab allows you to add, edit or delete a location.

To add, simply go to the last line of the list and encode the new location.

To edit, select an existing location and change it.

To delete, select an existing location and remove it.

You can report that a location is for shipping preparation (useful if you turn on the shipment preparation setting). These locations will be used to move the item when validating the preparation of an expedition.

If this location is occupied by one or more items, a message informs you that it cannot be deleted. If this location is assigned to one or more items, a message asks you to confirm its removal.

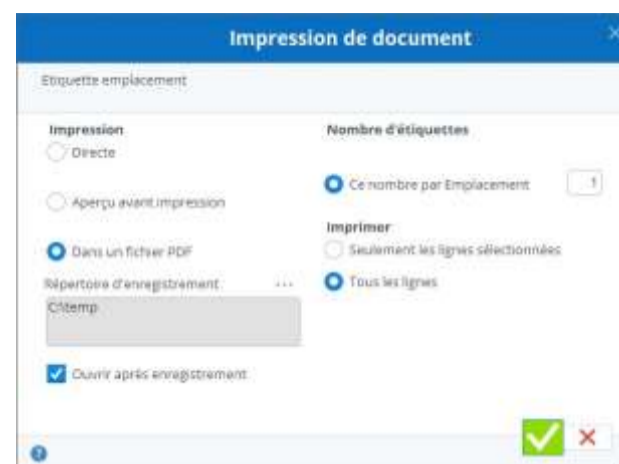
26.1.1 Import a list of locations

You can import your locations via an Excel file.

26.1.2 Print location labels

In order to identify your locations, and to use a barcode reader to scan them, it is possible to print their labels.

Click the "print" button accessible from the Edition tab.



26.2 Free locations from disabled items

By clicking on the padlock button on the top ribbon, you free all locations from the deactivated items.

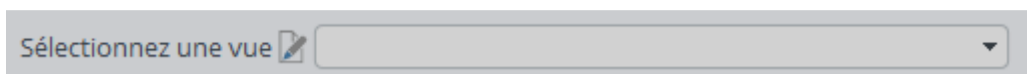
Beware, this action is irreversible. If deactivated items still contain stock on these sites, the assignment to that location will be deleted. This does not mean that the stock disappears but that the information that the item is stored at that location disappears.

27 The Views

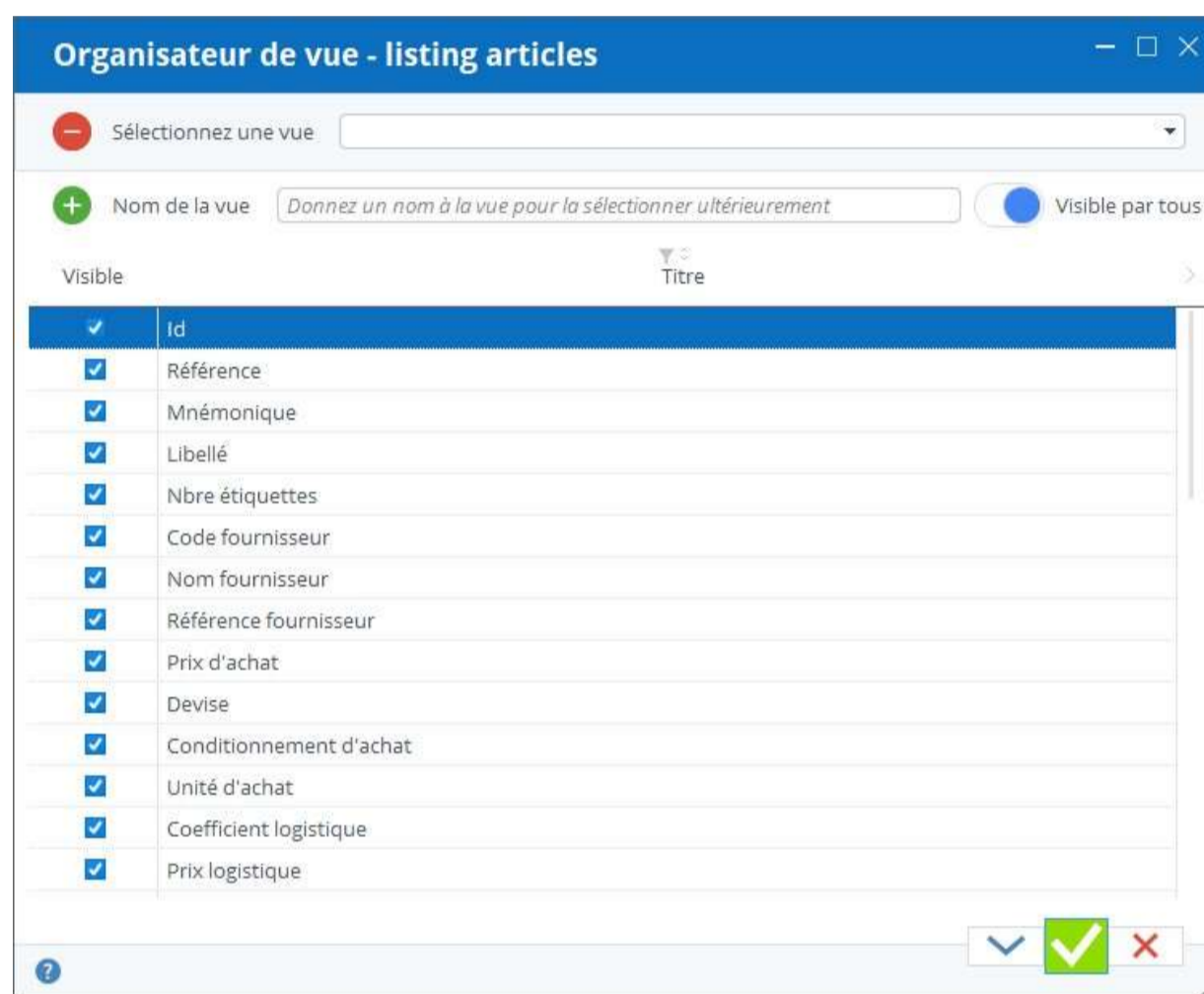
A view is a custom selection of columns that will be specific to a selection. For example, you can create your own views in the item selection.

The views are applicable to the majority of selections, i.e. items, customers, suppliers, warehouses, purchase orders, sales orders, receipts, shipments and invoices.

To create a view, click on the following "Edit" icon in the selection of your choice:



Each view can be accessible to all users defined in Stock IT Easy or only to the current user. For example, a user who manages purchases does not necessarily need to see the same column selection in the item selection as his colleague who works on shipping. In this case, the user can create a view and check the selector visible to all / visible to me.



Give the view you are creating a name. Uncheck the columns you don't want to see in this view. You can also drag and drop the columns to sort them in any order.

Click on "Validate", the display of the selection adapts to the created view. If the size of the columns does not suit you, adjust it column by column, then click again on the "Edit" button of the view and then on the "Validate" button, the size will then be remembered for a later opening.

You can create several different views. The last view selected will always be the one displayed by default on a later view.

In some selections there is a button named "Detail by line", this is the case for orders, shipments and invoices. For these selections, the "Detail by Line" views and the Header Selection display views are separate.

For example, you can create your view collection for sales order totals, and another view collection for sales order lines.

28 Lists

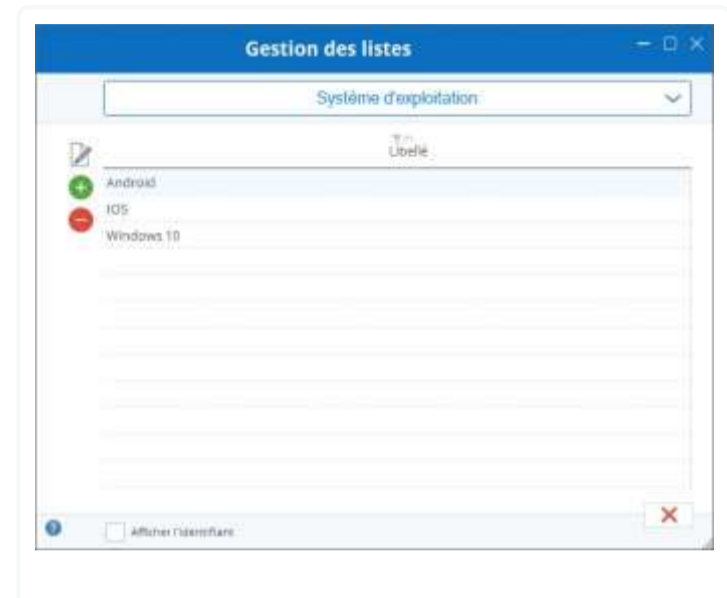
28.1 How do I manage customizable lists?

Lists are datasets, either predefined or added by you.

Lists can be accessed from the main menu, "Lists" button, or from any other window that requires adding or selecting a list, such as adding an 'info' to a customer card or adding a type of barcode to an item sheet.

The lists are grouped by themes.

In the first theme, you find the list groups as such as well as the lists you've created. Then the themes are the items, customers, orders, various, ...



28.2 Complete a list

Depending on which list is selected and what's in that list, you'll have access to a button to add, delete or update an occurrence or not. For example, if you select the "Types of Documents" list, you can't do any of these actions because the types of documents are predefined in Stock It Easy.

Example 1: You want to add a new item packaging.

Open list management

Select the "Conditioning" list in the "Items" theme

Then click the "Add" button and encode the packaging name in French and/or English Click the "validate" button

Example 2: You want to add a new custom list

Open list management

Select the "Group of Lists" list in the theme

Then click the "Add" button and encode the name of the list in French and/or English, for example, "Operating System"

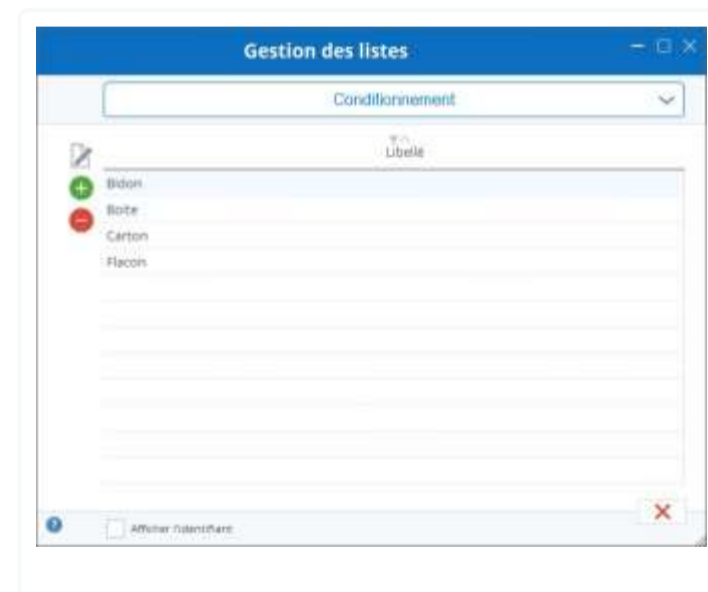
Click the "validate" button, the list is created, you then must add the occurrences of this list

Select the previously created "Operating System" list in the "Group of Lists" theme

Then click the "Add" button and encode the operating system name, in French and/or English, for example, "Windows"

Click the "validate" button, repeat the operation for each occurrence on the list

You now have a list called "Operating System" containing various operating system names, you can insert this list into the info - item sheets, so, in each item sheet, you will have a selector of the "Operating System" to qualify each item.



28.3 The vocabulary lists

As each company is unique, its internal vocabulary may be unique. That's why a series of keywords in Stock It Easy's vocabulary can be tailored to your needs.

To do this:

- Open list management
- Select the "Specific Vocabulary" list in the theme "Labeled"
- Change the text, so it will be replaced in the program by your translation, in the language you have modified

28.3.1 Example of vocabulary change

The term Mnemonic Warehouse is not suitable for my business, in the list and the warehouse sheet, I see this:

	Id	Code entrepôt	Mnémonique entrepôt	Nom entrepôt	Statut juridique	Contact
1	BRUX	BR	Logistic Bruxelles	Société anonyme	Monsieur Dupont	
3	NEW YORK	NY	Logistic New-York	Société anonyme	Mister Pitt	
2	PARIS	PA	Logistic Paris	Société anonyme	Madame Dubary	

Select a wording from the list to change, change

Vocabulaire spécifique

Langue: [FR] Libellé: [ID entrepôt]

- [FR] ID entrepôt
- [FR] Warehouse ID

[OK] [Cancel]

that wording.

Fiche entrepôt

Entrepôt : Logistic Bruxelles

Description: Code entrepôt: BRUX Groupe

Adresse: **Mnémonique en**: BR Statut ju

Infos +: Nom entrepôt: Logistic Bruxelles

GED: Contact: Monsieur Dupont

Once the wording is changed, it is updated in the windows using it.

	Id	Code entrepôt	ID entrepôt	Nom entrepôt
1	BRUX	BR	Logistic Bruxelles	Si
3	NEW YORK	NY	Logistic New-York	Si
2	PARIS	PA	Logistic Paris	Si

Fiche entrepôt

Entrepôt : Logistic Bruxe

Description: Code entrepôt: BRUX Gr

Adresse: **ID entrepôt**: BR Sta

Infos +: Nom entrepôt: Logistic Bruxelles

Contact: Monsieur Dupont

29 Additional information

Additional information (or info) is features that you add to the descriptions of items, suppliers, warehouses and customers.

In the signage items, suppliers, warehouses and customers, you can add descriptive fields of your choice.

These fields may contain either:

- alphanumeric data
- Digital data
- drop-down lists of your creation or existing ones

Info de contrôle	Périodicité contrôle	Dernier contrôle	Prochain contrôle	Couleur	RAM (Gb)	Système d'exploitation
				Noir	8.00	iOS
				Noir	8.00	Android
				Blanc	16.00	Windows 10

29.1 Add information

Open the signage sheet (item, supplier, warehouse or customer) in edition.

Click the "add" button in the "Info" tab.

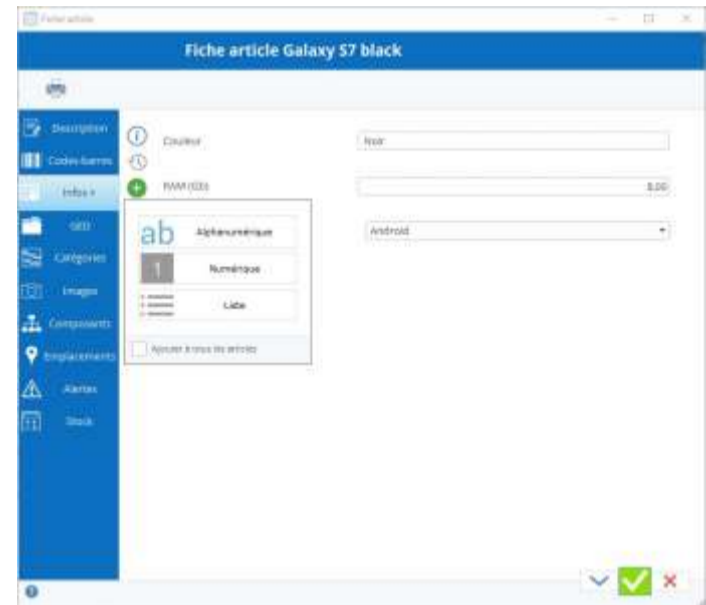
Then select the type of info to add.

Add an info

A window opens with the list of Info already existing for the selected type.

Select the info of your choice or create a new one if necessary.

The selected information field will automatically be added to your listing.



29.1.1 Add info on all cards at once

If you've checked the box "Add to all ... When selecting the type of info, an empty field will be added automatically on all the signage sheets (item, supplier, warehouse or customer), before you avoid adding it sheet by sheet, the copy of this field info - will be made when the file is validated during the editing.

29.1.2 Have different info depending on the fact sheets

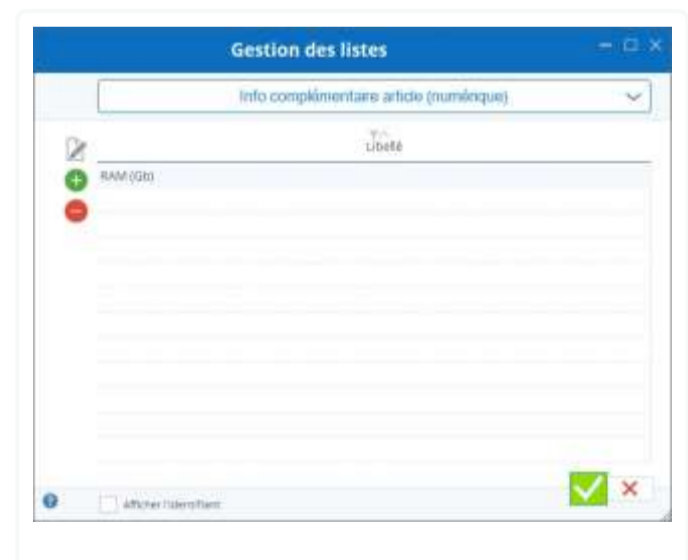
If, on the other hand, the type of info you add is only for a few sheets, you can add them to each of them, so you don't have those info fields on all the cards.

This allows you to have personalized listings by item, supplier, warehouse or customer.

29.1.3 View info in signage lists

In the items, suppliers, warehouses and customers' sign lists, you can check the "Show Info" box, in the case of long signposts, it can slow down the display of the one. The first 5 lists will be displayed as columns.

The info - is based on the lists



30 Notes

You can enter notes on the following concepts:

- To the articles
- To customers
- Suppliers
- At the warehouses
- At purchase orders
- At the helm of sales
- To expeditions
- To the bills
- As well as so-called "general" tasks

30.1.1 Examples of use?

Include important information about your last interview with Customer X

Note a special request from your customer regarding their order

Encode this customer's alternative contact email addresses

...

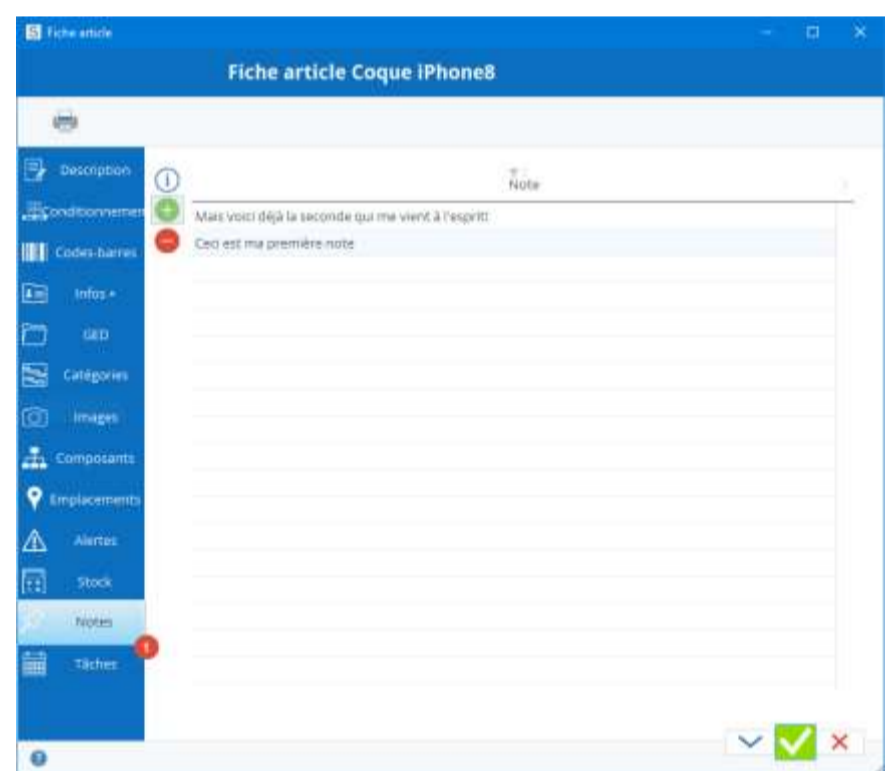
30.2 Encoding a note

A note can be encoded for a specific concept. The way to encode is always the same regardless of the concept. Let us take the example of the article. Open an article sheet, you will find a "Notes" tab.

- Turn in editing mode
- Click the "add" button, a line is added to the list of notes
- Encode your note

○ General notes

If the note you want to encode does not match any of the contexts mentioned above, you can access a window to manage those notes from the main help/general notes menu.



31 Tasks

A task is a note you write in Stock It Easy to which you assign a date. Once this date has been reached, if you have not checked this task as being performed, a reminder will be highlighted on the menu.

31.1 Tasks for what?

Tasks can be assigned to several concepts in Stock It Easy:

- To the articles
- To customers
- Suppliers
- At the warehouses
- At purchase orders
- At the helm of sales
- To expeditions
- To the bills
- As well as so-called "general" tasks

31.1.1 Examples of use?

Please state that an article must be revised on such a date, that its description sheet must be written at that time...

Remember that a purchase order must be returned to the supplier in x weeks.

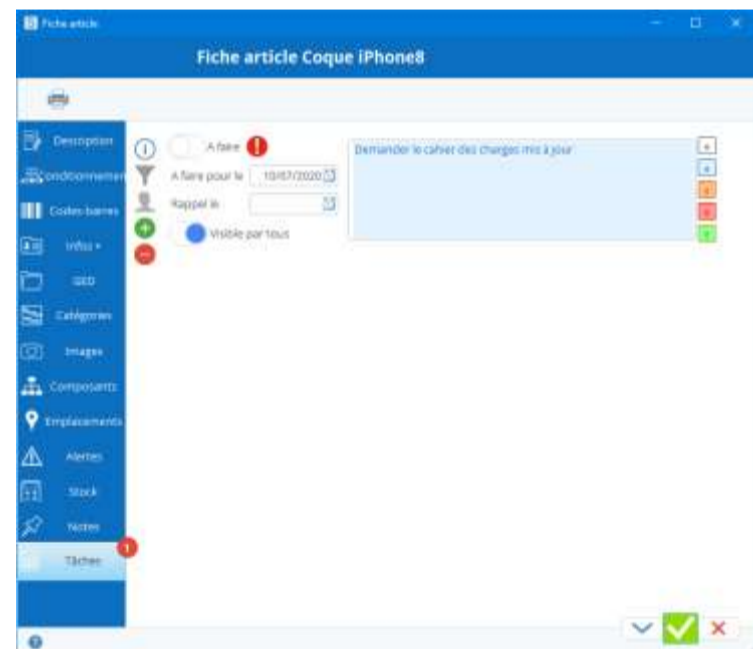
Put a memo to propose the renewal of an order to his customer in the future.

Put a general task to remember to reorganize this or that storage aisle ...

31.2 Encoding a task

As mentioned above, a task can be encoded for a specific concept. The way to encode is always the same regardless of the concept. Let us take the example of the article. Open an article sheet, you will find a "Tasks" tab.

- Turn in editing mode
- Click the "add" button, a task is created with the same-day deadline
- Encode your task, give it a specific color if necessary
- Adjust due date
- Encode a recall date if necessary
- Choose whether the task will be visible and editable by all users or only by yourself



still

You can also filter tasks that are only for you and for those that are to be done.

31.3 Validating a task

When your task is done, you can validate it (otherwise it will always appear to be done in reminders).

To do this, simply click on the "to do" switch that will turn into "fact."

You can also delete the task, just select it and click the "delete" button.

31.4 Reminders of tasks

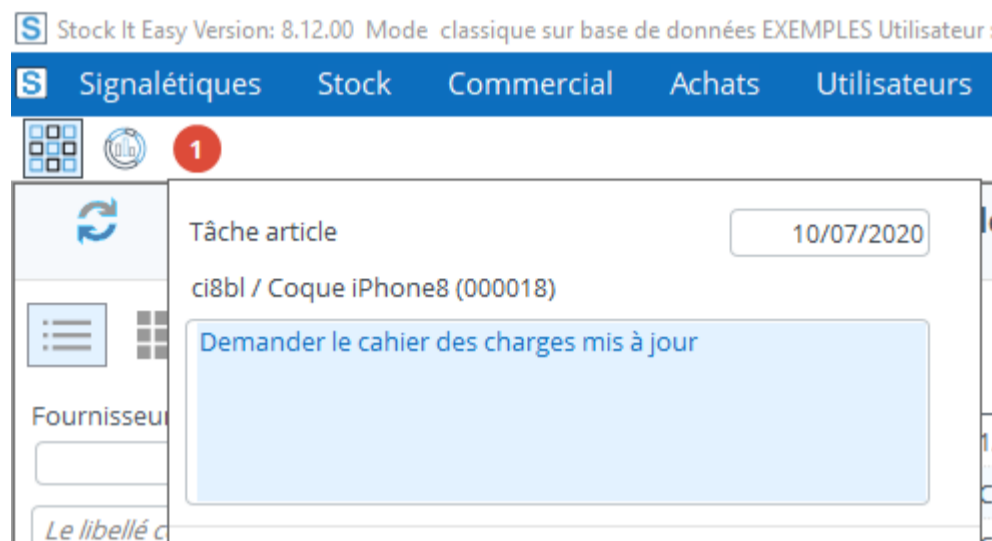
On each card with a task tab there is a red bubble with the number of tasks due if any.

From the general menu you will find the same bubble, but this time for all tasks combined, at least the one checked visible to you or for all users, and assigned to a concept that you have access to according to your profile. If your profile does not allow you to see purchase orders, you won't have reminders of expired tasks from purchase orders, for example.

If no task has expired when the program is opened, a "refresh" button will be visible. Just click this button whenever you want to check if in the meantime new tasks have expired (for example, an urgent task edited by another user).



If tasks have expired, click on the bubble, the to-do list opens.



Double click on a task, for example a task for the purchase order 202007001, this order opens. You can then edit and modify the task.

31.5 General tasks

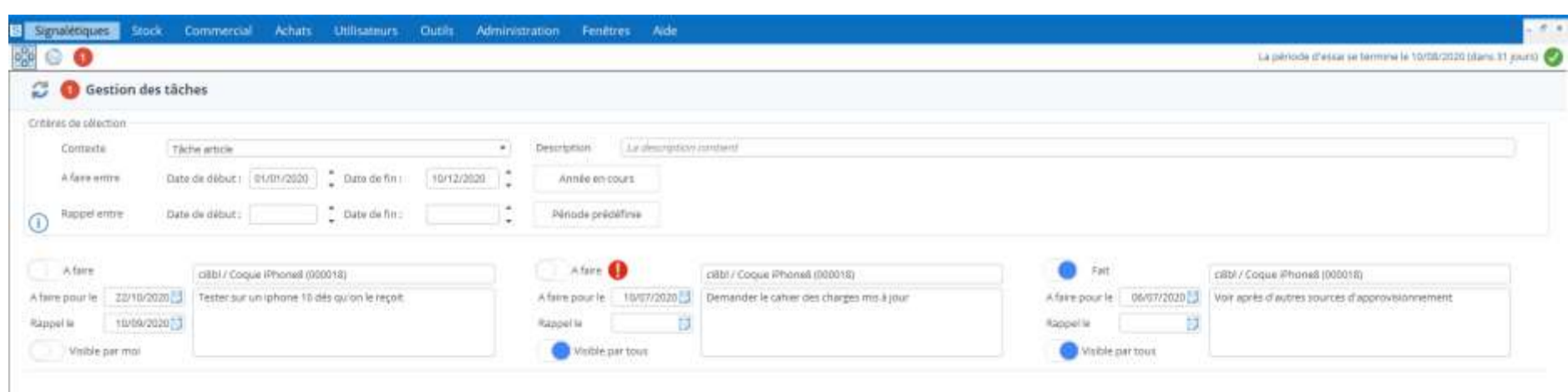
If the task you want to encode does not match any of the contexts mentioned above, you can access a window to manage these tasks from the main Help/General Tasks menu.

31.6 The task summary

From the main menu, in the Tools block, there is a button to access the task summary window.

From this window, you can edit all the tasks that you can access according to your profile.

The tasks here can be selected by context and forks of dates.



32 Prints and documents

Documents are categorized by type (item file, purchase order, item label, receipt voucher ...).

You decide via the general parameters of the models to be used, you can use one or more models per type, for example you select 2 models of purchase order because you do not intend to send always the same voucher.

A document can be based on a "Stock It Easy" model and will be printed or recorded in PDF format, or for some documents, it is possible to use a Word Office model that you can customize yourself.

32.1 "Print" button

To print a document, click the "Print" button in the window. Depending on the context, there may be several printable documents, so a selection menu asks you to choose the type of document. For example, in the purchase order, you can choose between the purchase order and the receipt order.

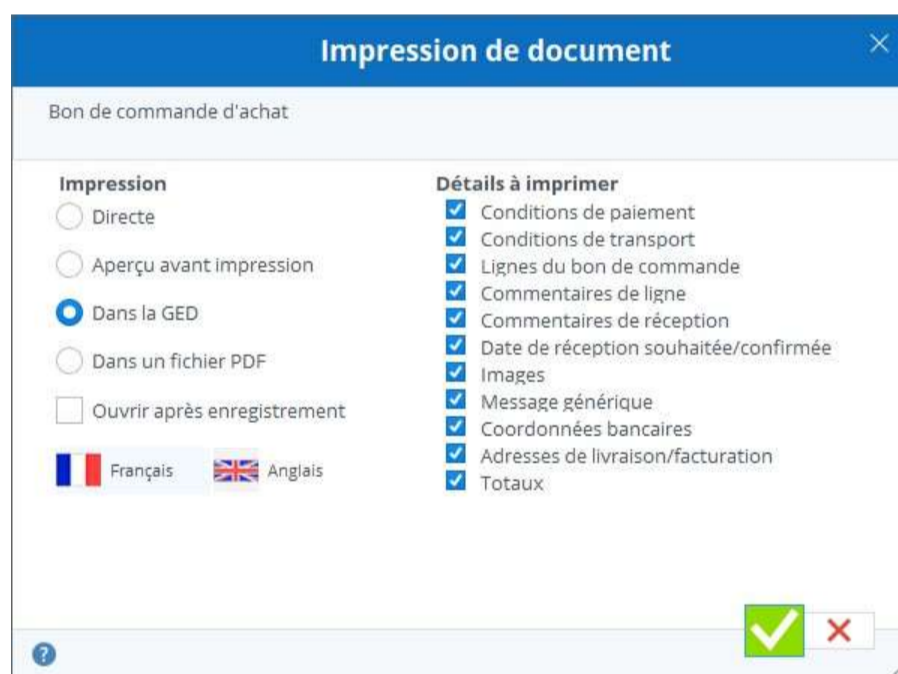
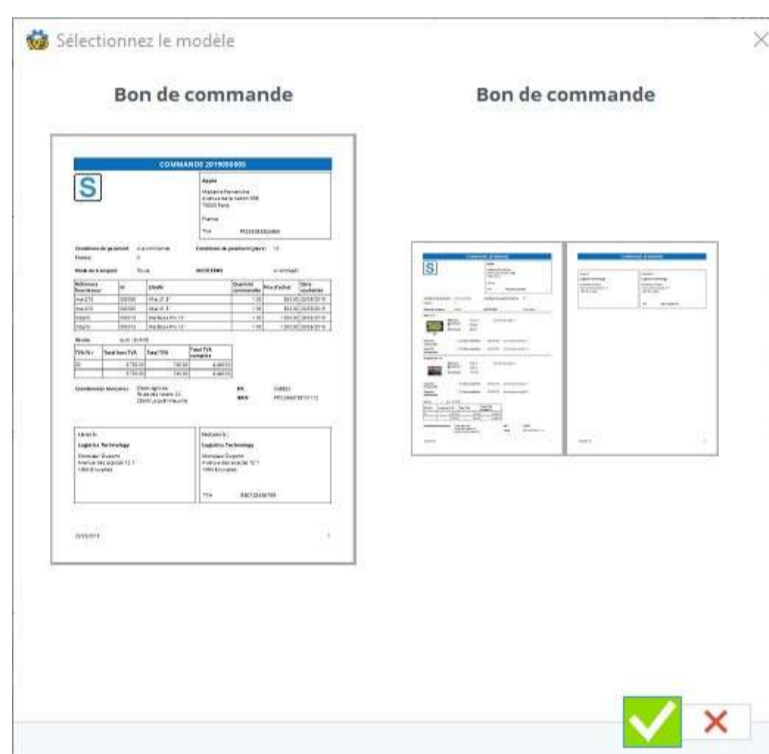
If you've chosen to use more than one template for the same type of document, that's when you should choose which model to use:

Selecting the model to print.

Then click "Validate."

A print window opens and depending on the model it will present a list of the print destination and a list of details to print.

The list of details to be printed varies depending on the document model.



If your model offers details to print, you can check or uncheck the details, but also drag/move them to change the print order of these in the document. Your last choice is memorized.

32.2 Print destination

Depending on the model, too, the destination may change.

Office Word documents can either be printed directly, stored on your computer or stored in the GED.

Stock It Easy documents can be printed directly, opened in a preview before printing, stored in a CFO or in the GED.

32.3 Save in GED (electronic document management)

If you print a document from a context with GED such as the item sheet, the vendor purchase order and many others, and if this context is open in edition, when printing it will be possible to register in the GED.

This means that the document will become an integral part of the database and can be retrieved by all users. For example, you save a purchase order, by sending the purchase order to the supplier, you specify to register in the GED. Your original purchase order will therefore be available in the order by any user. No need to create directories outside the program to manage documents.

Example of GED files in a purchase order



32.4 Print language

The document can be printed in the languages managed by the program. A default language is offered depending on the context. For example, you print a purchase order for a supplier for which you specified in their signage sheet that they wanted to receive the documents in English, that language will be used.

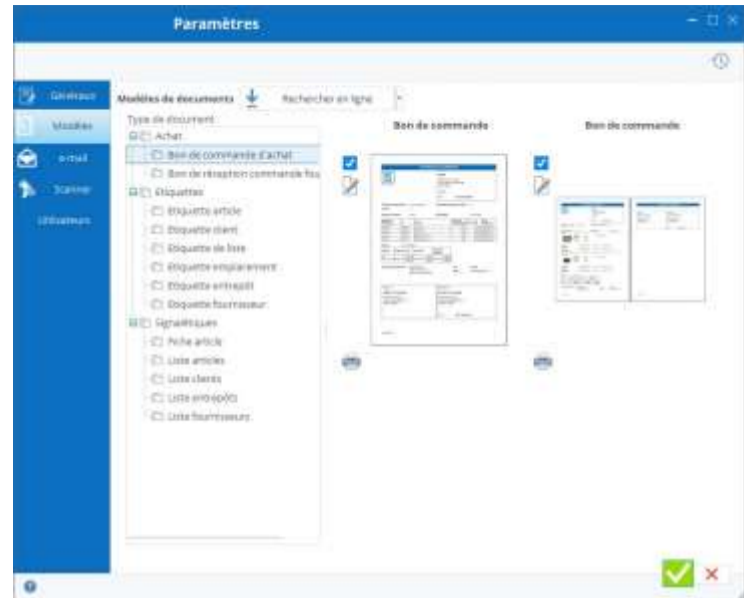
If you use Office Word documents, it is up to you to prepare the document in the language of your choice, so that the values you print in the document can also be entered into that language in the program.

33 Manage document templates

Stock It Easy allows you to edit many types of documents. For each type of document, you can activate one or more document templates. For each model, you can specify a printer (for example for a certain type of label), but also a default printer for all other models.

Documents are categorized by types in the left tree.

Select a type of document and you see the models already installed on your Stock It Easy.



33.1 Search online for new models.

By clicking on the "search online" button, Stock It Easy will check if models of the selected document type do not yet exist on your Stock It Easy installation, or if any of them have an update. New models are put online regularly.



Validate to download this document template



Once the model is installed, you can activate it, so it will be proposed as a template for printing this type of document.

33.2 Possible actions on a document model



Several icons appear to the left of a model.

A Word Office icon appears if the model is based on a Word Office document.

When a Word model exists, you can use it as such, or make a copy to customize it to your needs.

A checkbox allows you to select or deselect a document template in order to make it appear or not appear in the list of print templates of the type of document concerned.

An edit button allows you to change certain criteria of the document model such as its name, or the default margins in the case of a label model.

Changing margins is useful for adjusting slight lags on your printer, but you should always use a model designed for the label dimensions of your printer. If this model doesn't exist, we can always make it for you to measure.

A "Printer" button allows you to set a printer by default for THIS model. This is especially useful when a model is intended to be printed on a paper, it will always print on the right printer.

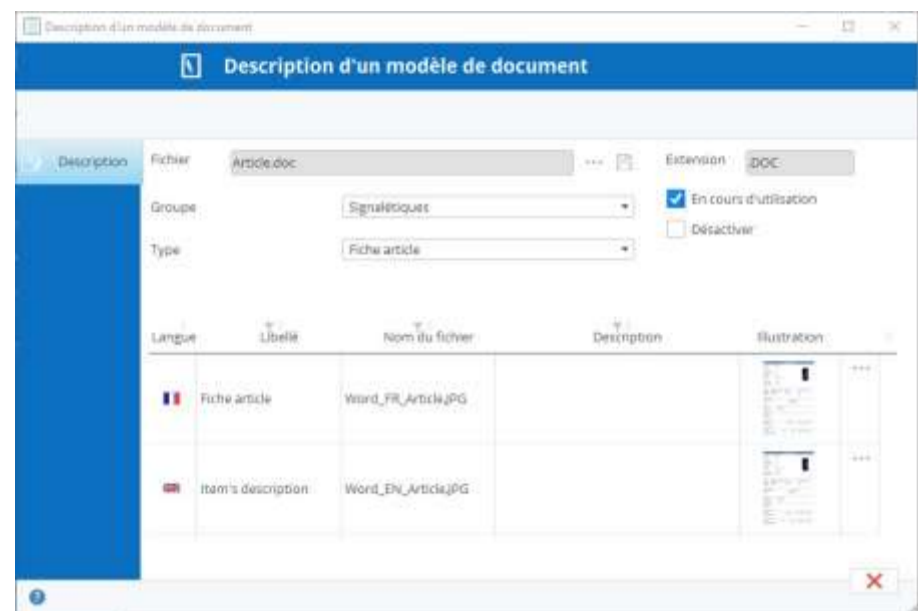
33.3 Office Word document templates

Some document templates are Microsoft Office Word documents.

The peculiarity of these models is that you can customize them according to your needs.

When a document template is Word-type, the Word icon appears to the left of the model.

By clicking on the Edit button, you open the plug for this model.



To change the model:

1. Click the "Save-under" button and save a copy of the model (keep an original intact for safety)
2. The document template opens in Word Office (you must have Office Word on your computer)
3. Adapt the layout as you like, you will find that the model contains a series of keywords surrounded by symbols and, for example, 'VOCARTREA'. These "beacons" are replaced when printed by the data in Stock It Easy. It's up to you to remove some that you're not interested in, or move them. Each of the models we provide contains all possible tags for this type of document, so it may be useful to print a document beforehand to see what each tag is.
4. Once you've adapted your template, save your changes, and then from the template sheet, select this Word file via the "Select a File" button (check that to the right of the file name in the Windows selection window you've chosen "Document Office")
5. Click "Validate"

Amounts can be rounded in 2 separate ways in Word templates.

If in your general settings the number of decimal places of the amounts is set to 3:

By default, 1.2526 will be 1.253 and 1.2002 will be 1.200

If you check the box "Strictly round quantities and prices in Word documents", 1.2526 will be 1.253 and 1.2002 will be 1.2 (the 0 excess on the right are not printed)

34 Email from Stock It Easy

Emails can be pre-completed with your personalized messages and keywords dynamically replaced depending on the context.

When you click the "E-mail" button, the message window opens and is pre-completed depending on the context.

Example 1: You click on an order awaiting approval, the email window will be pre-filled with the order data, the attachment approval request, the message and the recipient of the approval requests.

Example 2: You click on an order ready to send to the supplier, the email window will be prefilled with the order data, the order order attachment, the "order order" message and the supplier as the recipient.

34.1 Keywords

In the list on the left is a list of keywords (which can change depending on the context). Pass your mouse cursor over these keywords and you'll read their meaning.

Swipe/drop these keywords in your message, these will be automatically replaced by their context values when sending the email. You can also see the "translation" directly by clicking the button.

The subject and message with the keywords replaced by their value.

You can still change everything, i.e. the sender, the recipients (and in copy and/or hidden copy), add or delete attachments, change the object or body of the message.

Messages are not backed up, so it's a good idea to systematically add copies (hidden or not) of your emails in order to receive them also in your email to manage the ranking. This is featured in thee-mailsettings from the generalsettings.



35 Import your signage data from an Excel file

It is possible to import the following data into Stock It Easy from an Excel file:

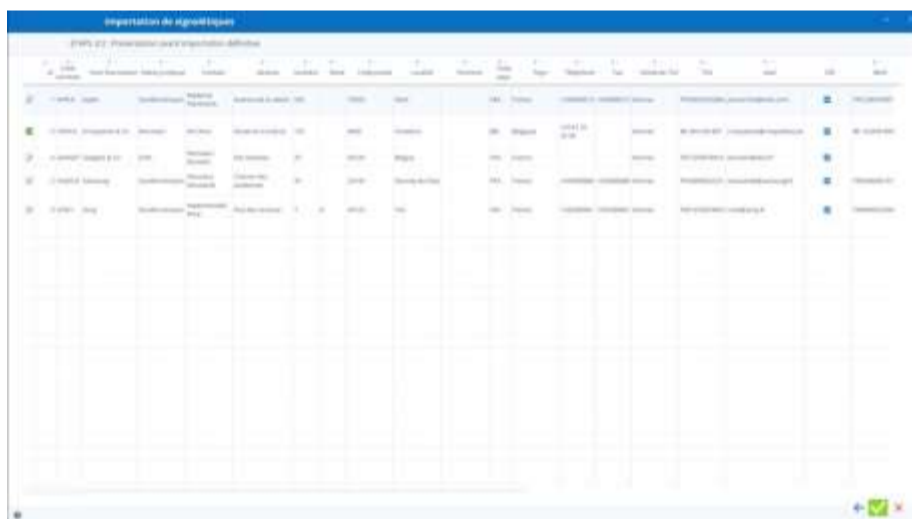
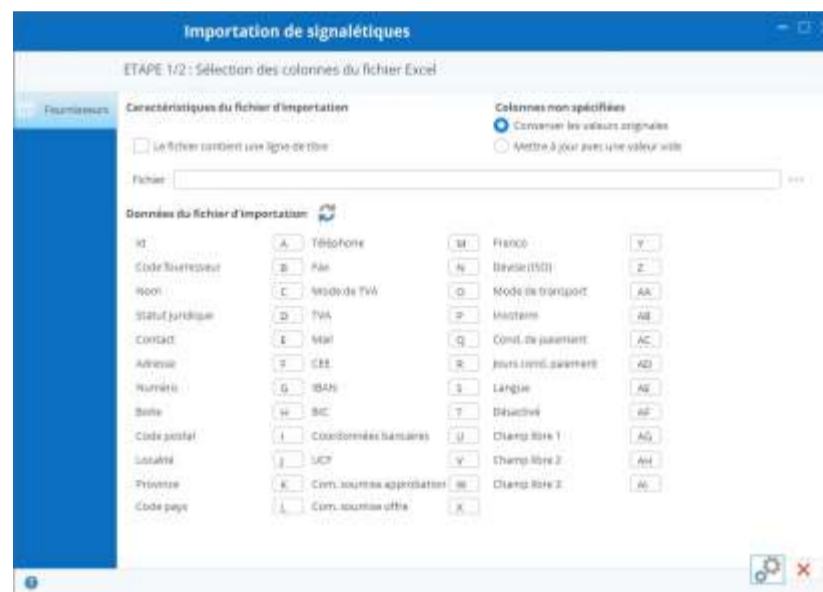
- Suppliers (from the "Import" button on the supplier list ribbon)
- Warehouses (from the "Import" button on the warehouse list ribbon)
- Warehouse storage locations
- Items (from the "Import" button on the item list ribbon)
 - Stock alerts per item per warehouse
 - Item storage locations per warehouse
 - The barcodes of the items
- Customers (from the "Import" button on the customer list ribbon)

35.1 Importing suppliers

Start with your own Excel vendor file or build a file directly from Stock It Easy

From the main menu, the "Suppliers" button in the "Signals" block open the vendor list and click the "Import" button in the blindfold.

- Select your supplier file
- Complete file features
- Complete column selection
- Click the "Anticipate Import" button
- You can verify that the data to be imported will be taken back in the right fields, is the supplier's name in the corresponding column?



A line of data to be added will be preceded by an "Add" image, one to be updated will be preceded by an "Edit" image.

If all your data looks correct, click the "Validate" button, otherwise, click the previous button, and change your column selection and/or data file.

If you want to create suppliers, don't use an "Id" column, but be sure to provide a "Supplier Code" column that should contain a unique value for each vendor.

If you want to update vendors, the file may contain either the "Id" column or the "provider code" column, the vendor will be

searched first on its "Id" and then, if it is not found on its "Supplier Code."

35.2 Importing warehouses

Start with your own Excel warehouse file or build a file directly from Stock It Easy.

From the main menu, the "Warehouses" button in the "Signals" block open the warehouse list and click the "Import" button in the blindfold.

The continuation of the import of warehouses is identical to the suppliers.

35.3 Importing customers

From the main menu, the "Customers" button in the "Signals" block open the customer list and click the "Import" button in the ribbon.

Start with your own Excel client file or build a file directly from Stock It Easy.

The following of the import of customers is identical to the suppliers.

35.4 Importing items

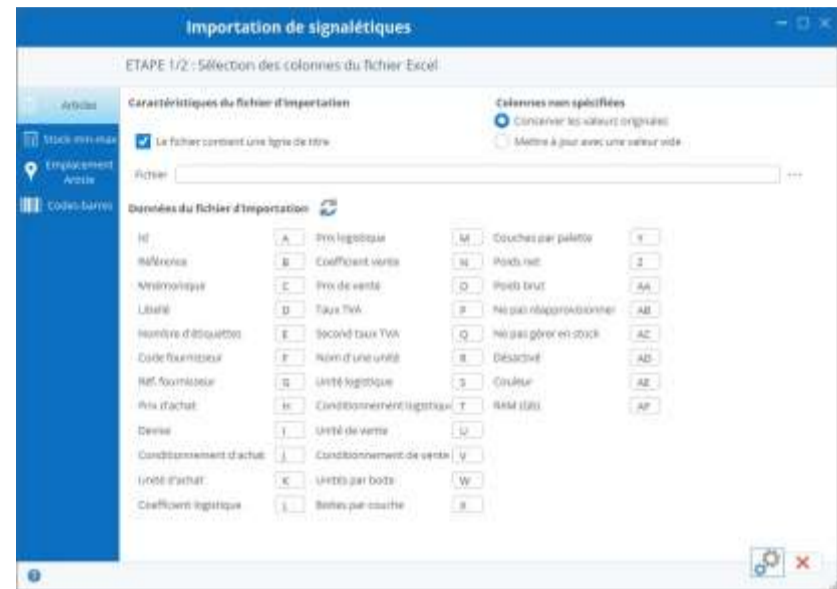
Start with your own Excel file of items or build a file directly from Stock It Easy.

From the main menu, the "Items" button in the "Signals" block open the list of items and click the "Import" button in the ribbon.

- Select your file, be careful, select the tab related to the file to be imported
- Complete file features
- Complete column selection
- Click the "Anticipate Import" button
- You can verify that the data to be imported will be taken back in the right fields, is the wording of the item in the corresponding column?

If you want to create the items, don't use an "Id" column, but be sure to provide a "Reference" column that should contain a unique value for each item.

If you want to update items, the file may contain either the "Id" column or the "reference" column, the item will be searched first on its "Id" and then, if it is not found on its "reference."



Id	Référence	Mnémonique	Libellé	Nbre étiquettes	Code fournisseur	Référence fournisseur	Prix d'achat	Ci
000018	d884	access	Coque iPhone11	1	GADGET	CoqueiBlack	4,00	EUR
000022	cp5	anima	Croquettes pour chats 5 kg	1		cp5	10,00	EUR
000021	cp5	anima	Croquettes pour chien 5 kg	1		cp5	10,00	EUR
000003	s7bb	smart	Galaxy S7 black	1	SAMSUNG	GalaxyS7Black	180,00	EUR
000004	s7bw	smart	Galaxy S7 White	1	SAMSUNG	GalaxyS7White	180,00	EUR
000001	8505b	smart	Galaxy S8 Black	1	SAMSUNG	GalaxyS8Black	200,00	EUR
000002	8505w	smart	Galaxy S8 White	1	SAMSUNG	GalaxyS8White	200,00	EUR
000005	imac215	Station	iMac 21,5"	1	APPLE	imac215	850,00	EUR
000020	IB256Gb-cb	smart	iPhone 8 256Gb + coque noir (Fabriqué)	1	APPLE	IB256GBCL	400,00	EUR
000008	I-5-Black84	smart	iPhone 8 256 Go	1	APPLE	I-8-256Go	400,00	EUR
000019	IB64Gb-cb	smart	iPhone 8 64Gb + coque noir (composé)	1	APPLE	IB64GBCL	600,00	EUR
000006	I-5-Black16	smart	iPhone 8 64Go	1	APPLE	I-8-64Go	350,00	EUR
000009	I-5-White16	smart	iPhone 8 Plus 256 Go	1	APPLE	I-8+-256Go	450,00	EUR
000007	I-5-Black32	smart	iPhone 8 Plus 64Go	1	APPLE	I-8+-64Go	400,00	EUR
000011	I-5-White64	smart	iPhone X 256Go	1	APPLE	I-X-256Go	650,00	EUR
000010	I-5-White32	smart	iPhone X 64Go	1	APPLE	I-X-64Go	600,00	EUR
000012	mbpro13	Mac	MacBook Pro 13"	1	APPLE	mbp13	800,00	EUR

35.5 Characteristics of import files



The source file to be selected is an Excel file (extension xls or xlsx).

The data will always be read in the first tab of the file.

If your file contains a line of column titles, check the "File contains a title line" box to avoid importing column titles as data.

It's likely that the columns in your file don't cover all possible field values, in which case select "keep the original values," so a field that isn't "linked" to a column in the file won't be updated. If, on the other hand, you want these fields to be vacuumed, select "Update with an empty value."

35.6 Selecting columns from the Excel file

For Stock It Easy to link one of its fields to the right column in your file, you need to tell it which column to read which data.

If you start a file generated from the vendor list, the column order is the default order set in the import window.

If your vendor data import file contains only 3 columns as follows:

	A	B	C
1	Code fournisseur	Nom fournisseur	Contact
2	APPLE	Apple	Madame Pervenche
3	CROCK	Croquettes & Co	Mr Olive
4	GADGET	Gadgets & Co	Monsieur Dumalin
5	SAMSUNG	Samsung	Monsieur Moutarde
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			

Match the letters of the columns between the selection and the file.

For "Import File Data" fields that are not in the file, delete the letter so that they are not searched in the file, as shown above.

To return to the default column letters, click the "Refresh" button.

35.7 Import "List" data

You will have noticed that a lot of data is taken up in the form of lists, such as the legal status of a supplier, the VAT rate of an item, the mode of transport etc.

Before you can properly import a list data from an Excel file, you need to know the ID of that value in the list and take it back to your data file.

To find out the identifier, simply open the list window from the main menu, button "Lists" from the "Administration" block, and in that window, select the list you're looking for and check the "Show ID" box.

Identifiant	Libellé
INCEXW	A l'entrepôt
INCCFR	Coût et fret
INCCOF	Coût, assurance et fret
INCFDB	Franco bord
INCFAS	Franco le long du navire
INCFCA	Franco transporteur
INCCPT	Port payé jusqu'à
INCCIP	Port payé, assurance comprise, jusqu'à
INCDAT	Rendu au terminal
INCCDP	Rendu droits acquittés
INCCDU	Rendu droits non acquittés
INCDAP	Rendu lieu de destination

36 Import movements from an Excel file

From an Excel file you can import input, output or inventory movements into your stock.

Access to movement imports is from the main menu: Stock / Import

Depending on the data in the import file, you may or may not refine your movement criteria.

It's also possible to import barcode files read from a terminal or retrieve live barcode readings from a connected barcode reader.

36.1 Importing movements

First, specify whether they are input, exit or inventory movements.

- an input movement will add items in stock
- an exit movement will remove items from stock
 - subject to their availability
- an inventory move will bring the quantity in stock to that taken back into the file

The file must be an Excel file (xls or xlsx). It may contain a line with the column titles, in which case, check the "file contains a title line" box, otherwise uncheck that box.

Select the Excel file.

Match the data you want to import with the Excel file columns.

For example, your file contains the item reference and quantity, the reference is in column A and the amount in column B.

Encode A in the Ref field. Item and B in the Quantity field.

36.2 Default values outside the file

Reference and quantity are the two-minimum information from the file that Stock It Easy needs to import.

The other columns can bring more finesse to the movement.

A third piece of information will be essential to the execution of the movement, this is the warehouse on which this movement will be carried out. This allows me to show you the usefulness of the right part of the Default Values if missing in the file. You'll find that you can select a warehouse here. So, it signifies that you can have a file with only reference and quantity and select in the default values the warehouse or run the moves.

In addition, you could specify on certain lines of the file a warehouse code, priority is always given to the file if the column is well identified (e.g. my "Warehouse" data is in column "C"), and a valid value is in this column (the warehouse code is in column C and this code does exist in Stock It Easy).

The same is true for the other data:

- Location
- Lot1 and Lot 2 (if managed in your stock settings)
- DLC and DLUO (if managed in your stock settings)
- Entry/exit vouchers (if managed in your stock settings)

The entry or exit modes offered and applied also depend on your stock settings.

36.3 Preload and validate the import of the file

Click the "Import" button at the bottom of the window, the file will be browsed based on your criteria.

The window will then display the data read in the file combined with the defaults if missing from the file.

Any inconsistencies will be highlighted and will not be importable, you can always go back and correct the source file or your selection criteria.

To validate the final import of the file, click the "Validate" button.

37 Importing movements from a barcode reader

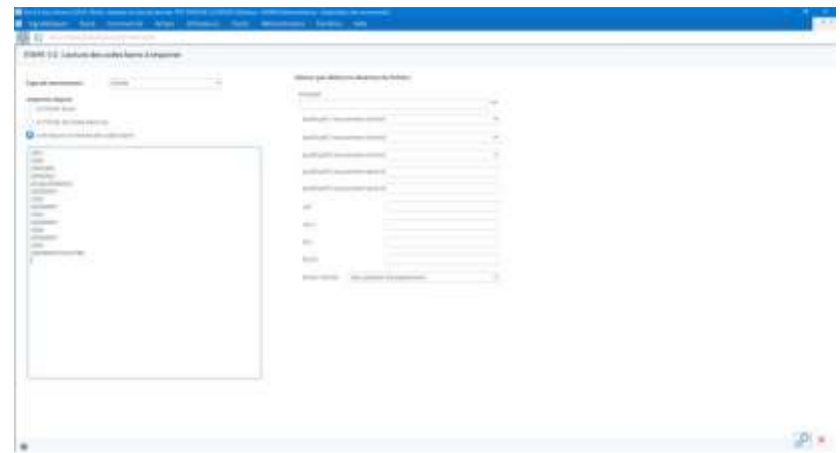
From a barcode reader you can import input, output or inventory movements into your stock.

Access to movement imports is from the main menu: Stock / Import

Depending on the data in the import file, you may or may not refine your movement criteria.

You can import from a barcode file previously available on your pc, or directly from the live playback of a barcode plugged into the pc (by cable or Bluetooth or Wireless).

Importing movements from a barcode reader



37.1 What barcodes can be used to import movements?

- The item
- The item's internal barcode
- the various barcodes of the same item in different formats
- information tracing and tracking the item (lot number, serial number, consumption deadline, optimal use date ...)
- Item location/storage address
- The warehouse
- The type of movement (entry/exit/inventory)
- FIFO output motion mode
 - Exit by location priority
 - location selection output
 - location priority entry
 - entry in location selection
- numbers from 0 to 9
- decimals separator

37.2 In what order do you scan these barcodes?

To validate an item, move, it is the entry of the barcode of this item that validates the barcodes scanned previously. In other words, we end with the barcode of the item.

Example 1:

Start in the import window by selecting the type of movement Entry, importing from a direct playback, the warehouse of your choice, and the entry mode without specifying location. Then click in the barcode entry area, and from the barcode reader connected to the pc:

1. scan the barcode of Item A
2. scan the barcode of the number 1
3. scan the barcode of the number 0
4. scan the barcode of the number 0
5. scan the barcode of Item B

Go back to the pc and click the "Import Preview" button.

Importing this series of barcodes will make the entry of 1 item A (no scanned quantity is worth 1 unit by default) the entry of 100 B items (1 then 0 then 0 then the item).

Example 2:

1. scan the barcode of Warehouse X
2. scan the barcode of the type of input movement

3. scan the barcode of the entry motion mode without location
4. scan the barcode of Item A
5. scan the barcode of the number 1
6. scan the barcode of the number 0
7. scan the barcode of the number 0
8. scan the barcode of Item B
9. scan the barcode of warehouse Y
10. scan the barcode of Item B

Go back to the pc and click the "Import Preview" button.

The importation of this series of barcodes will enter 1 Item A in Warehouse X the entry of 100 B items into Warehouse X the entry of 1 Item B into Warehouse Y

Following reading an item barcode, the values that directly relate to an item its reset.

These values are the item, the quantity, the tracking and tracking criteria, the location.

Other values such as warehouse, movement type, movement mode is only reset if a different value is scanned for the latter, such as the X warehouse change for the Y in example 2.

This allows you in the same barcode entry, for example, to switch from one type of movement to another (e.g. inputs and exits).

37.3 In a nutshell

In summary, the order in which to scan barcodes is:

1. movement data such as type (entry/exit/inventory), mode, warehouse
2. item data such as quantity, location, batch
3. the item (and then we resume in step 02 to close on the items)

38 Importing purchase orders from an Excel file

From the main menu, the "Orders" button in the "Buys" block, open the purchase order list and click the "Import" button in the ribbon.

- Select your command file
- Complete file features (see chapters "Import File Features")
- Complete the column selection (see the chapters "Select columns from the Excel file")
- Click the "Anticipate Import" button
- You can check that the data to be imported will be taken back in the right fields
- Click the "Validate" button to create commands

	A	B	C	D	E	F	G
1	Code entrepôt	Code fourni	Référence externe commande	Référence fournisseur	Quantité	Prix achat	Date souhaitée
2	TECH	APPLE		I-X-64Go	10		
3	TECH	APPLE		I-X-256Go	12		
4	TECH	APPLE		I864GBCBL	8		
5	FOOD	CROCK		cpccat	100		
6	FOOD	CROCK		cpcdog	100		
7	GADGET	GADGET		Coquei8black	500		

38.1 Import orders

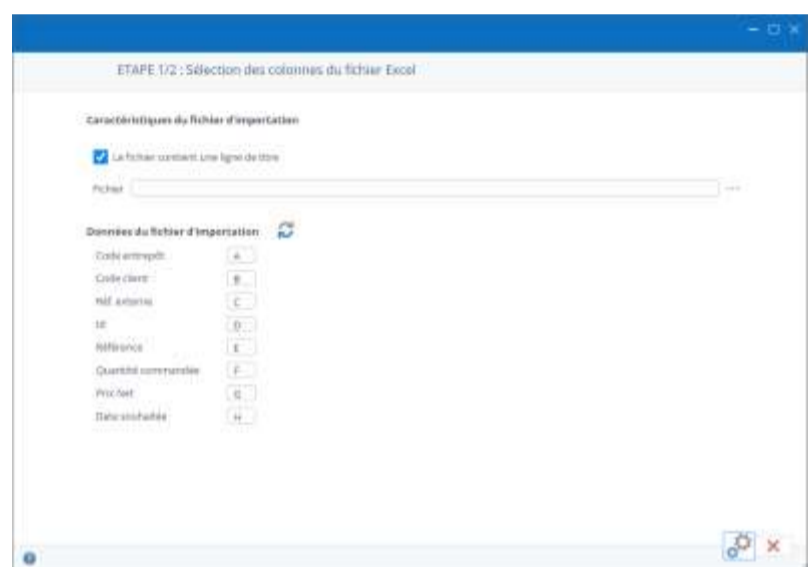
4 columns/information are required to import an order:

1. Supplier code
2. Warehouse code
3. The item's supplier code
4. The quantity

If any of this information is missing or is not correct in relation to the content of the database, the command cannot be created and will be presented on a red background in the preview before importation.

In addition to this four information, you can also specify:

1. An external order reference: If you have more than one order for the same warehouse-supplier torque, you can distinguish them with this external reference, otherwise, all that supplier's order lines will be grouped into one order
2. The desired date: By default, the desired date is the date of day 7, but you can specify another date in this column
3. The purchase price: by default, the price of the order is the purchase price of the item price, if a purchase price is included in the column, it will be considered



38.2 Default values outside the file

All the vendor's default values in the order tab for its signage sheet are taken up as they are when the order is created.

38.3 Preload and validate the import of the file

Click the "Import" button at the bottom of the window, the file will be browsed based on your criteria.

The window will then display the data read in the file combined with the default values missing from the file.

Any inconsistencies will be highlighted and will not be importable, you can always go back and correct the source file or your selection criteria.

To validate the final import of the file, click the "Validate" button.

39 Importing sales orders from an Excel file

From the main menu, the "Commands" button in the "Commercial" block, Commercial open the list of sales orders and click the "Import" button in the blindfold.

- Select your command file
- Complete file features (see chapter «Import File Features»)
- Complete the column selection (see the chapters "Select columns from the Excel file")
- Click the "Anticipate Import" button
- You can check that the data to be imported will be taken back in the right fields
- Click the "Validate" button to create commands

	A	B	C	D	E	F	G	H
1	Code entrepôt	Code client	Référence externe commande	Id Article	Référence article	Quantité	Prix net	Date souhaitée
2	FOOD	CLI2	AZERTY123		cpcat	5		
3	FOOD	CLI2			cpdog	2		
4	TECH	CLI3		000010		1		
5	TECH	CLI3		000011		2		
6	TECH	CLI3		000012		3		01-05-20
7	TECH	CLI3		000013		4		
8	TECH	CLI2		000014		5		
9	TECH	CLI2		000015		6		
10	TECH	CLI9		000016		7		
11	TECH	CLI2		000017		8		
12	TECH	CLI2		000018		9		
13	TECH	CLI12		000019		10		
14	TECH	CLI13		000020		11		
15	TECH	CLI14		000021		12		
16								

39.1 Import orders

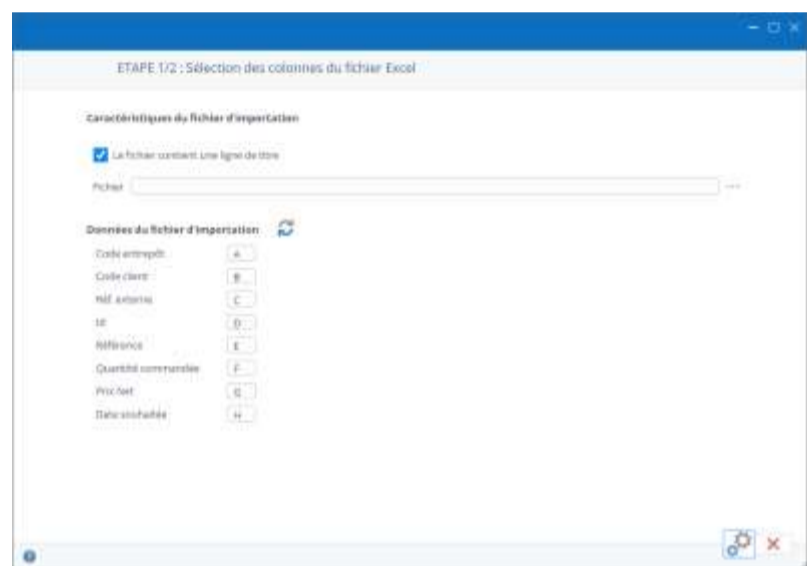
4 columns/information are required to import an order:

1. Customer code
2. Warehouse code
3. The item code or item Id
4. The quantity

If any of this information is missing or is not correct in relation to the content of the database, the command cannot be created and will be presented on a red background in the preview before importation.

In addition to this 4 information, you can also specify:

1. An external sales order reference: If you have more than one order for the same warehouse-customer torque, you can distinguish them with this external reference, otherwise all that customer's order lines will be grouped into one order.
2. The desired date: by default, the desired date is the date of the next day, but you can specify another date in this column
3. The net price: by default, the price of the order is the price of the item, if a net price is included in the column, it will be taxed as a selling price and the difference between the net price and the known selling price of the item will be interpreted as a discount.



39.2 Default values outside the file

All of the customer's default values in the order tab for their signage sheet are taken up as they are when the order is created. The delivery address of the order will be the billing address, or, if it exists, the default delivery address.

39.3 Preload and validate the import of the file

Click the "Import" button at the bottom of the window, the file will be browsed based on your criteria.

The window will then display the data read in the file combined with the default values missing from the file.

Any inconsistencies will be highlighted and will not be importable, you can always go back and correct the source file or your selection criteria.

To validate the final import of the file, click the "Validate" button.

40 Use a barcode reader with Stock It Easy

40.1 Barcode reader

A barcode reader is a device that can read certain types of barcode and return the value of the barcode read.



The drive of your choice will have to connect to the USB port of the computer or Stock It Easy is used.

This reader should be able to read the type of barcode you set in the app's general settings as well as those encoded in the item sheets. The main reading distinction is on the number of barcode sizes, 1D (EAN13, Code 128, ...) or 2D (Datamatrix, QR code, ...).

Once you've indicated in the settings that you're using a barcode reader, different Stock It Easy windows will contain a search field at the top.

Scanning a barcode in that window will have the effect, depending on the window, of either searching for the item in affiché list, or, for example in the customer order, adding the scanned item to the order, or allowing live reading of stock movements.

So, there is a direct interaction between reading by this type of player and on-screen manipulation in Stock It Easy.

40.2 Barcode reader with buffer



This type of drive is identical to the previous one, with the difference that it can work in connected mode or offline mode.

The advantage of this type of drive is that it can allow you to go and make a series of barcode inputs in your stock, and when reconnecting, unload the barcodes read either in a file or directly in the application.

40.3 Portable terminal

A portable device is a portable device equipped with its own operating system, usually an Android system, and for older Windows CE models.



This type of drive usually requires its own custom-developed application according to its brand, model and operating system that equips it.

Soon a dedicated application for Stock It Easy 8 will be available for this type of hardware.

This type of device is most often used for field entry, inventory, preparation etc.

40.4 What barcodes are available in Stock It Easy?

Through Stock It Easy, you can save, print and read the following barcodes:

- The item
- The item's internal barcode
- the various barcodes of the same item in different formats
- Tracking info and tracking the item (lot number, serial number, consumption deadline, optimal use date...)
- The location/storage address of the item
- The customer
- The supplier
- The warehouse
- The meaning of a movement (entry/exit/inventory)

- FIFO output motion mode
- Location priority output output in selection of location entry by location priority entered in location selection
- Each document order to buy order sales shipping signage sheets
- lists such as
- numbers from 0 to 9 decimal separator
- Barcodes containing a variety of information
- For example: the item, its location, its quantity, its tracking and tracking information, all in a single Datamatrix barcode
- ...