

PARCELNINJA

Scaleable cloud-based
warehousing & delivery
for South Africa

ParcelNinja Store Admin User Manual

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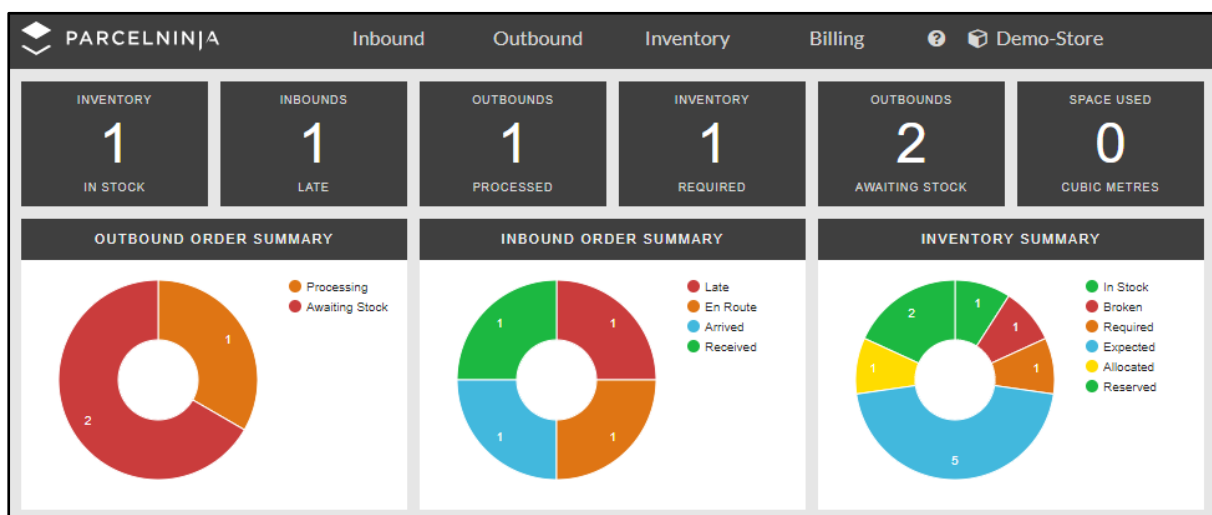
1. Overview

ParcelNinja Store Admin is a system that users can utilise to keep track of their inbounds, outbounds, inventory and billing.

2. Dashboard

The dashboard is an overview of Store Admin. There are summaries available to the user relating to:

- 1: Inventory in Stock
- 2: Inbounds Late
- 3: Outbounds processed
- 4: Inventory required
- 5: Outbounds awaiting stock
- 6: Space used in the warehouse
- 7: Outbound Order Summary
- 8: Inbound Order Summary
- 9: Inventory Summary



2.1 Inventory in Stock

This counter shows you how many items of inventory are currently in stock in the warehouse. This counter is clickable and leads to the inventory page and shows all the items in stock.

2.2 Inbounds Late

This counter shows the number of inbounds that are en route but have missed their estimated delivery date. This counter is clickable and leads to the Inbound page and shows all inbounds that are en route.

2.3 Outbounds processed

This counter shows the number of outbounds that have been processed on the current day. This counter is clickable and leads to the Outbound page and shows all outbounds that are processing.

2.4 Inventory required

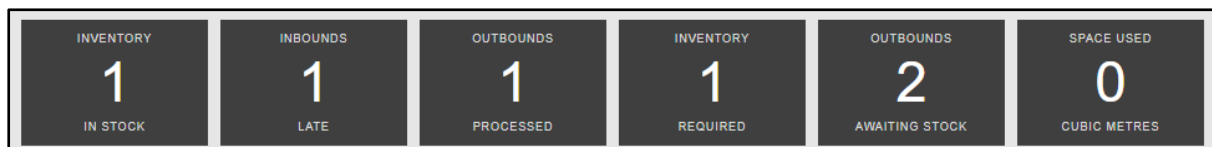
This counter shows the number of inventory items that are not in stock but have outbounds created for them. This is a clickable counter and it leads to the Inventory page and shows all items of inventory that are required.

2.5 Outbounds Awaiting Stock

This counter shows the number of outbounds that have items that are currently not in stock in the warehouse. This is a clickable counter and leads to the outbound page and shows all outbounds awaiting stock.

2.6 Spaced Used cubic metres

This counter shows how much space, in cubic metres, you are currently using in the warehouse. This counter is not clickable.



2.7 Outbound Order Summary

This graph summarises all the information you need to know about your outbounds.

- 1: Awaiting stock – this shows the number of all outbounds awaiting stock.
- 2: Processing – this shows the number of outbounds that are currently being processed today.
- 3: En route – this shows the number of outbounds that are currently en route to be delivered.
- 4: Delivered – this shows the number of outbounds that have been delivered today.

2.8 Inbound Order Summary

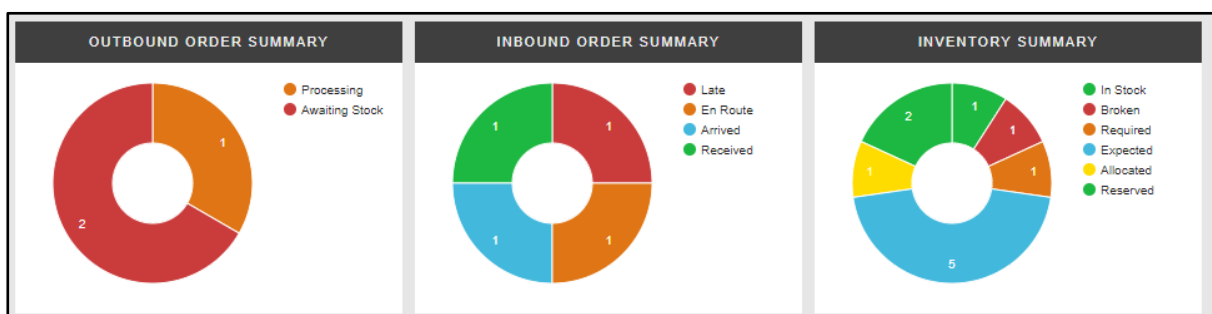
This graph summarises all the information you need to know about your inbound.

- 1: En route – this shows the number of inbound that are currently en route but not late.
- 2: Late – this shows the number of inbound that are en route but have missed their estimated delivery date.
- 3: Arrived – this shows the number of inbound that have arrived today.
- 4: Received – this shows the number of inbound that have been received today.

2.9 Inventory Summary

This graph summarises all the information you need to know about your inventory.

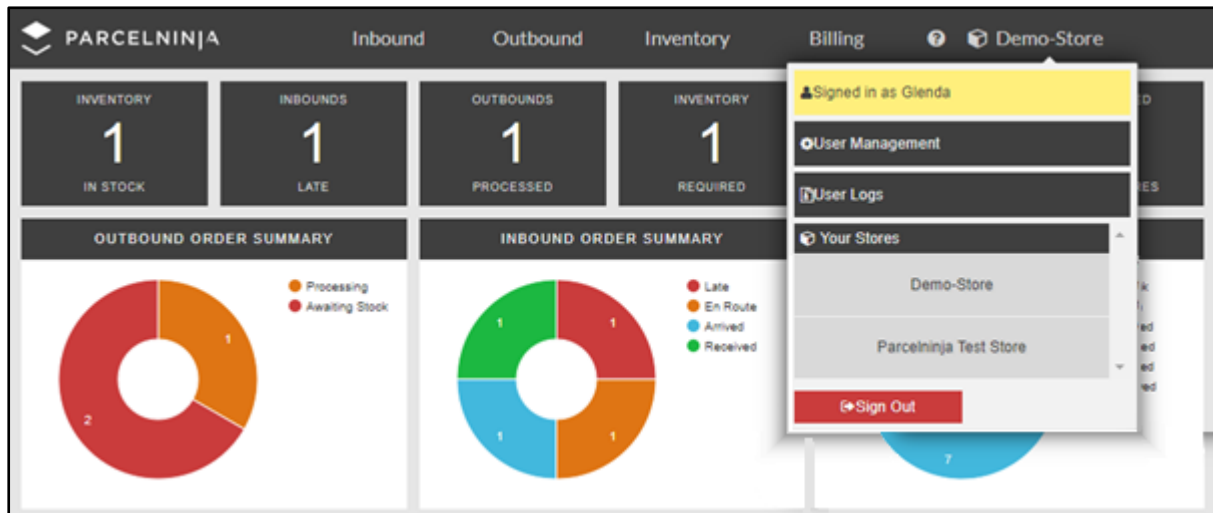
- 1: In stock – this shows the number of items in stock.
- 2: Broken – this shows the number of items that have been marked as broken.
- 3: Required – this shows the number of items that are required for outbounds.
- 4: Expected – this shows the number of items that are still expected to arrive at the warehouse.
- 5: Allocated – this shows the number of items that have been allocated to outbounds.
- 6: Reserved – this shows the number of items that have been reserved for future outbounds.



3. User Management

The user management holds the functionality of:

- 1: Adding, updating and deleting users
- 2: Adding and deleting API keys
- 3: Adding and deleting suppliers
 - Please note that this section is only accessible to the main Store Administrator role and will not be shown to normal users unless they have the create/update user permissions.



3.1 User Management Overview:

To get to User Management, click on your Store name tab on the top right.

A dropdown will appear showing:

- 1: Your login name
- 2: User Management button
- 3: User Logs button
- 4: Your stores
- 5: and the sign out button

Click on the 'User Management' button and this will take you to the User Management page.

This page is split into three sections which are

- 1: Store Admin Users
- 2: API Keys
- 3: Suppliers

User Management Page Breakdown:

Each section has a search bar where you can search for what you need.

The first page of each section will show the first 15 results and the remaining results are displayed on the pages that follow. In the bottom left corner of each section, you can see how many results are displayed in total on that page.

3.2 Store Admin Users:

The Store Admin Section is where the user can

- 1: View
- 2: Add
- 3: Update
- 4: and Delete users

Store Admin Users

| Login Name | Supplier |
|------------------|----------|
| user@email.co.za | Default |

Showing 1 to 1 of 1 entries

Previous 1 Next

Add User

3.2.1 Adding New Users:

If you (as the master admin) would like to add new users:

- 1: Click on the 'Add User' button on the right.
- 2: A pop up will appear where you must complete all the required details for your new user.
 - These details include email address, first name, roles and supplier.
- 2.1: Roles: Roles ticked provide your new user the permissions you require for them on this site.
 - Tick only what you want this user to see.
- 2.2: Supplier: There is a dropdown at the bottom of the pop up where you can assign a supplier to your user. Click on the dropdown and select the needed supplier. If no supplier is needed, select None.
- 3: Once you have entered and ticked all the required information, click on the 'Add User' button and the new user will be created. (An email will be sent to this user for login)

×

Add User

user@email.co.za

Username

Select Roles

| | | | | | |
|-------------------------------------|------------------|-------------------------------------|------------------|--------------------------|------------------|
| <input type="checkbox"/> | Create Inbound | <input checked="" type="checkbox"/> | View Inbound | <input type="checkbox"/> | Delete Inbound |
| <input type="checkbox"/> | Create Outbounds | <input checked="" type="checkbox"/> | View Outbounds | <input type="checkbox"/> | Delete Outbounds |
| <input checked="" type="checkbox"/> | View Inventory | <input type="checkbox"/> | Update Inventory | <input type="checkbox"/> | Delete Virtual |
| <input type="checkbox"/> | View Billing | <input type="checkbox"/> | Update Users | <input type="checkbox"/> | View Users |

Supplier:

None

None

Supplier 1

Supplier 2

Supplier 3

Add User

3.2.2 Updating Users

Update details:

- 1: Find the user you wish to update and click on their name.
- 2: A dropdown displaying the users details will show.
 - In this dropdown, you can update the necessary details, including adding or removing roles, choosing a supplier and deleting the user.
 - Please note, the user will have to log out and log back in for the changes to load.

Roles:

There is a list of all the available roles at the bottom of the user detail dropdown. This is where you can update the roles of a user by ticking or unticking the boxes.

Once the roles have been updated:

- 1: Click the 'Update' button, which will update all the new details.

Supplier:

This functionality is useful for when you would like to create a user for your suppliers to allow them to be in control of their own stock in Store Admin.

If you wish to add a supplier to a user:

- 1: Click on the dropdown list under Supplier.
 - Here you will see all the available suppliers and must choose one.
- 2: Once the supplier has been chosen, you will see that the roles for this user will change.

- Please note that if you assign a supplier to a user, they will only be able to view the inbounds and inventory for that specific supplier. Therefore, their roles will change to Create Inbound, View Inventory and View Inbound.
- All the other roles will be greyed out showing that they will not have access to these permissions.

3: Click on the 'Update' button to save the changes.

Delete a user:

1: Click on the 'Delete' button.

- An alert will pop up asking whether you are sure you want to delete this specific selected user. Please note that deleting the user cannot be undone.

If you do want to delete this user:

1: Click on 'Yes' and this specific user will be deleted.

If do not wish to delete this user:

1: Click on the 'Cancel' button and you will be taken back to the user dropdown.

user@email.co.za

Default

Roles

☒ Create Inbound

☒ View Inbound

☒ Delete Inbound

☒ Create Outbounds

☒ View Outbounds

☒ Delete Outbounds

☒ View Inventory

☒ Update Inventory

☒ Delete Virtual

☒ View Billing

☒ Update Users

☒ View Users

Supplier

None ▼

Update

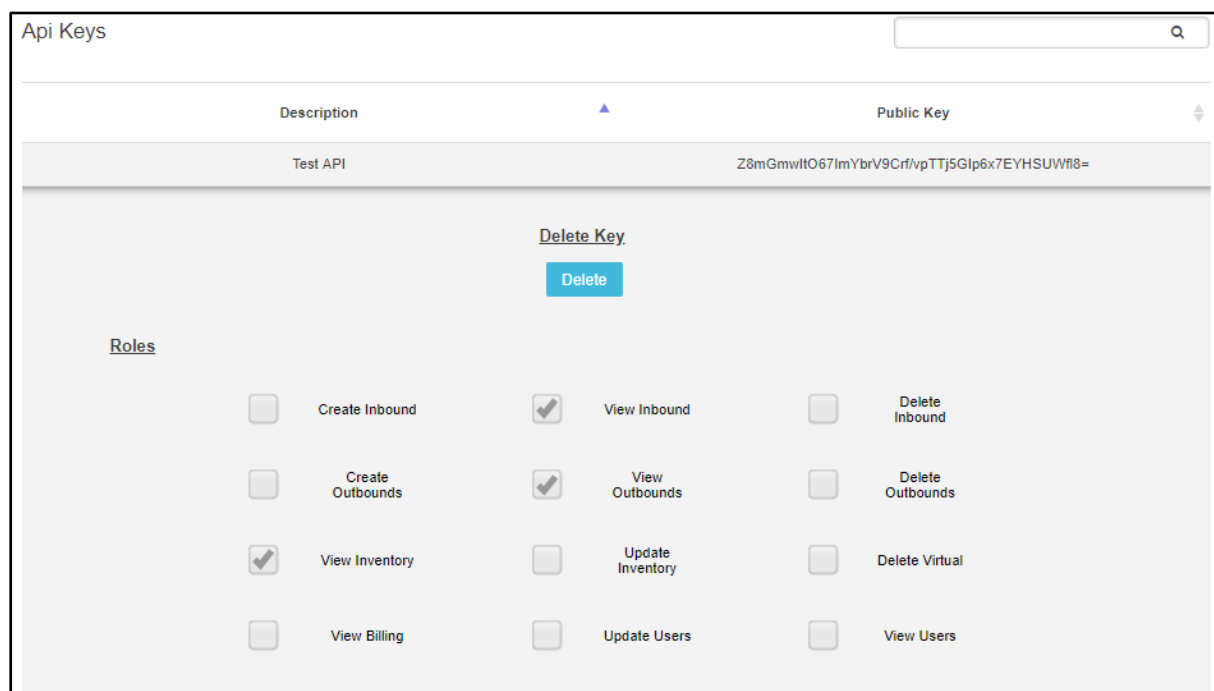
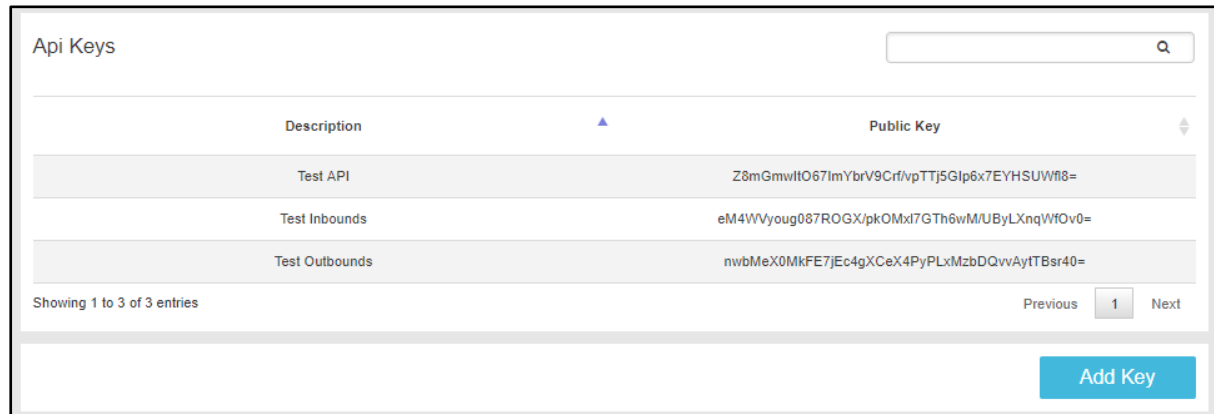
Delete

3.3 API Keys

The API Keys section is where you can:

- 1: View
- 2: Add
- 3: and Delete APIs

When you click on an API, a dropdown showing the API details will show.



3.3.1 Adding New API Keys

If you would like to add new API Keys:

- 1: Click on the 'Add API Key' on the right.
- 2: A pop up will appear where you must enter all the required detail fields for the new API.
 - You must tick all the required roles for the API.

×

Add Api Keys

New API

Select Roles

| | | | | | |
|-------------------------------------|------------------|-------------------------------------|------------------|--------------------------|------------------|
| <input type="checkbox"/> | Create Inbound | <input checked="" type="checkbox"/> | View Inbound | <input type="checkbox"/> | Delete Inbound |
| <input type="checkbox"/> | Create Outbounds | <input type="checkbox"/> | View Outbounds | <input type="checkbox"/> | Delete Outbounds |
| <input checked="" type="checkbox"/> | View Inventory | <input type="checkbox"/> | Update Inventory | <input type="checkbox"/> | Delete Virtual |
| <input checked="" type="checkbox"/> | View Billing | <input type="checkbox"/> | Update Users | <input type="checkbox"/> | View Users |

Add Key

- 3: Once this is done, click on the 'Add Key' button.
- 4: Another pop up will appear with the login details for the API you have just created.
 - You need to take note of these login details as they will only be shown once in this pop up.
- 5: Once you have taken down the login details, click on the 'Close' button which will close the pop up, and the new API Keys will be added.

×

Api Keys

Username :

W3wy+NIpogpG2Q/y/+QD6SG4t1xZug7y9tHzZDMIheM=

Password :

THkV8GBRdqbG4AC1wBiOYFx1Ia+d2iSlooyw5xpGKJQ=

Close

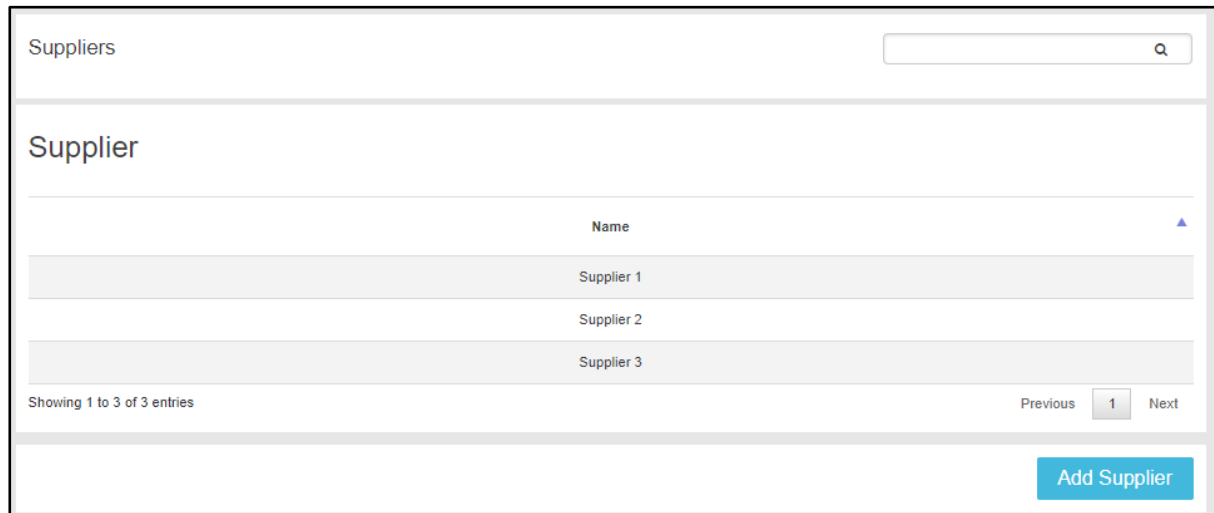
3.3.2 Deleting an API key:

- 1: Click on the 'Delete' button.
 - 2: An alert will pop up asking whether you are sure you want to delete this API key.
 - Please note that deleting the API key cannot be undone.
- If you do want to delete the API key:
- 1: Click on 'Yes' and the API will be deleted.
- If you do not wish to delete the API key:
- 1: Click on the 'Cancel' button and you will be taken back to the API dropdown.

3.4 Suppliers:

The Suppliers section is where you can:

- 1: View
- 2: Add
- 3: and Delete suppliers

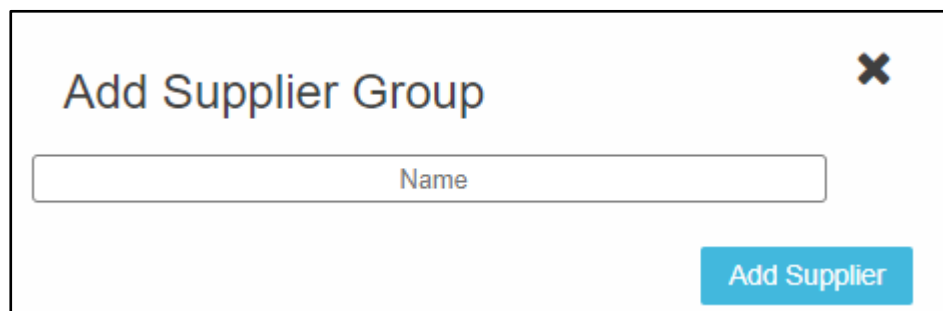


The screenshot shows a web interface for managing suppliers. At the top, there is a header bar with the title 'Suppliers' on the left and a search input field on the right. Below the header, the main content area is titled 'Supplier'. It contains a table with a single column header 'Name'. The table lists three suppliers: 'Supplier 1', 'Supplier 2', and 'Supplier 3'. Below the table, there is a pagination bar that says 'Showing 1 to 3 of 3 entries' on the left and 'Previous 1 Next' on the right. At the bottom right of the main content area, there is a blue button labeled 'Add Supplier'.

3.4.1 Adding New Suppliers

If you would like to add a new supplier:

- 1: Click on the 'Add Supplier' button on the right.
- 2: A pop up will appear where you must enter the supplier name.
 - Please note, you cannot add a supplier name that is the same as an already existing supplier.
- 3: Then click on the 'Add Supplier' button and the new supplier will be created.



The screenshot shows a pop-up form titled 'Add Supplier Group' with a close button (X) in the top right corner. The form has a single input field labeled 'Name'. At the bottom right of the form, there is a blue button labeled 'Add Supplier'.

3.4.2 Updating a Supplier Name

If you would like to update your supplier:

- 1: Click on the supplier you wish to update
- 2: A dropdown will appear with the option to update the supplier
- 3: Make the changes you wish to be updated
- 4: Click on the 'Update' button.

3.4.3 Deleting a Supplier

If you would like to delete a supplier:

- 1: Click on the supplier you would like to delete.
- 2: A drop down will appear with the option to delete the supplier

3: Click on the 'Delete' button.

Demo Supplier

Store Supplier

Demo Supplier

UpdateDelete

3.5 User Logs

The user logs page shows a log of all activities of all users in Store Admin. This log is only available to the main Store Administrator and any users that have the View Users role.

To get to the User Logs page, click on the Store Name tab on the top right and click on the User Logs button.


This page shows the:

- 1: User email
 - 2: Reference
 - 3: Action
 - 4: Action Date
 - 5: Notes
- Each of these headings can be used to sort the information as required.

On the top right of the page, there is a search bar that can be used to show specific results.

On the top left of the page, there is a dropdown that can be used to filter the page according to actions.

- 1: Click on the dropdown.
- 2: Select what action you would like to see.



PARCELNINJA

Inbound

Outbound

Inventory

Billing

Demo-Store

All

Logging

| User Email | Reference | Action | Action Date | Notes |
|------------------|-------------------|-----------------------------|------------------------|---|
| user@email.co.za | user@email.co.za | Deleted User | 2018-04-12 08:59:00 AM | |
| user@email.co.za | Demo Outbound 5 | Created Outbound | 2018-04-11 03:24:00 PM | |
| user@email.co.za | Demo Inbound 7 | Created Inbound | 2018-04-11 03:23:00 PM | |
| user@email.co.za | Demo Outbound 2 | Created Outbound | 2018-04-11 03:05:00 PM | |
| user@email.co.za | Demo Inbound 6 | Created Inbound | 2018-04-11 03:04:00 PM | |
| user@email.co.za | Demo Outbound 1 | Created Outbound | 2018-04-11 02:46:00 PM | |
| user@email.co.za | AAA | Reserved Stock | 2018-04-11 01:25:00 PM | Changed from 0 to 1 |
| user@email.co.za | Demo Outbound 4 | Created Outbound | 2018-04-11 01:21:00 PM | |
| user@email.co.za | Demo Outbound 3 | Created Outbound | 2018-04-11 01:08:00 PM | |
| user@email.co.za | Demo Virtual SKUs | Created Virtual Sku | 2018-04-11 12:56:00 PM | |
| user@email.co.za | Demo Product 1 | Updated Product Description | 2018-04-11 12:33:00 PM | changed from Demo Product to Demo Product 1 |
| user@email.co.za | Demo Inbound 1 | Created Inbound | 2018-04-11 12:29:00 PM | |
| user@email.co.za | Demo Inbound 5 | Created Inbound | 2018-04-11 12:18:00 PM | |
| user@email.co.za | Demo Inbound 4 | Created Inbound | 2018-04-11 12:01:00 PM | |
| user@email.co.za | Demo Inbound 3 | Created Inbound | 2018-04-11 11:41:00 AM | |

Showing 1 to 15 of 26 entries

Previous

1

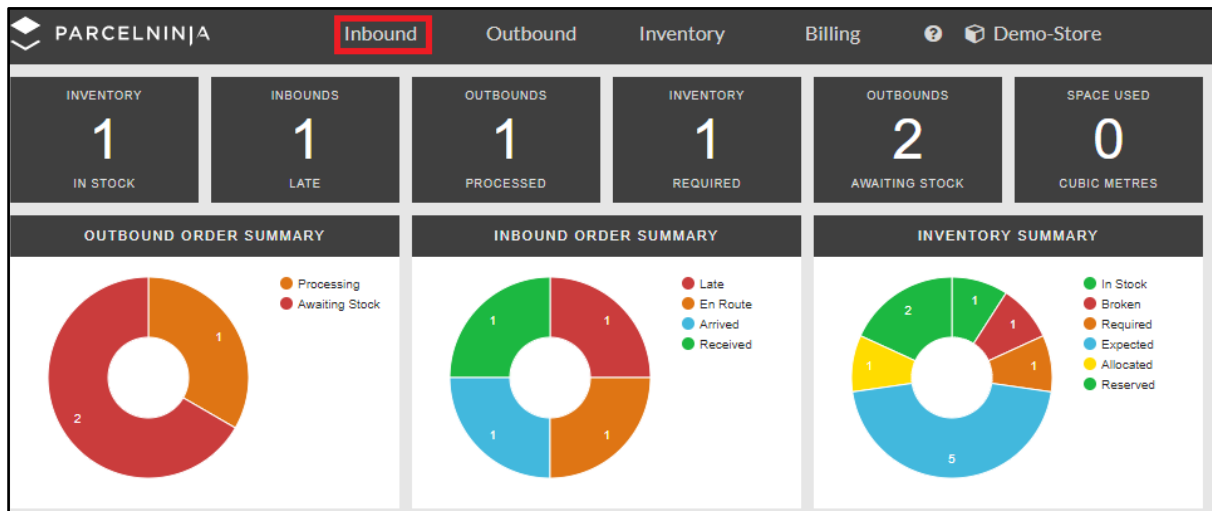
2

Next

4. Inbound

The Inbound tab is used for:

- 1: Creating new inbounds
- 2: Viewing inbounds
- 3: Searching through your list of existing inbounds
- 4: Importing inbound data
- 5: Exporting inbound data



4.1 Inbound Overview:

When you click on the Inbound tab at the top:

- 1: You will be taken to a page where you will see an overview of all your inbounds that you have created.

At the top of the page, there are 4 filters that show the different and current statuses of your inbounds.

These four filters are:

- 1: Variances - inbounds that contain
 - A product that is broken
 - More or less items than was expected to be received at Receiving.
- 2: Received - shows inbounds that have arrived and been checked into the warehouse at Receiving.
- 3: Arrived - inbounds that have arrived at the warehouse Pre-Receiving.
- 4: En route - inbounds that have not yet arrived at the warehouse.

Next to the 4 status filters is a search bar where you can search for your inbounds containing one of the following fields:

- 1: Inbound Number
- 2: Supplier
- 3: SKU

The inbound overview panel has different headings that may be used to sort the information displayed. The inbounds can be listed in order of:

- 1: Inbound Number
- 2: Supplier

- 3: Inbound Type
- 4: Item Quantity
- 5: Date Created

| Inbound No. | Source | Inbound Type | Item Qty | Created |
|----------------|----------------|-----------------|----------|------------|
| Demo Inbound 5 | Demo Inbound 5 | Supplier | 2 | 2018-07-09 |
| Demo Inbound 4 | Demo Inbound 4 | Return (Pickup) | 1 | 2018-07-09 |
| Demo Inbound 3 | Demo Inbound 3 | Supplier | 1 | 2018-07-09 |
| Demo Inbound 2 | Demo Inbound 2 | Supplier | 2 | 2018-07-09 |
| Demo Inbound 1 | Demo Inbound 1 | Supplier | 5 | 2018-07-09 |

You will also be able to see whether an inbound is a pickup on the inbound overview page. It will show (Pickup) in brackets next to the inbound type of that specific line item.

4.2 Creating an Inbound:

At the bottom right of the Inbound overview page, there is a 'Create Inbound' button which when clicked, leads to the Create Inbound page where you can create a new inbound.

At the top of the page are 4 required fields which are:

- 1: Inbound Order Number –put in your inbound number which can be a combination of letters and numbers.
- 2: Source – where your stock items are being supplied from. (supplier)
- 3: Expected Arrival – the date that the items are expected to arrive at the warehouse.
- 4: Inbound Type – there are two types of inbounds that can be captured:
 - Stock
 - Return

| | | | |
|-----------------------------------|------------------------|--------------------------------|-----------------------|
| Demo Inbound INBOUND ORDER NO. | Demo Inbound SOURCE | 2018/07/09 EXPECTED ARRIVAL | Stock INBOUND TYPE |
|-----------------------------------|------------------------|--------------------------------|-----------------------|

Drop Off Types:

Underneath that is a dropdown where you can select what drop off type your inbound is between:

- 1: Pickup
- 2: Drop off

Pickup:

A pickup is an inbound that you would like to be picked up by one of our couriers.

1: Select 'Pickup' in the dropdown list

2: Capture the following information:

- Customer Name
- Contact Number
- Email Address
- Pickup Date (must be at least two days in the future: a pickup cannot be for same or next day)

The fields on the right:

- Business Name
- Pickup Address
- The Suburb field - please note CBD is not acceptable.
- Select the postal code (there is an autocomplete that prepopulates postal codes)
- The Province field will populate according to what suburb you have selected.

Please note, you are not required to enter the Expected Arrival date for pickups.

The screenshot shows a web form for creating a pickup. At the top, there is a dropdown menu labeled 'Pickup' with a downward arrow, and below it, the text 'DROP OFF TYPE'. The form is divided into two main sections: 'PICKUP INFORMATION' on the left and 'PICKUP ADDRESS' on the right. The 'PICKUP INFORMATION' section contains three input fields: 'AB Customer', '0987654321', and 'user@email.co.za'. There is also a date field showing '2018/05/08'. The 'PICKUP ADDRESS' section contains four input fields: 'Parcelinja', '49 Galaxy Avenue', 'Linbro Business Park', and 'Linbro Park'. Below these, there are two more input fields: 'Gauleng' and '2090'.

Drop Off:

This is for when you or your own courier are dropping of the items at the warehouse.

1: Select 'Drop Off' in the dropdown list.

2: Fields will appear next to the dropdown for you to enter specific information.

2.1: Supplier reference: Enter your supplier reference. This reference can be a Purchase Order Number, a Waybill Number, an Invoice Number, etc.

- Please note that when the inbound arrives at the warehouse, this reference number must be documented somewhere on the package.
- If there is no reference number, the inbound will be turned away.

2.2: If you do not have a reference to put in, you can opt to attach the Manifest Document to your order by clicking the 'Manifest Attached' tick box. The manifest barcode will be the reference that is used for your inbound.

- Please note that the manifest document must be attached, otherwise the inbound will be turned away.

2.3: Container Type: If your items are coming in with a container, select what type of container they're coming in with, between 20ft container or 40ft container. If your items are not coming in with a container, select 'None'.

| | | | |
|--|--|--|---|
| <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 10px;">Drop Off</div> <div style="margin-left: 5px;">▼</div> </div> <div style="font-size: 0.8em; margin-top: 2px;">DROP OFF TYPE</div> | <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 10px;">PO/Waybill/Invoice No.</div> </div> <div style="font-size: 0.8em; margin-top: 2px;">SUPPLIER REFERENCE</div> | <input type="checkbox"/> MANIFEST ATTACHED | <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 10px;">None</div> <div style="margin-left: 5px;">▼</div> </div> <div style="font-size: 0.8em; margin-top: 2px;">CONTAINER TYPE</div> |
|--|--|--|---|

Next, you need to add your SKU's for your inbound.

The fields that need to be completed are:

- SKU (Must be in capital letters, no spaces or special characters)
- Product Name
- Barcode (no special characters)
- Unit Cost (optional – not required)
- Quantity (how many units you are inbounding)

Products
+Add another Product

1

SKU

Product Name

Barcode

Unit Cost

Qty

☐ Capture Expiry Date
☐ Capture Serial No.

X

There are two tick boxes:

- 1: Expiry Date (if your item has an expiry date that needs to be captured)
- 2: Serial Number

Once the 'Capture Serial Number' box is ticked, more fields will appear at the bottom where you will be able to enter the Serial number and add it.

Products
+Add another Product

1

AAA

Demo Product 1

12345

Unit Cost

1

☒ Capture Expiry Date
☒ Capture Serial No.

X

(Optional) Please enter the expected serial number

Add Serial

123435453

Remove Serial

EXPECTED SERIAL NUMBERS

If the Serial number you have entered needs to be removed:

- 1: Click on the serial number you wish to remove
- 2: Click on the 'Remove Serial' button.

Products
+Add another Product

1

AAA

Demo Product 1

12345

Unit Cost

1

☒ Capture Expiry Date
☒ Capture Serial No.

X

(Optional) Please enter the expected serial number

Add Serial

123435453

Remove Serial

EXPECTED SERIAL NUMBERS

There is a '+Add another Product' button to the right which will add more line items if you need to add more products.

If you need to remove a product from the inbound:

1: Click on the grey 'X' on the right of the product line item and that will remove the line item.

The screenshot shows a 'Products' form with two line items. Line item 2 is highlighted with a red box around the '+Add another Product' button and a grey 'X' button. Line item 1 has a serial number input field with '123435453' and an 'Add Serial' button. The form also includes checkboxes for 'Capture Expiry Date' and 'Capture Serial No.' for each line item.

Return:

If you are creating a Return Inbound, you will see there is a 'Sellable' option underneath the product line item. If the item can be resold, select 'Yes'. If not, select 'No'.

The screenshot shows the 'Products' form with two line items. Line item 2 has a 'No' dropdown for 'SELLABLE'. Line item 1 has a 'Yes' dropdown for 'SELLABLE'. The form also includes checkboxes for 'Capture Expiry Date' and 'Capture Serial No.' for each line item.

Once all the information has been captured:

1: Click on the 'Submit Order' button that is on the bottom right and this will submit the new inbound.

| | | | |
|---|---|---|--|
| <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Dem Inbound 1</div> <small>INBOUND ORDER NO.</small> | <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Demo Inbound 1</div> <small>SOURCE</small> | <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">yyyy/mm/dd</div> <small>EXPECTED ARRIVAL</small> | <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Stock</div> <small>INBOUND TYPE</small> |
|---|---|---|--|

Pickup

DROP OFF TYPE

| | |
|--|---|
| <small>PICKUP INFORMATION</small> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AB Customer</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">0987654321</div> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">user@email.co.za</div> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">2018/07/11</div> </div> | <small>PICKUP ADDRESS</small> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Parcelninja</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">49 Galaxy Avenue</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Linbro Business Park</div> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">Linbro Park</div> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">Gauteng</div> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">2065</div> </div> |
|--|---|

Products

[+Add another Product](#)

| | | | | | | |
|--|-----|----------------|-------|-----------|---|--|
| 1 | AAA | Demo Product 1 | 12345 | Unit Cost | 1 | <div style="display: flex; justify-content: space-between; align-items: center;"> <div> <input type="checkbox"/> Capture Expiry Date <input checked="" type="checkbox"/> Capture Serial No. </div> <div style="color: #ccc;">X</div> </div> <div style="margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">(Optional) Please enter the expected serial number</div> <div style="margin-left: 5px;"> Add Serial </div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-left: 5px;">123435453</div> <div style="margin-left: 5px;"> Remove Serial </div> </div> |
| <small>EXPECTED SERIAL NUMBERS</small> | | | | | | |

[Submit Order](#)

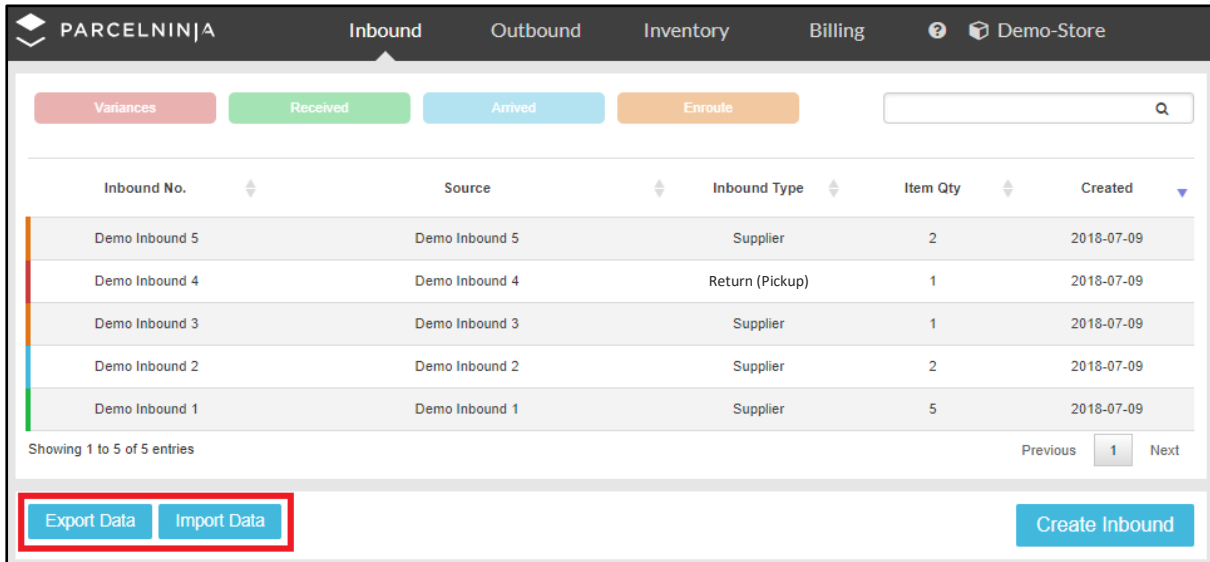
- Fields that have been incorrectly captured or not captured at all will be outlined in red indicating that you will be required to correct it before your Inbound will create.

4.3 Importing and Exporting Inbounds:

At the bottom left of the Inbound overview page are two buttons which can be used to import and export data.

1: The 'Export Data' button exports the existing inbounds into a downloadable CSV file.

2: The 'Import Data' button can be used to import one inbound with many items (only a CSV format file can be used). This feature is useful for creating large inbounds with many line items, as manually doing so would be time consuming.



| Inbound No. | Source | Inbound Type | Item Qty | Created |
|----------------|----------------|-----------------|----------|------------|
| Demo Inbound 5 | Demo Inbound 5 | Supplier | 2 | 2018-07-09 |
| Demo Inbound 4 | Demo Inbound 4 | Return (Pickup) | 1 | 2018-07-09 |
| Demo Inbound 3 | Demo Inbound 3 | Supplier | 1 | 2018-07-09 |
| Demo Inbound 2 | Demo Inbound 2 | Supplier | 2 | 2018-07-09 |
| Demo Inbound 1 | Demo Inbound 1 | Supplier | 5 | 2018-07-09 |

Showing 1 to 5 of 5 entries

Previous 1 Next

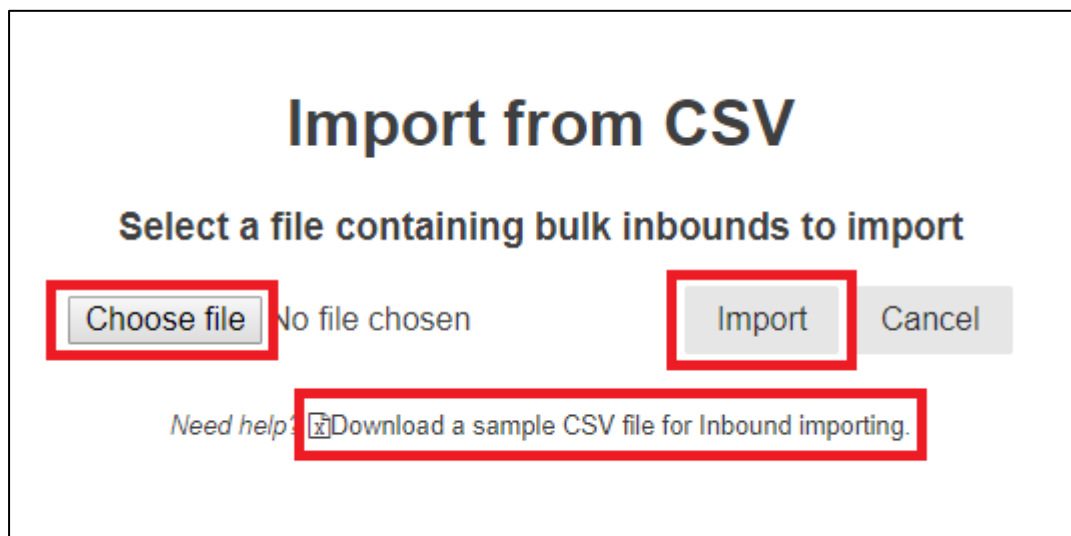
Export Data Import Data Create Inbound

1: Once you click on the 'Import Data' button, a pop up appears where the import file can be uploaded.

- A sample import file is also available for download at the bottom of the pop up and this will provide you with more information on what detail is needed when importing inbounds.

Once it has been uploaded:

- 1: Click on the 'Import' button and the file loaded will import the data for the new inbound.
- 2: You are required to complete the rest of the fields on the Inbound create page.



Import from CSV

Select a file containing bulk inbounds to import

Choose file No file chosen Import Cancel

Need help? [Download a sample CSV file for Inbound importing.](#)

4.4 Viewing an Inbound:

If you would like to view an inbound for more detail on the inbound:

You can search for the inbound you want to view and click on it.

This will take you to a page where you can view the details of the inbound.

At the top, it shows:

- The Inbound Order Number
- The Supplier
- The inbound type
- The status of the inbound

Once the inbound has arrived at the Warehouse and has been Pre-received, you will be able to see the Proof of Delivery (POD) details in the inbound. For a pickup, the POD details will show underneath the pickup delivery details.

These details include:

- Delivery Company
- Delivery Driver
- Delivery Reference
- Number of Parcels
- Date captured

The screenshot shows the PARCELNINJA web interface. The top navigation bar includes 'Inbound', 'Outbound', 'Inventory', 'Billing', and 'Demo-Store'. The main content area displays 'Demo Inbound 5' with the following details:

| DELIVERY COMPANY | DELIVERY DRIVER | REFERENCE | NO. OF PARCELS | DATE CAPTURED |
|------------------|-----------------|--------------|----------------|---------------|
| Demo Courier | Demo Driver | Demo Inbound | 1 | 2018-09-10 |

Underneath that, you will see a list detailing the items in the inbound. You can click on the products in the inbound and this will take you to a page that details that product. Once your inbound has been received, you can view the scanned serial numbers by clicking on the 'View Received Serial Number' button.

At the bottom of the Inbound page is a log of the different statuses the inbound has already reached and the dates when the inbound reached each status.

Demo Inbound 5

INBOUND ORDER

Demo Inbound 5

SUPPLIER

Stock

ORDER TYPE

Received

STATUS

DELIVERY COMPANY

DELIVERY DRIVER

REFERENCE

NO. OF PARCELS

DATE CAPTURED

Demo Courier

Demo Driver

Demo Inbound

1

2018-09-10

| SKU | Name | | Barcode | Expected Quantity | Useable Quantity | Broken Quantity |
|-----|----------------|---------|--|-------------------|------------------|-----------------|
| AAA | Demo Product 1 | Serials | 12345 | 1 | 1 | 0 |
| | | | Show Received Serial Numbers | | | |

Mon 10 Sep, 2018, 10:41

Processing complete

Mon 10 Sep, 2018, 10:38

Being Processed

Mon 10 Sep, 2018, 10:11

Arrived at warehouse

Mon 10 Sep, 2018, 10:11

Awaiting arrival

Manifest

Goods Received Voucher

Delivery Note

Invoice

Waybill

Returns Note

In the bottom right corner are the PDF documents that you may download to get more information on your inbound.

- 1: Manifest document – this is created on inbound creation
- 2: Goods received voucher – this is created when the inbound is finished receiving.
- 3: Other documents will display once the warehouse has captured them.

If the document is dark grey, then the document has been uploaded by the warehouse and you can download and view it. If it is light grey, then it has not been uploaded and is not downloadable.

When you view a return inbound, the inbound will show a Variances status at the top and items received that had been marked as unsellable. Items that are unsellable will be labelled as unsellable in the product line item. You will also be able to see the Pickup delivery information for your inbound if it is a pickup. As mentioned previously, the POD details of the pickup will be shown underneath the Pickup delivery information.

Demo Inbound 4

INBOUND ORDER

Demo Inbound 4

SUPPLIER

Return

ORDER TYPE

Variances

STATUS

PICKUP INFORMATION

AB Customer

0987654321

Email Address (optional)

2018-09-12

PICKUP ADDRESS

Parcelninja

49 Galaxy Avenue

Linbro Business Park

Linbro Park

2090

TRACKING EVENTS

No tracking information available yet

COURIER

Dawn Wing

TRACKING NO

TBD

PICKUP DATE

2018-09-12

EST. DELIVERY

2018-09-17

TRACKING LINK

-

Copy

DELIVERY COMPANY

Demo Courier

DELIVERY DRIVER

Demo Courier

REFERENCE

Demo Inbound 4

NO. OF PARCELS

1

DATE CAPTURED

2018-09-10

| SKU | Name | Barcode | Expected Quantity | Useable Quantity | Broken Quantity |
|-----|----------------|---------|-------------------|------------------|-----------------|
| AAA | Demo Product 1 | 12345 | 1 | 1 | 0 |
| AAB | Demo Product 2 | 123456 | 1 | 0 | 1 |

Mon 10 Sep, 2018, 11:04

Processing complete with variance

Mon 10 Sep, 2018, 11:03

Being Processed

Mon 10 Sep, 2018, 11:02

Scheduled for pickup with courier

Mon 10 Sep, 2018, 11:02

Awaiting arrival

Mon 10 Sep, 2018, 11:02

Arrived at warehouse

Manifest

Goods Received Voucher

Delivery Note

Invoice

Waybill

Returns Note

Cancelling an Inbound:

You as a user must have the assigned role to be able to action this.

- Please note that an inbound cannot be cancelled if it has reached a status that is passed awaiting arrival, i.e. arrived.
- A pickup can be cancelled anytime up until midnight, the night before the scheduled pickup date.
- If the 'Cancel Inbound' button is not visible, you will not be able to cancel the inbound.

1: Open the inbound you wish to cancel

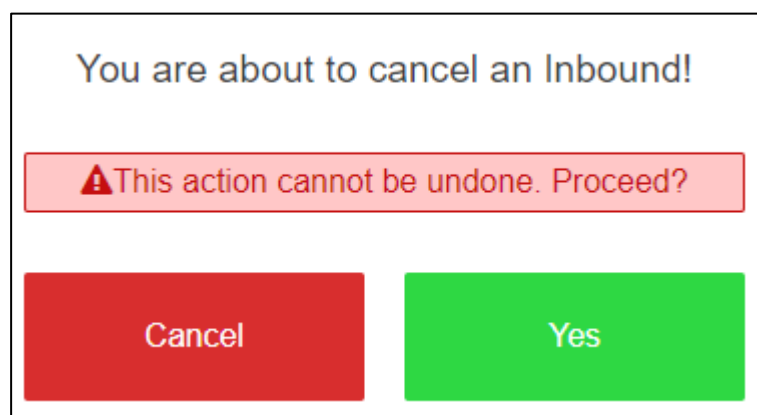
2: Click on the 'Cancel Inbound' button that is on the bottom right of the page.

3: An alert will pop up asking you if you are sure you want to cancel the inbound.

- Please note that cancelling the inbound cannot be undone.

If you do want to cancel the inbound, you must click on 'Yes' and the inbound will be cancelled.

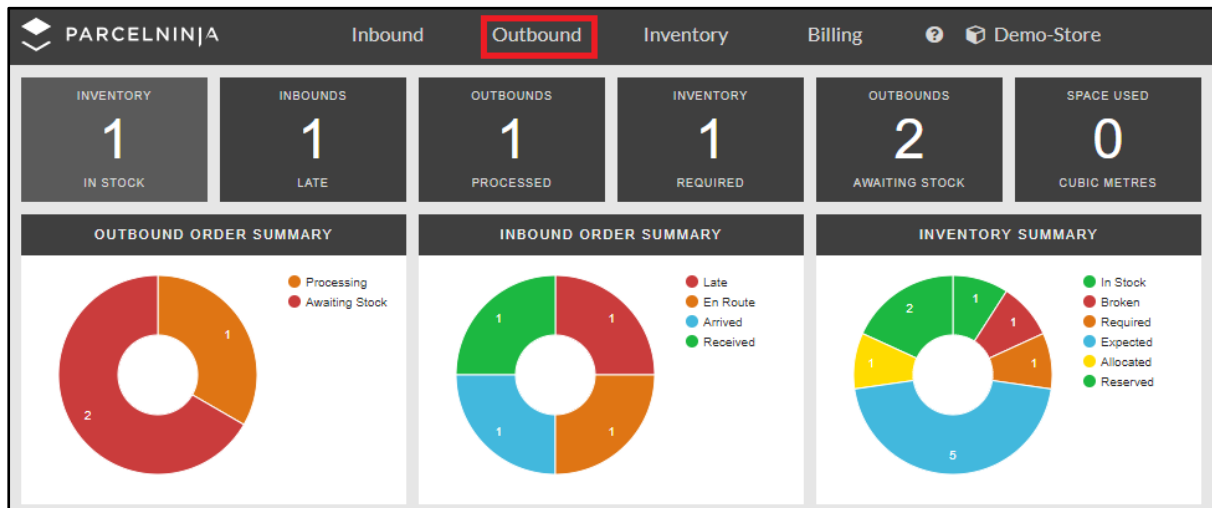
If you do not want to cancel the inbound, please click on 'No'.



5. Outbound

The outbound tab is used for:

- 1: Creating new outbounds
- 2: Viewing
- 3: Searching through your list of existing outbounds
- 4: Exporting outbound data
- 5: Importing customer orders
- 6: Importing supplier returns
- 7: Pulling a quote from couriers



5.1 Outbound Overview:

When you click on the Outbound tab at the top:

- 1: You will be taken to a page where you will see an overview of all your existing outbounds.

At the top of the page are 4 filters that show the different statuses of an outbound and these filters can be used to show the outbounds by their status.

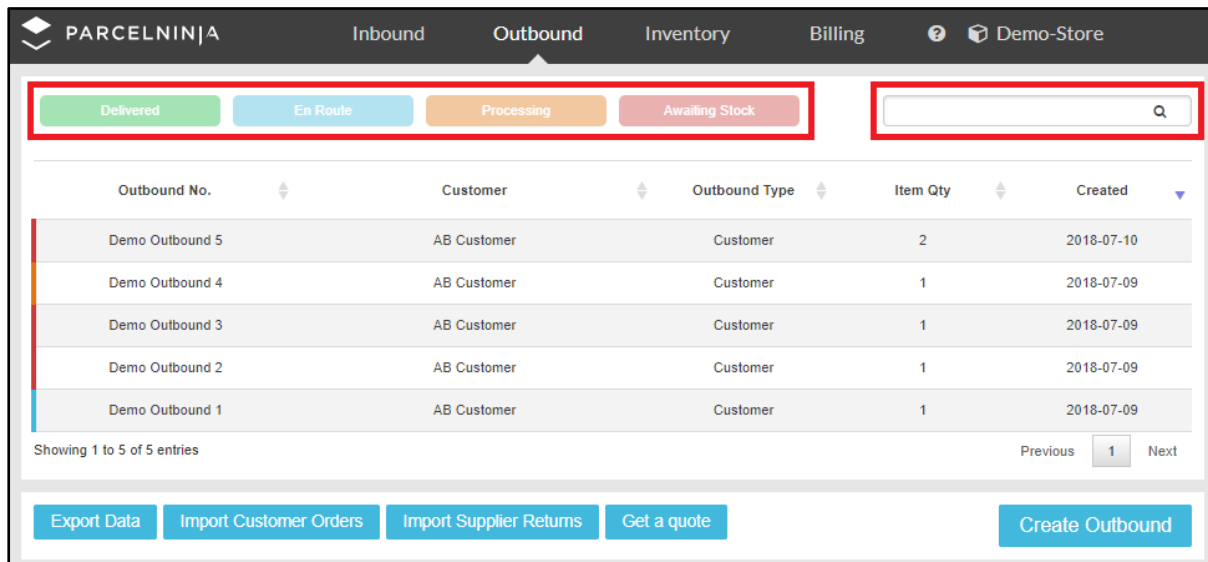
- 1: Delivered – outbounds that have been delivered to your customer.
- 2: En route – outbounds that are with the courier on their way to the customer (picked up by the courier)
- 3: Processing – outbounds that are currently in the picking queue or at the packing station being packed.
- 4: Awaiting Stock – outbounds that are still awaiting stock for the outbound order to be fulfilled.

Next to the 4 status filters is a search bar where you can search for outbounds using the following fields:

- 1: Outbound Number
- 2: Customer name
- 3: Waybill Number
- 4: SKU

The outbound overview panel has different headings that may be used to sort the information displayed. The outbounds can be listed in order of:

- 1: Outbound Number
- 2: Customer
- 3: Outbound Type
- 4: Item Quantity
- 5: Date Created

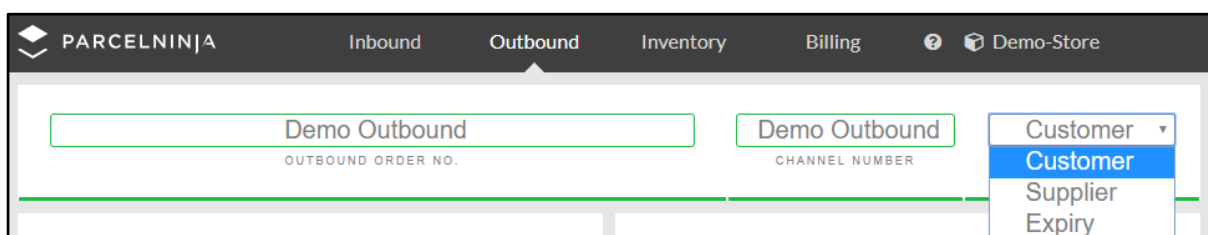


5.2 Creating an Outbound:

At the bottom right of the Outbound overview page, there is a 'Create Outbound' button which when clicked, leads to the Create Outbound page where you can create a new outbound.

At the top of the page are 3 entry fields that are required to be filled in, which are:

- 1: Outbound Order Number – outbound number which can be a combination of numbers and letters.
- 2: Channel Number – customer's name or supplier's name, depending on what type of outbound it is.
- 3: Outbound Type – there are 3 types of outbounds that can be captured:
 - Customer
 - Supplier
 - Expiry



Underneath those fields is where you must complete the delivery information of the outbound.

- 1: Complete the delivery information on the left.
- 2: All required fields must be completed. These fields are:

- Customer Name
- Contact Number
- Email Address
- Delivery Address

The Suburb field is a prepopulated field where you must search for the correct suburb and select the relevant postal code.

The Province field and Postal Code will populate according to what suburb you have chosen.

3: On the right is where you select the delivery options. You have a choice of three options:

- Cheapest delivery
- Fastest delivery
- Collect from warehouse

To pull the delivery quote options, you will need to have entered all the product details first and entered the suburb correctly. Once this information has been entered:

1: Click on the 'Request Courier Quotes' button at the bottom.

2: The delivery options table will load the prices and dates for each option.

3: Choose the delivery option you want.

- Please note that if you do not click on the 'Request Courier Quotes' button, the outbound will be created with the service you chose, and it will be quoted when it is packed in the warehouse.
- Please note that if you leave the suburb field empty, you will be charged a cost per region.

| CUSTOMER NAME | | Delivery Option | | Date | Price |
|--------------------------|------------|--|--|----------|---------|
| AB Customer | 0987654321 | <input checked="" type="radio"/> Cheapest | | 13th Apr | R 38.01 |
| Email Address (optional) | | <input type="radio"/> Fastest | | 12th Apr | R 49.73 |
| DELIVERY ADDRESS | | <input type="radio"/> Collect from warehouse | | N/A | R 17.00 |
| Parcelinja | | | | | |
| 49 Galaxy Avenue | | | | | |
| Linbro Business Park | | | | | |
| Linbro Park | Gauteng | 2090 | | | |

At the bottom of the page is where you add products to your outbound.

The fields that are required to be completed are:

- SKU
- Product Name
- Quantity (how many items are required for the outbound)

If the product has been previously captured, you can search for the item using the SKU field or Product Name field, and the rest of the product details will autocomplete.

The screenshot shows a form titled 'Products' with a '+Add another product' button in the top right. Below the title is a single line item with a grey circle containing the number '1'. The line item has four input fields: 'SKU' (containing 'SKU'), 'Product Name' (containing 'Product Name'), 'Quantity' (containing 'Quantity'), and a checkbox labeled 'Capture Serial No.' followed by a grey 'X' icon.

There is a '+Add another product' to the right which will add more line items if you need to add more products.

If you need to remove a product from the outbound:

1: Click on the grey 'X' on the right of the product line item and that will remove the item from the outbound.

The screenshot shows the 'Products' form with two line items. The top line item has a grey circle with '2', and the bottom line item has a grey circle with '1'. Both line items have input fields for 'SKU' (containing 'AAB' and 'AAA' respectively), 'Product Name' (containing 'Demo Product 2' and 'Demo Product 1' respectively), 'Quantity' (containing 'Quantity' and '1' respectively), and a checkbox labeled 'Capture Serial No.' followed by a grey 'X' icon. A red box highlights the 'X' icon on the top line item.

Adding products for a Supplier Outbound

1: Make sure the Supplier outbound type is selected at the top

2: Enter the product details

Please note that when you search for a product, you will be able to see the number of items in stock, number of items required and number of broken stock.

The screenshot shows the 'Products' form with a line item having a grey circle with '1'. The line item has input fields for 'SKU' (containing 'AAD'), 'Product Name' (containing 'Demo Product 4'), and 'Quantity' (containing '1'). A dropdown menu is open below the 'Product Name' field, showing a table with the following data:

| SKU | Product | In Stock | Back Order | Broken |
|-----|----------------|----------|------------|--------|
| AAD | Demo Product 4 | 0 | 0 | 1 |

Below the table is a button labeled '+Add Document'. The 'Products' form also has a '+Add another product' button in the top right.

Adding products that have an expiry:

1: Make sure the Expiry outbound type is selected at the top

2: Enter the product details

3: Enter the required expiry details for the products

- Ensure that the End date does not come before the Start Date

| 1 | SKU | Product Name | Start Date | End Date | Quantity | X |
|---|-----|--------------|------------|----------|----------|---|
|---|-----|--------------|------------|----------|----------|---|

Including a document with your outbound:

- 1: Click on the '+Add Document' button.
- 2: This will load a line item for you to add your document. (This field only accepts PDF documentation)
- 3: Click 'Choose file' button, which you must click to load your document.
- 4: There is a dropdown list next to the 'Upload' button where you must select what type of document this is. The options are:
 - Invoice
 - Notice
 - Packing Slip
 - Other
- 5: Next to that, you can choose where you would like the document to be placed.
 - Inside the package
 - Outside the package
 - Both.
- 6: Enter how many copies of this document are required for this outbound.

If you would like to add another document:

- 1: Click on the '+Add Document' button and follow the same steps when filling in the information.

If you would like to remove a document:

- 1: Click on the 'X' on the right of the line item and this will remove it.

| Document | | | | | | +Add Document |
|-------------|-------------------------|--------|--------|--------------|----------|---------------|
| Choose file | Thank you Note.png | Upload | Notice | Place Inside | 1 | X |
| Choose file | Product Information.jpg | Upload | Other | Place Inside | Quantity | X |

Fields that have been incorrectly captured or not captured at all will be outlined in red indicating that you will need to correct/complete before creating your outbound.

Demo Outbound 1

OUTBOUND ORDER NO.

Demo Outbound 1

CHANNEL NUMBER

Customer

OUTBOUND TYPE

CUSTOMER NAME

AB Customer

0987654321

Email Address (optional)

DELIVERY ADDRESS

Parcelninja

49 Galaxy Avenue

Linbro Business Park

Linbro Park

Gauteng

2090

Delivery Option

Date

Price

☒ Cheapest
 13th Apr
 R 38.01

☐ Fastest
 12th Apr
 R 49.73

☐ Collect from warehouse
 N/A
 R 17.00

Products

+Add another product

2

AAB

Demo Product 2

1

☐ Capture Serial No.

X

1

AAA

Demo Product 1

1

☐ Capture Serial No.

X

Document

+Add Document

Choose file

Thank You Note.pdf

Upload

Notice

Place Inside

1

X

Request Courier Quotes

Submit Order

5.3 Importing and Exporting Data:

At the bottom left of the outbound overview page, there are 3 buttons that you can use to import and export data.

PARCELNINJA

Inbound

Outbound

Inventory

Billing

?

Demo-Store

Delivered

En Route

Processing

Awaiting Stock

| Outbound No. | Customer | Outbound Type | Item Qty | Created |
|-----------------|-------------|---------------|----------|------------|
| Demo Outbound 5 | AB Customer | Customer | 2 | 2018-07-10 |
| Demo Outbound 4 | AB Customer | Customer | 1 | 2018-07-09 |
| Demo Outbound 3 | AB Customer | Customer | 1 | 2018-07-09 |
| Demo Outbound 2 | AB Customer | Customer | 1 | 2018-07-09 |
| Demo Outbound 1 | AB Customer | Customer | 1 | 2018-07-09 |

Showing 1 to 5 of 5 entries

Previous 1 Next

Export Data

Import Customer Orders

Import Supplier Returns

Get a quote

Create Outbound

- The 'Export Data' button exports the existing outbounds into a downloadable CSV file.
- The 'Import Customer Orders' button and the 'Import Supplier Returns' button can be used to import multiple outbounds. These features are useful for when manually creating many outbounds individually would be time consuming.

1: Click on either the 'Import Customer Orders' button or the 'Import Supplier Returns' button

2: A pop up appears showing where the import file can be uploaded.

- A sample import file is also available for download at the bottom of the pop up and this will provide you with more information on what fields are required when importing outbounds.
- The import file needs to be a CSV file



Once your file is Uploaded:

1: Click on the 'Import' button and the file loaded will import the data into the outbounds.

- Please note, if there are any errors, they will be displayed on the list page once the file has been imported.

5.4 Getting a Courier Quote:

On the Outbound overview page, there is a 'Get a quote' button that can be used to pull a quote from couriers.

1: Click this button

2: It will take you to the Courier Quote page

3: Enter the information on the items you want to quote on.

At the top of the page:

1: Enter the suburb of the address for which the quote is for. (The Suburb field is a search field where you must search for the correct suburb and select the relevant postal code. The Postal Code will populate according to what suburb you have chosen.)

If you need to clear the Suburb:

1: Click on the 'Clear Suburb' and the suburb will be cleared.

You are required to add products to your outbound that you want quotes on.

Enter the below fields:

- SKU

- Quantity
- Dimensions: by width (mm), height (mm), length (mm) and weight (grams).
- Please note, if you enter an existing SKU or virtual SKU, you will not be required to enter the dimensions.

If you need to add more products:

1: Click on the '+Add another Product' button.

If you need to remove products:

1: Click on the grey 'X' which will remove the product line item.

Once all the required fields have been completed click on 'Get Quote'.

- Please note that quoted prices do not include VAT.

Courier Quote

If you leave the Suburb empty, you will get the cheapest cost per Region.

Products

| | | | | | |
|---|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| 1 | <input type="text" value="AAA"/> | <input type="text" value="100"/> | <input type="text" value="110"/> | <input type="text" value="150"/> | <input type="button" value="X"/> |
| | <input type="text" value="200"/> | <input type="text" value="2"/> | | | |

Quote #1 - R 46.64 excl.

Service: S1 - Next business day
Service Delivery Days: 1
Quote Id: 18972045
Weight: 0.82 Kg
Cost: R 46.64 excl.

Quote #2 - R 38.01 excl.

Service: S2 - In two business days
Service Delivery Days: 2
Quote Id: 18972044
Weight: 0.82 Kg
Cost: R 38.01 excl.

Quote #3 - R 175.34 excl.

Service: S3 - In three business days
Service Delivery Days: 3
Quote Id: 18972040
Weight: 0.82 Kg
Cost: R 175.34 excl.

Quote #4 - R 17.00 excl.

Service: S0 - Collect from warehouse
Service Delivery Days: 0
Quote Id: 1
Weight: 0.82 Kg
Cost: R 17.00 excl.

**Please note quoted prices do not include VAT.*

5.5 Viewing an Outbound:

If you would like to view an outbound for more detail on the outbound:

You can search for the outbound you want to view and click on it.

This will take you to a page where you can view the details of the outbound.

At the top, it shows:

- 1: Outbound Order Number
- 2: The Customer name
- 3: The Outbound service type
- 4: What status the outbound is currently at

Underneath that, you will see a log of the different statuses the outbound has already passed with the dates that outbound reached each status.

To the right of that, you can see the delivery information of the outbound. If you wish to see the map location of the address:

- 1: click on the 'View Location' button
- 2: A map will pop up showing the location of the delivery address.

Underneath that is a list detailing the products in the outbound. Here, you can:

- 1: see the status of each individual inventory item by looking at the coloured vertical line of that line item.
 - Red – this is for inventory items that are awaiting stock
 - Green – this is for inventory items that are in stock
- 2: see what virtual SKUs are within this outbound.
- 3: see which items have serial numbers.
- 4: click on the products in the outbound and this will take you to a page that details that specific product.

| SKU | Name | Qty |
|-----|----------------|-----|
| AAC | Demo Product 3 | 1 |
| AAA | Demo Product 1 | 1 |

If you want to prioritise your outbound: (Please note no Parcelninja staff can action this on your behalf)

- 1: Click on the 'Prioritise Outbound' button that is on the bottom left of the page.
- 2: An alert will pop up asking you if you are sure you want to prioritise this outbound.

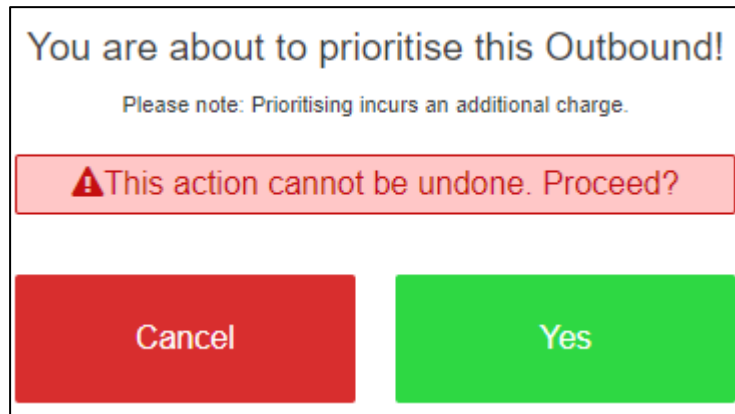
- Please note that prioritising incurs an additional charge.

If you do want to prioritise your outbound:

1: Click on 'Yes'.

If not:

1: Click on 'No'



If you wish to cancel an outbound:

1: Click on the 'Cancel Outbound' button that is on the bottom right of the page.

2: An alert will pop up asking you if you are sure you want to cancel this outbound.

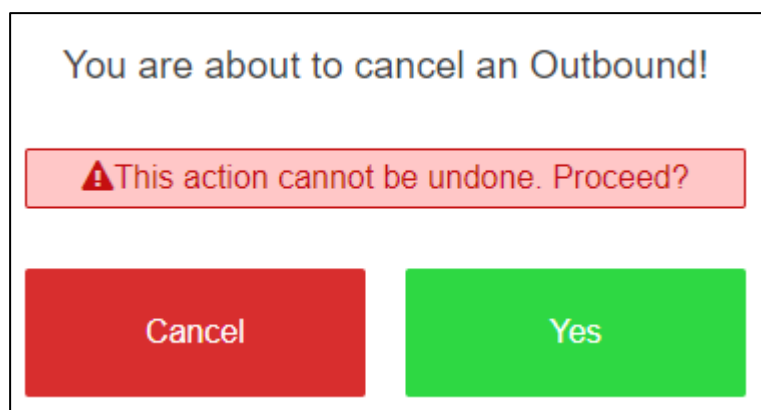
- Please note that cancelling the outbound cannot be undone.
- If the 'Cancel Outbound' button is not visible, this means the outbound is already in the picking process and cannot be cancelled. Contact out CSD Department for resolve of these instances.

If you do want to cancel this outbound:

1: Click on 'Yes' and the outbound will be cancelled.

If not:

1: Click on 'No'



Once your outbound has been packed and has been dispatched with the courier, you will be able to see the tracking events and the courier details, including:

- 1: Courier name
- 2: Courier service
- 3: Estimated delivery date
- 4: Tracking number
- 5: Tracking Link
- 6: Go button – which opens the tracking URL
- 7: Copy button – which copies the Tracking URL to your clipboard.

Demo
OUTBOUND ORDER

Customer
OUTBOUND TYPE

Fastest
SERVICE

Dispatched with courier
STATUS

| |
|---|
| <div> <div> <div> <div>Tue, 10 Apr 2018, 09:54</div> <div>Dispatched with courier</div> </div> </div> </div> <div> <div> <div> <div>Tue, 10 Apr 2018, 09:05</div> <div>Awaiting courier pickup</div> </div> </div> </div> <div> <div> <div> <div>Tue, 10 Apr 2018, 09:04</div> <div>Ready to be packed</div> </div> </div> </div> <div> <div> <div> <div>Tue, 10 Apr 2018, 08:18</div> <div>In packing queue</div> </div> </div> </div> <div> <div> <div> <div>Tue, 10 Apr 2018, 08:17</div> <div>Ready to be picked</div> </div> </div> </div> <div> <div> <div> <div>Mon, 09 Apr 2018, 15:53</div> <div>In picking queue</div> </div> </div> </div> <div> <div> <div> <div>Mon, 09 Apr 2018, 15:53</div> <div>Awaiting Stock</div> </div> </div> </div> |
|---|

Customer Name

0120001234

customer@email.com

Business name

Address 1

Address 2

Suburb

Province

0000

View Location

| SKU | Name | Qty |
|-----|--------------------------|-----|
| SKU | Product Description Text | 1 |

TRACKING EVENTS

| |
|---|
| <div> <div>Thu, 12 Apr 2018, 08:37</div> <div>Tracking Event</div> </div> |
| <div> <div>Wed, 11 Apr 2018, 23:52</div> <div>Tracking Event</div> </div> |
| <div> <div>Tue, 10 Apr 2018, 23:53</div> <div>Tracking Event</div> </div> |
| <div> <div>Tue, 10 Apr 2018, 23:53</div> <div>Tracking Event</div> </div> |
| <div> <div>Tue, 10 Apr 2018, 23:53</div> <div>Tracking Event</div> </div> |
| <div> <div>Tue, 10 Apr 2018, 16:30</div> <div>Tracking Event</div> </div> |
| <div> <div>Tue, 10 Apr 2018, 09:27</div> <div>Tracking Event</div> </div> |
| <div> <div>Tue, 10 Apr 2018, 09:27</div> <div>Tracking Event</div> </div> |

COURIER

Courier

COURIER SERVICE

3 Business days

EST. DELIVERY

2018-04-13

TRACKING NO

PNJ123456

TRACKING LINK

Tracking Uri

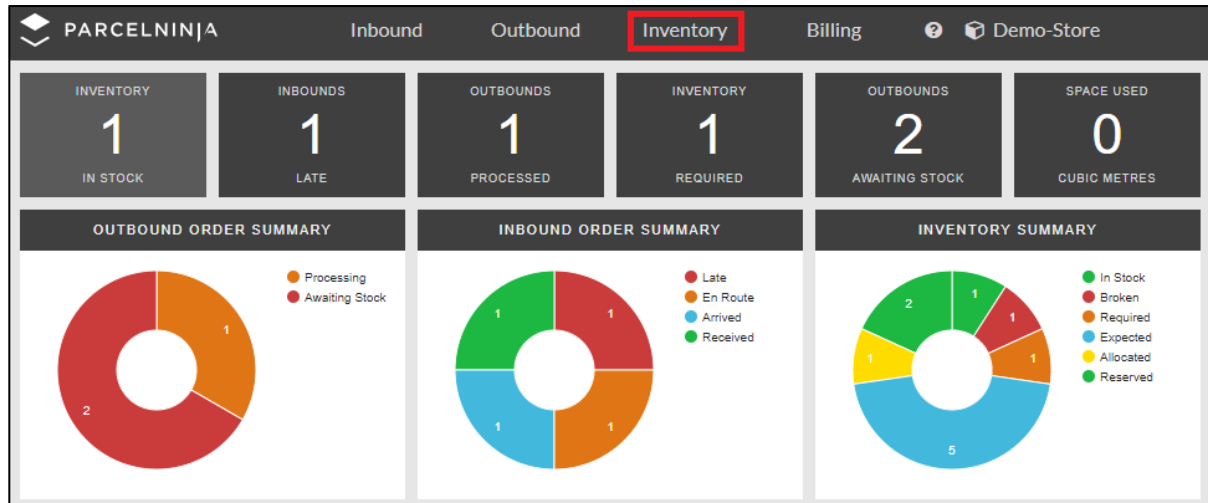
Go

Copy

6. Inventory

The inventory tab is used to view:

- 1: Your entire product inventory
- 2: See the status of the inventory products
- 3: Export data relating to the inventory
- 4: Create virtual SKUs



6.1 Inventory Overview:

When you click on the inventory tab at the top of the page:

- 1: You will be taken to a page where you will see an overview of all inventory.

At the top of the page are 4 filters that show the different statuses of the inventory, and these filters can be used to show the inventory by their status.

- There are tooltips that appear when you hover over the filters.

- 1: Required – inventory for which outbound orders have been created but no stock is available, and not en route to the warehouse.
- 2: En Route – inventory that is en route to the warehouse.
- 3: In Stock – inventory that is in the warehouse and is available to be assigned to an outbound.
- 4: Broken – inventory that is broken and unsellable and can be returned to the supplier.

Next to the 4 status filters is a search bar where you can search for inventory using the following fields:

- 1: SKU
- 2: Product Name
- 3: Barcode

The inventory overview panel has different headings that may be used to sort the information displayed into ascending or descending order:

- 1: SKU
- 2: Product Name
- 3: Number of inventory In Stock
- 4: Number of inventory Allocated
- 5: Number of inventory Required

- 6: Number of inventory En route
- 7: Number of inventory Broken
- 8: Cover (N/A)

| SKU | Product Name | In Stock | Allocated | Required | En Route | Broken | Cover |
|-----|----------------|----------|-----------|----------|----------|--------|-------|
| AAA | Demo Product 1 | 2 | 2 | 0 | 0 | 0 | * |
| AAB | Demo Product 2 | 0 | 0 | 0 | 2 | 0 | * |
| AAC | Demo Product 3 | 0 | 0 | 0 | 1 | 0 | * |
| AAD | Demo Product 4 | 0 | 0 | 0 | 0 | 1 | * |
| AAE | Demo Product 5 | 0 | 0 | 0 | 2 | 0 | * |
| AAF | Demo Product 6 | 0 | 0 | 1 | 0 | 0 | * |

Showing 1 to 6 of 6 entries

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6.2 Exporting Inventory Data:

At the bottom of the Inventory overview page are 3 buttons you can use to export various types of data.

- 1: The 'Export Data' button exports the inventory into a downloadable CSV file.
- 2: The 'Export Expiry' button exports the expiry date information for all the inventory into a downloadable CSV file.
- 3: The 'Export Serial Numbers' button exports the serial numbers for all the inventory into a downloadable CSV file.

| SKU | Product Name | In Stock | Allocated | Required | En Route | Broken | Cover |
|-----|----------------|----------|-----------|----------|----------|--------|-------|
| AAA | Demo Product 1 | 2 | 2 | 0 | 0 | 0 | * |
| AAB | Demo Product 2 | 0 | 0 | 0 | 2 | 0 | * |
| AAC | Demo Product 3 | 0 | 0 | 0 | 1 | 0 | * |
| AAD | Demo Product 4 | 0 | 0 | 0 | 0 | 1 | * |
| AAE | Demo Product 5 | 0 | 0 | 0 | 2 | 0 | * |
| AAF | Demo Product 6 | 0 | 0 | 1 | 0 | 0 | * |

Showing 1 to 6 of 6 entries

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6.3 Viewing an Inventory Item:

You can search for the item you want to view and click on it. More detail on the inventory item will load under the name of the item.

There is a field that displays the name of the item. If you want to update the name of the item:

- 1: Change the name in that field
- 2: Click on the 'Update' button.

Below that, the different details on the inventory item are listed:

- 1: Dimensions – shows the dimensions
- 2: Reservations – shows the number of units that have been reserved, required and allocated. If stock needs to be reserved for an upcoming order:
 - 2.1: Click on the drop down and select the number under 'Reserved'. This dropdown shows the total number of items in stock, which is also the maximum number of items that may be reserved.
 - 2.2: Once a number has been selected, click on the 'Update' button at the bottom.
- 3: Barcode – shows the barcode of the item
- 4: History Summary – gives a summary on what date stock came in or went out for this item on fully completed orders.
 - 4.1: The order reference
 - 4.2: The quantity of this item in that order
 - 4.3: The status of the order
- 5: Total In/Out Summary – shows the number of times the inventory item has come in and gone out of the warehouse.

The screenshot displays the 'View Inventory Item' interface for 'Demo Product 1'. At the top, a header bar shows key metrics: SKU (AAA), Product Name (Demo Product 1), In Stock (5), Allocated (1), Required (0), En Route (1), Broken (0), and Cover (*). Below this, a search bar contains 'Demo Product 1', with an 'Update' button and a close icon (X) to its right. The main content area is divided into several sections:
1. **Dimensions**: A table with columns for Length (mm), Width (mm), Height (mm), Physical Weight (Kg), and Volumetric Weight (Kg). Values are 100, 110, 150, 0.02, and 0.41 respectively.
2. **Reservations**: A table with columns for Reserved, Required, and Allocated. The 'Reserved' column has a dropdown menu (0, 1, 2, 3, 4, 5) and an 'Update' button. The 'Required' and 'Allocated' columns show 0.
3. **Barcodes**: Displays the barcode '12345'.
4. **Serial Numbers**: Displays the serial number '123435453'.
5. **Historical Summary**: A table with columns for Status Date, Order Reference, Quantity, and Status. It lists four transactions: 'OUT' (2018-04-11, Demo Outbound 1, 1, In picking queue), 'IN' (2018-04-11, Demo Inbound 5, 1, Processing complete), 'IN' (2018-04-11, Demo Inbound 4, 1, Awaiting arrival), and 'IN' (2018-04-11, Demo Inbound 1, 5, Processing complete).
6. **Total In/Out Summary**: A summary table with columns for IN (6) and OUT (0).

When you are finished viewing the inventory item:

1: Click on the 'X' on the top right corner and it will close the details.

6.4 Virtual SKU's:

A virtual SKU is a bundle of two or more items that are not pre-packaged items, that you wish to be picked and packed together. The virtual SKU functionality is useful for:

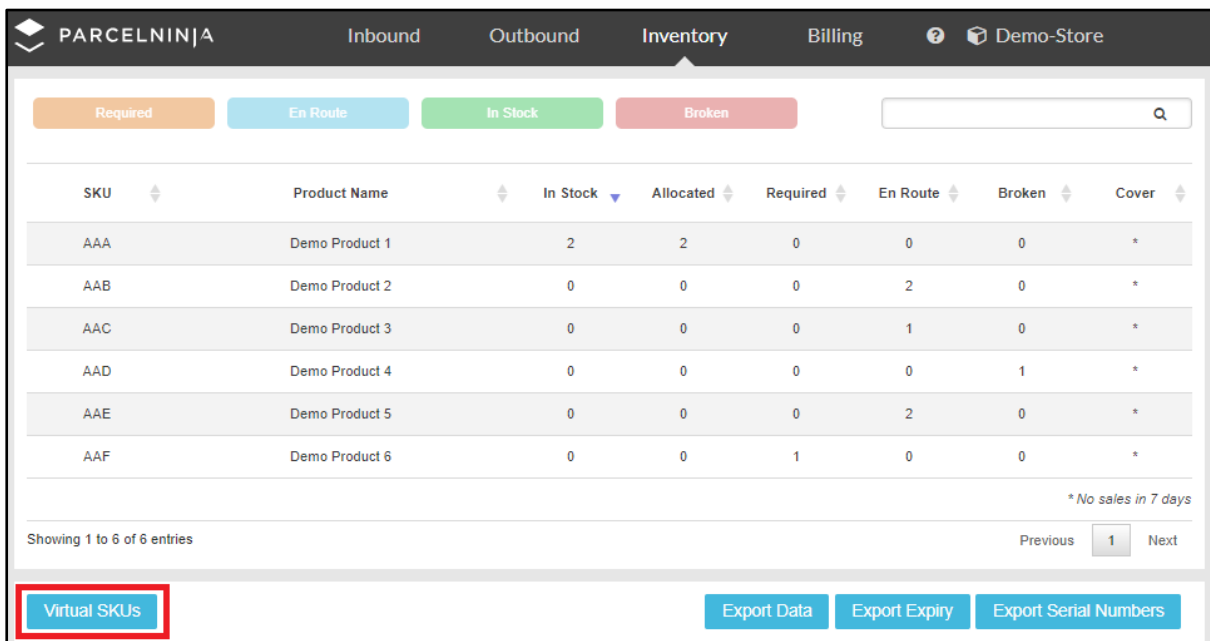
1: Creating bundles of items that do not come pre-assembled.

There is a 'Virtual SKU' button at the bottom left of the inventory overview. This feature can be used to:

1: Search and view existing virtual SKUs

2: Create new virtual SKUs.

- Please note, if you would like to include a virtual SKU in an outbound, the virtual SKU must be created first before creating the outbound. If you do this the other way around, the system will not be able to create a Virtual SKU.



| SKU | Product Name | In Stock | Allocated | Required | En Route | Broken | Cover |
|-----|----------------|----------|-----------|----------|----------|--------|-------|
| AAA | Demo Product 1 | 2 | 2 | 0 | 0 | 0 | * |
| AAB | Demo Product 2 | 0 | 0 | 0 | 2 | 0 | * |
| AAC | Demo Product 3 | 0 | 0 | 0 | 1 | 0 | * |
| AAD | Demo Product 4 | 0 | 0 | 0 | 0 | 1 | * |
| AAE | Demo Product 5 | 0 | 0 | 0 | 2 | 0 | * |
| AAF | Demo Product 6 | 0 | 0 | 1 | 0 | 0 | * |

* No sales in 7 days

Showing 1 to 6 of 6 entries

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Virtual SKUs Export Data Export Expiry Export Serial Numbers

6.4.1 Virtual SKU Overview:

When you click on the 'Virtual SKUs' button:

1: you will be taken to a page where you will see an overview of all virtual SKUs.

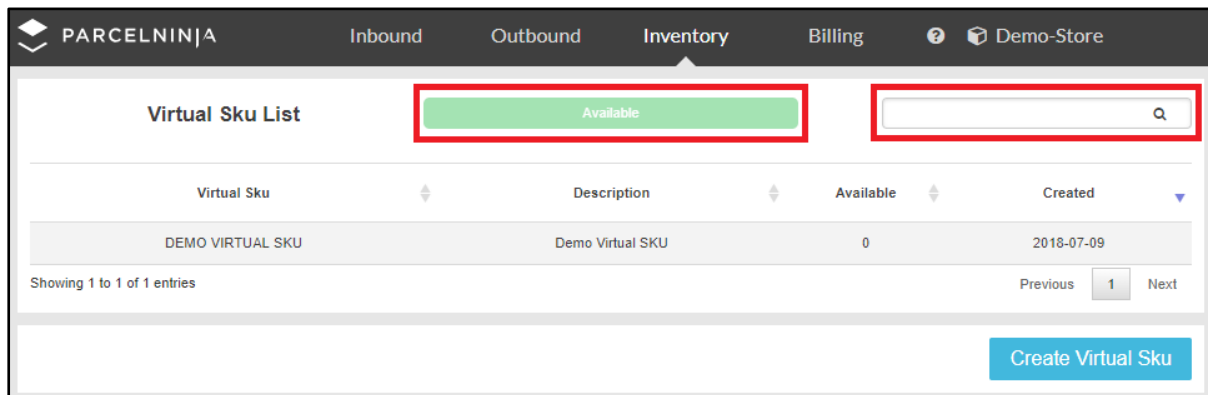
At the top of the page is one filter that shows one of the statuses for virtual SKUs which is Available. The 'Available' filter can be used to show the virtual SKUs that are available to be included in an outbound.

Next to the 'Available' filter is a search bar where you can search for virtual SKUs by using the following fields:

- 1: Virtual SKU
- 2: Description

The virtual SKUs Overview panel has different headings that may be used to order the information displayed. The virtual SKUs can be listed in order of:

- 1: Virtual SKU
- 2: Description
- 3: Number Available
- 4: Date Created



6.4.2 Viewing a Virtual SKU

If you would like to view a virtual SKU:

- 1: you can search for the virtual SKU you want to view and click on it
- 2: This will take you to a page where you can view the details of the virtual SKU.

At the top, it shows the virtual SKU name and the description. Underneath that, you will see what products make up the virtual SKU.

The detail about these products include:

- the SKU
- the product names
- the quantity of the product in the virtual SKU

On this page, you will be able to make changes such as:

- 1: Adding or removing products
- 2: Changing the virtual SKU name and description.

If you want to add more products to the virtual SKU:

- 1: Click on the '+Add another product' button to the right. This will add more line items.

If you need to remove a product from the virtual SKU:

- 1: Click on the grey 'X' on the right of the product line item and that will remove the item from the virtual SKU.

When you have finished making your changes:

- 1: Click on the 'Update Virtual SKU' button on the bottom right.

Deleting a virtual SKU:

- 1: Click on the 'Delete Virtual SKU' button on the bottom left corner.
 - Please note that inventory items that have no historic information once deleted, will automatically be completely removed from inventory.
- 2: An alert will pop up asking you if you are sure you want to delete the virtual SKU.

- Please note that deleting the virtual SKU cannot be undone.

If you do want to delete the virtual SKU:

1: Click on 'Yes' and the virtual SKU will be deleted

6.4.3 Creating a Virtual SKU:

At the bottom right of the Virtual SKU overview page, there is a 'Create Virtual SKU' button which when clicked, leads to the Create Virtual SKU page where a new virtual SKU can be created.

This page is where all the information regarding the new virtual SKU must be captured.

At the top of the page are 2 entry fields that must be completed:

- 1: Virtual SKU
- 2: Description

Underneath those fields is where you add products of the virtual SKU.

The fields that need to be captured here are:

- SKU
- Product Name
- Quantity

If this product has been previously captured in a virtual SKU, you can use either the SKU field or Product Name field to search for the product. The virtual SKU must have at least two inventory items.

The Quantity field is where you input how many units of the product are in the virtual SKU.

- Please note that you may not create a virtual SKU with a virtual SKU of an existing inventory item.
- Virtual SKU's are bundled items: 2 of product A and 2 of Product B = 4 items making up 1 SKU. If you do 20 of product A and 20 of product B, you will have 1 SKU of 40 items.

There is a '+Add another product' to the right which will add more line items if you need to add more products.

- Please note that items that are contained in a virtual SKU will automatically create if they do not already exist in the current inventory.

If you need to remove a product from the virtual SKU:

1: Click on the grey 'X' on the right of the product line item and that will remove the item from the virtual SKU.

Once all the information has been captured:

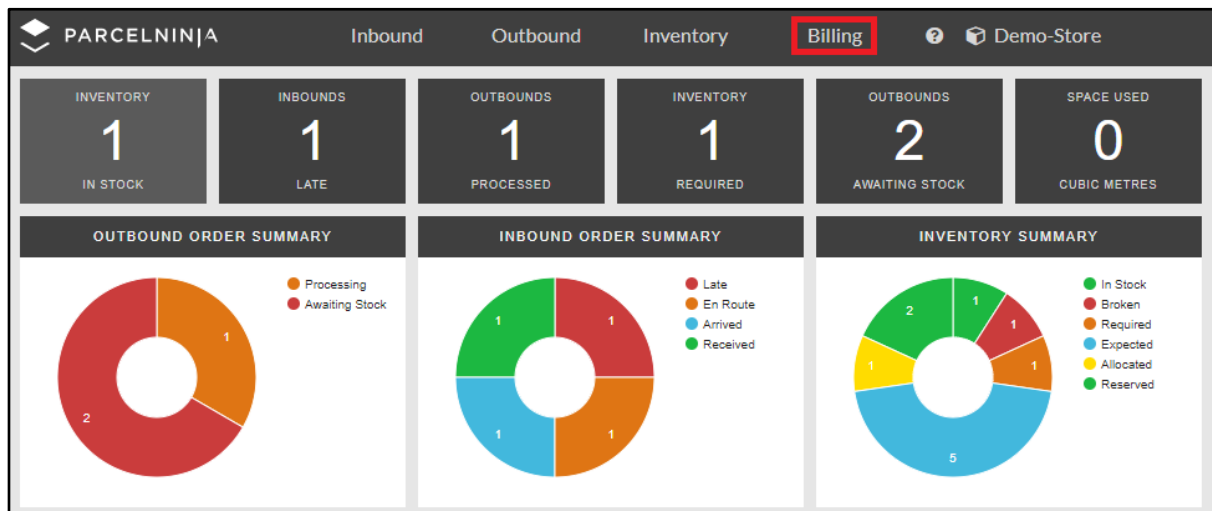
1: Click on the 'Submit Virtual SKU' button that is on the bottom right and this will submit the new virtual SKU.

| Products | | | | +Add another product |
|----------|-----|----------------|----------|--------------------------------------|
| 3 | AAB | Demo Product 2 | Quantity | X |
| 2 | AAC | Test Product 3 | 1 | X |
| 1 | AAA | Test Product 1 | 1 | X |

7. Billing

The billing tab is used to view your breakdown of each month's costs.

- Please note that you must refer to the invoice for the final bill.



7.1 Billing by Month Overview:

When you click on the Billing tab at the top:

1: You will be taken to a page that shows an overview of your Billing by month. The Billing by Month overview has two headings that may be used to filter the information displayed.

The headings are: (both can be used to filter the information in chronological order)

2.1: Period

2.2: Description

7.2 Opening a Month:

If you would like to open a month and view the billing within that month (this can be viewed at any stage of the current month)

1: Click on the month

2: You will be taken to a page that details all the costs.

At the top of the page, you will see three headings for:

1: Your store name

2: The month and Year

3: The billing total

The costs displayed include:

1: Monthly Costs

2: Storage Costs

3: Picking

4: Packing

5: Courier

6: Value Added Service Costs

7: Insurance Costs.

Each cost has a breakdown of why it has been charged and on the right of the line item, you will see the subtotal for that specific cost.

At the bottom of the page, you will see a subtotal for all costs.

- The Sub total is exclusive of VAT.
- Underneath the sub total will be the VAT charge
- The charge following that is the total for the month, including VAT.

The billing for the month is also available for you to download.

If you want to download the billing:

1: Click on the 'Download Detail' button at the bottom of the page.