

STOCK2TRACK

Inventory

User manual and guide — products, stock in and out, counts, transfers between branches, and stock reports

START HERE

Before you begin

STOCK2TRACK keeps stock per location: each shop, godown or van has its own quantity of every product. Every change, whether a sale, a purchase, a transfer or a count, is written to the stock ledger with the person who made it.

Setting up

1. Add your locations (Admin > Locations).
2. Add your categories and products, with GST and a reorder level (Chapter 2).
3. Enter opening stock (Chapter 3), and label the shelves if you use shelf counts.

The weekly routine

1. Low Stock and Batch Expiry (Chapter 14).
2. Purchase orders (Chapter 9).
3. Count a section, and a few shelves a day (Chapters 5 and 6).

Chapters

- | | |
|----------------------------------|-------------------------------|
| 1. Products & Inventory | 8. Asking for Stock (Indents) |
| 2. Adding and Editing a Product | 9. Purchase Orders |
| 3. Adding and Removing Stock | 10. Repacking and Assembling |
| 4. Location and Partner Prices | 11. Discount Schemes |
| 5. Counting Stock | 12. Printing Barcode Labels |
| 6. Counting a Shelf | 13. The Stock Ledger |
| 7. Moving Stock Between Branches | 14. Expiry and Low Stock |

Products & Inventory

Every product you sell, with its price, GST and the stock at each location.

Who	Owner, stock manager	How often	Daily
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Why it matters

This list is the master for billing, purchases and the online shop. A wrong price here is a wrong price on every bill.

How to use it

1. Open **Inventory > Products & Inventory**. Search by name or barcode, or filter by **Category** and **Location**.
2. **Available** is the stock at the chosen location; **Sold** is what has been billed.
3. The row icons edit the product, add or remove stock (**Update Quantity**), set location and partner prices, add images, and show where it is placed.
4. Press **Add Product** to create one, or **Download Template** and **Import Excel** to load many at once. **Export to Excel** saves the list.

STOCK2TRACK										
CLASSIC BLUE										
QUICK INVOICE										
NEW INVOICE										
Products & Inventory										
1 Search Category All Categories Location All Locations 2 ADD PRODUCT MAPPING REPORT										
3 DOWNLOAD TEMPLATE IMPORT EXCEL EXPORT TO EXCEL										
4 Actions ✎ 📦 📊 📅 📄 🗑️										
Image	Product Name	Barcode	Category	Price (Incl GST)	Price (Excl GST)	Profit	Cost Price	GST %		
	Glucose Biscuits Family Pack	10136	FMCG	40.00	33.90	3.01	30.89	18.00		
	Masala Dosa	40001	CAFE MENU	120.00	114.29	68.29	46.00	5.00		
	Idli Vada	40002	CAFE MENU	90.00	85.71	51.71	34.00	5.00		
	Veg Biryani	40003	CAFE MENU	220.00	209.52	125.52	84.00	5.00		
	Chicken Biryani	40004	CAFE MENU	280.00	266.67	160.67	106.00	5.00		
	Paneer Butter Masala	40005	CAFE MENU	240.00	228.57	137.57	91.00	5.00		
	Butter Naan	40006	CAFE MENU	50.00	47.62	28.62	19.00	5.00		
	Tandoori Roti	40007	CAFE MENU	30.00	28.57	17.57	11.00	5.00		
	Veg Fried Rice	40008	CAFE MENU	180.00	171.43	103.43	68.00	5.00		
	Veg Manchurian	40009	CAFE MENU	180.00	171.43	103.43	68.00	5.00		
	Gobi 65	40010	CAFE MENU	160.00	152.38	91.38	61.00	5.00		
	Chicken 65	40011	CAFE MENU	240.00	228.57	137.57	91.00	5.00		
	Filter Coffee	40012	CAFE MENU	40.00	38.10	23.10	15.00	5.00		
	Masala Chai	40013	CAFE MENU	30.00	28.57	17.57	11.00	5.00		

Figure 1. The product list

- 1

Search, category and location
- 2

Add a product
- 3

Load from or save to Excel
- 4

Edit, stock, rates, images, placement, delete
- 5

Stock at the chosen location

Before you start

Privilege **Product View**. Adding needs **Product Create**, editing **Product Update**, and the cost and profit columns **Profit**.

Good to know

- Delete on this list only switches a product off; its history stays.

Adding and Editing a Product

Name, barcode, HSN, prices and GST, category, reorder settings, and how the item is tracked.

Who	Stock manager	How often	When a new item arrives
-----	---------------	-----------	-------------------------

Why it matters

GST is worked out from these rates on every bill, and the reorder level decides when you are told to buy more.

How to use it

1. Type the **Title** and **Barcode** (press **Generate** for your own), and the **HSN Code**.
2. Enter the **MRP (Incl GST)**, the **Cost Price** and the GST: type **SGST %** and **CGST %** (IGST fills itself), and **Cess %** if any. Set the **Offer Price** if you sell below MRP.
3. Choose the **Category** (press **New** to add one), and the brand, unit and other details.
4. Under **Automatic Reordering**, set the **Reorder Level (ROL)**, the **Reorder Qty** and the **Preferred Supplier**. Tick **Auto Reorder** to have purchase orders drafted for you.
5. Tick **Has Batch** for items with batches and expiry dates, **Has Serial Number** for items tracked one by one (mobiles, appliances), and **Is Service** for things that are not stock.
6. For a new product, type the **Opening Stock** and its **Location**. Press **Save Product**.

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

+ NEW INVOICE

1

Title

Men's Cotton Shirt - Blue Check

Barcode

10001

GENERATE

2

HSN Code

6205

Description — Plain text or HTML (shown on eCommerce)

Men's Cotton Shirt - Blue Check by UrbanThread

Plain text or HTML accepted. Allowed tags: p, br, strong, em, ul, ol, li, h1-h6, a, img, table, blockquote, hr, code, pre. Scripts and unsafe markup are stripped on the storefront.

Preview as eCommerce will render

3

MRP (incl GST)

1,199.00

4

Cost Price

751.80

SGST %

2.50

CGST %

2.50

IGST %

5.00

Cess %

0.00

Basic Price

1,141.90

MRP (Excl GST)

1,141.90

5

Offer Price (incl GST)

1,199.00

Offer Price (Excl GST)

1,141.90

Discount %

Discount Rs

Profit: ₹390.10

Discount %

0.00

6

Category

MEN'S WEAR

NEW

Brand

UrbanThread

NEW

UQC

PCS

Article Code

ART-10001

Size

L

Figure 2. Prices, GST and category

- | | | | |
|---|--------------------|---|----------------------------|
| 1 | Name and barcode | 4 | GST and cess rates |
| 2 | HSN code | 5 | Selling price if below MRP |
| 3 | MRP and cost price | 6 | Category |

STOCK2TRACK CLASSIC BLUE QUICK INVOICE NEW INVOICE

Color: Blue Gender: Style (Shelf):

Style Code (Rack): Min Stock Qty (Alert): 10

Automatic Reordering

1 Reorder Level (ROL): 10 Reorder Qty: 21 2 Preferred Supplier: Apex Garments Wholesale 3 Auto Reorder: ☐

SUGGEST FROM SALES HISTORY Open Reorder Simulator

Inventory Classification

Criticality (VED): Desirable Procurement (SDE): Easy

Kit / Bill of Materials

Kit Mode: Normal product (no kit) Is Service: ☐ Is Traceable: ☒ 4 Has Serial Number: ☐

5 Has Batch (Multi-MRP): ☐ Active: ☒

6 SAVE PRODUCT CANCEL DELETE

Product Variants REFRESH

Assigned Variant Types:

Figure 3. Reorder settings and how the item is tracked

- | | |
|--|-------------------------------------|
| 1 Reorder level: below this, it is low stock | 4 Track each piece by serial number |
| 2 Supplier to order from | 5 Track batches, MRP and expiry |
| 3 Draft purchase orders automatically | 6 Save |

Before you start

Privilege **Product Create** (new) or **Product Update** (edit).

Good to know

- The Offer Price cannot be more than the MRP.
- The **Reorder Level** is what the Low Stock report uses, not "Min Stock Qty".
- For a product with variants, **Save Variants** changes stock only at the chosen Stock Location. A variant that has stock or sales is switched off instead of deleted.

Adding and Removing Stock

Add opening stock, a found carton, or remove damaged stock, with the change written to the stock ledger.

Who	Stock manager	How often	When stock arrives without a bill
-----	---------------	-----------	-----------------------------------

Why it matters

Every change is logged with the person and the time. Stock that changes without a trace is how goods disappear.

How to use it

1. Open **Inventory › Update Quantity**, search for the product and press **Add Qty**.
2. For an ordinary item, type the **Quantity** (a minus figure removes stock) and choose the **Location**.
3. For a batch item, type the **Batch No**, its **MRP**, cost, **Quantity**, and expiry and manufacturing dates. The batches already in stock are listed below.
4. For a serial-numbered item, type or scan each serial number and press **Add** to build the list.
5. Press **Add** and confirm. To add the same quantity to many ordinary items, tick them and use **Apply to Selected**.

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

NEW INVOICE

Update Quantity

1

Search Product

Q

Location

Main Store

Category

All Categories

	Actions	Product Name	Barcode	Price (Excl GST)	Available
☐	3 ADD QTY	18K Diamond Ring	50003	46,897.60	3
☐	ADD QTY	22K Gold Bangles (pair)	50002	2,57,779.05	3
☐	ADD QTY	22K Gold Chain 20 inch	50004	1,01,072.40	3
☐	ADD QTY	22K Gold Coin 8 g	50008	63,948.00	2
☐	ADD QTY	22K Gold Earrings – Jhumka	50005	71,795.50	2
☐	ADD QTY	22K Gold Necklace – Lakshmi Design	50001	2,01,031.20	3
☐	ADD QTY	Assam Tea 500 g	10133	266.67	35
☐	ADD QTY	Basmati Rice 5 kg	20003	618.10	65
☐	ADD QTY	Bath Soap 4-Pack	10138	135.59	18
☐	ADD QTY	Bath Towel – Cotton	10016	427.62	125
☐	ADD QTY	Brownie with Ice Cream	40017	142.86	200
☐	ADD QTY	Butter Naan	40006	47.62	200
☐	ADD QTY	Charging Port Module	30003	761.86	12
☐	ADD QTY	Chicken 65	40011	228.57	200

Figure 4. Update Quantity

- 1

Find the product and location
- 2

Stock now
- 3

Add or remove stock

Add Quantity

Assam Tea 500 g

1 Batch No *

2 MRP (Incl GST) 280

3 Cost Price 205.97 Quantity 0

Expiry Date 17-Oct-2026 MFG Date 17-Oct-2026

Location Main Store

4 Existing Batches at this Location

Batch No	MRP	Cost	Available	Expiry	Received
AS-241220M10	280.00	205.72	0.00	22-Dec-2025	22-Dec-2024
AS-250118M39	280.00	204.25	0.00	20-Jan-2026	20-Jan-2025
AS-250201M54	280.00	204.32	0.00	03-Feb-2026	03-Feb-2025
AS-250321M97	280.00	194.42	0.00	23-Mar-2026	23-Mar-2025

ADD CANCEL

Figure 5. Adding a batch

- 1 Batch number
- 2 MRP of this batch
- 3 Cost, quantity, expiry and manufacturing dates
- 4 Batches already in stock

Before you start

Privilege **Quantity Update**. Choosing another branch needs **All Branches**.

Good to know

- Goods bought on a supplier bill are added from the purchase, not here (see the Purchases manual).
- A batch that has sold stock cannot be deleted; deactivate it instead.

Location and Partner Prices

A different price for a branch, or for a type of buyer such as wholesale.

Who	Owner	How often	When prices differ by branch or buyer
-----	-------	-----------	---------------------------------------

Why it matters

Wholesale customers get their price automatically, and the counter cannot give it to anyone else.

How to use it

1. On the product list, press the **Location / Partner Rates** icon on the product.
2. The top shows the default price. Change the **SP Inc GST**, **Profit %** or **Offer Price** and press **Update**.
3. Under **Add Partner Rate**, choose the location, the **Partner** (Wholesale, Sales) and the **Rate**, and press **Add**. The table shows every location and partner price; click a figure to change it.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Location Rates

Men's Cotton Shirt - Blue Check

1

Default Rate (Inc GST): 1199.00

SP Inc GST

1199.00

Profit %

48.23

Offer Price

1199.00

Discount %: 0.00

2

UPDATE

3

Add Partner Rate

Unit

Main Store

Partner

WHOLESALE

Rate

999.00

ADD

4

Unit	SALES	WHOLESALE
Main Store	999	

DELETE SELECTED

CLOSE

Figure 6. Location and partner prices

- 1

Default price
- 2

Save a new default price
- 3

Location, partner and rate
- 4

Prices by location and partner

Before you start

Privilege **Product Update**.

Good to know

- Choose the partner on the bill and its price is used.

Counting Stock

Count what is on the floor, compare it with the system, and correct the difference with a reason.

Who	Stock manager	How often	Monthly, or a section each week
-----	---------------	-----------	---------------------------------

Why it matters

The difference is shrinkage: theft, damage or mistakes. Counted regularly, it is found while it is small and while people still remember.

How to use it

1. Open **Inventory › Stock Verification** and choose one **Location**.
2. Scan or choose each product, type the **Physical Qty** you counted, and press **Verify**. The **Difference** column shows shortages and surpluses.
3. When the count is done, press **Select Adjustables**, type the **Reason for Adjustment**, and press **Update Adjustments**. Stock is corrected and each change is logged as a shortage or surplus.
4. The **Adjustment Audit Log** lists every adjustment with the user, quantity and reason.

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

+

NEW INVOICE

Stock Verification

1 Location

Main Store

☐ All Locations

Product Barcode

2 Product Name

Physical Count

0.000

VERIFY

SELECT ADJUSTABLES

UNSELECT ALL

Selected: 0

4 Reason for Adjustment

Monthly count - 2 missing

5 UPDATE ADJUSTMENTS

Found 78 products

☐	Product Name	Available	Sold	Barcode	Physical	3 Difference	Rate	Asset Value	Sale Value	Category
☐	Men's Cotton Shirt - Blue Check	10.000	18.000	10001	8.000	2.000	1,199.00	7,518.00	11,990.00	MEN'S WEAR
☐	Glucose Biscuits Family Pack	371.000	0.000	10136			40.00	11,460.19	14,840.00	FMCg
☐	Masala Dosa	200.000	0.000	40001			120.00	9,200.00	24,000.00	CAFE MENU
☐	Idli Vada	200.000	0.000	40002			90.00	6,800.00	18,000.00	CAFE MENU
☐	Veg Biryani	200.000	0.000	40003			220.00	16,800.00	44,000.00	CAFE MENU
☐	Chicken Biryani	200.000	0.000	40004			280.00	21,200.00	56,000.00	CAFE MENU
☐	Paneer Butter Masala	200.000	0.000	40005			240.00	18,200.00	48,000.00	CAFE MENU
☐	Butter Naan	200.000	0.000	40006			50.00	3,800.00	10,000.00	CAFE MENU
☐	Tandoori Roti	200.000	0.000	40007			30.00	2,200.00	6,000.00	CAFE MENU

Figure 7. A stock count

- 1 One location

2 Product and the quantity counted

3 Shortage or surplus

4 Why the stock is being corrected

5 Correct the stock

Before you start

Privilege **Stock Verification View**; correcting stock needs **Stock Adjustments**.

Good to know

- Give Stock Adjustments only to the owner or a trusted manager. Check the audit log every month.

Counting a Shelf

Scan a shelf label, count the products on it, and save the count.

Who	Stock staff	How often	A few shelves every day
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Why it matters

A few shelves a day means the whole shop is checked every month without closing.

How to use it

1. Open **Inventory > Shelf Verification**. Scan the shelf label or type the **Shelf Code** and press **Scan**.
2. The products placed on that shelf are listed with the quantity expected there. Type what you count in **Physical Qty**; the difference shows at once.
3. Press **Save Audit**. The count is kept with your name and the time, and appears in **Reports > Shelf Audit History**.

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QUICK INVOICE

NEW INVOICE

Shelf Stock Verification

1 Shelf Code
10024-HOM-A1-S01

SCAN

4 SAVE AUDIT

2

Shelf: Shelf 1

LocationMain Store

ZoneHome Textiles

RackRack A

Shelf Code10024-HOM-A1-S01

Products on Shelf (2)

Product Name	Barcode	Expected Qty	System Stock	3 Physical Qty	Difference
Bath Towel - Cotton	10016	20	125	20	0
Double Bedsheet with 2 Pillow Covers	10015	15	1	15	0

Figure 8. A shelf count

- 1

Scan the shelf label
- 2

The shelf and where it is
- 3

Type what you count
- 4

Save the count

Before you start

Privilege **Shelf Verification**. Shelves are set up in the placement screens.

Good to know

- After saving, a manager with **Stock Adjustments** can press **Adjust Stock**. The location's stock moves by the difference between what was counted and what was expected on this shelf, once per audit, and the shelf's quantity becomes the counted figure.

Moving Stock Between Branches

Send stock from one location to another. The receiving branch accepts it when it arrives.

Who	Stock manager	How often	When a branch needs stock
-----	---------------	-----------	---------------------------

Why it matters

Stock in transit belongs to nobody until it is accepted. Two steps mean what left one branch is confirmed at the other.

How to use it

1. Open **Inventory > Transfer Inventory**. Choose the **From Location** and **To Location**.
2. Add products by barcode or name with the **Qty**, or type an **Indent No** and press **Load** to fill the request. Serial items need their serials chosen.
3. Press **Save Transfer**. The stock leaves the sending branch and is in transit, with a transfer number (STN).
4. At the receiving branch, open **Inventory > Accept Inventory**, tick what arrived, and press **Accept**. Press **Reject** to send it back.

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QUICK INVOICE

NEW INVOICE

Inventory Transfer

New Transfer

From Location

Main Store

To Location

Kukatpally Branch

Transfer Date

17-10-2026

Invoice Ref

Reject

Dump

Indent No

Enter indent number

LOAD

Barcode

Scan or type barcode

Product Name

Qty

1.00

+ ADD

10 available at source

Transfer Items (1)

DELETE SELECTED

SAVE TRANSFER

	S.No	Product Name	Barcode	Category	Unit Price	Qty	GST %	Cess %	Total	Serial Numbers
☐	1	Men's Cotton Shirt - Blue Check	10001	MEN'S WEAR	751.80	5.00	5.00	0.00	3,759.00	
Grand Total:									3,759.00	

Transfer History

From Location

-- All --

To Location

Godown

From Date

17-09-2026

To Date

17-10-2026

Completed

In Transit

STN#

FILTER

STN #	Created On	In Transit	Transferred	Qty	Total Value	Status	Inv Ref
-------	------------	------------	-------------	-----	-------------	--------	---------

Figure 9. A transfer

- From and to
- Load an indent
- Add products and quantity
- What is being sent
- Send it

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Accept Inventory

Location

All

REFRESH

☒	Initiated On	Product Name	Transferred	Serial Number	From Location	To Location
☒	17-10-2026 17:17:15	Bath Towel - Cotton	20		Main Store	Kukatpally Branch

1 selected

ACCEPT

REJECT

Figure 10. Accepting at the branch

- 1 Your branch

2 Stock on its way to you

3 Accept what arrived, or send it back

Before you start

Privileges **Stock Transfer** and **Accept Inventory**.

Good to know

- Each line is accepted whole; there is no part acceptance. Reject a line that arrived short and send a new transfer.
- If the setting Auto Accept Inventory is on, transfers are accepted at once.

Asking for Stock (Indents)

A branch writes down what it needs. The main store sends it with a transfer.

Who	Branch staff	How often	When stock runs low
-----	--------------	-----------	---------------------

Why it matters

Requests in writing stop "I told you on the phone" arguments, and the transfer can be loaded straight from the indent.

How to use it

1. Open **Inventory > Raise Indent** and press **Create Indent**.
2. Scan or choose each product, type the **Indent Qty** and press **Add**.
3. Choose the **Location** asking for it and press **Create Indent**. The indent is numbered and shows as **Open** until it is served.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Raise Indent

Add Product

Barcode

Product Name

Indent Qty

+ ADD

Scan or type barcode

0.00

Line Items (1)

Barcode	Product Name	Available Qty	Indent Qty	Category	
10001	Men's Cotton Shirt - Blue Check	10.00	10.00	MEN'S WEAR	

Location

Main Store

CREATE INDENT

CANCEL

Summary

Total Items: 1

Total Indent Qty: 10.00

Location: Main Store

Figure 11. An indent

- 1

Product and quantity needed
- 2

Lines requested
- 3

Branch asking
- 4

Create the indent

Before you start

Privilege **Indent**.

Good to know

- A served indent cannot be changed or deleted.

Purchase Orders

Orders to suppliers. They do not change stock; the supplier's bill does.

Who	Owner, buyer	How often	Weekly
-----	--------------	-----------	--------

Why it matters

An order in writing is what you check the supplier's bill against.

How to use it

1. Open **Inventory > Replenish Stock** to see your orders. Click one to see its lines.
2. Press **Create PO**. Choose the supplier and location; the supplier's products are listed with their stock and reorder level. Add lines with the quantity and cost, and press **Create PO**.
3. Press **PDF** to send it. When the supplier's bill is entered, the order lines are ticked off.
4. With the Auto Reorder module on, **Inventory > Auto Reorder** drafts orders for items below their reorder level. Review, then **Approve** (or **Approve + WhatsApp** to send it to the supplier).

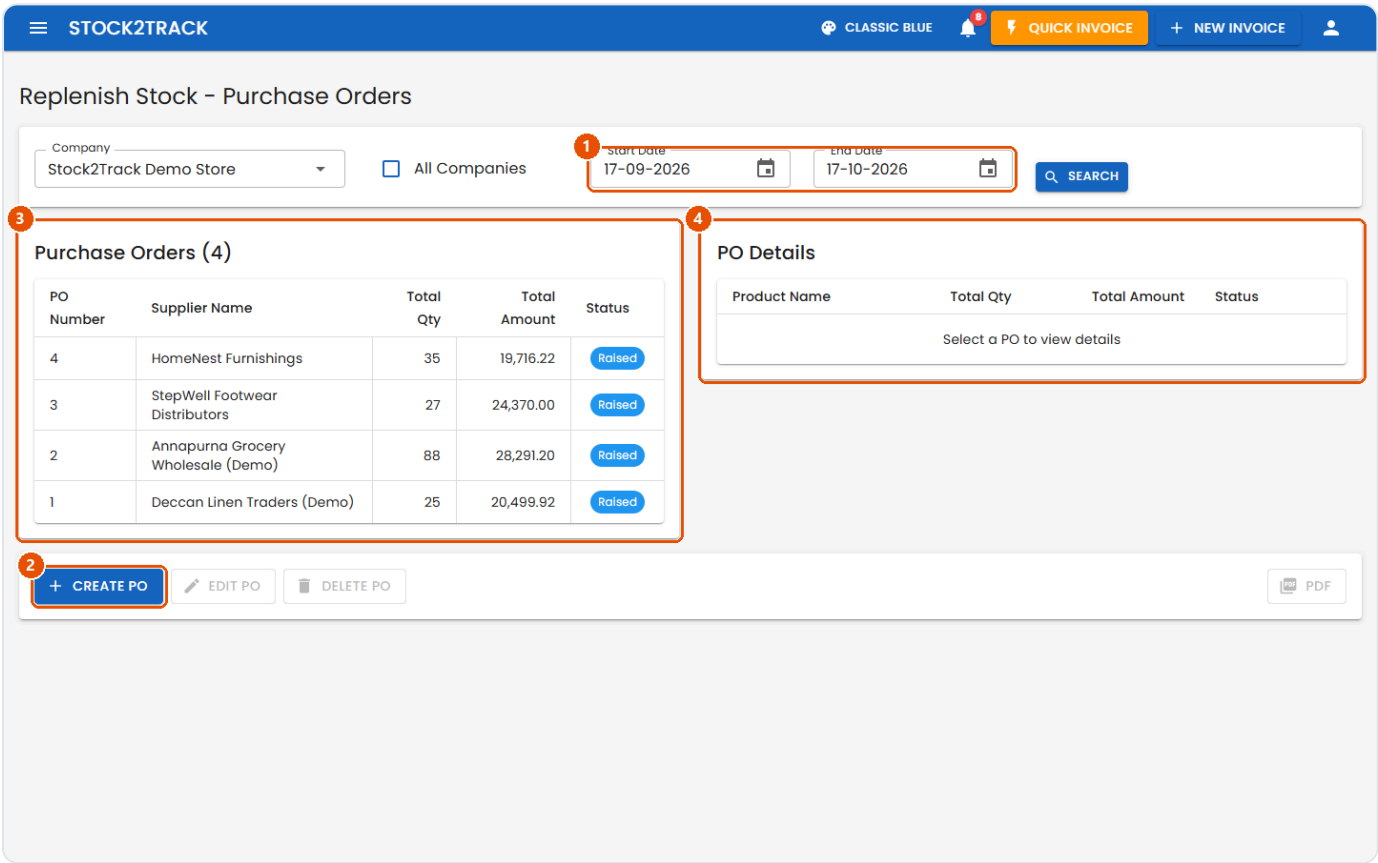


Figure 12. Purchase orders

- 1

Dates
- 2

New purchase order
- 3

Your orders
- 4

Lines of the chosen order

Before you start

Privilege **Replenish**; Auto Reorder needs **Auto Reorder View** or **Auto Reorder Approve**.

Repacking and Assembling

Turn one product into another: a 25 kg bag into 1 kg packs, parts into a hamper.

Who	Stock manager	How often	When you repack or build
-----	---------------	-----------	--------------------------

Why it matters

Stock that is repacked without being recorded shows as a shortage of one item and a surplus of another.

How to use it

1. Open **Inventory > Final Product (Assemble)** and choose the **Location**.
2. Under **Source Products**, add what you take from stock and the quantity used.
3. Under **Final Products**, add what you made and the quantity.
4. Press **Convert** and confirm. Both movements appear in the stock ledger. For a product with a saved recipe, choose it and press **Load Recipe**.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Final Product (Convert / Assemble)

Location

Main Store

1

Recipe (kit product)

Units to build

1

LOAD RECIPE

Products with a saved Bill of Materials

2

Source Products (Subtract From)

Product Name

Sugar 1 kg

Barcode

+

Product Name	Barcode	Portion	UQC	Available	Remove
No source products added					

3

Final Products (Add To)

Product Name

Barcode

+

Final Product Name	Barcode	Portion	UQC	Available	Remove
No final products added					

4

CONVERT

CLOSE

Figure 13. Repacking

- 1

 Load a saved recipe
- 2

 What you take from stock
- 3

 What you make
- 4

 Convert

Before you start

Privilege **Product Create**.

Good to know

- Serial-numbered products cannot be converted.

Discount Schemes

Buy two get one free, a category discount, or a discount on a bill above a value, between two dates.

Who	Owner	How often	For each promotion
-----	-------	-----------	--------------------

Why it matters

The scheme is applied at the counter by itself. The cashier cannot forget it, and cannot invent one.

How to use it

1. Open **Inventory > Discount Schemes**. Choose what the scheme is on: **Product, Category, Bill Value** or **Combo Pack**.
2. Type a **Scheme Name** and the **Start Date** and **End Date**.
3. Choose the **Discounted Item**: free items, a price discount, or a coupon value. For buy-and-get-free, set **Buy Qty** and **Free Qty**, and the free product if it is different.
4. Set the **Priority** (lower runs first) and press **Add**.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Discounting Schemes

Add New Scheme

1 Discount On

Product

Discount Value On

0.00

Scheme Name

2 Start Date

2026-10-17

End Date

2026-11-17

3 Discounted Item

Free Item(s)

Product

Discount/Coupon Value

0.00

4 Buy Qty

1.00

Free Qty

1.00

Free Product (option..)

Blank = same product

Priority

100

Lower = first

Active

5 + ADD

Discount On

Discount Value On

Scheme Name

Start Date

End Date

Product/Category Name

Discounted Item

Disc

DELETE SELECTED

Figure 14. A discount scheme

- 1

Product, category, bill value or combo
- 2

When it runs
- 3

Free items, a price discount or a coupon
- 4

Buy N, get M free
- 5

Add the scheme

Before you start

Privilege **Product Update**.

Printing Barcode Labels

Price and barcode labels for products, from a template made in the Barcode Designer.

Who	Stock staff	How often	When stock arrives
-----	-------------	-----------	--------------------

Why it matters

A labelled item scans at the counter at the right price, every time.

How to use it

1. Open **Inventory > Barcodes** and choose a **Template**.
2. Add products from **Available Products**, or load every item on a supplier's bill. Set how many copies of each.
3. Press **Preview**, then **Print**. For A4 sheets, tick **A4 Page** and set the rows, columns and margins.

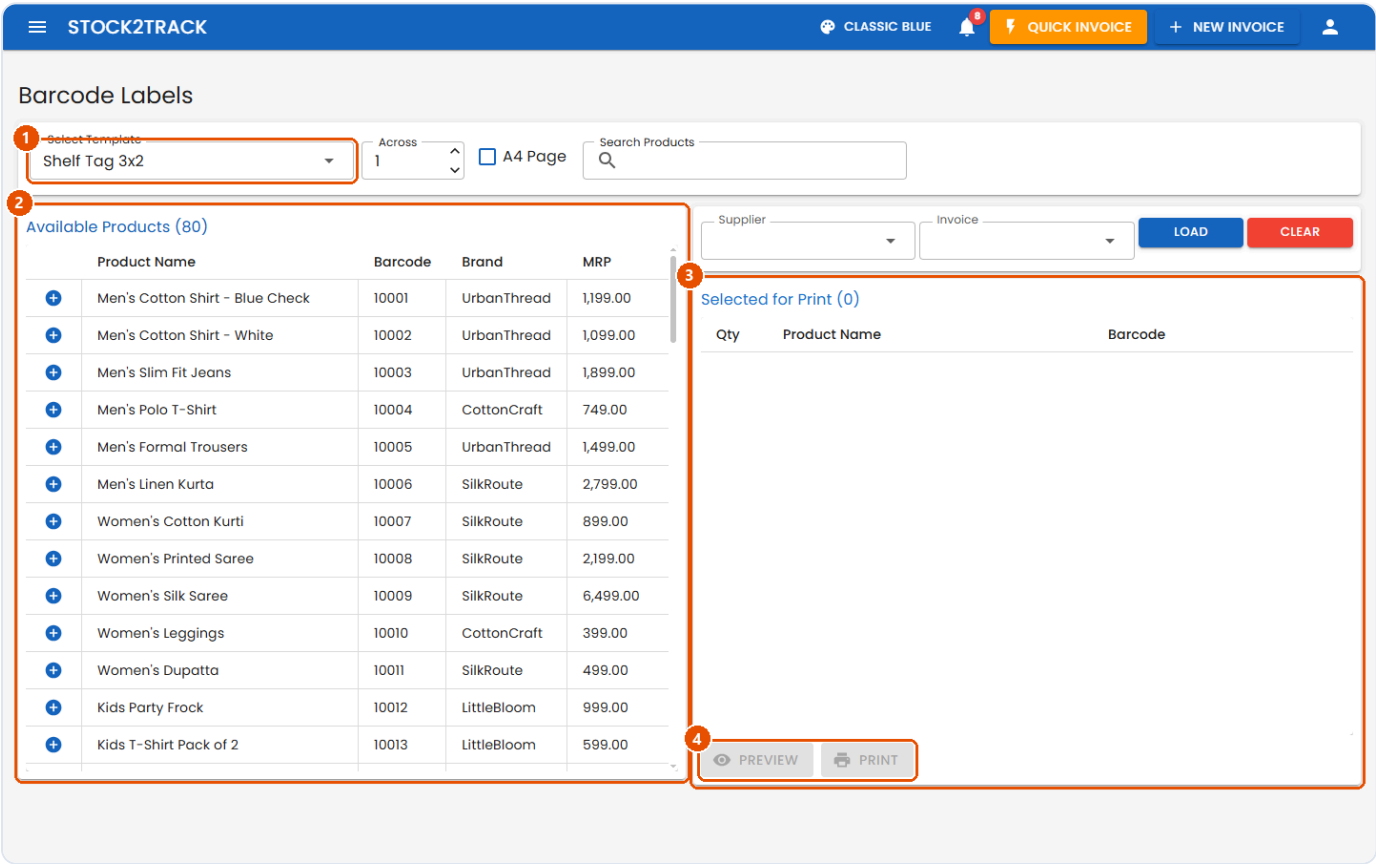


Figure 15. Barcode labels

- 1

Label template
- 2

Products to choose from
- 3

Labels to print and how many
- 4

Preview and print

Before you start

Privilege **Barcode creation**.

The Stock Ledger

Every movement of one product: opening stock, purchases, sales, transfers, adjustments, with the running balance and who did it.

Who	Owner	How often	When a figure looks wrong
-----	-------	-----------	---------------------------

Why it matters

When stock does not match, the ledger shows exactly when and how it changed, and by whom.

How to use it

1. Open **Reports > Stock & Inventory > Inventory Ledger**. Choose the dates, the product and the location, and press **Search**.
2. The tiles show opening stock, total in, total out, the expected closing figure and the actual stock. A **Discrepancy** means stock changed without a logged movement.
3. Each line shows the operation, quantity, running balance and the user.

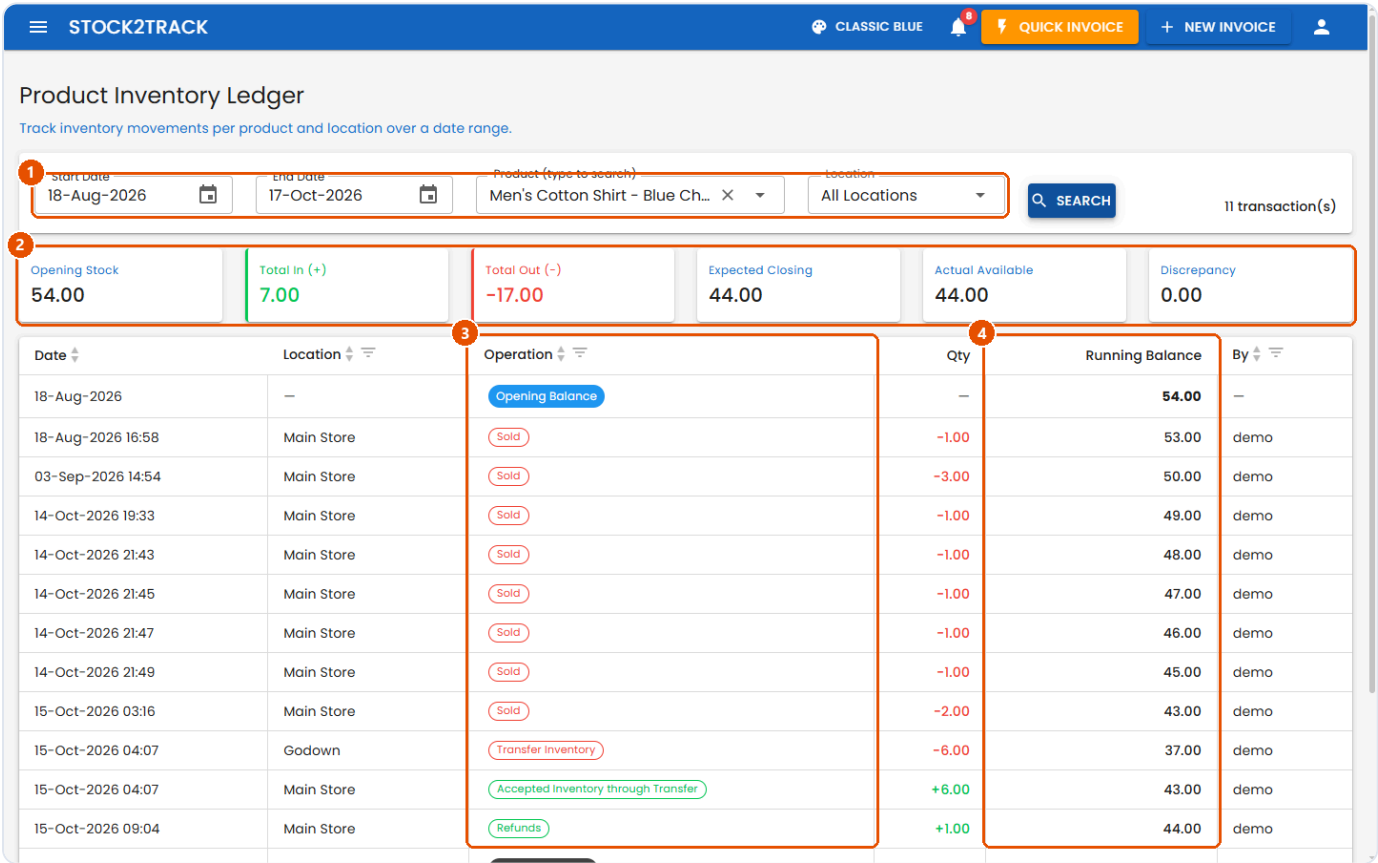


Figure 16. The stock ledger

- 1

Dates, product and location
- 2

Opening, in, out, expected, actual and discrepancy
- 3

What happened
- 4

Stock after each movement

Before you start

Privilege **View Product.**

Expiry and Low Stock

Batches close to expiry, and items at or below their reorder level.

Who	Stock manager	How often	Weekly
-----	---------------	-----------	--------

Why it matters

Expired stock is money written off; out-of-stock is a sale lost. Both are seen a week ahead here.

How to use it

1. Open **Batch Expiry Report**. Choose **Already Expired** or **Expiring in 30/60/90 Days** and press **Search**. Sell or return what is close to expiry.
2. Open **Low Stock Alert** and press **Generate**. Every item at or below its reorder level is listed with the shortage. Order these first.
3. **Stock Report** lists every product with its age and how much of what came in has sold.

STOCK2TRACK

CLASSIC BLUE
QUICK INVOICE
NEW INVOICE

Batch Expiry Report

Location
All Locations

1 Expiry Filter
All with Expiry

SEARCH

29 batches found

Product	Batch No	MRP	Available	Expiry Date	2 Days Left	3 Status	Location
Mango Pickle 500 g	MA-251001M38	210.00	7.00	03-Oct-2026	-14	EXPIRED	Main Store
Mango Pickle 500 g	MA-251001B39	210.00	2.00	03-Oct-2026	-14	EXPIRED	Kukatpally Branch
Glucose Biscuits Family Pack	GL-260620M23	40.00	188.00	20-Oct-2026	3	Expiring Soon	Main Store
Glucose Biscuits Family Pack	GL-260623M24	40.00	183.00	23-Oct-2026	6	Expiring Soon	Main Store
Instant Noodles 4-Pack	IN-260425B83	60.00	100.00	24-Oct-2026	7	Expiring Soon	Kukatpally Branch
Cow Ghee 1 L	CO-260210M30	690.00	56.00	09-Nov-2026	23	Expiring Soon	Main Store
Assam Tea 500 g	AS-251201B82	280.00	58.00	03-Dec-2026	47	OK	Kukatpally Branch
Wheat Atta 5 kg	WH-260908M65	285.00	16.00	09-Dec-2026	53	OK	Main Store
Wheat Atta 5 kg	WH-261011B84	285.00	41.00	11-Jan-2027	86	OK	Kukatpally Branch
Glucose Biscuits Family Pack	GL-260924B79	40.00	32.00	24-Jan-2027	99	OK	Kukatpally Branch
Instant Noodles 4-Pack	IN-260926M80	60.00	15.00	27-Mar-2027	161	OK	Main Store
Toor Dal 1 kg	TO-260914M71	189.00	23.00	13-Jun-2027	239	OK	Main Store
Sunflower Oil 1 L	2929-260915B73	165.00	15.00	14-Jun-2027	240	OK	Kukatpally Branch

Figure 17. Batch expiry

- 1 Expired, or expiring within 30/60/90 days
- 2 Days left (minus = already expired)

- 3 Expired, Expiring Soon or OK

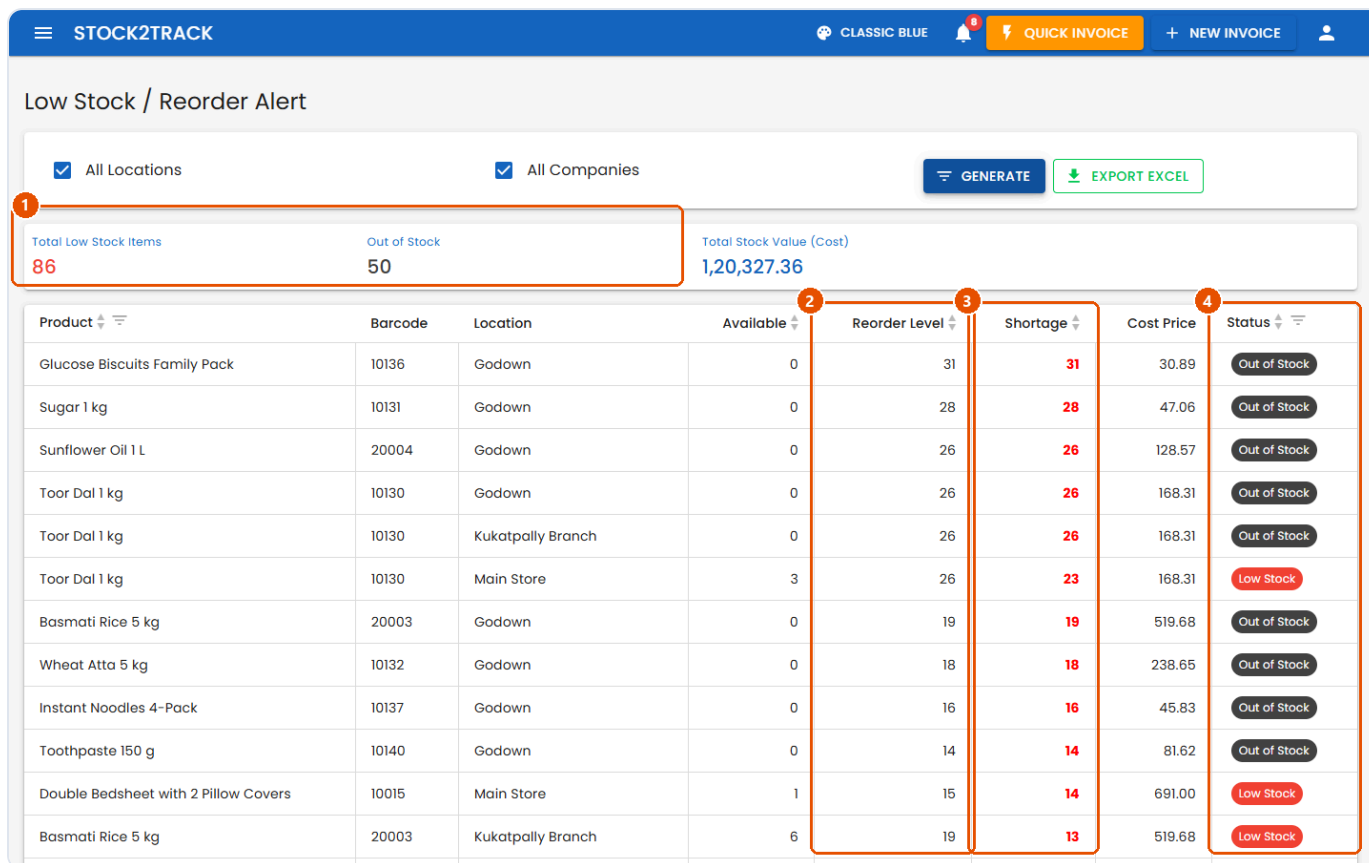


Figure 18. Low stock

- 1 How many items are low or out
- 2 The product's reorder level
- 3 How many short
- 4 Out of Stock or Low Stock

Before you start

Privileges **Batch Expiry Report** and **Stock Report**.

Good to know

- An item with no reorder level set is never reported as low.

Permissions

Permission	What it allows	Who
Product View / Create / Update / Delete	The product list and changes to it	Stock manager
Quantity Update	Adding or removing stock without a bill	Stock manager
Stock Verification View	Counting stock	Stock staff
Stock Adjustments	Correcting stock after a count	Owner
Shelf Verification	Shelf counts	Stock staff
Stock Transfer / Accept Inventory	Sending and receiving between branches	Branch managers
Indent / Replenish	Requests and purchase orders	Branch, buyer
Profit	Cost prices and profit	Owner
All Branches	Working with other branches' stock	Owner

Stock movements in the ledger

Operation	Comes from
Opening Stock	A new product saved with stock
Qty Added	Update Quantity
Stock Verification Shortage / Surplus	A count that was adjusted
Shelf Adjustment	Adjust Stock after a shelf count
Transfer Inventory	Stock sent to another branch
Converted	Repacking or assembling