

Bijoy Stock Inventory Manager Erp

Most advanced and robust software for stock inventory management and order processing.

This automated system keeps tracking of inventory, order, shipment, payment
which accelerate your business in real life.

Bijoy integrates both product purchase and sales order in a single platform.

User Manual

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Contents

- Introduction
- Admin Panel
 - User Management
 - Adding a new user
 - Adding address info to user profile
 - Inventory Management
 - Sales Order Management
 - Adding a new order
 - Processing sales orders
 - Purchase Order Management
 - Adding a new order
 - Processing purchase orders
 - Reports
 - Settings
 - System settings
 - Language settings
 - SMTP settings
 - Shipping method and courier services
 - Tax
 - Profile
- Customer Panel
 - Order Management
 - Profile
- Employee Panel
 - Sales Order Management
 - Purchase Order Management
 - Inventory
 - Profile

Introduction

Bijoy Stock Inventory Manager Erp is an intuitive platform that helps to go through the complex and time consuming steps of stock inventory management and order processing in a hassle-free way. The application allows three types of user to access the system and contribute to the processing stages obviously with the permission previously set by the administrator. The admin, employees and customer login makes the system more user friendly as well as co-operational. The application is designed to process both sales and purchase orders which will be described elaborately later on in this document. For the better management of sales orders the application divides the whole process into 5 different stages which makes the process management a lot easier eventually making it more organized for keeping track of shipments. The application also handles the purchase order processing so that the admin can keep track of the stock level. As a whole it is a great way for managing orders as well as company inventory.

Admin Panel

User Management

There are 4 types of users for the system.

1. Admin
2. Customer
3. Employee
4. Supplier

Of them admin, customer and employees can directly log in to the system. For supplier there is no log in.

Name	Contact	Options
 Mr. Customer Customer	customer@example.com +1234556	Action ▾
 Miss. Employee Employee	employee1@example.com +123456	Action ▾
 Mr. Employee Employee	employee2@example.com +12345678	Action ▾
 Mr. Supplier Supplier	supplier@example.com +123456	Action ▾
 Camden Foster Customer	hifufih@hotmail.com +472-57-4245743	Action ▾
 Hanae Summers Customer	wycadofei@hotmail.com +212-30-7658300	Action ▾

Admin can see the users of the system all at once or he/she can separately browse the users according to their types as shown in the above image. It is also quite easy to view profile of any user. By just clicking on the name of the user or from the action dropdown admin can get access to user profile or user edit page or even can delete the user if he/she wants. Before going to the edit or profile page lets see how an admin can add user to the system. The top right button leads to the page where admin can submit the form of adding user.

Adding New User

The image below represents an untouched form for adding users.

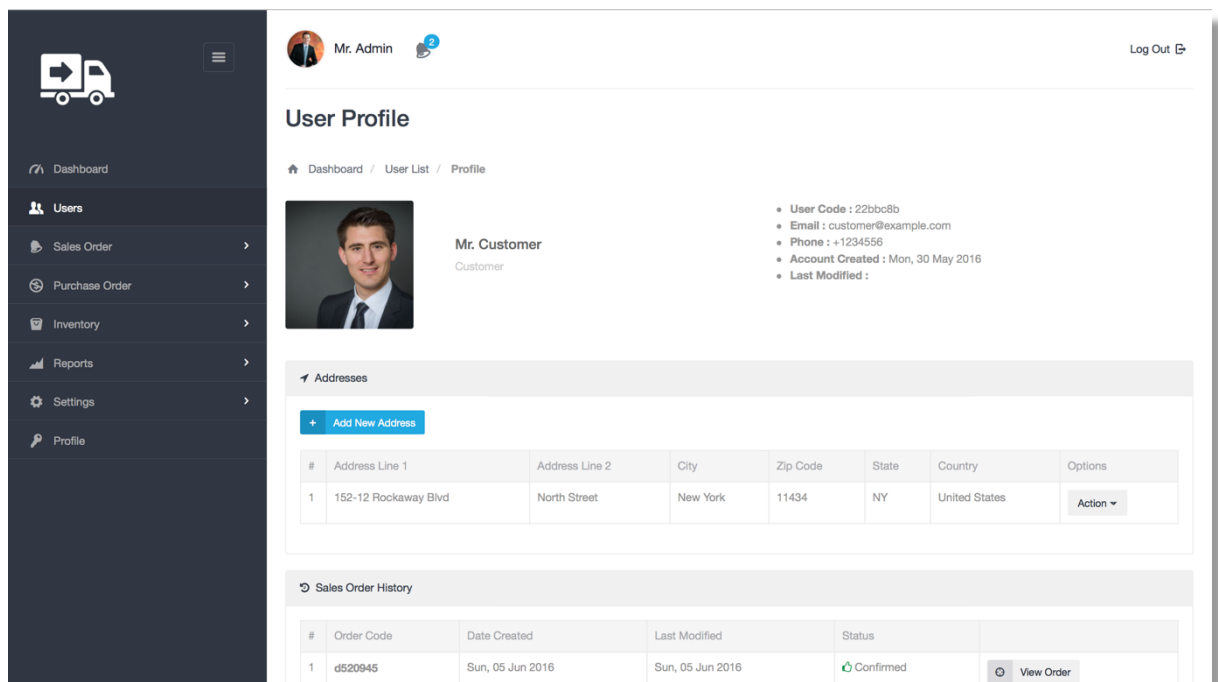
The screenshot shows the 'Add New User' form in a dashboard. The form is titled 'Add New User' and is located under the 'Users' menu. The form is divided into two main sections: 'User Information' and 'Address Information'. The 'User Information' section includes fields for Name, Email, User Type (a dropdown menu), Phone, Gender (a dropdown menu), and Photo (a placeholder with 'no photos' and a 'Select Image' button). The 'Address Information' section includes fields for Address Line-1, Address Line-2, City, Zip Code, State, and Country (a dropdown menu). A green 'Save User' button is located at the bottom right of the form. The dashboard header shows 'Mr. Admin' and a 'Log Out' link. The left sidebar contains navigation options: Dashboard, Users, Sales Order, Purchase Order, Inventory, Reports, Settings, and Profile.

The left portion of the form is for taking general information about the user and right portion is for taking the detailed address of the user. The system can take multiple addresses for a single user in case any user has more than one address. It becomes quite handy when it comes to different shipping and billing address for a single user/customer. The user type field determines the info which should be provided for adding that user. For example, when someone selects 'customer' as user type, a new password field will show up. When someone selects 'employee' as user type it will bring both password and user permission field which are necessary for adding user as employee. On selecting 'supplier' there will be no event because for adding supplier no extra filed is needed.

The screenshot shows the 'Add New User' form in a dashboard, with the 'Employee' user type selected. The form is titled 'Add New User' and is located under the 'Users' menu. The form is divided into two main sections: 'User Information' and 'Address Information'. The 'User Information' section includes fields for Name, Email, User Type (a dropdown menu set to 'Employee'), Phone, Gender (a dropdown menu), and Photo (a placeholder with 'no photos' and a 'Select Image' button). The 'Address Information' section includes fields for Address Line-1, Address Line-2, City, Zip Code, State, and Country (a dropdown menu). A green 'Save User' button is located at the bottom right of the form. The dashboard header shows 'Mr. Admin' and a 'Log Out' link. The left sidebar contains navigation options: Users, Sales Order, Purchase Order, Inventory, Reports, Settings, and Profile.

Adding Address to User Profile

As stated earlier, by clicking on the name of the user or from the action dropdown admin can get to user profile page.



The screenshot displays a user profile page for 'Mr. Customer'. The page includes a sidebar with navigation options like Dashboard, Users, Sales Order, Purchase Order, Inventory, Reports, Settings, and Profile. The main content area shows the user's profile information, including a photo, name, and role (Customer). A list of user details is provided: User Code: 22bbc8b, Email: customer@example.com, Phone: +1234556, Account Created: Mon, 30 May 2016, and Last Modified. Below this is a section for 'Addresses' with a '+ Add New Address' button and a table containing one address entry. The table has columns for #, Address Line 1, Address Line 2, City, Zip Code, State, Country, and Options. The address entry is: # 1, Address Line 1: 152-12 Rockaway Blvd, Address Line 2: North Street, City: New York, Zip Code: 11434, State: NY, Country: United States, and Options: Action. Below the addresses section is a 'Sales Order History' section with a table containing one entry: # 1, Order Code: d520945, Date Created: Sun, 05 Jun 2016, Last Modified: Sun, 05 Jun 2016, Status: Confirmed, and a View Order button.

#	Address Line 1	Address Line 2	City	Zip Code	State	Country	Options
1	152-12 Rockaway Blvd	North Street	New York	11434	NY	United States	Action

#	Order Code	Date Created	Last Modified	Status	
1	d520945	Sun, 05 Jun 2016	Sun, 05 Jun 2016	Confirmed	View Order

As it is seen, the profile page contains all the information about the user and there is also a table for his/her addresses. Clicking the 'add new address' button will bring the modal for address addition form to this user. Admin can add as many address as he needs and also has the ability to edit or delete the user.

Inventory Management

Adding A Product

The system can handle products both with variants and products without variants. From the image you can see that there is a selector selecting if the product has variant.

The screenshot shows the 'Add Product' form. The form is titled 'Add Product' and has a breadcrumb trail: 'Dashboard / Inventory / Add Product'. The form is divided into two columns. The left column contains fields for 'Code' (with a value of 'a2deb88'), 'Product Name', 'Brand', 'Category' (a dropdown menu), 'Description', and 'Variants' (a dropdown menu). The right column contains fields for 'Cost Price', 'Selling Price', 'Initial Stock', and 'Alert Quantity'. Below these fields is an 'Image' section with a placeholder that says 'no photos' and a 'Select Image' button. At the bottom of the form is a green 'Add Product' button. The footer of the page reads '© 2016 BIJOY | Creativeitem'.

If the product has variants, select that in the variants select box and that will bring out some fields where you can add information for the variant. You can add as many variants as you want for a product.


The screenshot shows the 'Variants' section. It features a table with columns for 'Type', 'Specification', 'Initial Stock', 'Alert Quantity', 'Cost Price', and 'Selling Price'. There are three rows of input fields, each with a red 'X' icon to its right. Below the table is a blue '+ Add Another Variant' button. At the bottom of the form is a green 'Add Product' button. The footer of the page reads '© 2016 BIJOY | Creativeitem'.

After adding a product if you want to add more variants later you can do that from the product details page. It should be noted that if during adding product if you don't select the product to have variant then you can't add variants later on.

Product Details

Dashboard / Inventory / Product Details

iPad Pro



Product Code : 4f2a9e0
Brand : Apple
Category : Electronics
Date Created : Mon, 30 May 2016

9.7 inch ipad model

[Edit Product Info](#)

[+ Add Variant](#)

📄 Variants

#	Code	Type	Specification	Cost Price	Selling Price	In Stock	Alert Cauntity	Options
1	914d7a8	colour/size	space grey/16 GB	700	750	10	5	Action ▾
2	4ad6d16	colour/size	space grey/128 GB	800	850	10	5	Action ▾
3	26dc698	colour/size	rose gold/ 64 GB	750	800	9	5	Action ▾

It should be kept in mind that you can't completely delete a product after adding. What you can do is to send the entry to the archive list. This can also be reversed.

Sales Order Management

Adding A New Sales Order

Add New Order

Dashboard / Sales Orders / Add New Order

Customer Information

Order Code: 5ab21df

Customer: Select A Customer

Seller: Mr. Admin

Billing Address: Select Customer First

Shipping Address: Select Customer First

Date: Tue, 07 Jun 2016

Products

Products	Price	In Stock	Qty	Discount %	Tax	Sub Total
iPad Pro - colour/size : space grey/16 GB	750	10	1	0	No Tax	750.00
Select A Product						

+ Add Another Product

TOTAL : USD 750.00

✓ Create Order

Adding a sales order is quiet easy. The new sales order add page has two panels as shown in the image above. One panel is for entering the customer information and the lower panel is for the products you want to include in the order.

The product selector shows all the products with variants and when you select a product it brings that product's selling price (which you have already added during adding the product to the inventory). In stock quantity is also shown here and there is option for adding discount or tax to the products individually. The tax comes from system settings which will be discussed later.

When you hit the 'create order' button the order is created as pending and a mail is sent to the customer regarding this order which he can see later on by logging in with his/her credentials.

Processing Sales Orders

As it was stated earlier that sales orders when created makes an entry as a pending order. Only admin and employees with sales orders managing permissions can process the orders.

Mr. Admin 2 Log Out

Process Order

Dashboard / Sales Orders / View Order

Sales Order #551ca1e

Pending > Confirmed > Partially Shipped > Shipped > Delivered Not Paid

Order Approval

- Overview
- Shipments
- Invoice
- Payments
- Comments

Product	Price	In Stock	Qty	Discount %	Tax %	Sub Total
Galaxy S7 Edge - colour/size : black/64GB	800	9	1	0.2	12	894.208
Laserjet Pro M127FW Wireless	400	8	1	0.4	12	446.208
					Grand Total	1340.42

To process this order, you need to confirm the order first. Before confirming check your stock and customer information. After you have confirmed the order, you can create invoice and shipments.

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The above image is the first stage of an order when it is still in pending state. You can either confirm the order from here (which will decrease the stock quantity of the products that are in the order) or can cancel the order. Confirming the order will enable the tabs below 'order approval' and you will be able to proceed.

Sales Order #551ca1e Share Check Info

Confirmed > Partially Shipped > Shipped > Delivered Not Paid

Overview

- Shipments
- Invoice
- Payments
- Comments

2 Products Ordered

0 Products Shipped

\$1340 Total Amount

0 Paid Amount

Ordered Products

Product	Price	In Stock	Qty	Discount %	Tax %	Sub Total
Galaxy S7 Edge - colour/size : black/64GB	800	8	1	0.2	12	894.208
Laserjet Pro M127FW Wireless	400	7	1	0.4	12	446.208
					Grand Total	1340.42

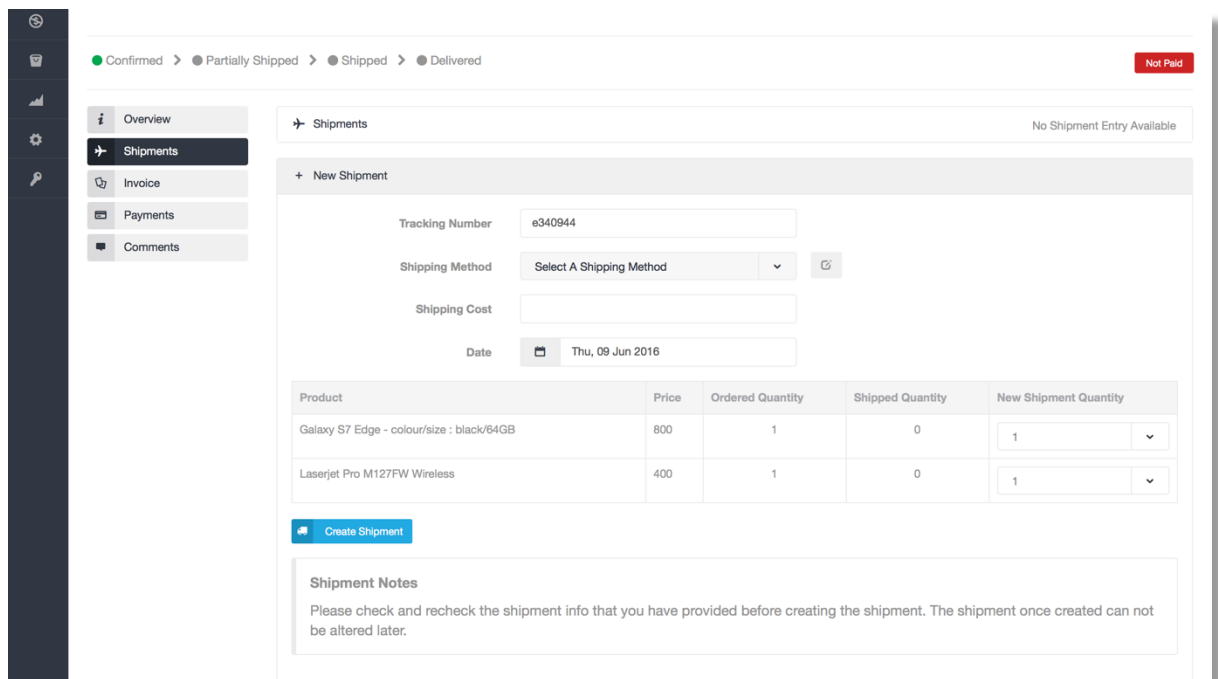
Shipments No Shipment Entry Available

Invoice No Invoice Available

Payments No Payment Entry Available

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The overview page is the overall summary of the order from where you can see what's going on within this order.
So the next stage after confirmation is the shipment.



Confirmed > Partially Shipped > Shipped > Delivered Not Paid

Overview
Shipments
Invoice
Payments
Comments

Shipments No Shipment Entry Available

+ New Shipment

Tracking Number: e340944

Shipping Method: Select A Shipping Method

Shipping Cost:

Date: Thu, 09 Jun 2016

Product	Price	Ordered Quantity	Shipped Quantity	New Shipment Quantity
Galaxy S7 Edge - colour/size : black/64GB	800	1	0	1
Laserjet Pro M127FW Wireless	400	1	0	1

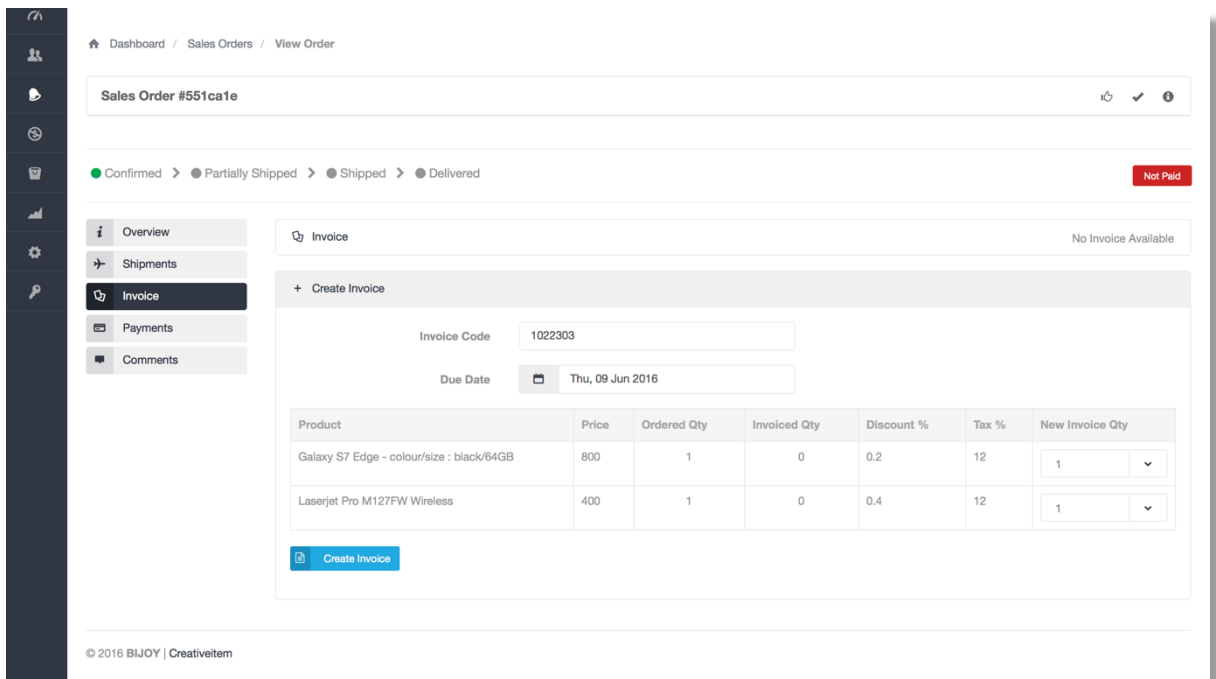
Create Shipment

Shipment Notes
Please check and recheck the shipment info that you have provided before creating the shipment. The shipment once created can not be altered later.

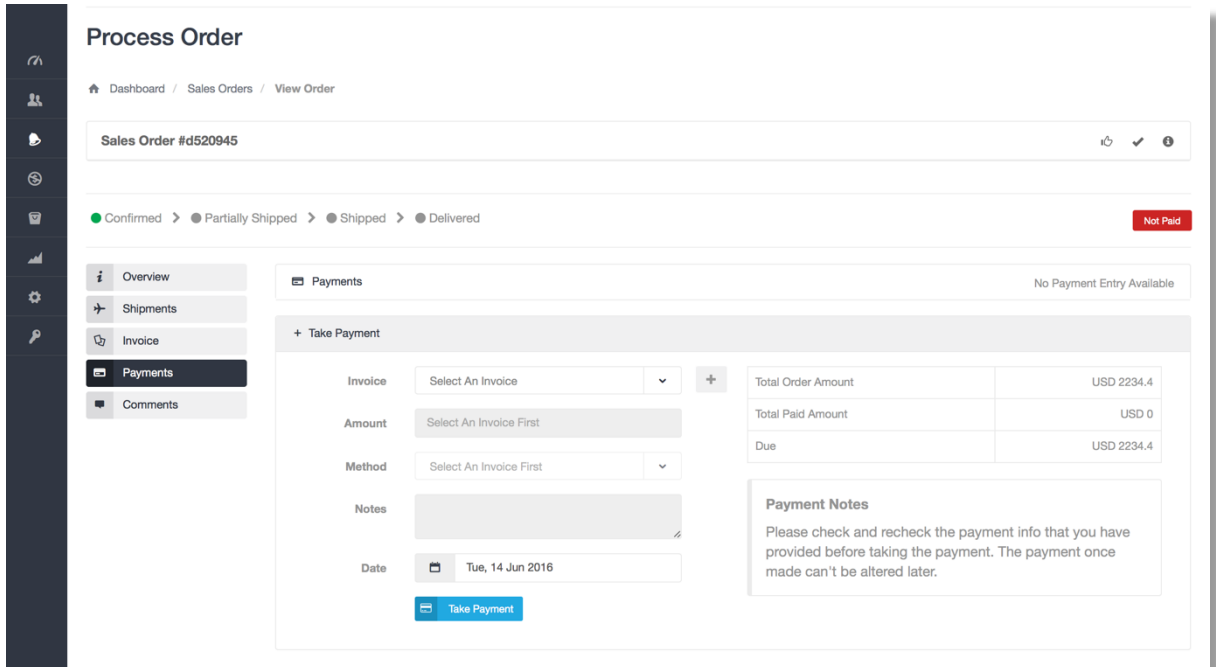
You can add multiple shipments to a particular order. All the shipments that you will make will show up in the order summary. Keep in mind that shipment once made can not be altered so check before you create any shipment.

When you start shipping a product the order status goes from 'confirmed' to 'partially shipped'. Partially shipped is the stage when the total number of shipped products is less than the total number of ordered products. When you have shipped all the products ordered, the order status will change from 'partially shipped' to shipped.

Then it comes to the step of invoicing and payments. To be frank you can add invoice and take payments anytime you want after the order has been approved. Its not compulsory to complete shipment before you create an invoice or take payments under any invoice. It should be noted that if you haven't created any invoice for that order you will not be able to take payment because the payment is taken under an invoice. So before taking payments make sure to create an invoice. You can see the image below for the invoice page where you can create an invoice providing the due date and an invoice code. The invoice code must be unique.

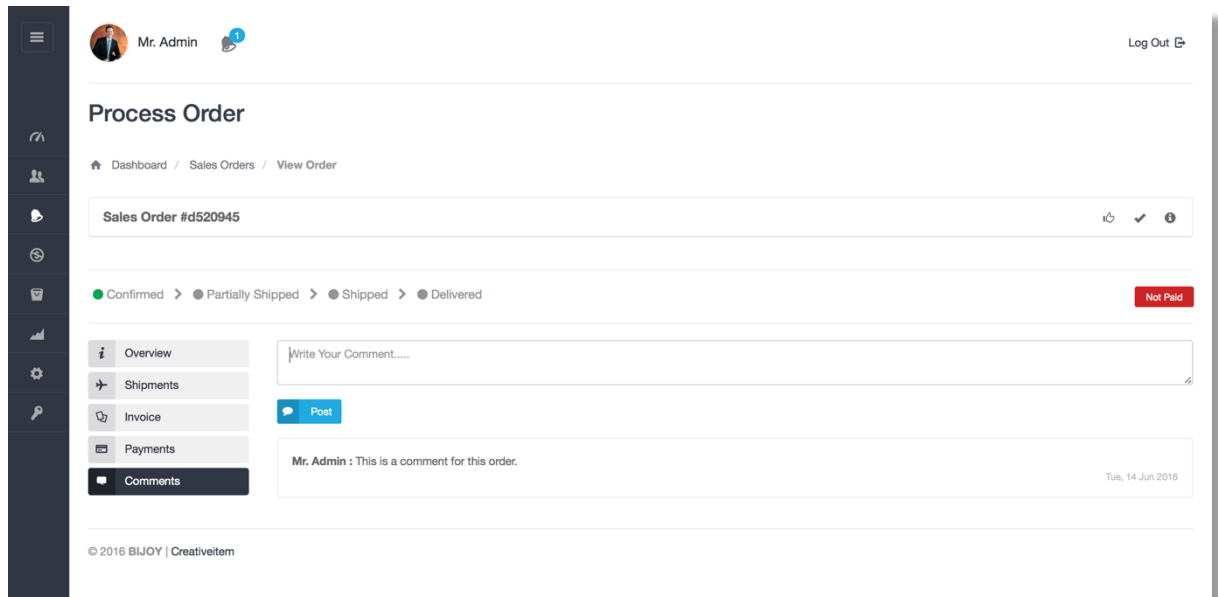


After you have added invoices, you can take payments. As you can see from the image below the all unpaid invoices will show up in the selectbox where you can select an invoice under which you want to take payment. Selecting the invoices will bring the invoiced amount automatically and you can take that payment.



It should be kept in mind that the payment once made can't be edited. When all the payments are made for the order that is, there is no due you will need to mark the order as paid manually.

The comment section is for admin and permitted employees where they can discuss over any matter regarding that order.



When the order is completed that is, all the shipments are done, payments are taken, you can mark the order as delivered which will change the order status as delivered.

Purchase Order Management

Adding A New Purchase Order

Adding a purchase order is something similar to the case of adding sales orders. But in this case the order is for the company. That means when your stock gets low or zero you will need to purchase products that you have added earlier through this purchase order. As you can see from the image below that for adding a purchase order you need to select a supplier

Add Purchase Order

Dashboard / Purchase Orders / Add New Order

Supplier Information

Order Code: e4b23f0
Supplier: Mr Supplier
Ordering User: Mr Admin
Address: 2755 Broadway, New York, NY, United States
Date: Tue, 14 Jun 2016

Products

Products	Price	In Stock	Qty	Sub Total	
iPad Pro - colour/size : rose gold/ 64 GB	750	9	3	2250.00	✖
98B229 Precisionist Chronograph Gunmetal	425	16	3	1275.00	✖

TOTAL : USD 3525.00

Create Order

before adding that order. The product selection is same as in case of sales order but the difference is that when you select a product it brings up the cost price of the product what you have inserted during adding the product and there is no filed for any discount or tax here. You can add as many product as you want to purchase from that selected supplier. After you have created the order it enters as a pending order.

Purchase Orders

All Orders

Show 10 entries Search:

Order Code	Supplier	Status	Total	Date Added	Date Raised	Date Received	Options
166bb3b	Mr Supplier	Pending	386500	Sun, 05 Jun 2016			Action
bde11b7	Dexter Galloway	Pending	10800	Sun, 05 Jun 2016			Action
d9c7903	Mr Supplier	Received	15000	Sun, 05 Jun 2016	Sun, 05 Jun 2016	Sun, 05 Jun 2016	Action

Showing 1 to 3 of 3 entries

Processing A Purchase Order

As it is said earlier that the purchase order you create enters the database as a pending order and doesn't increase your stock. Similar to sales orders, the purchase orders have some stages. The stages are – pending > raised > received.

Mr. Admin

Log Out

Process Order

Dashboard / Purchase Orders / View Order

Purchase Order #166bb3b

Product	Cost Price	In Stock	Ordered Quantity	Sub Total
iPad Pro - colour/size : rose gold/ 64 GB	750	9	10	7500
Galaxy S7 Edge - colour/size : black/64GB	700	8	10	7000
1947 Harley-Davidson Touring	62000	2	6	372000
			Grand Total	386500

Raising this order will send a mail to the supplier containing the products you have chosen for order. After you have received all the products ordered, make sure to mark the order as received which will increase the stock level of the ordered products.

[Raise Order](#)

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After you have created an order, the first step of processing is raising the order to the supplier. As you can see from the above image, the products that you have ordered for purchasing are listed along with their prices. When you click the button 'raise order' it sends an email to the supplier of that order notifying him/her about that order. It actually mails a link to the supplier from which he/she can see the details of that order.

After you have raised the order, the stock level will not increase because you have not received the products you have ordered, which brings up the next stage.

Ordered Products

Product	Cost Price	In Stock	Ordered Quantity	Sub Total
iPad Pro - colour/size : rose gold/ 64 GB	750	9	10	7500
Galaxy S7 Edge - colour/size : black/64GB	700	8	10	7000
1947 Harley-Davidson Touring	62000	2	6	372000
			Grand Total	386500

The order has already been raised. Please check if you have received all the products that you have ordered from the supplier. Then mark the order as received. Marking the order as received will increase your stock level of the ordered products and will also make the payment status of the order as paid.

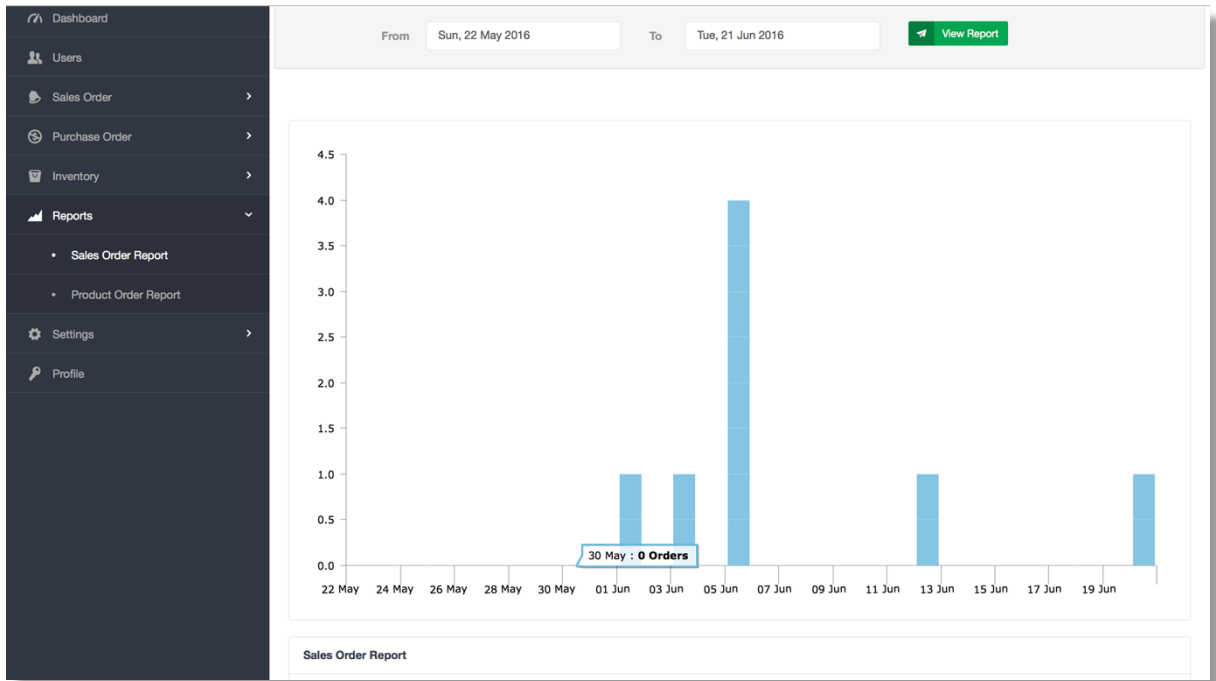
[Mark As Received](#)

When you have received the products from the supplier mark the order as received. That will increase the stock level of the products.

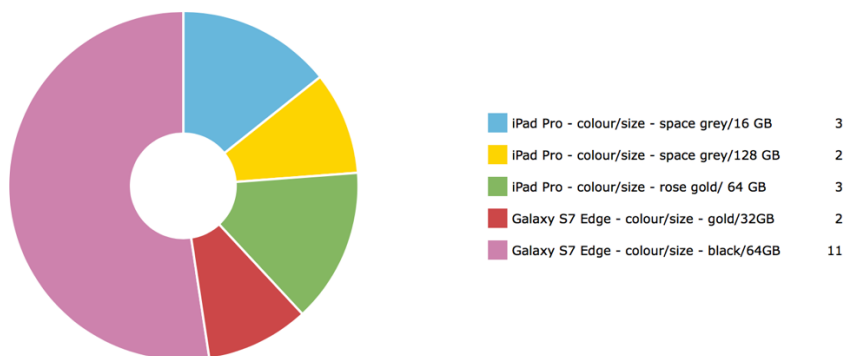
Reports

Initially we have introduced two types of reports in the application. One is sales order report and another one is product order report.

The sales order report refers to the number of sales order within the selected date range. By default, the report of last 30 days is shown both in a graphical way and tabular way. You can also select any custom date range you want.



The product order report shows that how many of each of the products of yours have been ordered. You have to select the product category and the products that you want to see the report for. The product report is also shown both by a pie chart and table.



Settings

System Settings

From system settings you can change the basic information about the application like system name, system title, phone, address etc. You can also change language, system currency and logo from here. It should be kept in mind that the currency that you select in system settings will be used throughout the system.

The screenshot displays the 'System Settings' interface. On the left, a dark sidebar contains navigation links: Dashboard, Users, Sales Order, Purchase Order, Inventory, Reports, Settings (with a dropdown arrow), and Profile. The 'Settings' dropdown is open, showing sub-items: System Settings, Language Settings, SMTP Settings, Shipment & Courier, and Tax. The main content area is titled 'System Settings' and features the following fields:

- System Name: Bijoy Order Management System
- System Title: Bijoy Order Management System
- Address: Sydney, Australia
- Phone: +8012654159
- System Email: admin@example.com
- Language: english (dropdown menu)
- Text Align: left-to-right (LTR) (dropdown menu)
- System Currency: US dollar - USD (dropdown menu)
- Logo: A placeholder box with a 'Select image' button below it.

A blue 'Save' button is located at the bottom of the form.

Language Settings

From language settings you can do a lot of things. When you go to the page of language settings you can see the list of languages that are included in the system and each language is associated with a button called 'edit phrase'. Clicking that button will take you to the page of editing phrases of that particular language. If you see that some phrases are missing from the language you have selected or some phrases are mistranslated, you can edit them from here. You can add new languages if you want.

SMTP Settings

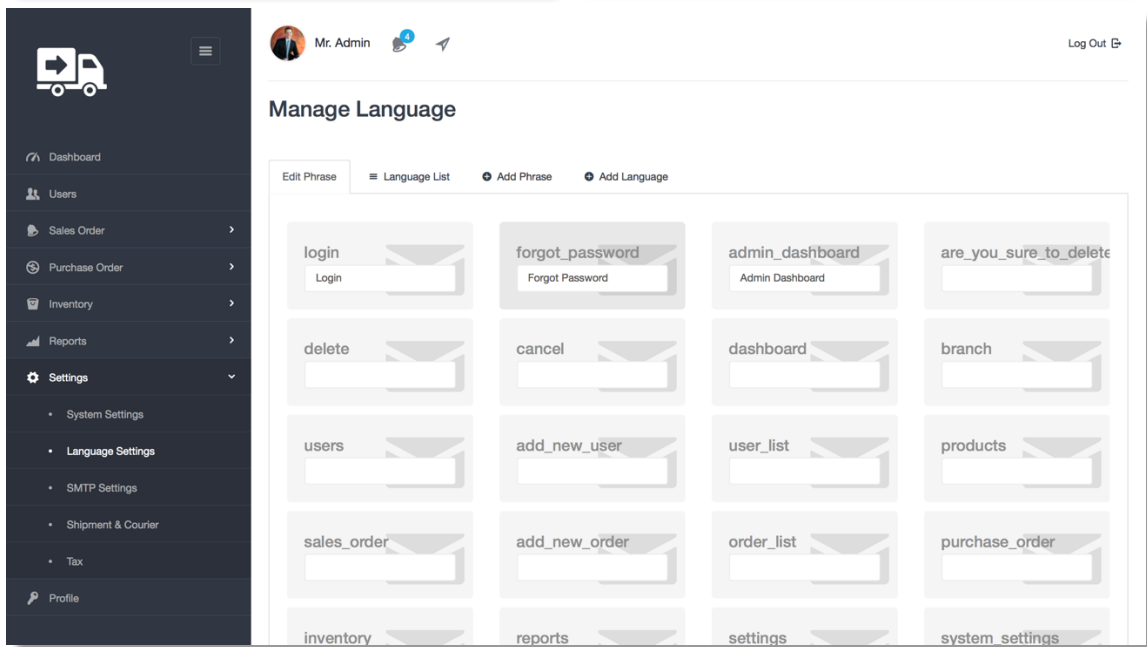
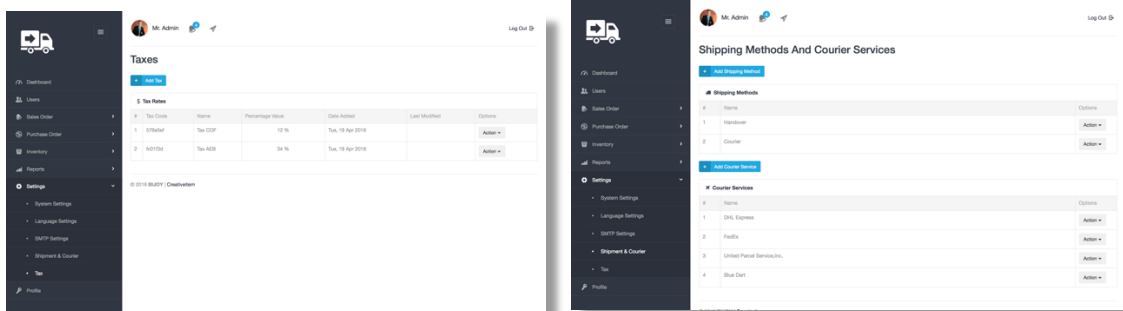
SMTP settings is for the preference in which you want to send the mails from the system. If you disable the SMTP mail function, the default mail sending function will be used. If you enable SMTP make sure to fill up the information which are needed to send the emails using your provided SMTP configuration.

Shipment & Courier

Earlier in this documentation you have seen that in some places in the sales order processing shipment methods and different names for courier companies are used. Those are not static rather you can add/edit/delete as many shipment methods you want and you can also add/edit/delete your preferred courier services.

Tax Settings

You can add/edit/delete tax information from the tax menu under settings. The taxes that you will add will come up while adding sales orders.



Profile

In the profile menu you can change your personal basic information and also can change password.

Customer Panel

Order Management

From the order menu in customer panel he/she can see the orders that has been made in his/her name. He/she can also monitor the stages in which the order is going through and can also see the payments and invoices of the orders.

Profile

Similar to admin panel, customers can edit basic profile information and change password from here. The extra feature is that he/she can add addresses to his/her profile which will come in admin panel during order while taking shipping/billing address for the customer.

Employee Panel

Sales Order Management

Employee will be able to manage sales orders and will get all the facilities of sales order management similar to admin if admin gives permission to manage sales orders to that employee.

Purchase Order Management

Employee will be able to manage purchase orders and will get all the facilities of purchase order management similar to admin if admin gives permission to manage purchase orders to that employee.

Inventory

If admin gives permission of managing inventory to an employee, he/she will be able to add products and see the stock level.

Profile

From the profile menu employee can edit his/her basic information and can also change password.