

INVENTORY MANAGEMENT

Welcome! This guide helps store teams keep inventory, item details, and vendor information accurate so shelves stay stocked and ordering runs smoothly.

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? 1. Before You Start

- **Who should use this guide:** Receiving clerks, stock managers, assistant managers.
- **What you need:** Your Spendwell login plus access to a scanner or mobile device for invoice uploads.
- **Daily rhythm:** Review items in the morning, receive stock as deliveries arrive, tidy up approvals and price checks before closing.

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?? 2. Getting Around

Area	What You'll See	Why It Matters
Inventory Receive	Open/Pending/Approved receipts with totals and invoice images.	First stop when a delivery shows up.
Item List	Every item with units, alerts, recipes, and images.	Keeps catalog details fresh and accurate.
Vendor Assignments	Which vendor supplies each item and their agreed price.	Prevents mix-ups and highlights missing vendors.
Price Watch	Weekly, monthly, and yearly cost trends by item.	Helps spot unusual price jumps quickly.

Tip: Pin your branch or store view so it opens first every time you sign in.

? 3. How It All Connects

flowchart LR

A[#f4f1bb Vendor Delivery] --> B[#9adcff Inventory Receive]

B --> C[#ffb5e8 Item & Stock Update]

C --> D[#c1fba4 Price Watch & Reports]

D -->|Insights| A

- **Vendor assignment** fills item details automatically when you receive goods.
- **Item master** stores the information recipes, scanners, and reports rely on.
- **Inventory receive** records what actually arrived and updates stock.
- **Price watch** keeps leadership aware of cost changes.

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? 4. Daily Flow for Store Teams — Mindmap Snapshot

? Inventory Success

? Morning Start

- Review Pending Receipts
- Clear Item Alerts

? Deliveries

- Capture Invoice Images
- Match Quantities

- Note Shortages

?? Afternoon Pulse

- Approve Completed Receipts
- Update Vendor Prices

? Closeout

- Check Price Watch
- Share Highlights with Manager

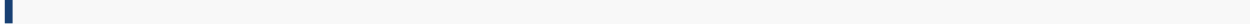
A. Morning Check ?

1. Log in and pick your branch.
2. Open **Inventory Receive** to see any pending receipts that need approval.
3. Scan the **Item List** for alerts (low stock, missing images, outdated info).

B. During Deliveries ?

1. When a truck arrives, open **Inventory Receive** and start a new receipt.
2. Snap clear photos or upload the PDF invoice - the system reads line items automatically.
3. Match quantities, adjust if needed, and note any shortages or extras.

C. End-of-Day Wrap-Up ?

1. Approve any completed receipts so stock numbers stay current.
 2. Update vendor prices if the day's invoices show new costs.
 3. Peek at **Price Watch** for sudden spikes to share with management.
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? 5. Receiving Stock Step-by-Step

1. Start a Receipt

- Choose the vendor, confirm the date and branch.
- Add any helpful notes (truck number, receiver name, etc.).

2. Upload the Invoice

- Accepts JPG, PNG, or PDF.
- Ensure images are bright and legible; retake if blurry.

3. Review Suggested Items

- The system lists items it recognizes; mismatches show in red.
- Fill in missing items manually when needed.

4. Check Quantities & Prices

- Adjust units to match what you actually received.
- Add comments for substitutions or damaged goods.

5. Save as Pending

- Use this if you want a second pair of eyes before approval.

6. Approve the Receipt

- Once approved, stock levels update and the receipt locks.
- Attach additional photos or notes before approving if helpful.

“ **Reminder:** ☐ Partial deliveries should stay pending until the rest arrives or you’ve noted the shortage.

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?? 6. Keeping Item Details Accurate

When to Add or Edit Items

- New product added to the catalog.
- Packaging size changes (e.g., 24-pack becomes 20-pack).
- Updated brand, barcode, or shelf life.
- Seasonal items returning after a break.

Adding a New Item ?

1. Go to **Item List** → **Add Item**.
2. Fill in required details: category, subcategory, item name, vendor ID, units, and taxes.
3. Upload a clear product image (preferably square, front-facing).
4. Toggle alerts like “Show Inventory Alerts” if the item is critical.
5. Save — the item gets an ID automatically.

Editing an Existing Item ??

1. Search by name, SKU, or barcode.
2. Update the necessary fields (brand, units, pricing, etc.).
3. Add helpful notes (e.g., “Keep refrigerated,” “Top seller”).
4. Save and let the team know if the change affects recipes or POS.

“ **Heads-up:** ⚠ If the system stops you from changing units, it means stock already exists in the old unit. Finish or adjust current stock first and try again.

“ ? 7. Working with Vendors

Staying Organized

- Each vendor should only be linked to the items they actually supply.
- Use the search bar to quickly confirm if an item already has a vendor.

Assigning Items to a Vendor ?

1. Open **Vendor Assignments** and pick the vendor.
2. Check or uncheck items they provide.

3. Update the agreed price and allowed fluctuation (% difference you'll allow without review).
4. Save your changes — future receipts will pull these details automatically.

Updating Prices After Delivery ?

- If an invoice shows a different price, update it in the vendor assignment screen.
- Comment on why a price changed (seasonal, promo ended, etc.).
- Large unexpected changes? Flag them in **Price Watch** for leadership.

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? 8. Watching Prices & Stock Health

Price Watch Board ?

```
timeline
  title Price Radar
  section Weekly View
    Spot tiny jumps : Weekly average vs receipt
  section Monthly View
    Highlight trending items : Monthly average
  section Yearly View
    Celebrate stable partners : Yearly average
```

- Use it every Monday to see which items are creeping up in cost.
- Filter by category or item name to focus on key products.
- Share any big jumps with your manager before ordering more stock.

Stock History Snapshot ??

- Each approved receipt shows where the stock came from, who received it, and how much was added.
- Use the history view when reconciling counts or investigating shrinkage.

? 9. Troubleshooting for Store Teams

Issue	What to Do
<input type="checkbox"/> Invoice won't upload	Check file type/size. Ensure you're on Wi-Fi. Try re-uploading a clearer photo.
<input type="checkbox"/> Items missing from suggestion list	Add them manually and double-check the vendor assignment for next time.
<input type="checkbox"/> Receipt stuck in pending	Make sure all items have quantities, then click Approve.
<input type="checkbox"/> Can't edit item units	Clear out existing stock or ask a manager to adjust stock balances.
<input type="checkbox"/> Vendor price looks wrong	Compare with the latest invoice and update the vendor assignment if needed.
<input type="checkbox"/> Price Watch shows blanks	Approve recent receipts so the board has data to display.

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? 10. Best Practices

- Keep invoices sharp and well-lit so the system reads them correctly.
- Note substitutions or shortages right away; it saves time during counts.
- Review low-stock alerts each afternoon and escalate critical items.
- Refresh vendor prices monthly, even if nothing seems off.
- Use the comments field to leave breadcrumbs for the next receiver.

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? 11. Quick Reference Cards




• Statuses

- **Pending**: Waiting for review.
- **Approved**: Stock updated and locked.
- **Archived**: For older receipts you no longer need to edit.

- **Units & Conversion**

- **Pack**: Case or box size received.
- **Stock Unit**: How your store counts the item (e.g., each, pound).
- **Conversion**: How many stock units are in one pack.

- **Alert Icons**

-  Needs attention (missing data or low stock)
-  Image attached
-  Notes available

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? 12. Keep Improving

- Celebrate clean audits and share what worked with other stores.
- Submit suggestions for new fields or reports through your manager.
- Pair new team members with experienced receivers for the first week.

Need help? Reach out to your store manager or the Spendwell support team listed in your company directory.

Thanks for keeping inventory accurate and customers happy! 

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