

Stock Control

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Add Stock Shipment

To add a new stock shipment to Polixen, click the **Stock Control** link in the main menu, then click the **New Shipment** link. You can also click the **New Shipment** button on the View Shipments page.

On this page you will need to enter the following details:

- Supplier
- Arrival Date
- Stock Location
- Comments (*optional*)

New Shipment

Select a Template

Save as Template

Create Shipment

Warning:

There are meal runs without stock locations.
This can cause errors in your stock calculations.
Please add stock locations to all meal runs and contact Polixen.




| | | | |
|----------------|--|---------------|---|
| Supplier | <input type="text" value="Simplot Australia"/> | Arrival Date: | <input type="text" value="15/03/2023"/> |
| Stock Location | <input type="text" value="Head Office"/> | Comments | <input type="text"/> |

For each meal that this stock shipment contains please go through the following steps and repeat for each meal:

1. Click on the **Add Meals** button

2. Select a meal in the **Meal Type** dropdown list
3. Enter a quantity in the **Qty** field
4. Enter an expiration date in the **Expiry** field

Add Meal

| | | | | | | |
|------------|--|------|----|---------|------------|---|
| Meal Type: | Frozen Mains - Simplot - Roast Lamb | Qty: | 10 | Expiry: | 31/03/2023 |  |
| Meal Type: | Frozen Mains - Simplot - Beef and Bean casserole | Qty: | 20 | Expiry: | 31/03/2023 |  |
| Meal Type: | Frozen Mains - Simplot - Peppered Beef | Qty: | 10 | Expiry: | 31/03/2023 |  |

When you have finished entering all the meals, click on the green **Create Shipment** button.

Select a Template

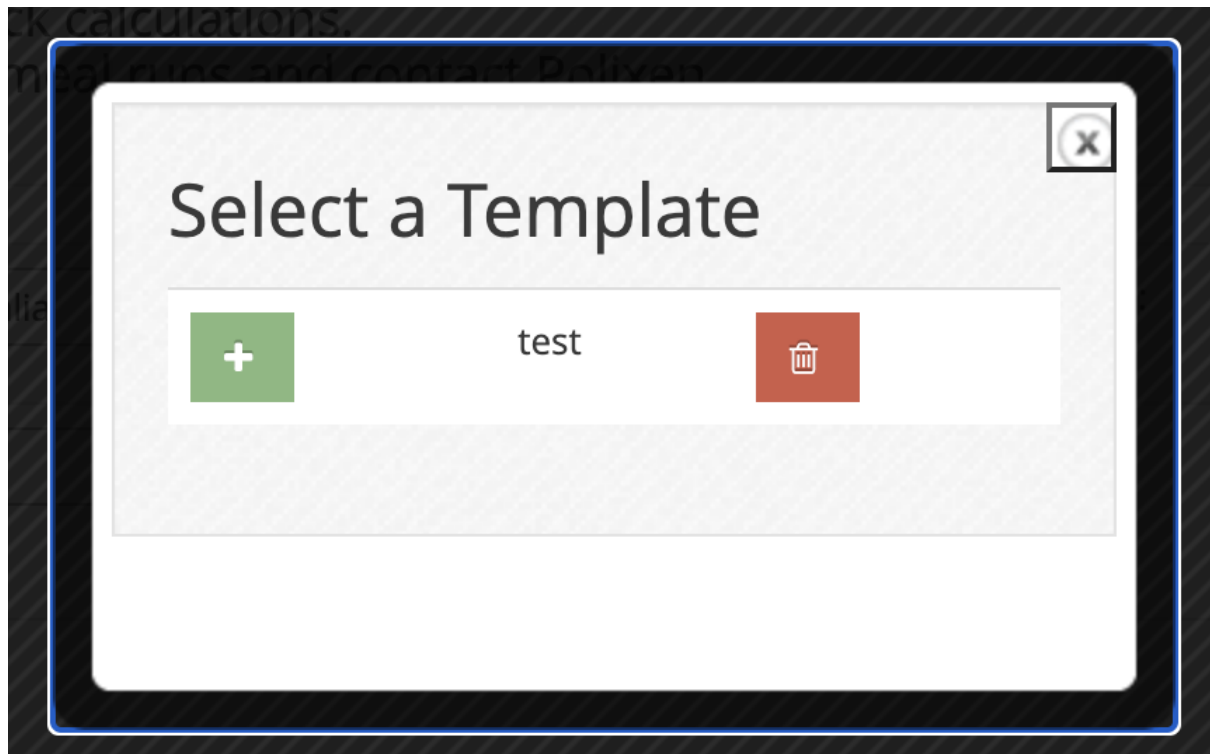
Save as Template

Create Shipment

Templates

You can also save shipments as a **Template**, which you can use to add the same meals to a new shipment in the future.

Once you have templates, you can select them when creating a new shipment.



View Stock Shipments

To view entered stock shipments click on **Stock Control** on the main menu and select **View Shipments**. You will be presented with a screen similar to the one below.

View Shipments
New Shipment

Start : 12/02/2023
End : 17/03/2023
Search

| Filter by Supplier | Filter by Stock Location | Items | Date Received | Notes |
|----------------------------|--------------------------|-------|------------------------------|-------|
| <i>i</i> Simplot Australia | Head Office | 300 | Wednesday 15th of March 2023 | |

Click on the blue button next to a stock shipment to view all the details including meals included.

Simplot Australia

Received on Wednesday 15th of March 2023

Stock Location: Head Office

Shipment Items:

| | Qty | Meal Name | Expiry |
|---|------|-----------------------------------|---------------------------|
| Q | 100x | Simplot - Roast Lamb | Friday 31st of March 2023 |
| Q | 100x | Simplot - Beef and Bean casserole | Friday 31st of March 2023 |
| Q | 100x | Simplot - Peppered Beef | Friday 31st of March 2023 |

Total Qty: 300

Edit Stock Shipments

To edit a stock shipment, navigate to view a stock shipment as detailed in the section above. Then click on the **Actions** button and select **Edit Shipment**. A popup will appear similar to the one below.

Click **Save Changes** to save your progress.

Edit Shipment

Supplier

Simplot Australia ▾

Stock Location

Head Office ▾

Arrival Date

15/03/2023

Comments

Comments...

Meal Type:

Simplot - Roast Lamb ▾

Qty:

100

Expiry:

31/03/2023

Meal Type:

Simplot - Beef and Bean cass ▾

Qty:

100

Expiry:

31/03/2023

Meal Type:

Simplot - Peppered Beef ▾

Qty:

100

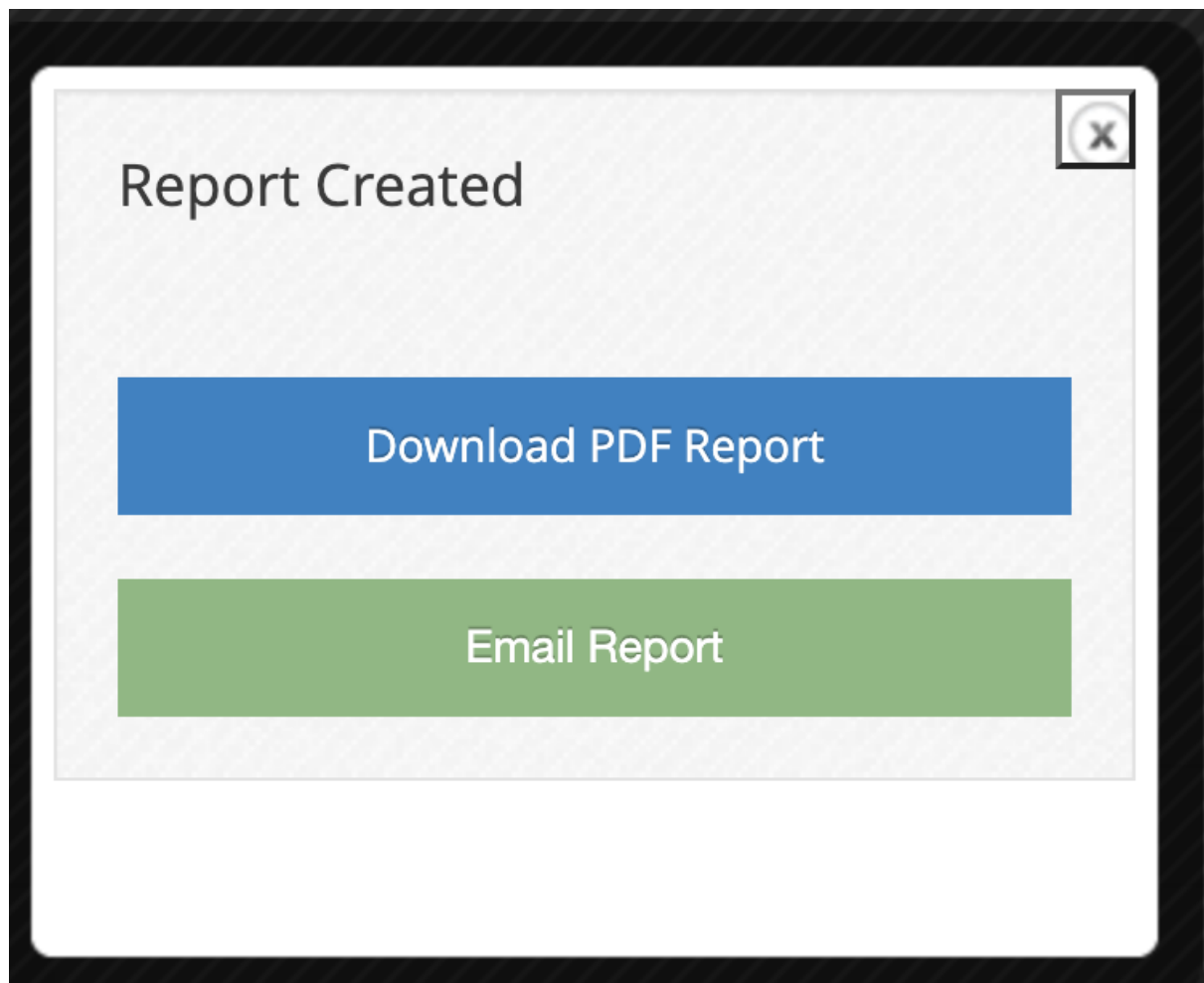
Expiry:

31/03/2023

Save Changes

Print Shipment

Under Actions, you can also print a shipment by clicking on **Print Shipment**. That will open a popup giving you the option to **Download PDF** or **Email Report**.



Stock Shipment Report

Shipment Details

| Supplier | Location | Received |
|-------------------|-------------|------------------------------|
| Simplot Australia | Head Office | Wednesday 15th of March 2023 |

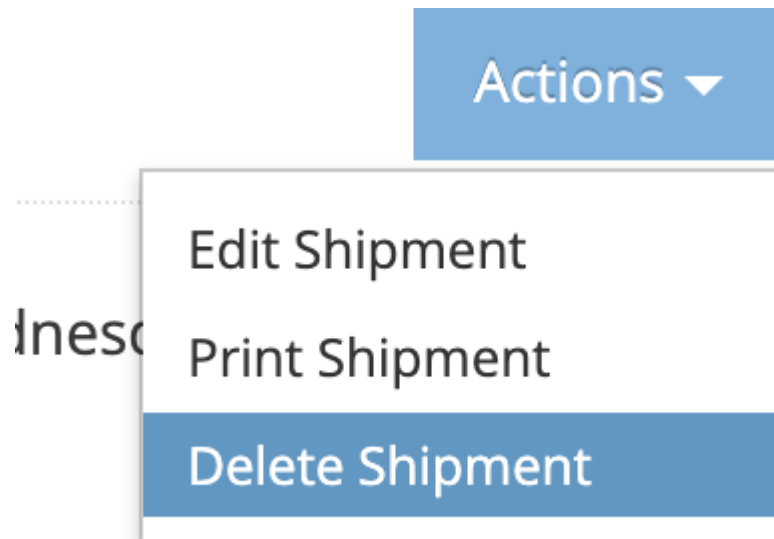
Shipment Meals

| Meal | Qty | Expiry |
|--|-----|---------------------------|
| Simplot - Roast Lamb (Frozen Mains) | 100 | Friday 31st of March 2023 |
| Simplot - Beef and Bean casserole (Frozen Mains) | 100 | Friday 31st of March 2023 |
| Simplot - Peppered Beef (Frozen Mains) | 100 | Friday 31st of March 2023 |

Total Qty: 300

Delete Shipment

If you need to delete a shipment, simply select Delete Shipment on the actions dropdown menu.



View Stock Levels

To view current stock levels click on **Stock Control** on the main menu and select **View Stock**.

This page will list all the meals that have been entered into the system, along with their current stock level, location and total value.

View Stock

Show Meals From All Supplier

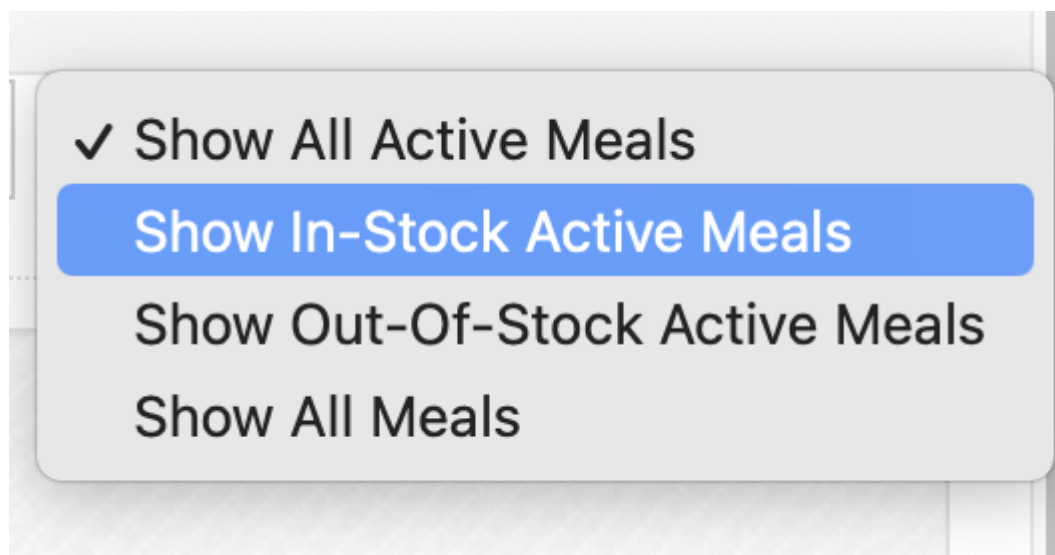
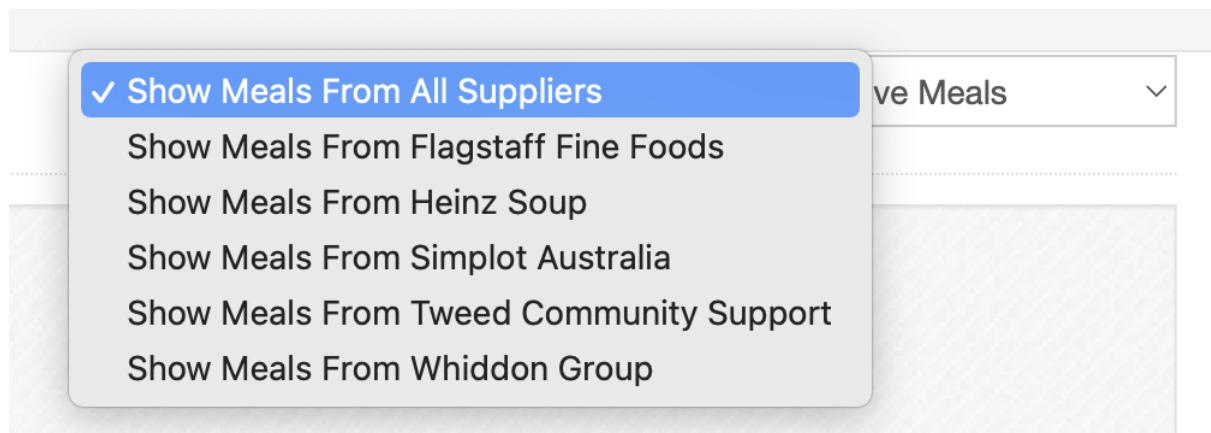
Show All Active Meals

Warning:

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Please add stock locations to all meal runs and contact Polixen.

| | Meal Name | All Locations | Total Items | Total Value |
|--|-----------------------------------|---------------|-------------|-------------|
| | Beef and Bacon casserole | | -4 | \$0.00 |
| | Beef and Bacon casserole | Head Office | 18 | \$63.00 |
| | Dessert - Mango Mousse | Head Office | 68 | \$238.00 |
| | Simplot - Beef and Bean casserole | Head Office | 100 | \$350.00 |

On the top right-hand side of the page, you can also filter the meals by suppliers or status.



View Stock History

To view a meal's stock history (shipments & deliveries), click on **Stock Control** on the main menu then select **View Stock**. Find a meal you wish to view the stock history for and click on the "I" button next to the meal's name.

This will present a page that details all the stock shipments and deliveries for that specific meal. At the top right, you can select the date range for the meal history.

| Start : 15/02/2023 | | End : 17/03/2023 | Go | Discard Stock |
|--------------------|------------|------------------|-----|---------------|
| i | Date | Name | Qty | |
| i | 15/03/2023 | New Shipment | 100 | |

To Discard Stock, simply click on the red button at the top. That will open a pop-up box where you can fill in the quantity of stock to discard and add comments.

Discard Stock

| | |
|--------------------------|---|
| Meal Name | Simplot - Beef and Bean casserole |
| Meal Location | Head Office |
| Stock to Discard | <input type="text" value="0"/> |
| Date Stock Was Discarded | <input type="text" value="17/03/2023"/> |
| Comments | <input type="text"/> |

Discard Stock