

Inventory

In the Inventory module, purchased or manufactured products are converted into Stock (with Serial or Part number) and can be kept, transferred, sold etc. Stocks are organized in Warehouses.



Stock type

There are currently 4 Stock types for products in Lapis - Batch stock, Single Stock, Compound stock, Packaged stock

Batch stock allows you to create a group of multiple units of an item, and assign them a unique value/number/tag called Batch No.

Single Stock is a unique stock item, it has a unique Serial No. and each unit can be traced.

Compound stock is a stock that consists of a list of possible subproducts, which are single stock type.

Stocks are managed within the Inventory, and used in Sales and Purchases processes. Each stock corresponds to a product, defined in the system.

Creating Warehouse

A New warehouse can be created via Create New/Other choosing Warehouse

Select Type



warehouse



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Inbound
Warehouse..



Internal
Warehouse..



Outbound
Warehouse..



Warehouse



Warehouse



Warehouse

Name, address and Supervisor can be defined, as well as some standard for the system properties like Containers, Relations etc.

(Draft-Warehouse)



Standard edit ▾

Collaborators: administrator



Name *



Address Country:

Select Value

State/Province:

State/Province

City:

City

Postal Code:

Postal Code

Address Line 1:

Address Line 1

Address Line 2:

Address Line 2

Supervisors



Containers



Cancel

Save Draft

Create

By pressing Create the warehouse is ready and can be seen in the Warehouses container.

Warehouse 1 (Warehouse)



Stock

0/0 [Icons]

Title Types Serial Number Batch Number Purchase Price Sub Products [Settings]

No results... yet!

Properties

Name: Warehouse 1
Address: Bulgaria, Sofia
Supervisors: [Supervisor1](#)
Containers:

Activities

Types Comment Activity

B I U ...

Add a Comment

Creating Stock via Transfer

Purchase #01 (Purchase Invoice)

- ★ Add Bookmark
- 🔗 Attach File(s)
- ⚙️ Change Property
- 📄 Copy
- 🔗 Create Transfer**
- 🗑️ Delete
- ✎ Edit
- 📄 Export to CSV
- 📄 Export to Excel
- 🔗 Pop Out Window
- 🔗 Relate To

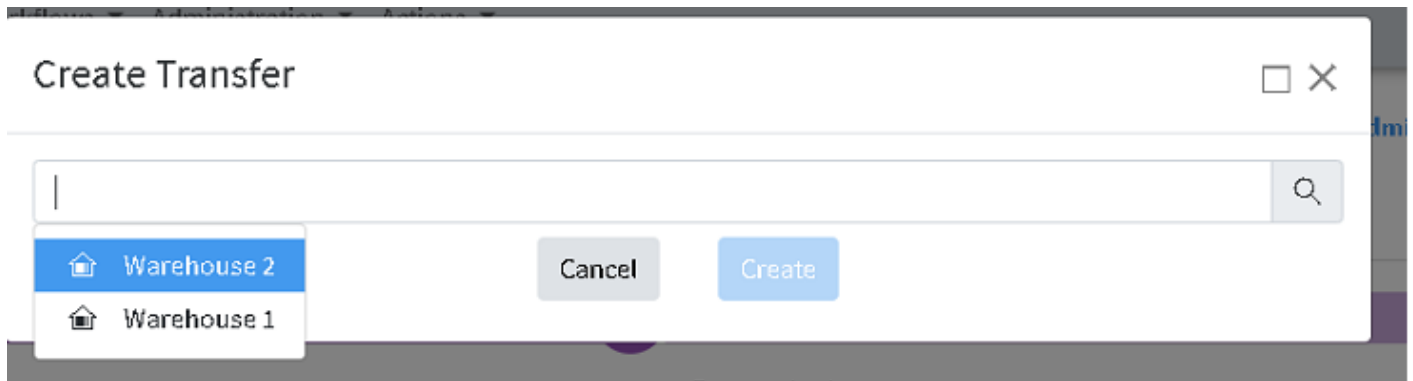
Properties

Description:
Currency: EUR
Payment Method: Bank Transfer
Bank Name:
IBAN:
BIC:

Paym

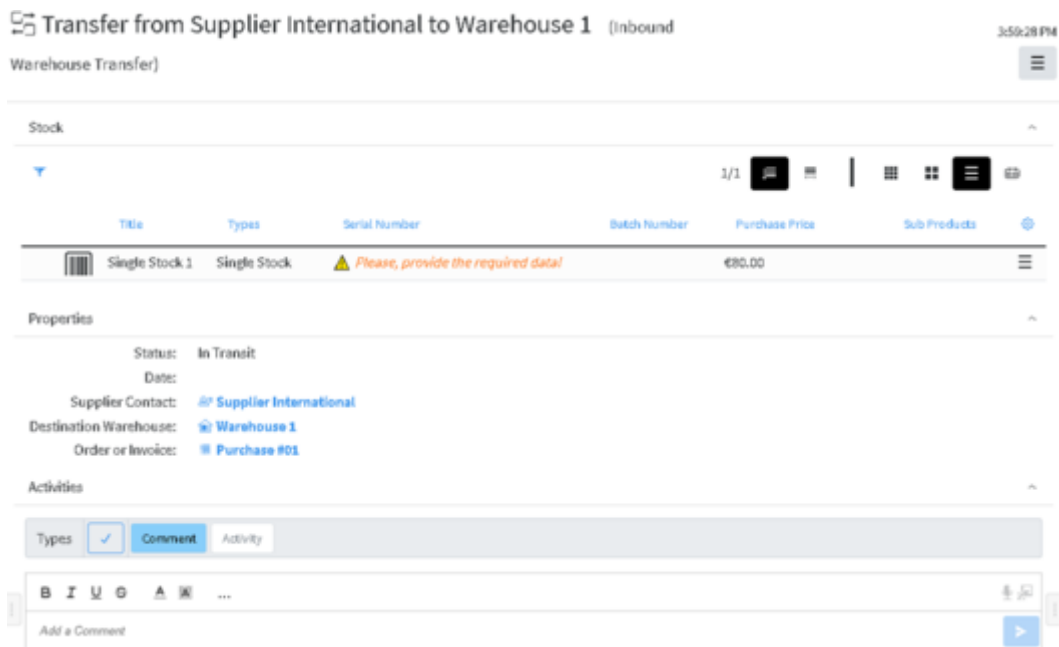
[Price List](#)


The destination warehouse has to be selected



Choosing the warehouse and pressing Create, creates object Inbound Warehouse Transfer, which is actually Purchase Transfer.

It looks this way:



Items from the Invoice become stock in the transfer. The Serial number can be set by editing the details of the stock via Edit menu in the right end of the row 

Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
Single Stock 1	Single Stock			€80.00	

Please, provide the required data!

Properties

Status: In Transit
 Date:
 Supplier Contact: [Supplier International](#)
 Destination Warehouse: [Warehouse 1](#)
 Order or Invoice: [Purchase #01](#)

Activities

Types: Comment Activity

Rich Text Editor: B I U ...

Add a Comment

- Single Stock 1
- Add Bookmark
- Attach File(s)
- Change Property
- Copy
- Delete
- Edit**
- Export to CSV
- Export to Excel
- Pop Out Window

Then the Stock Edit screen appears, where details can be added or edited.

Transfer from Supplier International to Warehouse 1 /

4:11:31 PM

Single Stock 1 (SS2001) (Draft-SingleStock) ☰

Standard edit ▾ Collaborators: administrator +

Status * **In Transit** Purchase Price * **EUR** 80

Production Date Expiration Date

Maintenance Date 12/31/2021 Notes

Serial Number * **SS2001**

Activities

Types: Comment Activity

Rich Text Editor: B I U ...

Add a Comment

↶ Cancel
Save Draft (2)
Save

After saving the info appears in the Transfer.

Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
Single Stock 1 (SS2001)	Single Stock	SS2001		€80.00	

The Transfer is created with Status is **In Progress**, presuming that the products are shipped but not yet delivered to the Warehouse.

When the products are ready to be entered in the warehouse, the status should be set to Finished, and the Date has to be set.

Once the status is set to Finished, the stocks enter the destination Warehouse.

The Stock in the transfer appear as NON CURRENT, as new version of the stock is created, listed in the corresponding Warehouse


The screenshot shows a web interface for 'Warehouse 1'. At the top, there is a navigation bar with a home icon, the text 'Warehouse 1 (Warehouse)', and a menu icon. Below this is a section titled 'Stock' with a dropdown arrow. A toolbar contains a search icon, a '1/1' indicator, and several view and filter icons. The main area is a table with columns: Title, Types, Serial Number, Batch Number, Purchase Price, and Sub Products. A single row is visible: 'Single Stock 1 {SS2001}' under Title, 'Single Stock' under Types, 'SS2001' under Serial Number, and '€80.00' under Purchase Price. Below the table is a 'Properties' section with the following details: Name: Warehouse 1, Address: Bulgaria, Sofia, Supervisors: Supervisor1, and Containers: (empty).

Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
Single Stock 1 {SS2001}	Single Stock	SS2001		€80.00	

Properties

- Name: Warehouse 1
- Address: Bulgaria, Sofia
- Supervisors: Supervisor1
- Containers:

Clicking on the stock title, opens the stock object, with the information as follows:

 **Single Stock 1 (SS2001)** (Single Stock)



Properties ^

Product:  **Single Stock 1**
 Status: Available
 Warehouse:  **Warehouse 1**
 Purchase Price: €80.00
 Production Date:
 Expiration Date:
 Maintenance Date: 12/31/2021
 Notes:
 Transfer:
 Serial Number: SS2001

Title	Created At	User Updated At
No Relations		

Invoices ^

Invoice	Service	Buyer	End User	Valid From	Valid To
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History ^

Ordered - **(NOT CURRENT) Single Stock 1**
 Transferring from **Supplier International** to **Warehouse 1 - Transfer from Supplier International to Warehouse 1 - (NOT CURRENT) Single Stock 1 (SS2001)**
 Transferred to **Warehouse 1 - Single Stock 1 (SS2001)**

Activities ^

Stock versions

With each change in Stock status or if it the stock is a part of Transfers of some kind, the new version of the Stock object is created.

The previous versions are kept in the system for reference and tracking

Here is how to see versions of the stock, which is available:

Find the stock in the warehouse and open it.



Stock

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Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
Single Stock 1 (SStock002)	Single Stock	SStock002		€80.00	

Properties

Name: Warehouse 1
 Address: Bulgaria, Sofia
 Supervisors: [Supervisor1](#)
 Containers:

The number next to the name shows how many versions exist

Single Stock 1 (SStock002) **v.5** (Single Stock)



Properties

Product: [Single Stock 1](#)
 Status: Available
 Warehouse: [Warehouse 1](#)
 Purchase Price: €80.00
 Production Date:
 Expiration Date:
 Maintenance Date:
 Notes:
 Transfer:
 Serial Number: SStock002

Title	Created At	User Updated At
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No Relations

Invoices

Invoice	Service	Buyer	End User	Valid From	Valid To
DEAL 1 - OCT-21 (#INV - 0000001)	Service on Stock Maintenance Yearly	Client company 1	Client company 1		
Purchase order #2	Single Stock 1	PBT EU Ltd			

History

- Ordered - (NOT CURRENT) [Single Stock 1](#)
- Transferring from [Supplier Local](#) to [Warehouse 2 - Transfer from Supplier Local to Warehouse 2 - \(NOT CURRENT\) Single Stock 1 \(SStock002\)](#)
- Transferred to [Warehouse 2 - \(NOT CURRENT\) Single Stock 1 \(SStock002\)](#)
- Transferring from [Warehouse 2 to Warehouse 1 - Transfer from Warehouse 2 to Warehouse 1 - \(NOT CURRENT\) Single Stock 1 \(SStock002\)](#)
- Transferred to [Warehouse 1 - Single Stock 1 \(SStock002\)](#)

Activities

By clicking on the number box, the list with versions appear

Single Stock 1 (SStock002) v.5 (Single Stock)



Properties

Product: **Single Stock 1**
 Status: Available
 Warehouse: **Warehouse 1**
 Purchase Price: €80.00
 Transfer:
 Serial Number: SStock002

v.5 **Single Stock 1 (SStock002)**
 administrator 11/12/2021, 5:22:54 PM

v.4 **(NOT CURRENT) Single Stock 1 (SStock002)**
 administrator 11/12/2021, 5:20:24 PM

v.3 **(NOT CURRENT) Single Stock 1 (SStock002)**
 administrator 11/12/2021, 3:25:37 PM

v.2 **(NOT CURRENT) Single Stock 1 (SStock002)**
 administrator 11/12/2021, 3:25:03 PM

v.1 **(NOT CURRENT) Single Stock 1**
 administrator 11/12/2021, 3:22:52 PM

Date:
Date:
Date:
Date:

Title **Created At** **User Updated At**

No Relations

Invoices

Invoice	Service	Buyer	End User	Valid From	Valid To
DEAL 1 - OCT-21 (#INV - 0000001)	Service on Stock Maintenance Yearly	Client company 1	Client company 1		
Purchase order #2	Single Stock 1	PBT EU Ltd			

History

Ordered - **(NOT CURRENT) Single Stock 1**
 Transferring from **Supplier Local** to **Warehouse 2 - Transfer from Supplier Local to Warehouse 2 - (NOT CURRENT) Single Stock 1 (SStock002)**
 Transferred to **Warehouse 2 - (NOT CURRENT) Single Stock 1 (SStock002)**
 Transferring from **Warehouse 2** to **Warehouse 1 - Transfer from Warehouse 2 to Warehouse 1 - (NOT CURRENT) Single Stock 1 (SStock002)**
 Transferred to **Warehouse 1 - Single Stock 1 (SStock002)**

In the History section, the information of the transfers appear.

In the Invoices Section appear information of the Purchase Invoice and Sales invoice (if stock itself or service on it is sold)

Transfer between warehouses

Find the product in the list of stocks In the Stock container

Stock (Query Container)



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Title **Warehouse** **Types** **Serial Number** **Batch Number** **Purchase Price** **Status** **Sub Prt**




	Single Stock 1 {SS2001}	Warehouse 1	Single Stock	SS2001		€80.00	Available	
	Single Stock 1 {SStock003}	Warehouse 2	Single Stock	SStock003		€80.00	Available	
	Single Stock 1 {SStock002}	Warehouse 2	Single Stock	SStock002		€80.00	Available	
	Single Stock 1 {SStock001}	Warehouse 2	Single Stock	SStock001		€80.00	Available	


or in the corresponding warehouse




Warehouse 2 (Warehouse)

Stock

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Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
 Single Stock 1 (SStock003)	Single Stock	SStock003		€80.00	
 Single Stock 1 (SStock002)	Single Stock	SStock002		€80.00	
 Single Stock 1 (SStock001)	Single Stock	SStock001		€80.00	

From the menu on the right of the product line , choose **Transfer** and then choose the destination warehouse, and then press Create.



Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
 Single Stock 1 (SStock003)	Single Stock	SStock003		€80.00	
 Single Stock 1 (SStock002)	Single Stock	SStock002		€80.00	
 Single Stock 1 (SStock001)	Single Stock	SStock001		€80.00	

Properties

Name: Warehouse 2
Address: Bulgaria, Plovdiv
Supervisors: [Supervisor1](#)
Containers:

Activities

Types Comment Activity

B I U   ...

- Attach File
- Change Property
- Copy
- Delete
- Edit
- Export to CSV
- Export to Excel
- Merge Stock
- Pop Out Window
- Relate To
- Transfer**

Transfer

A new transfer is created with status **In Transit**.



Stock



1/1

Title Types Serial Number Batch Number Purchase Price Sub Products

	Single Stock 1 {SStock002}	Single Stock	SStock002		€80.00	
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Properties



Status: In Transit

Date: 11/1/2021

Source Warehouse: Warehouse 2

Destination: Warehouse 1

Warehouse:

Once status is changed to **Finished**, the stock is moved to the Destination Warehouse.



Stock



2/2

Title Types Serial Number Batch Number Purchase Price Sub Products

	Single Stock 1 {SStock002}	Single Stock	SStock002		€80.00	
	Single Stock 1 {SS2001}	Single Stock	SS2001		€80.00	

Properties



Name: Warehouse 1

Address: Bulgaria, Sofia

Supervisors: Supervisor1

Container:

Sales Transfer

During the Sales process, on the Order stage, after validation of the order, the status cannot be changed to Processed, if stocks are not defined for each Item in the Order (If they are products or Service on stock. The following message will appear upon trying to do so.

Should set stock for all product items



Adding a stock to an Item is done by Edit operation, then by clicking of the Item line, to reveal the Item section.

If you add a stock, which does not correspond to the Item product, the following message will appear:

Should set stock from the same product type

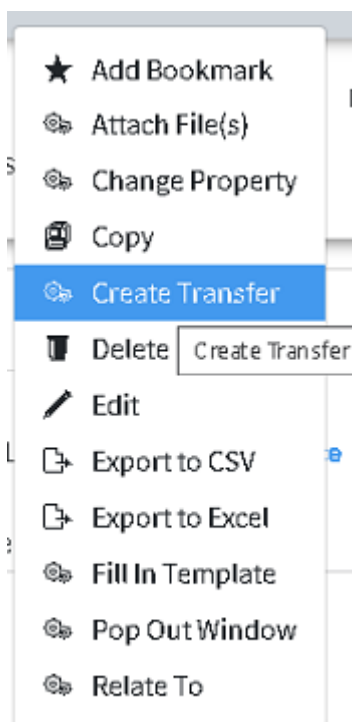


After selecting stocks, for all Items, the status can be changed to Processed.

Once status Processed is set, the Invoice can be issued, from which Sales Transfer can be created.

From Sales Invoice, Transfer can be created. This represents shipping and delivering goods to the Buyer.

The stock is taken out of the available Stock items, and kept for reference in Sold Stock container in Inventory section.



Transfer includes only stock items, not services. It is created with status In transfer.

Once the date is set and the status is changed to Finished, the stocks are moved to Sold stock container.

The new version of stock object is created and the one, listed in the transfer become NON CURRENT.

Transfer from Warehouse 1 to Client company 1 (Outbound Warehouse Transfer)

7:00:54 PM

Stock

Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
(NOT CURRENT) Single Stock 1 (SS2001)	Single Stock	SS2001		€80.00	

Properties

Status: **Finished**
Date: 11/2/2021
Source Warehouse: [Warehouse 1](#)
Delivery Contact: [Client company 1](#)
Order or Invoice: [DEAL 1 - OCT-21 \(#INV - 0000001\)](#)

Activities

Stock items, included in Sales Invoices and included in Sales transfers with status Finished are listed in the Sold Stock Container in Inventory.

Sold Stock (Query Container)

Title	Types	Serial Number	Batch Number	Purchase Price	Sub Products
Single Stock 1 (SS2001)	Single Stock	SS2001		€80.00	

In the Stock object the info for its transfers can be found in the History Area

Single Stock 1 (SS2001) v.6 (Single Stock)



Status: Sold
 Warehouse:
 Purchase Price: €80.00
 Transfer:
 Serial Number: SS2001

Production Date:
 Expiration Date:
 Maintenance Date: 12/31/2021
 Notes:

Title	Created At	User Updated At
No Relations		

Invoices



Invoice	Service	Buyer	End User	Valid From	Valid To
DEAL 1 - OCT-21 (#INV - 0000001)	Single Stock 1	Client company 1	Client company 1		
Purchase #01 (#P-001-22)	Single Stock 1	PBT EU Ltd			

History



- Ordered - **(NOT CURRENT) Single Stock 1**
- Transferring from **Supplier International to Warehouse 1 - Transfer from Supplier International to Warehouse 1 - (NOT CURRENT) Single Stock 1 (SS2001)**
- Transferred to **Warehouse 1 - (NOT CURRENT) Single Stock 1 (SS2001)**
- Transferred to **Warehouse 1 - (NOT CURRENT) Single Stock 1 (SS2001)**
- Transferring from **Warehouse 1 to Client company 1 - Transfer from Warehouse 1 to Client company 1 - (NOT CURRENT) Single Stock 1 (SS2001)**
- Sold to **Client company 1 - Single Stock 1 (SS2001)**

Revision #2

Created 15 November 2024 15:05:20 by Pierre
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