

Inventory Management

Setup Guide

Enabling inventory, warehouses & locations, per-store fulfillment, and receiving · Inventory module v1.2.1

Before you begin

This guide walks an administrator through standing up Inventory from a clean state: enabling the module, creating the warehouse and location structure, wiring up per-store fulfillment, bringing SKUs under tracking, and receiving your first stock. Work top to bottom the first time — later steps assume the earlier ones are done. Every screen is under the **Inventory** admin area.

Step 1 — Enable the module

Open **Inventory** → **Settings**. Until the module is enabled, this is the only Inventory screen visible.

- 1 Turn on **Inventory Module Enabled** (`INVENTORY_MODULE_ENABLED`). This activates the warehouse/location engine; while off, the store keeps its legacy stock behaviour and the operational screens stay hidden.
- 2 Choose the **stores** that will use Inventory-managed stock (`INVENTORY_ENABLED_STORE_IDS`). Only these stores are brought into per-store fulfillment.
- 3 Optionally limit which **product types** are tracked (`INVENTORY_ENABLED_PRODUCT_TYPE_IDS`).

- 4 Pick a **warehouse mode** (`INVENTORY_WAREHOUSE_MODE`): one shared warehouse for all enabled stores, or a separate warehouse per enabled store. The required warehouse/location structure is created, and a background migration of existing legacy stock is queued.
- 5 Click **Save Settings**. The full Inventory menu now appears.

Choose store scope and warehouse mode deliberately. Enabling Inventory provisions structure and migrates stock in the background. If multiple warehouses are created at first enable, the legacy stock bootstrap seeds the first enabled store's warehouse, because legacy stock is not store-split. Later changes to store toggles adjust eligibility but do not rebuild existing warehouses.

Step 2 — Set the core inventory rules

Still in Settings, set how the engine behaves. These apply globally.

Setting	Key	What to choose
Allocation Method	<code>INVENTORY_ALLOCATION_METHOD</code>	<code>default_bin</code> (reserve from the store's default location) or <code>fifo</code> (reserve oldest stock first).
Allow Negative Stock	<code>INVENTORY_ALLOW_NEGATIVE_STOCK</code>	Off (safer) blocks anything that would drive a location below zero; on permits oversells/backorders.
Serialization Enable Rule	<code>INVENTORY_SERIALIZATION_ENABLE_RULE</code>	Require zero stock, allow with serial import, or always allow — governs when a SKU may switch to serial tracking.
PO Starting Number	<code>INVENTORY_PURCHASE_ORDER_NUMBER_START</code>	The first purchase-order number to issue.

Purchase-order governance, vendor payment terms, transfer carriers, disclaimers, cycle count controls (blind counting, variance tolerances, approvals, notifications, count schedules & ABC classes, QuickBooks shrinkage journal), Pre-Cuts and fractional quantities are also configured on this screen. They are optional and can be set later; see the User Manual for the full field list.

Step 3 — Create warehouses

Open **Inventory** → **Warehouses**. A warehouse is a building or site that holds stock.

- 1 Choose **Create Warehouse**.
- 2 Enter a **Code** and **Name** (required) and an optional **Description**.
- 3 Fill in the delivery details used on purchase-order exports: **Warehouse Address for Deliveries**, **Phone Number**, **Primary Contacts**, and **Special Instructions**.
- 4 Set the **Active** toggle and select the **Stores** this warehouse serves.
- 5 Save. The warehouse automatically gets a default location (named *Primary Location* on first save, marked as both default and default-receive).

In warehouse-per-store mode this structure is created for you at enable; you only need to revisit warehouses to add delivery details or extra stores.

Step 4 — Set up locations

Open **Inventory** → **Locations**. A location (bin or shelf) is the level at which stock is actually counted.

- 1 Choose **Create Location** and pick its **Warehouse**.
- 2 Enter a **Code** and **Name** (required); optionally set **Size**, **Max Items** and **Physical Location**.
- 3 Set the toggles: **Active**, **Default Location** (used for allocation) and **Default Receive Location** (where PO receipts land). Only one of each can exist per warehouse.
- 4 Decide store scope: leave the location to **inherit the warehouse's stores**, or define its own subset (which cannot exceed the warehouse's stores).
- 5 Save. Print barcode/QR labels from the index if you label bins physically.

Step 5 — Wire up per-store fulfillment

Per-store fulfillment is a consequence of your warehouse and location store assignments — there is no separate switch. A store's orders are fulfilled only from **locations eligible for that store**.

A location is eligible for a store when it is **active** and either:

- it **inherits** its warehouse's store assignments and that warehouse serves the store; or
- it has its own **store subset** that includes the store.

Availability shown to a shopper for a store equals the summed available stock across that store's eligible locations, so "available" always equals "fulfillable."

- 1 Confirm each warehouse's **Stores** list matches the stores it should fulfill.
- 2 For any location that should serve only some of those stores, set its own store subset; otherwise leave it inheriting.
- 3 If you adjust eligibility after stock exists, rebuild the **per-store availability cache** (globally or per warehouse) so the storefront reflects the new mapping.

The per-store availability cache is a denormalised table of on-hand, reserved, available and in-stock per (SKU, store). It is refreshed automatically as stock changes; a missing row for a store means zero available there.

Step 6 — Bring SKUs under tracking

Adoption is per-SKU — enabling the module does not track everything automatically.

- 1 Open **Inventory → Reports → SKUs Without Inventory Tracking**.
- 2 Filter to the SKUs you want to manage.
- 3 Enable tracking for selected rows, all filtered rows, or the whole scope, with an optional starting quantity (one global quantity, or row-level quantities when using selected rows).
- 4 Once tracked, each SKU gains an **Inventory** tab and a **Purchase History** tab on its product record — for serial tracking, fractional quantities, alternate barcodes and per-location planning values.

Step 7 — Receive your first stock

You can receive against a purchase order or directly. To get stock in quickly:

- 1 Open **Inventory → Inventory Management** and use the **Receive** action (or a SKU's Manual Inventory Adjustment on its Purchase History tab).

- 2 Choose the **SKU** and destination **location**. When only one valid location exists it is auto-selected.
- 3 Enter the **quantity**, a **unit cost** (this creates a FIFO cost layer), and a note. For serialized SKUs, enter one serial per unit.
- 4 Post the receipt. On-hand increases at that location, a cost layer is recorded, the SubProduct and product stock status refresh, and the per-store availability cache updates.

For ongoing purchasing, use **Inventory → Purchase Orders** to raise a PO to a vendor, then **Receive** against it — partial receipts, per-line locations and serial capture are all supported, and each receipt advances the PO toward Received.

After the first receive, verify the SKU on the Inventory Management grid: On Hand should reflect what you received, Available should equal On Hand minus any Reserved, and the store's storefront availability should match.

Setup checklist

- Module enabled and enabled stores chosen.
- Warehouse mode selected; warehouses created with delivery details and store assignments.
- Locations created, with default and default-receive set, and store scope confirmed.
- Per-store eligibility verified; availability cache rebuilt if rules changed after stock existed.
- Target SKUs switched to inventory tracking.
- Opening stock received, with cost and (where applicable) serials.