

FRC Inventory Management Software MANUAL

Robo'Lyon #5553 has developed an inventory management software for the FRC. We've used it in the past build season, and it has worked well for us so far. We wanted to share it with you if this can be of any help.

It is optimized for FRC teams, but you can easily adapt it for FTC or FLL teams. We recommend that you to read the attached manual in order to understand how it works.

The software isn't perfect (yet) so we would like you give us some feedback to tell us about improvements that we can do.

If you have any difficulties or questions, you can ask us in this thread.

The aim is to help you have a better organization in your FRC team. Here are all the explanations you need to use the software:

1) HOME

On this page, you can quickly choose 4 options: Items, Suppliers, Order and Purchase. Below, more options are available such as stock value, total ordered, robot cost and prototypes cost are also displayed.

2) CONFIGURATION

On the "config" page, you can enter the type of items you have, your currency, the rate of the currencies, your address, the name of the suffix used by the software, etc.

Example: if you want the software to be in USD, specify USD in the "desired currency" section and put 1 to the rate of that currency then adjust the other currency rates.

Note:

If you modify the name of a category, changes will be taken into account for future articles, but it will not modify the name of the category of the previously created articles. Thus, it's better to configure the software before adding any article.

If you modify the rate of a currency it will actualize the value of the stock, the robot cost... but it will not modify the details of orders that have already been purchased and therefore their cost.

Please do not modify things that are mentioned in red as “not to be changed” because they are necessary for the proper functioning of the software.

3) ITEMS

On the item page, you can see all your stock. To add an item, click “Add” and write all the characteristics such as the supplier, the weight, the price, and many other features. The item is automatically added to the items list when you click “add” and you can continue to add other articles.

With the button “remove” you can manage your articles that you want to get out of the stock. You can choose if they are used or simply thrown away.

You can change some information about an article (the number use for prototyping for example) with the button “change or delete”. Before adding articles, it is necessary to add suppliers.

4) SUPPLIERS

You can add a supplier with the button add. You can specify the website, a phone number and the currency used by the supplier. Those details will be considered for the purchase order bill.

5) ORDER MANAGEMENT AND PURCHASE

The “orders” page is dedicated to the order management. With the button “create” you have two ways to create an order. First, you have to select a supplier, then you can go for a normal order or a quick order. This way of doing it means that all the items which the quantity available is under the minimal stock quantity previously defined will be ordered in the right amount to fulfill that level. If the box “all items” is checked, all the items of that supplier will be added to the list in the same conditions. (this means you can find some articles in the list with a quantity defined as zero). If you double tap on an article you can modify its quantity.

If you choose to go for the normal process, you have different options too. You will create your order by adding articles one by one to the list specifying the final number of articles that you want in your stock (the number of articles to order to fulfill that amount will be added automatically) or more simply the quantity that you want to order.

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Once you've added all the articles to your order, you can click the "order" button on the bottom of the page.

You can manage your orders with the button "change". When you select an order and after clicking on "show detail", you can:

- Modify a quantity
- Add an article that you forgot
- Change the status of the order when it's purchased (important to specify it for the receipt of the order)

Don't forget to save after any modification.

With the button "print" you can save the purchase order as a pdf and then print it. It changes the status of the order to "printed".

The "purchase" page shows you the template of the purchase order bill and the last printed order. You can modify the template of the purchase order (your logo) on the purchase page. To proceed you need to remove the protection on that sheet on the revision section of excel. **The password is ROBOLYON**. Don't forget to put it back once you've added your logo to prevent any unfortunate modifications. You can modify the address on the "config" page

When you receipt your order, you can click the red button "receipt" to automatically update the stock (the order status must be "purchased" to proceed). If you received a partial amount of your order, you can still update your stock by double-clicking an article and modifying the quantity receipted (the state of the order is mentioned as "partially received").

When you received the last pieces, you can update the stock by modifying the collected quantity of an article on the "order receipt" page (you double click the article and then, you add the quantity that you've just received NOT the total number of pieces that you have ordered).

When all the collected quantities of each article matches the ordered quantity, the order is fully received. Therefore, its status passes to "fully received".

Enjoy ! TEAM 5553