STOCK FLOW GUIDE

# Warehouse → Shop: Requesting, Issuing, and Receiving Stock

How stock physically moves between locations in the Bite Events & Rentals system (“kutoa na kurudisha”), who is responsible at each step, and how manual stock corrections work.

# 1. What This Flow Is For

Every product's stock is tracked **per location** — a Main Warehouse might hold 300 chairs while the Dar es Salaam Shop holds 30. When the shop is running low, it doesn't edit numbers directly; it goes through the **Stock Request** flow so the movement is approved, tracked, and reflected correctly at both ends. This is the "kutoa na kurudisha" (issue and return) flow referenced throughout the admin panel as **Maombi ya Stoo**.

A separate, simpler tool — **Stock Adjustments** (Marekebisho ya Stoo) — exists for corrections that aren't a transfer between locations at all: a physical count found more or fewer items than the system expected, damage, theft, or simply entering a location's opening stock. Section 5 covers this.

### Stock buckets, in one line each

| Bucket | Meaning |
|---|---|
| **Physical Qty** | Everything actually sitting at that location, in any condition. |
| **Available Qty** | Physical stock that is free to sell, rent out, or transfer right now. |
| **Reserved Qty** | Committed to a confirmed rental booking, not yet dispatched. |
| **In Transit Qty** | Issued from one location, not yet received at the destination. |
| **Damaged / Under Repair** | Set aside after an inspection or damage report — not sellable. |

## 2. The Stock Request Flow, Step by Step

This is the path a request takes from "we need more chairs" to "the chairs are on the shelf and counted." Every step below is a real screen in **Maombi ya Stoo**.

### 1 Shop creates a request (Draft)

**Who:** Shop / Sales Staff at the requesting location | **Permission:** create-stock-requests

Staff picks the source location (usually the Main Warehouse) and lists the products and quantities needed. The request starts as a **Draft** — nothing happens yet and it can still be edited freely.

### 2 Submit for Approval

**Who:** Same requester | **Permission:** create-stock-requests

Moving the request to **Pending Approval** sends a notification to everyone with approval rights at the source (warehouse) location, so the right people see it without having to check manually.

### 3 Warehouse decides: Approve or Reject

**Who:** Warehouse Manager at the source location | **Permission:** approve-stock-requests

The warehouse can approve the **full** quantity, approve a **partial** quantity (e.g. only 15 of the 20 chairs asked for, if that's all that's free), or **reject** the request outright with a required reason. Approving reserves that stock at the warehouse so it can't be double-promised elsewhere. The requester is notified of the decision either way.

### 4 Warehouse issues the stock

**Who:** Storekeeper / Warehouse Manager | **Permission:** issue-stock

Once approved, the warehouse physically pulls the items and marks them **Issued**. This creates a Stock Transfer record and moves the quantity from the warehouse's Available bucket into In-Transit. Two notifications fire here: the original requester is told stock is on its way, and staff at the **destination** shop with receiving rights are told to expect a delivery.

### 5 (Optional) Mark In Transit

**Who:** Delivery / Warehouse staff

For deliveries that take time (a different town, a scheduled run), the transfer can be flagged **In Transit** as a visible status between "issued" and "received," useful for tracking multi-day transfers.

### 6 Shop receives and counts the stock

**Who:** Storekeeper / Shop staff at the destination | **Permission:** confirm-stock-receipt

The shop confirms how many of each item actually arrived — full or **partial** receipt is supported, in case a box went missing in transit. Confirmed quantities move out of In-Transit and into the shop's own Available stock. A shortfall between issued and received quantities stays visible on the request for follow-up.

### 7 Cancelling a request

**Who:** The requester, or anyone with approval rights | **Permission:** create-stock-requests / approve-stock-requests

A request can be cancelled any time **before** stock is issued. Cancelling releases any quantity that had been reserved at the warehouse back to Available. Once stock is issued, the request can no longer be cancelled — it has to be received and reconciled instead.

**Why the approval step exists**

Skipping straight from “requested” to “issued” would let two shops both promise the same 20 chairs to different customers before either delivery actually happens. The approval step is what reserves the stock the moment it's approved, not the moment it physically leaves the warehouse.

## 3. Who Gets Notified, and When

Notifications appear in the bell icon at the top of the admin panel (and, for staff using the mobile app, on their device). Nobody has to refresh a list and guess — the right people are pinged automatically at each handoff.

| Trigger | Notified | Purpose |
|---|---|---|
| Request submitted for approval | Staff with approve-stock-requests at the source (warehouse) location | A new request is waiting on your decision. |
| Request approved or rejected | The original requester | Tells them the outcome, and the approved quantity if partial. |
| Stock issued | The original requester | Confirms their request is being fulfilled and is on its way. |
| Stock issued | Staff with confirm-stock-receipt at the destination (shop) location | Tells them to expect a delivery to receive and count. |
| Stock falls at or below minimum | Staff with adjust-inventory at that location | Low-stock alert so a new request can be raised proactively. |

### Permissions needed at each step

| Permission | What it allows | Who has it by default |
|---|---|---|
| create-stock-requests | Create a request, submit it, cancel your own before it's issued | Shop/Sales Staff |
| approve-stock-requests | Approve (full/partial) or reject a pending request | Warehouse Manager |
| issue-stock | Mark approved stock as physically issued | Warehouse Manager, Storekeeper |
| confirm-stock-receipt | Confirm what actually arrived at the destination | Storekeeper |
| adjust-inventory | Record a Stock Adjustment (Increase / Decrease / Set) | Warehouse Manager |

Super Administrator and Manager hold every permission automatically. Roles and their permissions are configured by an administrator and can be adjusted if your business needs a different split of responsibilities.

## 4. Stock Adjustments: Corrections, Not Transfers

Use **Marekebisho ya Stoo** (Stock Adjustments) when stock needs to change at a single location for a reason that has nothing to do with moving items between locations — a physical count, damage, theft, or entering the very first stock a product ever had at a location. Every adjustment requires a written reason and is permanently recorded against that product and location.

| Type | What it does | Example use |
|---|---|---|
| Increase | Add a quantity on top of what's currently recorded | "Found 5 extra chairs during the count" |
| Decrease | Remove a quantity from what's currently recorded | "3 chairs went missing" |
| Set (exact quantity) | Type the true total directly — the system works out the difference for you | "We just did a full stock count: there are exactly 42 chairs here, not 47" |

> **Increase/Decrease vs. Set**
>
> Increase and Decrease ask "by how much did it change?" and are best when you already know the delta. **Set** asks "what is the true number right now?" and is usually faster after a physical stock count, since you don't have to do the subtraction yourself — enter the counted number and the system calculates and records the adjustment automatically.

Every adjustment writes an entry to the same permanent stock ledger as sales, rentals, and transfers (visible in Reports → Stock by Location), so nothing here is a silent, untraceable edit.

## 5. Worked Example

**Scenario:** The Dar es Salaam Shop has 30 plastic chairs available but a client just booked an event needing 45. The Main Warehouse has 300 in stock.

1. Shop staff opens **Maombi ya Stoo → Ongeza**, selects Main Warehouse as the source, and requests 20 Plastic Chairs (30 + 20 = 50, comfortably covering the 45 needed).
2. Staff submits the request. The Warehouse Manager gets a notification immediately.
3. The Warehouse Manager checks their own stock, sees 300 available, and approves the full 20.
4. The requester is notified: “your request for 20 Plastic Chairs was approved.”
5. A Storekeeper at the warehouse pulls 20 chairs off the shelf and marks the request **Issued**. The warehouse's available count drops by 20; a Stock Transfer record is created.
6. The Dar es Salaam Shop is notified that 20 chairs are on the way and to expect them.
7. The chairs arrive. Shop staff opens the transfer and confirms **20 received** — all present and correct. The shop's available stock rises from 30 to 50.
8. If only 18 had arrived, the shop would record 18 received; the missing 2 stay flagged on the request for follow-up rather than silently disappearing.

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