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Build Intrinsically

AssetTrack

Organization Inventory & Asset Management System

USER & ADMINISTRATOR GUIDE

A complete reference manual for day-to-day use and system administration

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1. Introduction

1.1 About AssetTrack

AssetTrack is a organization inventory and asset management system built for the day-to-day realities of running a campus: tracking equipment and consumables across classrooms, labs and offices, routing transfer and purchase requests through the right approvals, logging repairs, and keeping a clear, auditable record of what was bought, when, and by whom.

This guide covers every screen and feature in the application, organized by task rather than by menu, so you can look up "how do I request a transfer" or "how do I close a stocking plan" and get a direct answer.

1.2 Who This Guide Is For

This manual serves two audiences in one document:

- Everyday users (teachers, department staff, location custodians) who need to look up items, request transfers, report repairs, or track a purchase request.
- Administrators and department heads who configure the system, manage staff and approvals, and are responsible for budgets and reporting.

Sections that apply only to administrators or managers are clearly marked. If a feature described here doesn't appear in your copy of the application, it is most likely restricted to a role you don't currently hold — see Section 4, "User Roles & Permissions."

1.3 Key Concepts

Assets vs. Stock

Every item in AssetTrack is tracked one of two ways:

- Asset — a unique, individually identifiable item such as a projector, laptop, or piece of lab equipment. Assets can carry a serial number and asset tag and are tracked one at a time or by lot if quantity is defined.
- Stock — a consumable or bulk-quantity item such as paper, markers, or sports equipment, tracked as a quantity in a unit (pieces, reams, boxes, litres, etc.).

Stock can be recorded as consumed (Section 6.14) and quick-restocked (Section 6.15); assets can be depreciated (Section 6.16) — each concept only applies to its own tracking type.

Departments, Locations and Access

Every location (a classroom, lab, office or store) belongs to a department and may have a custodian — a staff member responsible for the items kept there. Your access to inventory, transfers and repairs is normally scoped to the departments and locations you're associated with; administrators see everything.

The Approval Workflow

Transfers and procurement requests move through up to two decision points: your manager (if you have one and the request requires it) and an administrator. A request is only fully "Approved" once every required decision has been made. You can track exactly where a request stands at any time from its status badges.

1.4 What's New in This Edition

Version 8.1 of this guide describes AssetTrack application version 11.10 and later. If your organization has upgraded recently, this table summarises what has been added or changed since the previous edition of the guide, and where to read about it.

Area	What's new	Section
Editing and corrections	Authorised users can edit submitted transfer, procurement, repair and petty cash requests. Every change is saved in an edit log with who, when and what changed. Consumption and scrap records can also be corrected.	17
Returns after receiving	Goods can be sent back to the vendor after they are in inventory. The inventory count, stock value and the budget plan are corrected together, and the original receipt is kept.	8.11
Asset restocking	Restocking an existing asset now explains the effect on depreciation and lets you add the units to the existing lot or create a new entry.	8.10
Budget linking	Procurement, petty cash, repairs and quick restocks can be linked to a plan, and the link can be added or changed later. A plan's spent figure is always calculated from its linked records.	10.6, 10.12
Import and template	Download an Excel template, fill it in, review exactly what will happen, and import inventory in bulk.	18
Permissions and groups	Per-person permission toggles, user groups, and a clear order of precedence.	4.6 to 4.9, 13.7
Rejection reasons	A reason is required when a request is declined; it is shown with the Rejected badge, in emails and in exports.	8.5, 11.3
Quotations and bills	A quotation or invoice is attached while a request is open; the bill is attached when the goods are received.	8.4
Receiving real figures	Enter the quantity actually received and the amount actually paid when receiving goods.	8.6
Deleted items	Records of a deleted item are kept as read-only history, greyed out, and can be browsed in a Deleted items archive.	6.20
Costs and rounding	Unit costs keep six decimals and every amount is rounded once, so cheap bulk items and large totals stay accurate.	6.19
Report filters	A Filters card narrows any report by department, location, category, vendor and more.	14.5
Setup renames	Renaming a department, location, category or vendor now carries the new name to the records that are still live.	13.1 to 13.4

Area	What's new	Section
Sign-in rules	Session length, sign-in limits and password rules explained in one place.	2.4
Email settings	The mail server (SMTP) is now set up on the Organization screen, with a Send test email button — no server files to edit.	13.8

2. Getting Started

2.1 Signing In

Open the AssetTrack web address provided by your organization in a browser. You'll see the sign-in screen with your organization's name and logo.

- Enter your work email address.
- Enter your password.
- Select Sign in.

If your email and password are correct but your account has been deactivated by an administrator, you will see a message saying your account is inactive — contact your organization's AssetTrack administrator.

TIP

New accounts are created with a temporary password by an administrator (typically Welcome@123 unless changed). Change this immediately after your first sign-in from My Profile — see Section 15.2.

2.2 Forgot Password

If you've forgotten your password, use the OTP (one-time password) reset flow rather than contacting an administrator:

1. On the sign-in screen, select Forgot password?
2. Enter your work email address and select Send OTP.
3. Check your email for a 6-digit code. It is valid for 10 minutes.
4. Enter the code on the Enter OTP screen. It verifies automatically once you've typed all 6 digits.
5. Choose a new password (minimum 8 characters) and confirm it.

If the code expires before you enter it, select Resend OTP from the same screen rather than starting over.

NOTE

For security, requesting an OTP always shows the same confirmation message whether or not the email address has an account — this prevents someone from using the reset form to check who has an account.

2.3 Signing Out

Select your name and role at the bottom of the sidebar to go to My Profile, or use the Log out link directly beneath it at any time. Signing out ends your session immediately.

2.4 Sessions, Security and Sign-in Limits

These rules explain behaviour you may notice when signing in or working in AssetTrack:

- Session length — once you sign in you stay signed in for up to 12 hours, after which you are asked to sign in again. Signing out (Section 2.3) ends the session immediately.
- Sign-in limits — to protect accounts from guessing, a limited number of sign-in attempts is allowed from one network in a short period (30 attempts in 15 minutes). If you reach the limit, wait a few minutes and try again.
- Password reset codes — a reset code (OTP) is valid for 10 minutes, and up to 5 codes can be requested in 10 minutes (Section 2.2).
- Passwords — a password must be at least 8 characters. Passwords are stored in a scrambled (hashed) form, so nobody, including administrators, can read a password; an administrator can only reset it to the temporary default.
- Temporary passwords — a new account, or an account whose password an administrator resets, starts with a temporary password that should be changed at the first sign-in (Section 15.2).
- Inactive accounts — an account set to Inactive by an administrator cannot sign in, but its history is kept (Section 13.5).
- Permissions are enforced by the system — every action is checked against your permissions when you perform it, not just hidden from the screen, so a button you cannot see is also blocked if someone tries to reach it another way (Section 4).

- Devices — you can see and sign out the devices signed in to your own account from My Profile (Section 15.4).

TIP

If you are locked out, use Forgot password on the sign-in screen (Section 2.2). If your account is inactive or your permissions look wrong, ask your administrator.

3. Understanding the Interface

3.1 The Sidebar

The sidebar on the left is how you move between every part of the application. It's organised into three groups:

- Day-to-day (top): Overview, Inventory, Transfers, Procurement, Repairs, Consumption, and Scraps for people with scrap access — available to everyone with full dashboard access.
- Team Approvals: appears only for managers with staff reporting to them.
- Setup (admin only): Departments, Locations, Categories, Vendors, Staff & Users, User groups, Organization — configuration screens for administrators.
- Stocking Plans, Reports, Petty Cash, My Profile and Support sit below Setup and are available based on your role and permissions (see Section 4).
- Your name, role and a small avatar appear at the bottom of the sidebar — select it to jump to My Profile.
- On desktop, select the collapse icon at the top of the sidebar to shrink it to icons only, giving more room for tables and forms — select it again to expand it back.

3.2 The Topbar

The bar across the top of every screen shows the current section's name and a one-line description of what it's for. On narrow screens (tablets and phones), a menu icon appears here to open and close the sidebar.

3.3 Working on a Phone or Tablet

AssetTrack is fully usable on a phone or tablet. The sidebar collapses behind a menu button, tables scroll horizontally where needed, and forms stack into a single column. All the same features are available — nothing is desktop-only.

3.4 Notifications, Confirmations and Feedback

AssetTrack gives you feedback in a few consistent ways:

- Toasts — a small message in the bottom-right corner confirming an action succeeded (green) or failed (red), which disappears after a few seconds.
- Confirm dialogs — for anything that can't easily be undone (deleting an item, removing a photo, declining a request), AssetTrack asks you to confirm before proceeding, clearly describing what will happen.
- Status badges — colour-coded labels (Pending, Approved, Rejected, Under Repair, and so on) used consistently across every list and table in the application.
- Email notifications — administrators and requesters receive an email when a request needs review or has been decided, if email is configured for your organization (see Section 16).

3.5 Dark and Light Mode

Select the sun/moon icon in the top bar to switch between light and dark themes at any time. Your preference is remembered for future visits on the same device.

3.6 Installing AssetTrack as an App

On a supported device and browser, AssetTrack can be installed as a standalone app from the browser's "Install" or "Add to Home Screen" prompt, giving it its own icon and window separate from the browser. This requires your organization's AssetTrack instance to be running on a registered domain with a valid SSL certificate — without that, the install prompt will not be offered.

3.7 Entering Dates in AD or BS

Wherever a date is entered across AssetTrack — purchase dates, transfer and procurement history, repair reports and more — the date picker lets you enter it in either the Gregorian (AD) or Bikram Sambat (BS) calendar, converting between the two automatically. See Section 6.2 for how the Miti (BS date) is used for sorting, and Section 21.1 for the definition of Miti.

4. User Roles & Permissions

AssetTrack has four levels of access. Every account has exactly one role (Administrator, Manager, or Staff), and separately may or may not be the custodian of one or more locations, which can further shape what you see.

Capability	Administrator	Manager	Staff
View and search inventory	Yes	Yes	Yes
Add / edit / delete items	Yes	No	No
Request transfers & procurement	Yes	Yes	Yes
Approve/decline transfers & procurement	Yes (final)	Yes (own team, first step)	No
Report repairs	Yes	Yes	Yes
Update/resolve repairs	Yes	Own department	Only if location custodian
Create & manage stocking plans	Yes	Yes	No

Capability	Administrator	Manager	Staff
Record petty cash expenses	Yes	Yes	Yes
Approve petty cash	Yes	No	No
Manage departments/locations/categories/vendors	Yes	No	No
Manage staff accounts	Yes	No	No
Configure organization wide settings	Yes	No	No
Set permissions and user groups (Sections 4.6 to 4.9)	Yes	No	No
Edit & revert consumption records (Section 17.4)	Yes	No	No
Adjust received purchases — returns & corrections (Section 8.11)	Yes	No	No
Edit submitted requests (Section 17.2)	Yes	No	No
Record stock consumption	Yes	Yes	Yes
Import items from Excel (Chapter 18)	Yes	No	No
Export reports	Yes	Yes*	Yes*

* Managers and staff can export reports, but the data is automatically scoped to the departments and locations they have access to — see below.

The table shows the default for each role. An administrator can change what any individual person or user group may do, so two people with the same role can have different buttons — see Sections 4.6 to 4.9. Cells marked Custodian only apply to staff who look after a location.

4.1 Administrator

Full access to every screen and every record in the system, regardless of department. Administrators are the only role that can approve requests at the final step, manage other staff

accounts, and change system-wide settings like organization setup and department/location structure.

4.2 Manager / Department Head

A manager sees and manages inventory, transfers, procurement and repairs for the departments they're assigned to, and is the first approval step for any staff member who reports to them (visible under Team Approvals). A manager's decision is combined with the administrator's: a request is only fully approved once both required decisions are in.

4.3 Staff

Staff can view inventory within their department's locations, request transfers and procurement, report repairs, and record petty cash expenses. They cannot edit inventory records directly or make approval decisions.

4.4 Location Custodian (Limited Access)

Any staff member can additionally be made the custodian of one or more specific locations by an administrator. A custodian of exactly one location, without any other departments assigned, sees a simplified "My Location" view on the Overview screen instead of the full dashboard — showing just the items and repair reports at their location, with quick actions to report issues or request transfers. This is designed for staff whose entire responsibility is a single room or store, such as a lab assistant or store keeper.

NOTE

An administrator can override this automatic behaviour for any individual account from Staff & Users, granting or denying full dashboard access regardless of how many locations someone is a custodian of.

4.5 Scrap Access

Viewing and managing the Scraps register (Section 6.13) is controlled by its own permission, separate from dashboard access (Section 4.4). Administrators always have it; managers have it by default; staff need it explicitly granted by an administrator from Staff & Users (Section 13.5). Someone without scrap access does not see Scraps in their sidebar at all, and the underlying screens and API are blocked from their account regardless.

4.6 Permission Toggles (Per Person)

Behind the three roles sits a list of individual permissions — one for each thing a person might do, such as adding items, approving transfers, editing submitted requests or exporting reports. Each permission is shown as a switch (a toggle) in the Permissions panel of a user's record (Section 13.7). The switches start at the role's default; an administrator can switch any of them on or off for one person without changing their role.

- On (green) — the person is allowed to do this.
- Off (red) — the person is not allowed to do this.
- Custom tag — this switch was changed for this person, so it no longer follows their role or group.
- Group tag — the setting comes from the person's user group (Section 4.7).

Select Reset to group / role defaults in the Permissions panel to remove a person's personal changes. One permission, Manage users & permissions, is locked: it is always on for administrators and can never be given to anyone else, so only administrators can ever change permissions. Every other permission can be switched off, even for an administrator.

NOTE

Switching a permission off also switches off the shortcuts that normally earn it. For example, a location custodian can usually quick-restock stock at their own location, and a department head can update repairs in their department; if the matching permission is switched Off for that person, those shortcuts stop working too.

4.7 User Groups

A user group is a named set of permission settings kept in one place — for example Accounts team or Store keepers. Instead of adjusting the same switches person by person, an administrator sets them once on the group and adds people to it. A person belongs to at most one group.

For every permission, a group can say On, Off, or Role default. Role default means the group has no opinion, so each member keeps following their own role for that permission. Only the permissions a group actually sets are affected.

- Changes to a group apply to every member immediately, from their next action.
- Deleting a group never deletes people — members simply fall back to their role defaults plus any personal changes.
- A member can still be given a personal exception on their own record; it overrides the group for that person only.
- A group can never grant the locked permission, Manage users & permissions.

4.8 How the Final Permission Is Decided

When AssetTrack checks whether you may do something, it looks at three places, from most specific to least specific, and uses the first one that has a setting:

1. Your own personal setting (tagged Custom on your record).
2. Your user group's setting, if you are in a group and the group sets that permission.
3. The default for your role — Administrator, Manager or Staff.

For example, Sita is Staff, and the Store keepers group has Quick-restock stock items switched On. The staff default is Off, but the group says On, so Sita can quick-restock. If an administrator later switches Quick-restock Off on Sita's own record, her personal setting wins and she can no longer do it, while the rest of the group still can.

Some abilities can also be earned through your place in the organization — being the custodian of a location, or the head of the department that owns it. For those, a personal or group Off blocks everything, but otherwise either the permission or your position is enough.

TIP

Role defaults reproduce what the application allowed before permissions existed, so nothing changes for

anyone until an administrator switches a permission or assigns a group.

4.9 Permission Reference

This table lists every permission, what it controls, and its default for each role. Permissions are grouped by area, in the same order as the Permissions panel. Some staff defaults depend on circumstances: Custodian only means staff who look after exactly one location get the limited single-location view (Section 4.4), and With dashboard access means the permission follows whether the person has full dashboard and inventory access.

Permission	What it controls	Admin	Manager	Staff
Dashboard & inventory				
Full dashboard & inventory access	See the whole inventory, dashboard, transfers, procurement, repairs and consumption lists. Off = limited to their own location.	Yes	Yes	Custodian only
Add inventory items	Create new items and assets.	Yes	No	No
Import inventory from Excel	Download the import template and bulk-import items from a filled-in Excel file. New rows also need Add inventory items; changes to existing items also need Edit items & photos.	Yes	No	No
Edit items & photos	Change item details, depreciation settings and photos.	Yes	No	No
Delete items	Permanently delete inventory records.	Yes	No	No
Dispose items	Dispose of items (moves them to Scraps), including from a repair report.	Yes	No	No
Split & group asset lots	Split a lot into units or merge several records into one lot.	Yes	No	No
Log condition changes	Record a change in an item's condition.	Yes	Yes	No
Record stock consumption	Deduct used-up stock/consumables.	Yes	Yes	Yes
Quick-restock stock items	Add stock directly without a procurement request. Location custodians can always do this for their own location unless this is switched off.	Yes	No	No
View purchase history & stock batches	See what an item was bought for, from whom, and its stock batches.	Yes	Yes	Yes
Transfers				

Permission	What it controls	Admin	Manager	Staff
Request transfers	Ask to move items between locations.	Yes	Yes	Yes
Give final approval on transfers	Approve or reject transfer requests as the final approver.	Yes	No	No
Approve team requests (as manager)	Review transfer and procurement requests raised by the people who report to them.	Yes	Yes	Yes
Procurement				
Request procurement	Raise purchase / restock requests.	Yes	Yes	Yes
Give final approval on procurement	Approve or reject purchase requests as the final approver.	Yes	No	No
Receive goods into inventory	Book approved purchases into inventory.	Yes	No	No
Repairs & maintenance				
Report repair issues	Report an item as needing repair or attention.	Yes	Yes	Yes
Update repair requests	Change status, vendor and costs. Location custodians and the head of the owning department can always do this for their own locations unless this is switched off.	Yes	No	No
Delete repair requests	Permanently delete repair records.	Yes	No	No
Editing submitted requests				
Edit submitted requests	Correct mistakes in transfer, procurement, repair and petty cash requests. Every edit is saved in the request's edit log with who made it and what changed.	Yes	No	No
Adjust received purchases (returns & corrections)	After goods have been received, correct the quantity kept and the amount paid — for example when items are sent back to the vendor. The inventory count, stock value and the budget plan are corrected to match, the original receipt is kept in the purchase history, and a reason is required for the request's edit log. Needs "Edit submitted requests" as well.	Yes	No	No
Edit & revert consumption records	Correct a recorded consumption (quantity, purpose, date, notes) or revert it entirely. Stock on hand is corrected to match, and every change is saved in the record's edit log.	Yes	No	No
Scraps				

Permission	What it controls	Admin	Manager	Staff
View & work with Scraps	Open the Scraps register and attach bills.	Yes	Yes	No
Revalue or remove scrap records	Set the depreciated value of a scrap record, or restore it to active inventory.	Yes	No	No
Budgets & petty cash				
View budgets	See annual, weekly and petty-cash budget plans.	Yes	Yes	Yes
Define & edit budgets	Create budget plans and change their amount, dates and status.	Yes	Yes	No
Approve budgets	Mark a budget plan as approved.	Yes	No	No
Delete budgets	Permanently delete budget plans.	Yes	No	No
Set the petty cash limit	Change the maximum amount allowed for a single petty expense.	Yes	No	No
View petty expenses	See the petty expense list and receipts.	Yes	Yes	Yes
Add petty expenses	Submit a petty cash expense (and attach receipts to their own).	Yes	Yes	Yes
Approve petty expenses	Approve or reject petty expenses; can also manage any expense's receipt.	Yes	No	No
Delete petty expenses	Permanently delete petty expense records.	Yes	No	No
Reports & financial visibility				
View & export reports	Open the Reports page and download Excel exports.	Yes	Yes	With dashboard access
View depreciation & book values	See depreciation figures, book values and the depreciation report. Off = these are hidden everywhere.	Yes	Yes	Yes
Setup & administration				
Manage departments	Add, edit and delete departments.	Yes	No	No
Manage locations	Add, edit and delete locations and their custodians.	Yes	No	No
Manage categories	Add, edit and delete item categories and their depreciation policy.	Yes	No	No
Manage vendors	Add, edit and delete vendors.	Yes	No	No

Permission	What it controls	Admin	Manager	Staff
Manage organization & branding	Change the organization name, logo, app wording and other general settings.	Yes	No	No
Manage organization depreciation policy	Change the organization-wide default depreciation method, rate, life and salvage.	Yes	No	No
Manage users & permissions	Add, edit and remove users and edit their permissions. Always on for administrators; cannot be given to anyone else.	Yes	No	No

5. Dashboard Overview

The Overview screen is the first thing you see after signing in. It gives a live snapshot of the inventory system and, for administrators, a way to act on pending requests without leaving the page.

5.1 Summary Cards

Nine cards across the top of the screen show, at a glance:

- Total items tracked — the full count of assets and stock items in the system (disposed items are in Scraps and are not counted).
- Total inventory +asset value — unit cost × quantity currently on hand, summed across everything tracked. An item with none left in stock contributes Rs. 0. This uses original purchase cost, not depreciated book value — see Section 6.16 for asset depreciation.
- Total Inventory value(stock) — unit cost × quantity currently on hand for stock based items
- Total inventory value (asset) — unit cost × quantity currently on hand for asset based items
- Total asset value after depreciation — total value of tracked assets as per depreciation applicable today (value changes after each midnight pass)
- Under repair — how many items currently have the "Under Repair" condition.
- Low stock alerts — how many stock items have fallen to or below their configured minimum level (disposed items are not counted).

- Pending approvals — the combined count of transfer and procurement requests still awaiting a decision. Requests that have already been declined, for example by a manager, are not counted.
- Every card is clickable and takes you straight to the relevant screen.

Total inventory value never includes disposed items — those are valued separately on the Scraps screen (Section 6.13) and never distort the figure for what the organization currently owns and uses. If your account has scrap access, a sixth card on this screen shows the current total Scrap value, kept visibly separate from the inventory figure above it.

For organizations with depreciation configured (Section 6.16) or active consumption tracking (Section 6.14), Overview may show one or two further cards — Total book value (current depreciated value across all assets) and Total consumption this period — alongside the figures above, so the effect of those modules is visible without leaving the dashboard.

5.2 Quick Review Panel (Administrators)

Administrators see three additional panels — Pending Transfers, Pending Procurement, and Open Repair Reports — each listing the most recent items awaiting attention. Transfers and procurement requests can be approved or declined with a single click directly from this panel, without navigating away from Overview.

5.3 Category and Location Breakdown

A simple bar breakdown shows how inventory is distributed across categories, with item counts and combined value, so you can see at a glance where the bulk of the organization's assets sit.

5.4 Low Stock and Warranty Alerts

Two panels highlight items that need attention soon:

- Low stock alerts — any stock item at or below its configured minimum level, with the current quantity remaining.
- Warranty alerts — any item with a warranty expiring within 30 days, or already expired, clearly marked.
- Selecting any alert takes you directly to that item's detail page.

5.5 Recent Activity Feed

A chronological feed of the most recent transfers, procurement requests and repair reports across the system, each showing who took the action, when (in both Gregorian and Bikram Sambat dates), and its current status. Selecting an entry takes you to the relevant section.

5.6 "My Location" (Limited-Access Custodians)

If your account is scoped to a single location (see Section 4.4), your Overview screen instead shows a focused "My Location" panel: the items at your location with their condition and tags, and a list of any repairs reported there, each with quick Report Issue and Transfer buttons.

6. Inventory Management

The Inventory screen is the full catalogue of everything AssetTrack is tracking — assets and stock, across every location you have access to.

6.1 Viewing Inventory

Three view modes are available from the toggle at the top of the screen, so you can pick whichever suits the task:

- List — a full data table with every column (category, type, tag/serial, location, quantity, condition, tags). Best for scanning detail.
- Grid — photo-forward cards, one per item, best for visually identifying equipment.
- Compact — a dense single-line-per-item view for quickly scrolling through a large list.

6.2 Searching, Filtering and Sorting

The filter bar above the list lets you narrow results by:

- Free-text search — matches item name, asset tag, serial number, model number, manufacturer, and tags.
- Location, Category, Condition, and Asset/Stock type — dropdown filters, usable in any combination.
- Sort — choose Name, Purchase date, Cost, or Quantity from the sort dropdown, and use the direction button beside it to flip between ascending and descending.
- In addition, the Name, Miti (Bikram Sambat date), Date, Item and Quantity/Cost column headers in every table across the application — Inventory, Transfers, Procurement, and Repairs — can be selected directly to sort by that column; select the same header again to reverse the order. An arrow icon next to the column name shows the current sort direction.

When you search, a summary banner above the results shows the total quantity and value matching your search, and — if the same item name appears more than once, for example split across different locations — a breakdown of how many records and how much total quantity exist for that name. This makes it possible to see at a glance how much of something you actually have in total, even when it is spread across several locations under separate records. The breakdown clears automatically once the search box is emptied.

6.3 Tags

Any item can carry one or more free-text tags (for example, "exam season," "fragile," or "loaned"). Tags appear as small labels throughout the inventory list; selecting a tag anywhere instantly filters the list to just items carrying that tag, with a chip shown in the filter bar so you can clear it again with one click.

6.4 Adding a New Item (Administrators)

Select + Add Item from the Inventory screen. The form adapts based on the tracking type you choose:

1. Choose Asset (unique) or Stock / consumable as the tracking type.
2. Enter the item name and, optionally, category and location.
3. For assets: asset tag, serial number, model number, manufacturer, colour, dimensions and weight are all optional but useful for identification.
4. For stock: enter the starting quantity, unit, minimum stock level (the reorder threshold), and choose the stock issuing method — see Section 6.8.
5. Set the condition, purchase date, purchase cost, vendor and warranty expiry if known.
6. Add any tags, and notes if useful.
7. Select Save item.

6.5 Editing an Item (Administrators)

Open any item and select Edit item to change any of its details. This needs the Edit items & photos permission (Section 4.9). Changing the Condition field here is logged automatically to the item's history — see Section 6.9.

- Stock items — changing the quantity or the unit cost here is treated as a correction. A quantity change adds stock to, or removes it from, the item's batches so FIFO/LIFO issuing stays accurate (Section 6.8), and a unit cost change re-prices the stock still on hand. For everyday stock-ins use Quick Restock or Procurement, and for usage use Consumption.
- A quantity cannot be negative.
- The unit cost can have up to six decimals; amounts are rounded once, at the end (Section 6.19).

- If a unit cost was entered wrongly on goods that arrived through procurement, correct the purchase itself (Section 8.11) so the budget plan is corrected as well.

6.6 Item Photos

From an item's detail page, administrators can select Upload photo to attach a picture (PNG, JPG, WEBP or GIF, up to 15 MB), and Remove photo to take it off again. Photos appear throughout the Grid inventory view and on the item detail page, making equipment easy to identify visually.

6.7 Assets vs. Stock (Tracking Type)

This choice, made when the item is created, determines how it behaves throughout the system:

- Assets are tracked individually — a transfer moves the whole item to a new location.
- Stock is tracked by quantity — a transfer moves a specified amount, reducing the source location's quantity and adding to (or creating) the item at the destination.

6.8 FIFO / LIFO Stock Issuing Method

Every stock item has a configured issuing method, shown as a small badge on its detail page and set from the item form:

- FIFO (First In, First Out) — the oldest received batch of stock is used up first. This is the standard choice for most consumables, since it naturally rotates older stock out before it can go to waste or expire.
- LIFO (Last In, First Out) — the most recently received batch is used first. This suits items where recency doesn't affect usability and you want the newest purchase reflected in usage first.
- This isn't just a label: whenever stock of that item is transferred out, AssetTrack automatically draws down the correct batch (or batches) according to this setting, and carries the batch's cost information along with it. You can see the live batch breakdown — what was received when, at what cost, and how much of each batch remains — on the item's Stock Batches tab (Section 6.9).

TIP

You can change an item's issuing method at any time from Edit item; it only affects how future stock

movements are drawn down, not the item's history.

6.9 The Item Detail Page

Selecting any item opens a detail page with the item's full information plus up to four tabs:

- **Activity Log** — every condition change, transfer and repair involving this item, newest first, with who made the change and when.
- **Purchase History** — a permanent, unchangeable record of every time this item was purchased or restocked, including quantity, cost, who received it, which vendor it came from, and the original bill or receipt image if one was uploaded. This record cannot be edited or deleted by anyone, including administrators — it exists specifically to let the organization verify a purchase against its supporting document at any time, which matters for accountability and audit purposes.
- **Stock Batches (stock items only)** — the current FIFO/LIFO batch breakdown described in Section 6.8.
- **Consumption (stock items only)** — every time this specific item has been logged as consumed, newest first, with quantity, cost, purpose and who recorded it. See Section 6.14.

From here you can also request a transfer, report an issue, (managers and administrators) log a condition change directly, and — for stock items — record consumption (Section 6.14) or quick restock (Section 6.15). Assets with a purchase cost and date also show a Depreciation card here (Section 6.16).

6.10 Condition Status

Every item has one of six condition values:

Condition	Meaning
New	Recently received, not yet used.
Good	In normal working order.
Fair	Usable but showing wear.
Under Repair	Currently out of service pending repair — set automatically when a repair is

Condition	Meaning
	reported.
Damaged	Not usable; may or may not be repairable.
Disposed	No longer in service or has been removed/written off.

Every condition change — whether made directly on the item form or via the "Log condition" quick action — is recorded permanently in the item's Activity Log with an optional note explaining why.

Setting an item's condition to Disposed moves it out of the live inventory list and into the Scraps register — see Section 6.13.

6.11 Deleting an Item (Administrators)

Select Delete from an item's detail page (this needs the Delete items permission). You will be asked to confirm, because the item is removed from live inventory and cannot be brought back. Nothing recorded about the item is deleted: its purchases, consumption, transfers, repairs and condition changes all remain as read-only history, marked Item no longer in inventory, and the item is listed in the Deleted items archive — see Section 6.20.

6.12 Item Codes (Unique Identifiers)

Every item record is assigned a unique, permanent code (for example, INV-000042) the moment it is created, shown as a small badge next to the item's name everywhere it appears — the inventory list, grid and compact views, the item detail page, and any dropdown where you are choosing an item, such as for a transfer, a repair, or a restock. This matters because more than one item record can share the same name: two “Badminton Racket” records at different locations, for example, or a batch that gets split across locations by a transfer. The code is what lets you tell those records apart at a glance and confirm exactly which one you are working with. An item's code never changes for the life of that record, including through edits, condition changes, and transfers of the item itself. A transfer that splits stock into a new location, or a procurement request that creates a brand-new item, is always given its own new code, distinct from the source item it came from.

6.13 Scraps (Disposed Inventory)

Setting an item's condition to Disposed (Section 6.10) automatically moves it out of the live inventory list and into the Scraps register — a dedicated screen for tracking write-offs separately from everything still in active use.

- **Separate valuation** — disposed items are never counted in the dashboard's Total inventory value or the Inventory report; the Scraps screen shows its own Original value and Current (revalued) value totals instead, so write-offs never distort the figures for what the organization actually still owns.
- **Revaluing (Administrators)** — an administrator can enter a Depreciated value for any scrapped item, to record what it was actually worth, or sold for, at the time of disposal, separately from what it originally cost.
- **Bills** — a disposal certificate, scrap sale receipt, or other supporting document can be attached to a scrap record at any time, previewed the same way bills appear elsewhere in the app (Section 8.7), and removed again if needed without affecting the scrap record itself.
- **Restoring an item (Administrators)** — if an item was disposed by mistake, select Restore from its scrap record to remove it from Scraps and return it to active inventory, with its condition set back to whatever it was immediately before disposal.

- Editing a scrap record (Administrators) — select Edit on a scrap record to correct its original unit cost, depreciated value, disposal date or notes. Changing the value directly in the table is also logged. Every change is saved in the record's edit log (Section 17.3). This needs the Revalue or remove scrap records permission.
- Who can see Scraps — access is a separate permission from general dashboard access; see Section 4.5.

6.14 Recording Consumption (Stock Items)

Stock items that get used up — paper, markers, chemicals, sports equipment — can be logged as consumed directly from the item's detail page, without needing a transfer or a condition change. This reduces the item's quantity on hand and creates a permanent record of who used it, how much, and why.

1. Open the stock item's detail page and select Record consumption from Quick actions.
2. Enter the quantity used — it cannot exceed what's currently on hand.
3. Enter a purpose or reason. This is required, and appears on the consumption log (for example, "Used in Grade 8 science class").
4. Optionally add notes.
5. Select Record.

The item's quantity is reduced immediately, and stock is drawn down from its batches following the item's configured FIFO/LIFO issuing method (Section 6.8) — the same mechanism used for transfers and restocks. The cost of what was consumed is calculated automatically from that batch cost; you never enter a cost yourself.

You can also record consumption without opening the item first: on the Consumption screen select + Record consumption, choose the stock item from the searchable list, then enter the quantity, the date used, the purpose and any notes.

Every consumption entry appears on the item's own Consumption tab (Section 6.9), and across the whole organization on the Consumption screen in the sidebar, where entries can be filtered by date range and exported to Excel (Section 14). Consumption records are never deleted, but if one was entered wrongly, a person with the Edit & revert consumption records permission can correct it or revert it, and the stock on hand is corrected to match — see Section 17.4.

NOTE

Recording consumption is available to anyone with access to the item's location, not just administrators — the same as requesting a transfer (Section 7.1).

6.15 Quick Restock (Stock Items)

Quick Restock adds stock to an existing item directly from its detail page, without creating a procurement request — useful for a small local purchase, or stock bought with petty cash, where the formal manager/admin approval workflow (Section 8.5) isn't needed.

1. Open the stock item's detail page and select Quick restock from Quick actions.
2. Enter the quantity received.
3. Enter the total amount paid for that quantity. This is required (type 0 for a free or donated item), and the per-unit cost is calculated for you. You can also choose a vendor.
4. Optionally select Link to budget plan to count this restock's cost against an active annual or weekly stocking plan (Section 10) — the dropdown lists active plans along with their remaining budget.
5. Optionally add notes, then select Restock.

The quantity is added immediately, a new stock batch is created for FIFO/LIFO purposes (Section 6.8), and a Purchase History entry is recorded the same as a procurement receipt — the only difference is there's no request or approval step in between.

TIP

Use Procurement (Section 8) instead of Quick Restock whenever a purchase should go through manager/admin approval before it's bought — Quick Restock assumes the purchase has already happened and is simply being recorded.

6.16 Depreciation (Assets)

AssetTrack can estimate how an asset's value declines over time from its original purchase cost, so a current book value is available for internal reporting without a fresh valuation. Depreciation is purely a calculated estimate — it never changes the purchase cost on record, only how that cost is presented over time.

For any asset with a purchase cost and purchase date, a Depreciation card appears on its detail page, below Quick actions (Section 6.9), showing its method, current book value and accumulated depreciation — plus, unless the method is None, its rate, useful life and salvage value.

- Straight-line — spreads the depreciable amount (purchase cost minus salvage value) evenly across the asset's useful life in years. This is the default and suits most equipment.
- Declining balance — reduces the book value by a fixed percentage each year, so value drops fastest early on. This suits assets like computers that lose value quickly at first.
- None — the asset never depreciates; book value always equals purchase cost.

Every asset's depreciation settings — method, rate, useful life and salvage value — are resolved from three tiers, checked in this order of priority, with each figure falling through to the next tier independently if it hasn't been set at a more specific one:

- Category default — set per category from the Categories screen (Section 13.3); applies to every asset in that category.
- Item-level override — select Configure on an item's Depreciation card to set the method, rate, useful life, or salvage value for that one asset specifically, useful for high-value equipment that depreciates differently from the rest of its category. Leave any field on Auto to fall through to the category default, or the global default below, if neither has been set.
- Global organisation default — set from the Organization screen (Section 13.6); the final fallback, used only when neither a category nor an item-level value has been configured for that figure.

NOTE

Depreciation is an internal estimate for reporting and planning — it doesn't change the purchase cost recorded in Purchase History (Section 6.9) or the Dashboard Overview's Total inventory value (Section 5.1), both of which always use original purchase cost. If an asset is later disposed, its Scrap record (Section 6.13) starts from that same original cost, and its Depreciated value there is entered separately — your depreciation estimate here can inform that figure, but doesn't set it automatically.

Depreciation is worked out on the whole lot (unit cost × quantity) and rounded once, so an asset's book value plus its accumulated depreciation always equals its cost to the paisa — see Section 6.19. When more units are added to an existing asset, AssetTrack asks whether to add them to the lot or create a new entry — see Section 8.10.

6.17 Splitting and Grouping Items

AssetTrack can split a single record into several, or combine several records back into one, without losing their purchase and audit history.

- **Splitting** — from an item's detail page, select Split to divide part of its quantity off into a new record, for example to send part of a batch to a different location or to assign individual asset tags to units that were procured together as one quantity. The new record gets its own item code (Section 6.12) and starts its own Activity Log, while its Purchase History still traces back to the original purchase. Asset tags can be assigned at the time of the split, or left blank and added later by editing the item.
- **Grouping** — select Group with another item from Quick actions to combine compatible records into a single record with a combined quantity. The records must have the same item name, category, location and depreciation settings, and none of them may be disposed, damaged or under repair. Records that don't meet these conditions cannot be grouped, so no information is lost. The merged record carries a weighted-average cost and purchase date, and the records that were absorbed appear in the Deleted items archive (Section 6.20) so their history stays visible.
- **Category-based behaviour** — because categories set the default tracking type and unit (Section 13.3), splitting or grouping always keeps the resulting record(s) inside the same category as the source, so reporting by category (Section 5.3, Section 14.1) stays accurate.

6.18 Lot Tracking

In addition to the FIFO/LIFO batch breakdown described in Section 6.8, each stock batch can carry a lot number — useful for consumables received in dated or numbered lots, such as lab chemicals or printed materials with a supplier batch code. Enter the lot number when receiving procurement (Section 8.6) or recording a quick restock (Section 6.15); it then appears alongside that batch's cost and quantity on the item's Stock Batches tab, making it possible to trace a specific consumption or transfer back to the exact lot it was drawn from.

6.19 How Costs, Values and Rounding Work

AssetTrack follows the same money rules on every screen, so totals can be trusted at any scale:

- Amounts and unit costs are kept differently — money amounts such as totals, budgets, spend and book value are kept to two decimals (paisa), while the cost per unit can have up to six decimals. This lets cheap items bought in bulk keep their real cost: 12,000 sheets

bought for Rs. 1,250 cost Rs. 0.104167 each, and the stock is valued at Rs. 1,250.00 — not Rs. 1,200 as it would be if the unit cost were cut to two decimals.

- Rounding is done once — amounts are rounded half-up (1.005 becomes 1.01) at the end of a calculation, never on numbers that were already rounded.
- Enter totals, not unit prices — on procurement requests, quick restocks and petty cash you enter the total for the full quantity; AssetTrack works out the per-unit cost.
- Stock is valued from its batches — the value of a stock item is its quantity multiplied by the weighted-average cost of the batches still on hand. When stock is used or transferred, the average is recalculated from what remains, so issuing the older batch first leaves the newer, possibly dearer, stock at its true cost.
- Transfers keep cost — stock moved to another location carries the cost it had, so a transfer never changes the organization's total value.
- Consumption cost is exact — the cost of what was used is the exact cost of the batches drawn from, rounded once.
- Asset book value is worked out per lot — book value plus accumulated depreciation always equals the lot's cost.
- Totals are summed from exact figures and rounded once, so a dashboard or report total can differ by a few paisa from adding up the rounded rows you see.

NOTE

Items entered before version 11.8 of the application may carry a unit cost that was rounded to two decimals. For goods that arrived through procurement, an administrator can rebuild the exact unit cost from the recorded total with the optional unit-cost repair described in the deployment guide; it shows a preview and changes nothing until it is applied.

6.20 Deleted Items and Their Records

Deleting an item (Section 6.11) removes it from live inventory but never erases what happened to it. The records are kept so the organization can always see roughly what was bought, used, moved and repaired in the past.

- Records stay — the item's purchase history, consumption, transfers, repairs, condition changes and scrap record all remain.
- Greyed out with a notice — wherever these records appear (Transfers, Procurement, Repairs, Consumption, Scraps, Team Approvals and the Overview lists) they are greyed out and marked Item no longer in inventory. If the item was absorbed into another lot by grouping, the notice says Item merged into another lot. Hover over the notice to see when it was removed and by whom.
- Read-only — Edit, Update, Delete, Restore, bill upload and value changes are switched off, and the system refuses them even if someone tries another way. A pending transfer or request for a removed item can only be declined, not approved or received.
- Budgets are unaffected — money already spent on a removed item stays counted on its budget plan.
- Clicking a removed item from a log explains that it no longer exists instead of opening an item page.

The Deleted Items Archive

To look back over removed items, open Inventory and select Deleted items (available to people who can view purchase history and have access to every department, because it covers the whole inventory). The archive lists each removed item with when and by whom it was removed, the number and value of its purchases, how much of it was used, and how many transfers and repairs it had. Select a row to open a read-only view of its purchases, usage, transfers, repairs and condition changes.

NOTE

Items deleted before this feature existed have no saved details. Their records are still locked and listed in the archive as Deleted (before removal tracking), using whatever name the old records carry.

7. Transfers

A transfer moves an item — or a quantity of stock — from one location to another. Because this changes who is responsible for an item, every transfer goes through an approval step before it takes effect.

7.1 Requesting a Transfer

From the Transfers screen (or an item's detail page), select + Request Transfer.

1. Choose the item. If it's a stock item, a quantity field appears — enter how much to move (you can't request more than is currently available).
2. Choose the destination location.
3. Enter a reason — this is required and is shown to whoever reviews the request.
4. Select Submit request.

You can only request transfers for items in locations you have access to.

7.2 Approval Workflow

Every transfer shows two decision columns — Manager and Admin — alongside an overall Status:

- If you don't have a manager on file, the manager decision automatically shows Not Required and only the administrator's decision is needed.
- If you do have a manager, both decisions are needed before the transfer is marked Approved.
- If either reviewer declines the request, its overall status becomes Rejected immediately.
- Administrators approve or decline directly from the Transfers table (or the Overview quick-review panel); managers do the same from Team Approvals (Section 12).

7.3 What Happens on Approval

The moment a transfer receives its final required approval, AssetTrack applies it automatically:

- Assets move entirely to the new location.
- Stock is deducted from the source (drawing from the correct FIFO/LIFO batch) and added to a matching item at the destination — creating one there if it doesn't already exist — carrying the batch's cost information with it.

- You'll receive an email if notifications are enabled for your account, and can always check a transfer's current status from the Transfers screen.

8. Procurement

Procurement is how new purchases enter the system — whether that's a brand-new item the organization has never stocked before, or restocking something that's running low.

8.1 New Items vs. Restocking

When you open + Request Item, a toggle at the top lets you choose:

- New item request — for something not currently in inventory. Enter a name and category.
- Restock existing item — choose an existing item from a dropdown of everything currently tracked; its unit and category are filled in automatically.

Restocking through Procurement creates a request that follows the manager/admin approval workflow (Section 8.5) before stock is added. If approval isn't needed — for example, a small local purchase already made — use Quick Restock (Section 6.15) on the item's own detail page instead, which adds stock immediately.

If the item you are restocking is an asset rather than a consumable, AssetTrack explains how adding units affects its depreciation and lets you choose between adding them to the existing lot or creating a new entry — see Section 8.10.

8.2 The Procurement Cart

You don't have to submit one request at a time. Fill in an item's quantity, unit, estimated cost and preferred vendor, then select + Add to cart — it appears in a running list where you can adjust quantities with the +/- stepper or remove it entirely. Add as many items as you need, write one justification covering the whole batch, and submit — AssetTrack creates a separate procurement request for each cart item, all sharing that justification.

Once submitted, select a justification anywhere it's shown truncated — the Procurement table, or Team Approvals (Section 12) — to open it in a preview modal, so a long justification never needs to be shown in full inline.

8.3 Linking to a Stocking Plan

If your organization is tracking an annual or weekly stocking plan (Section 10), you can optionally link your request to it from the Link to a stocking plan dropdown, which lists active plans along with their remaining budget. Doing this means the request's cost will count against that plan's budget once approved, and the request will show up in that plan's activity list — useful for keeping departmental spending organised and visible. Quick Restock (Section 6.15) offers the same plan-linking option for restocks that don't go through a formal procurement request.

The link can be added, changed or removed later, even after the request has been approved or received. Select Edit on the request and use the Budget plan field (Section 17.2); the plan's spent figure follows automatically.

8.4 Quotations and Bills

While a request is open, you can attach a quotation or invoice (image or PDF, up to 20 MB) to it — either when creating the request, or afterwards from the Quotation column of the Procurement table. The bill itself is attached when the goods are received, in the Receive dialog (Section 8.6), or afterwards from the Bill column. Once received, the bill becomes part of the item's permanent Purchase History (Section 6.9), so the organization always has the original supporting document alongside the purchase record.

A bill can also be attached after the item has already been received into inventory — for example, if the invoice arrives later than the delivery itself. In that case it is still copied automatically into the item's permanent Purchase History, the same as if it had been attached beforehand.

8.5 Approval Workflow

Procurement requests use the same two-step manager-then-admin approval structure as transfers (see Section 7.2), with the same Manager / Admin / Status columns.

Rejection reasons — whenever a request is declined, whether by a manager or an administrator and whether from the table, Team Approvals or the Overview quick-review panel, a dialog asks for a reason and will not continue without one. The reason appears next to the Rejected badge (select the eye icon), is included in the notification email, and is exported in the Rejection Reason column of the reports.

Decisions are final — once a request has been approved or declined, it cannot be decided again. If something was decided in error, raise a new request, or use the corrections described in Chapter 17 where they apply.

8.6 Receiving Procurement into Inventory (Administrators)

Once a request is Approved, an administrator selects Receive from the Procurement table to bring it into live inventory:

- Choose the location the item(s) arrived at.
- Optionally enter an asset tag and serial number (for individually-tracked assets).
- Set the condition on arrival (typically New).
- Optionally attach a bill here if one wasn't already uploaded.
- Select Add to inventory.

For a restock, the quantity is simply added to the existing item. For a new item, a new inventory record is created. Either way, AssetTrack automatically creates a stock batch entry (for stock items) and a permanent Purchase History entry carrying the bill, cost and vendor — this is also the point at which a linked stocking plan's spend is updated if applicable.

The Receive dialog asks for two real figures, pre-filled from the request: Quantity received (what actually arrived) and Total amount paid (what was actually paid; type 0 for a free item). Stock, cost, purchase history and the linked budget plan follow these figures, so a short delivery, or an invoice that differs from the quote, is recorded correctly. For a purchase that came from a petty cash expense, the amount paid is the petty cash amount and cannot be changed here.

Costs are always entered as a total for the full quantity involved — on the procurement request, in the procurement cart, and in the Est. total cost field here — since that is usually what is known before an item is priced individually. AssetTrack calculates the per-unit cost automatically once the request is received, and that per-unit figure is what then appears on the item record and in its Purchase History, shown alongside the total value for that record so the two are never ambiguous.

TIP

AssetTrack checks quantities and costs while receiving: the quantity received must be greater than zero, the amount paid must be zero or more, and a quantity of zero is never rounded up to one.

8.7 Viewing Bills

Select the  View button anywhere a bill icon appears to open it in a viewer within the app, without needing to download it separately.

8.8 Procuring Assets in Quantity

Assets don't have to be received one at a time. A procurement request or restock for an asset-type item can be received with a quantity greater than one, the same way stock is — AssetTrack creates the individual asset records once the quantity is received. Asset tags and serial numbers stay optional at receipt (Section 8.6); if the units need to be told apart later, use Split (Section 6.17) to divide the record apart and assign a tag to each one, or assign tags manually on each item afterwards.

8.9 Petty Cash and Direct Add-to-Inventory

Not every purchase needs to go through a procurement request. Two shortcuts exist for purchases that have already been made:

- Petty cash — record the purchase as a petty cash expense instead (Section 11.1). Once approved it counts against the linked plan and, if you tick Also add to inventory on the form, it creates a purchase that is received into inventory like any other (Section 11.5).
- Direct add-to-inventory — for a purchase that should appear in inventory immediately without an approval step, add the item directly from the Inventory screen (Section 6.4), or import many items at once from Excel (Chapter 18). Items added this way are not linked to a budget plan; use Procurement or Quick Restock when the cost should count against a plan.

8.10 Restocking an Asset: Add to the Lot or Create a New Entry

Assets lose value over time (Section 6.16), so adding new units to an existing asset record matters. Instead of merging silently, AssetTrack asks how you want it recorded. The question appears when you add an asset restock to the procurement cart, when a petty cash expense restocks an asset, and again when the goods are received, where the choice is final.

- Add to existing lot — the new units join the same record. The cost per unit becomes the weighted average of the old and new units, and the purchase date becomes the weighted-average date, so the older units keep most of their age. The whole lot is then depreciated together, which means the new units are treated as slightly older than they really are. Individual tags and serial numbers can only be given later, by splitting the lot (Section 6.17).
- Create a new entry — the units become a separate record with their own purchase date, cost, tag and serial number, and depreciate exactly from today. Choose this when the new units should not be averaged with the old ones — for example a newer model, or a different warranty.
- Cancel — nothing is changed.

For example, a lot of 10 chairs bought three years ago at Rs. 5,000 each is restocked with 2 new chairs at Rs. 6,500 each. Added to the lot, the 12 chairs have an average cost of Rs. 5,250 and a purchase date about two and a half years ago. Created as a new entry, the 2 new chairs are a separate record at Rs. 6,500 that starts depreciating today, and the original 10 are untouched.

At receiving, the dialog shows the figures before and after merging — units in the lot, cost per unit and purchase date — so you can see the effect before choosing.

- Choosing a new entry while raising the request turns it into an ordinary new-item request.
- Stock (consumable) restocks do not ask, because stock has no depreciation.
- If the delivery goes to a location where the item does not exist yet, there is nothing to merge into, so no question is asked.
- A restock is never merged into a record that has been disposed.

8.11 Returns and Corrections After Receiving

Sometimes a problem is found after goods are in inventory: items arrive damaged, the wrong model was delivered, or the vendor agrees a refund. A person with the Adjust received purchases (returns & corrections) permission — administrators by default, and they also need

Edit submitted requests — can correct the received request so that inventory and the budget follow.

1. Open Procurement, find the received request and select Edit.
2. In the box Correct this purchase after receiving, change Quantity kept in inventory (enter 0 to send everything back) and, if money changed, Amount actually paid.
3. A line under the fields previews the effect — for example, Inventory reduced by 20 (sent back to the vendor) · budget released Rs. 200 on the linked plan.
4. Enter the Reason for the correction. It is required and is saved in the edit log.
5. Select Save.

Everything is corrected together, in one step:

- Inventory count and stock value — for stock items the units come off that delivery's own batch, so the cost layers stay right; for an asset lot the returned units and their cost come out of the lot's value.
- Budget — the linked plan's spent total is recalculated from the new amount paid, so the money is released (or charged) on the plan. A request that came from a petty cash expense keeps its petty cash amount in step.
- Purchase history — the original receipt is never rewritten. A separate Returned or Correction line, with a negative quantity and amount, is added to the item's purchase history.
- Edit log — the change, the inventory count before and after, and your reason are recorded with who made them and when (Section 17.3).

Limits

- Only units from that delivery that are still on the shelf can be sent back. If some were already used or moved, the message says how many can be returned, and nothing is changed.
- If the inventory item has been disposed of or deleted, the purchase can no longer be adjusted (Section 6.20).

- The ordered item, category, quantity and the original estimate stay as they were; only the quantity kept and the amount paid change.
- Returning every unit of an asset lot leaves its record at quantity 0. It can then be deleted if it is no longer needed.

TIP

To record a refund or price correction without returning anything, keep the same quantity and enter the lower amount actually paid.

9. Repairs & Maintenance

9.1 Reporting an Issue

6. Select + Report Issue from the Repairs screen, or Report an issue from an item's detail page.
7. Choose the affected item.
8. Describe the issue in detail.
9. Set a priority — Low, Medium, High or Urgent.
10. Submit.

Reporting a repair on an item that's currently New or Good automatically changes its condition to Under Repair, which is reflected everywhere the item appears.

9.2 Tracking Repair Status

A repair moves through a simple status sequence: Reported → In Review → In Repair → Repaired (or Not Repairable / Cancelled). The current status is shown as a badge in the Repairs table and on the item's Activity Log.

9.3 Updating a Repair

Repairs can be updated by administrators, the relevant department manager, or the custodian of the location where the item is kept. Select Update on any repair to change its status, assign a vendor, record estimated and actual cost, and add resolution notes.

Marking a repair Repaired automatically returns the item's condition to Good; marking it Not Repairable sets the item's condition to Damaged.

10. Stocking Plans

Stocking plans let a organization plan and track spending in the way it actually budgets — across a full fiscal year, week by week for recurring supply orders, or as a small departmental petty cash allocation — and see, in real time, how much of that budget has actually been used.

10.1 The Three Plan Types

- Annual — a fiscal-year budget, typically scoped to a department (for example, "FY 2082/83 Science Department Budget").
- Weekly — a recurring order for a specific week, useful for routine consumable restocking (for example, "Week 12 — Central Store Restock").
- Petty — a small, ongoing cash allocation for day-to-day departmental expenses, tracked separately from formal procurement (Section 11).

Switch between the three using the tabs at the top of the Stocking Plans screen; each has its own summary statistics and plan list.

10.2 The Summary Bar

At the top of each tab, four live figures summarise every plan currently visible: Total budgeted, Spent so far, Remaining, and how many plans are Over budget. These update immediately based on the status filter you have selected.

10.3 Filtering by Status

Use the Active / Closed / All filter to control which plans are shown — useful for keeping the default view focused on plans still in use while letting you review closed ones when needed.

10.4 Creating a Plan (Managers and Administrators)

1. Select + Create Plan from the relevant tab.
2. Enter a title and, optionally, a description, date filter ranges for the budget.
3. Choose a department, or leave it set to All departments.
4. Enter a budget amount if you want spend tracked against a limit.
5. For an annual plan, enter the fiscal year label (for example, 2082/83). For a weekly plan, enter the week number and its start date.

6. Select Create plan.

10.5 The Plan Detail View

Selecting any plan card opens its detail view, which shows:

- A live budget gauge — a progress bar showing the percentage of budget spent, with the spent and total figures, remaining balance, and a clear warning if the plan has gone over budget.
- Period context — for an annual plan, a fiscal-year progress bar showing which month of the year it is and how many days remain; for a weekly plan, its date range and days remaining; for petty cash, when it was created.
- Linked activity — for annual/weekly plans, every procurement request and quick restock (Section 6.15) linked to the plan, each showing its amount (procurement requests also show their approval status); for petty plans, every linked petty cash expense.

10.6 How Spend Is Tracked

A plan's Spent figure is not manually entered — it updates automatically as linked activity happens:

- Procurement requests — a request linked to a plan counts once it has had its final approval. Until it is received it counts at its estimated cost; after receiving it counts at the amount actually paid.
- Petty cash expenses — an expense linked to a plan counts once it is approved (Section 11). A petty expense that also adds to inventory is counted once, as the petty expense.
- For quick restocks (Section 6.15): linking a restock to the plan adds its cost to the plan's spend the moment it's recorded, since a quick restock has no separate approval step to wait for.
- Repairs — a repair linked to a plan counts its actual cost, or its estimate until the actual cost is known. Cancelled repairs count for nothing, and deleting a repair gives the amount back.
- Returns and corrections — reducing the quantity or the amount paid on a received purchase (Section 8.11) releases that money on the plan.

- Pending and declined items — they are listed on the plan's detail view but marked not counted yet, so the list and the Spent figure make sense together.

This means the budget gauge on a plan's detail view always reflects real, approved activity — not just what was planned. The Spent figure is recalculated from the linked records each time, so it cannot drift away from what the plan's list shows; if a record is corrected or moved to another plan, both plans update.

10.7 Closing and Reactivating a Plan

From a plan's detail view, managers and administrators can select Close plan once it's no longer in use (for example, at the end of a fiscal year), or Reactivate a previously closed plan. Closed plans remain visible under the Closed filter for historical reference.

10.8 Editing the Budget

Select Edit budget from the plan detail view to change the allocated amount at any time — useful if a department's budget is revised mid-year.

10.9 Starting a Request From a Plan

The + New request against this plan button on a plan's detail view takes you straight into the procurement request form (or the petty cash expense form, for a petty plan) with that plan already selected — the fastest way to log a purchase you know should count against a specific budget.

10.10 Deleting a Plan (Administrators)

Deleting a plan removes it permanently. Any procurement requests or petty cash expenses that were linked to it are not deleted — they simply lose their plan reference.

10.11 Date Range and Dynamic Budgeting

Every plan type now uses the same configurable date range picker when it's created or edited (Section 10.4, Section 10.8) — pick any start and end date, rather than being limited to a fixed fiscal-year or week-number format. Spend and the period-context bar on the plan detail view (Section 10.5) are calculated dynamically against whatever range is set, so a plan can cover a custom period — a term, a project, a grant period — and still show accurate progress and days-remaining figures, the same way an annual or weekly plan does.

10.12 Linking Purchases to a Plan: Where and How

Where	How to link	When it counts
Procurement request	Link to a stocking plan on the request form, or Budget plan when editing a request later (Section 17.2).	After final approval; at the amount actually paid once received.
Petty cash expense	Linked stocking plan on the expense form, or Budget plan when editing.	Once the expense is approved.
Quick restock	Link to budget plan in the Quick restock dialog (Section 6.15).	Immediately.
Repair	Budget plan in the repair's Update dialog, or when editing.	Actual cost, or the estimate until known.
From a plan	+ New request against this plan on the plan's detail view starts a request with the plan already chosen (Section 10.9).	As for the type of request.

Only active plans can be chosen when linking. If a purchase was entered without a link, select Edit on it and add the plan afterwards; the plan's Spent figure moves with it. Items added directly from the Inventory screen or imported from Excel are not linked to any plan.

10.13 Why a Plan's Spent Figure May Differ From What You Expect

- Pending and declined items do not count — only approved procurement, approved petty cash, quick restocks and non-cancelled repairs do.
- Estimate versus amount paid — a received purchase counts at the amount actually paid, which may differ from the original estimate.
- Returns release money — a return or correction after receiving (Section 8.11) lowers the plan's spend.
- You may see fewer requests than are counted — the plan's list shows the requests you are allowed to see (Section 4), while the Spent figure covers everything linked to the plan.
- Removed items still count — money spent on an item that was later deleted stays on the plan (Section 6.20).
- A request was never linked — add the plan by editing the request (Section 17.2).

11. Petty Cash

Petty cash covers small, immediate purchases that don't warrant a formal procurement request — stationery top-ups, minor repairs, refreshments for a meeting, and similar day-to-day costs.

11.1 Recording an Expense

1. Select + Record Expense from the Petty Cash screen.
2. Enter a description and amount.
3. Choose a category (Stationery, Cleaning, Refreshments, Minor repairs, Transport, or Other).
4. Optionally select a department and link the expense to a petty cash stocking plan (Section 10).
5. To add the purchase to inventory at the same time, tick Also add to inventory, choose New item (category and item name) or Restock existing item (pick the item), and enter the quantity and unit (Section 11.5).
6. Set the expense date.
7. Optionally upload a receipt.
8. Submit.

Every organization has a configured per-expense limit (shown on the form). Amounts above this limit are not accepted through petty cash — use a formal procurement request instead, which has its own approval trail suited to larger purchases.

11.2 Receipts

A receipt can be attached when recording the expense, or afterwards using the Upload button in the Petty Cash table. Select View to open an attached receipt. Receipts can be images (PNG, JPG, WEBP) or PDF files up to 256 KB; photos are compressed automatically.

11.3 Approval (Administrators)

New expenses start as Pending. An administrator reviews them from the Petty Cash screen and selects Approve or Decline. Declining requires a reason (Section 8.5). Approving an expense that's linked to a stocking plan immediately updates that plan's spend total (Section 10.6).

11.4 Setting the Petty Cash Limit (Administrators)

The per-expense limit shown on the petty cash form (Section 11.1) is configurable, not fixed. Administrators can set it to whatever amount suits the organization from the Organization settings screen (Section 13.6), and the new limit applies immediately to every account.

11.5 Editing, Deleting and Receiving Petty Cash Purchases

- Editing — people with the Edit submitted requests permission see an Edit button on each expense. They can correct the description, amount (still within the petty cash limit), category, date, item and quantity (for purchases added to inventory), notes and budget plan. Every edit is saved in the edit log (Section 17.3).
- After the purchase is received — once an expense that added to inventory has been received, its amount and item can no longer be changed here. Correct the linked procurement request instead (Section 8.11); the petty cash amount follows.
- Receiving — for an expense that adds to inventory, a Receive button takes you to the Receive dialog (Section 8.6). Afterwards the row shows In inventory.
- Deleting — people with the Delete petty expenses permission can delete an expense, which gives the amount back to its plan. If the expense had already created a purchase in inventory, that purchase remains and keeps counting.

12. Team Approvals (Managers)

If you are the manager for one or more staff members, a Team Approvals item appears in your sidebar, badged with the number of decisions currently awaiting you.

Two tabs — Transfers and Procurement — list every request from your direct reports, showing the item, quantity or cost, justification or reason, the administrator's decision so far, and your own decision. Select Approve or Decline on any pending item; your decision is combined with the administrator's as described in Section 7.2 to determine the request's final status.

Declining a request requires a reason (Section 8.5), and a decision cannot be changed once made. Requests for items that have since been removed from inventory are greyed out and can only be declined (Section 6.20).

13. Administration & Setup

The screens in this section are only visible to administrators, and control the underlying structure everything else in AssetTrack is built on.

13.1 Departments

Departments are the top-level grouping used throughout the system — staff, locations and stocking plans are all scoped to one or more departments. From the Departments screen, select + Add Department to create one with a name and optional notes. A department cannot be deleted while it still has locations or staff assigned to it — reassign those first.

A department's name can be changed at any time from the Departments screen. The new name is carried to the department's locations, its budget plans and its petty cash expenses. Completed history, such as past logs, keeps the name as it was at the time.

13.2 Locations

Each location represents a physical room, lab, office or store. When creating or editing a location, you can set:

- Type, building and floor — for identification and organisation.
- Department — which department this location belongs to, or leave unassigned for a shared space.
- Custodian — the staff member responsible for items kept here (see Section 4.4).
- Shared access — when enabled, staff from every department can see this location's inventory, not just their own department.

A location cannot be deleted while it still holds items — move or reassign them first.

Renaming a location updates its name on the items kept there, in the Scraps register, on pending transfers and on open repairs. Completed transfers, consumption and purchase history keep the name as it was at the time.

13.3 Categories

Categories group items for reporting and default behaviour. Each category has a tracking type (Asset or Stock) used as the default when adding a new item, and a default unit (for example, "pcs" or "reams") pre-filled on the item form. A category in use by existing items cannot be deleted until those items are recategorised.

A category's name can be changed the same way. The new name is carried to existing items, procurement requests, petty cash expenses and the Scraps register. Categories are also where a category-level depreciation default can be set, taking priority over the organization-wide global default for every asset in that category unless the asset has its own item-level override — see Section 6.16.

13.4 Vendors

The vendor directory records suppliers the organization purchases from — contact person, phone, email, address and what they typically supply — selectable from a dropdown anywhere a vendor can be recorded (item purchase, procurement request, repair assignment).

Renaming a vendor updates its name on items, and on procurement requests and repairs that are still open. Received purchases and logs keep the name as it was at the time.

13.5 Staff & Users

This is where accounts are created and managed.

Adding a User

1. Select + Add User.
2. Enter their name, email and phone.
3. Choose their role — Staff, Manager / HOD, or Administrator.
4. Optionally set who they report to (their manager) and their home location.
5. Select which department(s) they belong to.
6. Optionally choose a User group (Section 4.7) so the person inherits that group's permission settings.
7. Optionally adjust the person's individual permissions in the Permissions panel (Section 4.6). Full dashboard & inventory access is one of these permissions — leave it on its default unless you specifically need to force full or limited access regardless of how many locations someone looks after.
8. Save — a temporary password is generated and shown to you, and an email is sent to the new user with their sign-in details if email is configured.

New accounts should change their temporary password on first sign-in (Section 15.2).

Editing or Deactivating a User

Select Edit on any user to change their role, department assignments, manager, or contact details, or to set their account Status to Inactive — which prevents sign-in without deleting their historical records. Select Remove to delete an account entirely; this cannot be undone, though the person's past requests and history remain in the system for record-keeping.

Resetting a password — in the user's Edit dialog, Reset to default password sets the password back to the temporary default and emails the person. It is a last resort, and they should change it right after signing in (Section 15.2).

13.6 Organization

From the Organization screen, administrators can set the organization name, a tagline shown under it, and upload a organization logo. The logo appears in the sidebar, the sign-in page, and in the header of every email AssetTrack sends — keeping the experience consistent with your organization's identity throughout.

The same screen also has a separate Petty cash settings section where administrators can set the per-expense petty cash limit (Section 11.4).

It also has a Default depreciation policy section, where administrators set the method, rate, useful life and salvage-value percentage applied to every asset unless the asset has its own override — see Section 6.16.

A separate Application Login screen customization section (currently experimental) additionally lets administrators rename the application itself and adjust its naming throughout the interface, beyond the organization name and logo covered above.

Notification emails are configured and sent per organization/organisation rather than per individual user account, so the sender identity and themed template (Section 16.2) stay consistent no matter who triggers the notification. The mail server itself is set up under Setup → Organization → Email (SMTP) — see Section 13.8.

13.7 User Groups and Permission Toggles: How To

This section shows the steps. Section 4 explains the ideas and lists every permission. Only administrators can change permissions.

Creating a User Group

1. Open Setup → User groups and select + New group.
2. Enter a Group name (for example Accounts team) and, optionally, a description.
3. In Permissions for this group, choose for each ability On, Off, or Role default. Leave an ability on Role default if the group should not affect it. Clear all sets every ability back to Role default.
4. Select Save group.

Putting People in a Group

Open Setup → Staff & Users, select Edit on the person, and choose the group in the User group field. The person immediately inherits the group's settings. Choose No group to remove them from it.

Giving One Person an Exception

In the person's Edit dialog, find the ability in the Permissions panel and select its switch. The switch is tagged Custom, and it now overrides both their group and their role for that ability. Select Reset to group / role defaults to remove all of a person's personal changes.

Changing or Deleting a Group

Select a group's edit action in the User groups list to change its settings; members are affected immediately. Deleting a group does not delete anyone — members fall back to their role defaults plus any personal changes.

Examples

- Accounts team — a group with View budgets, Define & edit budgets, View reports and View depreciation & book values On, so finance staff see budgets and reports without being made managers.
- Store keepers — a group with Quick-restock stock items and Record stock consumption On, so store staff can stock in and out without raising requests.
- Records clerk — a person with Edit submitted requests switched On personally, so one trusted clerk can correct requests without being an administrator.
- Read-only reviewer — a person with Add items, Edit items, Delete items and Dispose items switched Off, so they can look but not change.

13.8 Email (SMTP) Settings

AssetTrack sends email for password reset codes, welcome messages, request notifications and decision notices (Chapter 16). The mail server it uses is set up on the Organization screen by people with the Manage organization & branding permission (administrators by default), so no server files need to be edited.

1. Open Setup → Organization and find the Email (SMTP) card. Select its heading to collapse or expand it.
2. Turn on Allow sending email.
3. Enter the SMTP host (for example smtp.example.com), the Port (usually 587, or 465), the Username (often your email address) and the Password. With Gmail or Microsoft 365 use an app password rather than your normal password.
4. Optionally enter a From email and a From name. If you leave them blank, messages are sent from the username, under the name of your organization and the app.
5. Check Use SSL/TLS from the start: turn it on for port 465 and leave it off for port 587 (STARTTLS). The switch follows the port automatically when you type 465 or 587.

6. Select Save email settings, then Send test email. The test is sent to your own account's email address, and the screen tells you it was sent or explains in plain words why it failed.

Provider	SMTP host	Port	SSL/TLS from the start
Gmail	smtp.gmail.com	587	Off (or port 465 with it on). An app password is required.
Microsoft 365	smtp.office365.com	587	Off. The mailbox must be allowed to send using SMTP.
Your own domain (cPanel)	mail.yourdomain.com	587 or 465	Off for 587, on for 465.

These are typical values only; always follow your email provider's own instructions.

- The password is stored encrypted and is never shown again. Leave the Password box blank when saving to keep the saved one; type a new password only to replace it.
- When Allow sending email is off, nothing is sent: password codes, approval notices and request notifications are not delivered, so keep it on in normal use.
- Changes take effect immediately, with no restart. A new connection is made as soon as the settings are saved.
- Installations that were set up before this screen existed with server environment variables keep working. Saving this screen switches to the details entered here, and the existing password is kept unless a new one is typed.
- If the server's secret key is ever changed by whoever hosts the application, the saved password can no longer be read, and the screen asks for it to be entered again.

If the test email fails

- Username or password refused — check them, and use an app password where the provider requires one.
- Server could not be found — check the host for typing mistakes (enter the address only, without http://).
- Secure connection could not be made — check that the port and the SSL/TLS switch agree (465 with it on, 587 with it off), and that your hosting allows outgoing mail.

- The test works but people do not receive messages — ask them to check their spam folder, and make sure the From email belongs to the mail account being used, because many providers refuse other addresses.

14. Reports

The Reports screen produces Excel spreadsheets for five areas of the system, each respecting the same department/location scoping that applies to your account elsewhere in the application.

14.1 Available Reports

Report	Contents
Inventory report	Every item with location, condition, cost and category.
Transfer log	Complete transfer history with route and status.
Procurement log	Purchase requests with costs and full approval trail.
Repair log	All maintenance events with vendor and cost information.
Consumption log	Every recorded consumption entry with quantity, cost and purpose.
Depreciation Report	Every asset depreciation tracking, type, and book value tracked based on date adjusted or filter applied

14.2 Filtering by Date Range

Set a From and To date at the top of the Reports screen before exporting or previewing — it applies to whichever report you choose next.

14.3 Previewing and Exporting

Select a report card to see a quick on-screen preview of the data before committing to a download, or select Export Excel directly to download the full spreadsheet immediately.

14.4 Depreciation Valuation Date

Because depreciation is calculated continuously (Section 6.16), any report that includes asset book value is generated as of a specific date rather than a running figure. When exporting or previewing the Inventory report, set the valuation date alongside the From/To range (Section 14.2) — depreciation for every asset is calculated as of that date, so the book values in the report stay consistent even if you generate it days or weeks after the fact. If no valuation date is set, AssetTrack uses the date the report is generated.

14.5 Report Filters

Above the report cards, the Filters card narrows what a report includes. Filters available are department, location (the list narrows to the chosen department), category, vendor, condition, item type, depreciation method, status, priority, request type and — for administrators — the person. Only the filters that make sense for the selected report are shown.

- Preview and export always use the same filters, so what you preview is what you download.
- Every exported sheet prints a FILTERS APPLIED block under its title (or says that all records are included).
- A department filter includes the department's own records plus anything kept in its locations.

14.6 What the Exports Contain

Exported logs include an Edits column showing how many times a record was corrected (Section 17.3) and a Rejection Reason column for declined requests. Money is shown to two decimals, and headline totals are summed from exact figures and rounded once (Section 6.19). Transfers, procurement and repair exports are not cut off by the on-screen list; only a large safety limit applies.

15. My Profile

15.1 Profile Photo

Select Change photo on the My Profile screen to upload a picture of yourself (shown in the sidebar and anywhere your name appears alongside an avatar), or hover over your photo and select the small ✕ to remove it.

15.2 Changing Your Password

1. Go to My Profile.
2. Enter your current password.
3. Enter and confirm a new password (minimum 8 characters).
4. Select Update password.

TIP

Change your password immediately after your account is first created, since new accounts start with a shared temporary password known to whoever set up your account.

15.3 Your Account Details

My Profile also shows your email, department(s), manager, phone number, account status, and which locations (if any) you are the custodian of — useful for confirming your access is set up correctly.

15.4 Session and Device Management

My Profile shows every device currently signed in to your account, with when and where each session started. Select Log out next to any device to end that session remotely — useful if you signed in on a shared or public computer and forgot to sign out, or don't recognise a session. This is separate from Section 2.3; logging out a device this way ends only that one session, leaving your other devices signed in.

Select Log out all other devices to end every session except the one you are using right now — a quick way to secure your account if you think someone else may have signed in.

16. Notifications & Email

16.1 What Triggers an Email

- A new transfer, procurement, or repair request notifies administrators.
- A decision on your transfer or procurement request (approved or declined, by a manager or administrator) notifies you.
- A decline on your request includes the reason given by the reviewer.
- A new stocking plan notifies administrators.
- A password reset OTP is sent to the email address on the account requesting it.
- A new staff account receives a welcome email with sign-in details.

16.2 Email Appearance

Every email AssetTrack sends uses the same themed template as the application itself — your organization's name, logo and colours in the header, with the specific details of the notification in a clean summary card below. This keeps notifications instantly recognisable as coming from your organization's system.

17. Editing, Corrections & the Edit Log

People make mistakes and circumstances change. AssetTrack lets authorised people correct records after they have been submitted, and keeps a permanent log of every correction so nothing is changed silently.

17.1 Who Can Edit and What Is Recorded

Editing requests needs the Edit submitted requests permission (administrators by default; it can be given to individual people or user groups — Section 4.6). People who have it see an Edit button on transfers, procurement requests, repairs and petty cash expenses, and on the manager's Team Approvals. Consumption records, scrap records and returns after receiving have their own permissions (Section 4.9).

Each save must change at least one field, can carry an optional note, and writes one entry to the record's edit log with who made the change, when, and the old and new value of every field.

17.2 Editing a Submitted Request

1. Select Edit on the request's row.
2. Change the fields you need. Any fields that cannot be changed are explained in a message at the top of the dialog.
3. Optionally add a note explaining the change.
4. Select Save.

Request	Can be edited	Locked when
Transfer	Reason, destination, quantity.	Destination and quantity are locked once the transfer has been decided.
Procurement	Item, category, quantity, unit, estimated cost, vendor, division, justification, budget plan.	Item, category, quantity, unit and estimate are locked once received (use Section 8.11 for returns and corrections). A restock keeps the restocked item's name and category.
Repair	Issue, priority, vendor, estimated and actual cost, resolution notes, budget plan.	A repair's status is changed with Update, not Edit.
Petty cash	Description, amount, category, date, item and quantity, notes, budget plan.	Amount and item are locked once a linked purchase is received.

Cost corrections on approved requests move the linked plan's spent total by the difference, and changing the Budget plan moves the spend from one plan to the other. The edit log records the old and new plan.

17.3 The Edit Log

A record that has been corrected carries an Edited $\times N$ pill, where N is the number of changes. Select the pill to open the edit log: each entry shows who made the change, when, the optional note, and every field's old value against its new value. The log is paged, eight entries at a time. The same pill and log appear on consumption and scrap records, and the Excel logs have an Edits column (Section 14.6).

17.4 Correcting or Reverting Consumption

People with the Edit & revert consumption records permission see Edit and Revert on each record in the Consumption screen.

- Edit — change the quantity, purpose, date or notes. Changing the quantity corrects the item's stock on hand and its FIFO/LIFO batches, and the cost is recalculated from the batches.
- Revert — puts the whole quantity back into stock and keeps the record, flagged Reverted. Reverted records are left out of totals, reports and the item's history, but can still be found by choosing the matching status filter. A reverted record cannot be changed again.

The record, the stock and the log entry are saved together in one step, so they cannot disagree. If the item has since been removed from inventory, its consumption records are read-only (Section 6.20).

17.5 Editing Scrap Records

Scrap records can be corrected by people with the Revalue or remove scrap records permission — see Section 6.13. Each correction is saved in the record's edit log in the same way.

17.6 Returns and Corrections After Receiving

Once goods are in inventory, the quantity kept and the amount paid can still be corrected — for example when items are sent back to the vendor. Inventory, stock value and the budget are corrected together, and the original receipt is kept. See Section 8.11.

17.7 Decisions Are Final, and Moves Are Re-Checked

An approval or a decline cannot be repeated or reversed. When a transfer is approved, AssetTrack checks again that the item is still at the requested location and that enough stock remains. If the item has moved, or the stock has since been used, it refuses with a clear message and changes nothing; decline the request and raise a new one for what is actually available.

17.8 Records of Removed Items Are Read-Only

Records belonging to an item that was deleted cannot be edited, because they are history. See Section 6.20.

18. Importing Inventory from Excel

Import lets you bring many items into AssetTrack at once — for example when first setting up, or when a supplier sends a list — and also update existing items in bulk. Nothing is saved until you have reviewed exactly what will happen.

18.1 Before You Start

- Permission — importing needs Import inventory from Excel (administrators by default). Creating new items also needs Add inventory items, and changing existing items also needs Edit items & photos (Section 4.9).
- Existing setup — categories, locations, departments and vendors are never created by an import. They must already exist (Chapter 13).
- Size — one file can hold up to 5,000 rows.

TIP

Start with a small test file of three to five rows to see how the review screen works before importing a large list.

18.2 Step 1: Download the Template

On the Inventory screen, select Export Import Template. AssetTrack downloads an Excel file built from your own setup, with three sheets:

- Items — the sheet you fill in, one row per inventory record starting on row 2. Green headings are required for new items. Do not rename, remove or reorder the headings; extra columns of your own are ignored.
- Instructions — the rules in short form, with example rows.
- Lists — every available category, department, location, vendor, condition and other list value. The matching columns on the Items sheet offer these as dropdowns.

18.3 Step 2: Fill In the Items Sheet

Column	What to enter
Item Code	Leave blank for a new item (a code such as INV-000123 is assigned automatically). Fill in an existing code only to update that item.
Item Name	Required for new items.
Category	Required for new items. Must be an existing category; it decides whether the item is an Asset or Stock.
Tracking Type	Optional: Asset or Stock. If filled it must agree with the category; if blank it is taken from the category.
Department	Optional. Must be the department the location belongs to. Useful when two locations share a name.
Location	Required for new items. Must be an existing location.
Quantity	Assets: whole units, at least 1 (blank means 1). Stock: required, 0 or more. For stock, the quantity becomes the opening stock batch.
Unit	For example pcs, sets, boxes. Blank uses the category's default unit.
Condition	New, Good, Fair, Under Repair or Damaged. Blank means Good. Disposed items are handled with Dispose, not import.
Asset Tag, Serial Number, Model Number, Manufacturer, Color, Dimensions, Weight	Assets only. An asset tag must be unique across the whole inventory.
Purchase Date	Type as 2026-07-20 (AD) or 2083-04-05 (BS / Miti). See the date rules below.
Unit Cost (Rs.)	The price of ONE unit, not the total. Numbers only; commas are fine.

Column	What to enter
Vendor	Optional. Must be an existing vendor.
Warranty Expiry	Same date rules as Purchase Date. Cannot be before the purchase date.
Stock Issuing Method	Stock only. FIFO or LIFO. Blank means FIFO.
Min Stock Level, Reorder Quantity	Stock only. The level at which the item counts as low, and a suggested restock amount.
Depreciation Method, Rate, Useful Life, Salvage Value	Assets only. Blank leaves the category or organization policy in force. Rate and life apply only with Straight-line or Declining balance. These columns appear only if you may view depreciation.
Tags	Separate several tags with commas.
Notes	Free text.

18.4 New Items and Updates

- Item Code blank — a new item is created and gets the next code automatically.
- Item Code filled — the item with that code is updated. Only the cells you fill in are changed; a blank cell never erases existing data.
- No code — an asset whose Asset Tag (or, failing that, Serial Number) already exists is updated instead of duplicated. Stock items are matched on Name, Category and Location.
- Asset or Stock — decided by the category. Assets are individual units or lots (quantity at least 1); stock items are consumables whose quantity goes up and down.
- Department and Location — a location belongs to one department. If you fill in Department it must match; it is only used to check the row and to tell apart locations that share a name.

18.5 Entering Dates

Type dates as YYYY-MM-DD, for example 2026-07-20 (AD) or 2083-04-05 (BS / Miti). The cells are formatted as text so Excel leaves them exactly as typed. Years 2035 and above are read as BS and earlier years as AD; you can also state it explicitly, such as 2083-04-05 BS or 5 Shrawan 2083. Other shapes are accepted too (20/07/2026, 20 Jul 2026, real Excel dates, Nepali digits). Anything unclear is flagged in the review step rather than guessed.

18.6 Step 3: Import and Review

1. On the Inventory screen, select Import Records and choose your filled-in file.
2. The Review before importing window opens. Every row is marked Create, Update, No change or Error, with the exact field changes, and any warnings or errors.
3. If dates were typed as text, check the Typed dates are setting (Auto-detect, AD or BS) and change it if needed; the review refreshes.
4. If some rows have errors, you can fix the file and import again, or tick Skip the rows with errors and import everything else.
5. Select Confirm & import. The file is checked once more at that moment and everything is saved in a single step — either all of it, or none of it.

Select Cancel at any time before confirming to leave without importing anything.

18.7 Common Reasons a Row Is Rejected

- A category, location, department or vendor name does not match an existing one (names are matched without regard to capital letters).
- A department is filled in but is not the department the location belongs to.
- The Tracking Type disagrees with the category.
- An asset tag is already used by another item.
- A quantity is not valid for the item type — assets need at least 1, stock needs 0 or more.
- A warranty expiry is before the purchase date.
- A required cell is empty for a new item (name, category or location; quantity for stock).
- Asset-only columns filled in on a stock row, or stock-only columns on an asset row; these are ignored with a warning.

18.8 After the Import

- New items receive their item codes and appear in Inventory straight away.
- For new stock items, the quantity becomes the opening stock batch used for FIFO/LIFO issuing (Section 6.8).
- The import is recorded, with who imported what and when.

- Imported items are not linked to a budget plan; use Procurement or Quick Restock when a cost should count against a plan (Section 10.12).

19. Quick How-To Reference

A short list of common tasks and where to do them. The numbers in brackets point to the section with the full explanation.

I want to...	How
Reset a forgotten password	Sign-in screen → Forgot password? → enter email → enter the 6-digit code → choose a new password. (2.2)
Record that stock was used	Consumption → + Record consumption, or open the item → Record consumption. Enter quantity, purpose and date. (6.14)
Add stock bought locally	Open the stock item → Quick restock → enter quantity and total amount paid; link a budget plan if needed. (6.15)
Request a purchase	Procurement → + Request Item → New item or Restock existing → add to cart → justification → submit. (8.1, 8.2)
Link a purchase to a budget, or fix a missing link	On the request form choose Link to a stocking plan; later, Edit the request and set Budget plan. (8.3, 10.12)
Receive approved goods	Procurement → Receive → location, quantity received, total amount paid, condition, bill → Add to inventory. (8.6)
Send damaged goods back to the vendor	Procurement → Edit the received request → Correct this purchase after receiving → lower the quantity kept and the amount paid → add the reason → Save. (8.11)
Restock an asset without mixing old and new units	When asked, choose Create a new entry instead of Add to existing lot. (8.10)
Transfer an item	Open the item → Transfer, or Transfers → + Request Transfer; choose destination and quantity. (7.1)
Report a faulty item	Repairs → Report Issue, or open the item and report the issue from there. (9.1)
Record a petty cash expense that also adds to inventory	Petty Cash → + Record Expense → tick Also add to inventory → New item or Restock existing. (11.1, 11.5)
Correct a mistake in a submitted request	Select Edit on the request, change the field, add a note, Save. (17.2)
See who changed a record	Select the Edited ×N pill on the record to open its edit log. (17.3)
Correct or undo a consumption	Consumption → Edit or Revert on the record. (17.4)

I want to...	How
Import many items at once	Inventory → Export Import Template → fill in → Import Records → review → Confirm & import. (Chapter 18)
Give one person an extra permission	Staff & Users → Edit the person → switch the ability On in the Permissions panel. (13.7)
Set permissions for a whole team	User groups → + New group → set abilities → Save; then put people in the group from Staff & Users. (13.7)
Reset someone's password	Staff & Users → Edit → Reset to default password. (13.5)
Stop someone signing in	Staff & Users → Edit → set Status to Inactive. (13.5)
Find an item that was deleted	Inventory → Deleted items → select the item. (6.20)
Export a report for one department	Reports → Filters → choose the department → select the report → Export Excel. (14.5)
Close or reactivate a budget plan	Stocking Plans → open the plan → Close plan or Reactivate. (10.7)
Understand why a plan's Spent differs	See the reasons listed in Section 10.13.
Change the petty cash limit	Organization → Petty cash settings. (11.4)
Rename a department, location, category or vendor	Open its setup screen, edit the name and save; live records follow the new name. (13.1 to 13.4)
Set up or change outgoing email	Setup → Organization → Email (SMTP) → turn on Allow sending email → enter host, port, username and password → Save email settings → Send test email. (13.8)
Change or sign out a device	My Profile → Signed-in devices → Log out next to the device. (15.4)

20. Frequently Asked Questions

I can't see Inventory, Transfers, Procurement or Reports in my sidebar.

Your account is likely scoped to a single location as a custodian (Section 4.4), which shows a simplified "My Location" view on Overview instead. If you believe this is incorrect, ask your administrator to review your dashboard access from Staff & Users.

I submitted an OTP for password reset and it says invalid or expired.

OTPs are valid for 10 minutes and are single-use. If you requested a new one after the first (for example, by selecting Resend OTP), make sure you're entering the most recently received code, since requesting a new one invalidates the previous code.

Why can't I request a transfer for more stock than I can see is on the shelf?

The quantity available for transfer is the quantity currently recorded in AssetTrack at the source location, which should match what's physically there. If it doesn't, ask an administrator to review and correct the item's recorded quantity.

My procurement request is Approved but the item isn't showing in inventory yet.

An approved procurement request still needs to be Received by an administrator before it becomes a live inventory record — see Section 8.6. Approval means the purchase is authorised; receiving means it has physically arrived.

I uploaded the wrong bill or receipt to a procurement request.

Open the request, select the bill viewer, and use Remove bill, then upload the correct one. Note that once an item has been received into inventory, the bill copied into its permanent Purchase History (Section 6.9) cannot be changed — this is intentional, to preserve an accurate audit trail.

A stocking plan's "Spent" figure looks wrong.

For a procurement request linked to a plan, spend only updates once that request is approved (Section 10.6) — pending or declined requests never count. A quick restock linked to a plan (Section 6.15) counts immediately instead, since it has no approval step. Check the plan's Linked activity list to see exactly which entries are contributing to the total.

The file I'm trying to upload is being rejected.

Photos (avatars, item photos, logo) are limited to 15 MB and must be PNG, JPG, WEBP or GIF. Bills, receipts and other documents are limited to 20 MB and may additionally be PDF. AssetTrack checks this before uploading and will tell you immediately if a file doesn't meet these limits.

I disposed of an item by mistake — how do I get it back?

Open the Scraps screen (Section 6.13) and select Restore on that item's record. This removes it from Scraps and returns it to active inventory, with its condition reset to whatever it was immediately before it was disposed. You will need scrap access to see the Scraps screen at all — see Section 4.5.

The Edit button is missing, or greyed out, on a request or record.

Editing needs the Edit submitted requests permission (Section 17.1). A greyed-out button means the record belongs to an item that has been removed from inventory and is now read-only history

(Section 6.20). If you believe you should be able to edit, ask an administrator to check your permissions.

The goods I received were damaged. How do I send them back?

Edit the received procurement request and use Correct this purchase after receiving to lower the quantity kept and the amount paid. Inventory and the budget plan are corrected together — see Section 8.11. This needs the Adjust received purchases permission.

A budget plan's Spent figure doesn't match the list I can see.

Pending and declined items are not counted, a received purchase counts at the amount actually paid, and you may not be allowed to see every request linked to the plan. See Section 10.13.

I was asked whether to add to the existing lot or create a new entry. Which should I choose?

Add to existing lot averages the cost and purchase date of the old and new units; create a new entry keeps them separate. Choose a new entry when the new units should not be averaged with the old ones — see Section 8.10.

I can't approve or decline a request any more.

A request can only be decided once, and requests for items that have been removed from inventory can only be declined. If the request has already been approved or declined, raise a new request (Section 17.7).

Can I still see what was bought for an item I deleted?

Yes. Its records are kept as read-only history, and Inventory → Deleted items shows each removed item with its purchases, usage, transfers and repairs (Section 6.20).

How do I add many items at once?

Use Inventory → Export Import Template, fill in the sheet, then Import Records and review before confirming — see Chapter 18.

Why does a colleague with the same role see different buttons?

Permissions can be changed per person and per user group, on top of the role. See Sections 4.6 to 4.8.

A total is a few paisa different from adding up the rows.

Totals are summed from exact figures and rounded once, while each row is shown rounded. See Section 6.19.

Password codes and notification emails are not arriving.

Open Setup → Organization → Email (SMTP). Check that Allow sending email is on, save, then select Send test email: it reports in plain words whether the username or password was refused, the server could not be found, or the port and SSL/TLS setting do not match. Also check the recipient's spam folder (Section 13.8).

Is a reason really required when I decline a request?

Yes. The reason is shown with the Rejected badge, included in the email to the requester and exported with the logs (Section 8.5).

My import shows errors on some rows.

Select a row in the review window to see the exact reason. The most common causes are a name that doesn't match an existing category, location or vendor, or a duplicate asset tag — see Section 18.7. You can fix the file, or skip the rows with errors.

21. Glossary

Term	Meaning
Asset	A uniquely tracked item (one record per physical item or by lot if quantity involved).
Stock	A consumable tracked by quantity in a unit.
Custodian	The staff member responsible for a specific location.
FIFO	First In, First Out — oldest stock batch is used first.
LIFO	Last In, First Out — newest stock batch is used first.
Miti	A date shown in the Bikram Sambat (Nepali) calendar.
Stocking Plan	A budget allocation (annual, weekly, or petty cash) that procurement or petty cash spend can be linked to.
Purchase History	The permanent, unchangeable record of every purchase/restock event for an item, including its bill.
Stock Batch	A distinct received quantity of a stock item, tracked with its own cost and date for FIFO/LIFO purposes.
Petty Cash	Small day-to-day expenses recorded and approved outside the formal

Term	Meaning
	procurement flow.
Dashboard-Gated	A screen only shown to accounts with full dashboard access (see Section 4.4).
Edit log	The permanent record of every correction made to a request, consumption record or scrap record: who, when, and the old and new values.
Lot	A single record holding several identical units, with one cost, purchase date and depreciation.
Unit cost	The cost of one unit, kept to up to six decimals. Totals are unit cost × quantity, rounded once.
Weighted-average cost	The average cost of the batches still on hand, weighted by their quantities.
Returned / Correction line	A separate entry in an item's purchase history, with a negative quantity and amount, recording a return or correction after receiving.
Permission toggle	A switch that allows or blocks one specific ability for one person.
Role default	What an ability is set to for Administrators, Managers or Staff before any group or personal change.
User group	A named set of permission settings shared by its members.
Custom (tag)	Marks a permission switch that was changed for one person and so overrides their group and role.
Import template	The Excel file downloaded from Inventory that is filled in and imported to create or update items in bulk.
Deleted items archive	The read-only list of items removed from inventory, with their purchases, usage, transfers and repairs.
Quotation	A supplier's quote or invoice attached to a procurement request before the goods are received.
Budget plan link	The connection between a purchase, expense or repair and a stocking plan, which makes its cost count towards the plan's Spent figure.

21.1 Additional Terms

- **Item Code** — a unique, permanent identifier (for example, INV-000042) assigned to every item record, used to tell apart records that share the same name.
- **Scrap** — an item whose condition has been set to Disposed, moved to the Scraps register and valued separately from live inventory.
- **Restore (Scrap)** — removing an item from the Scraps register and returning it to active inventory, undoing a disposal.
- **Consumption** — recording that a quantity of a stock item was used up, reducing its quantity on hand and creating a permanent log entry (Section 6.14).
- **Quick Restock** — adding stock to an existing item directly from its detail page, without going through a procurement request (Section 6.15).
- **Depreciation** — an estimate of how an asset's value declines over time from its purchase cost, shown as book value on the item's detail page (Section 6.16).
- **Book Value** — an asset's estimated current value after depreciation.
- **Useful Life** — the number of years over which an asset is depreciated under the straight-line method.
- **Salvage Value** — the estimated residual value of an asset at the end of its useful life; depreciation never reduces book value below it.

22. Support & Contact

For questions about using AssetTrack that aren't answered in this guide, first check with your organization's AssetTrack administrator, who can address account access, permissions, and organization-specific configuration.

For technical issues, feature requests, or questions about the underlying system, contact:

Utkrista Acharya for KutkiTech Pvt. Ltd.

Developer of AssetTrack — Organization Inventory & Asset Management System

— End of Document —