RekordPOS | Quick guide

Keep the counts true.

Low stock, adjustments, transfers and expiry.

Stock goes up when you buy and down when you sell. This guide covers everything else: spotting what is running out, recording what was damaged or lost, moving goods between warehouses, and watching expiry dates.

IN THIS GUIDE

1. **Watch low stock**
   See what to reorder before it runs out
2. **Adjust stock**
   Record damage, loss or a count difference
3. **Transfer stock**
   Move goods from one warehouse to another
4. **Check expiry**
   Find products that are past or near their date

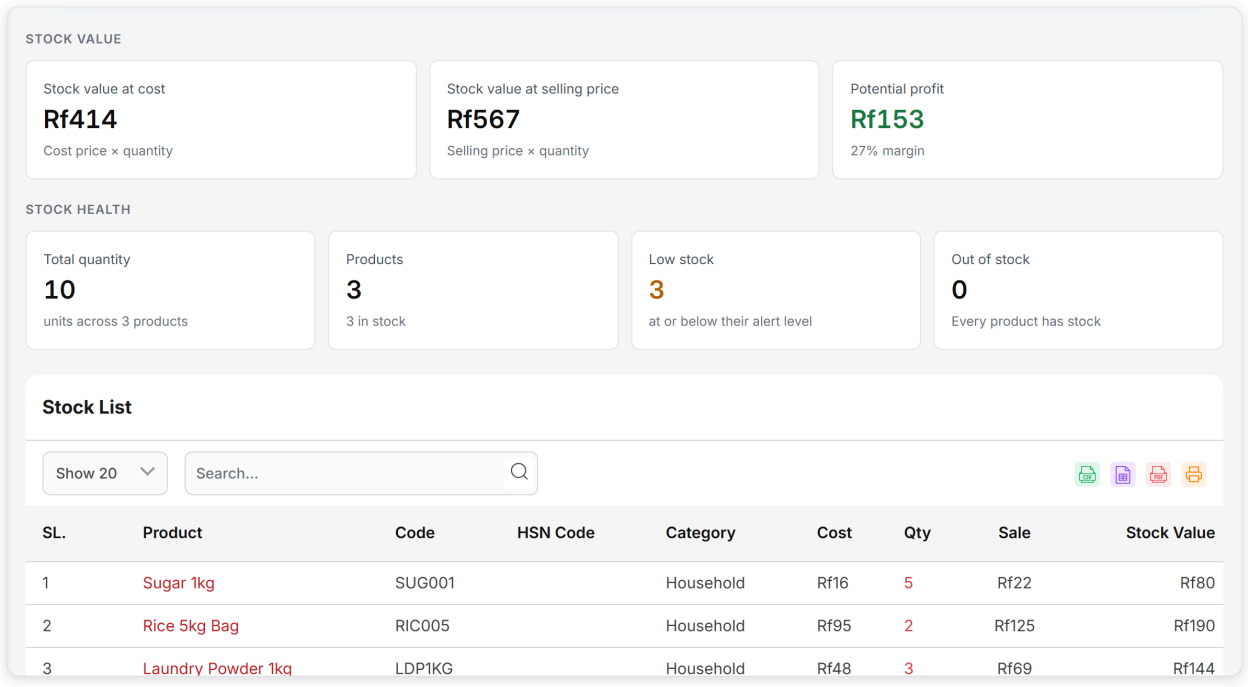
WHERE
Stock List in the menu

TIME
A minute for each job

TIP
Always give a reason

1 All stock and low stock

Open **Stock List**, then **Low Stock**. At the top are the totals: **stock value at cost**, **stock value at selling price** and the **potential profit** between them. Under them is **Stock Health**: total quantity, products in stock, products low, and products out of stock. The list below names each product that has fallen to its alert level.

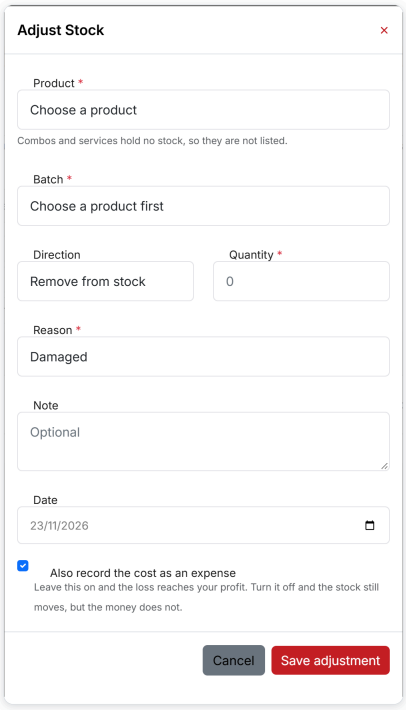


Stock value, stock health and the products that are low

Set the alert level on each product (the Alert Qty column in Bulk Edit). A product is called low when it falls to that number or below. The same products appear on your dashboard under Stock Health, with a Reorder link.

2 Adjust stock

Something broke, went missing, or the count on the shelf is not what the screen says. Open **Stock List**, then **Adjustments**, and press **Adjust Stock**. Choose the **product** and its **batch**, whether to **add to or remove from** stock, the **quantity** and a **reason** such as Damaged.



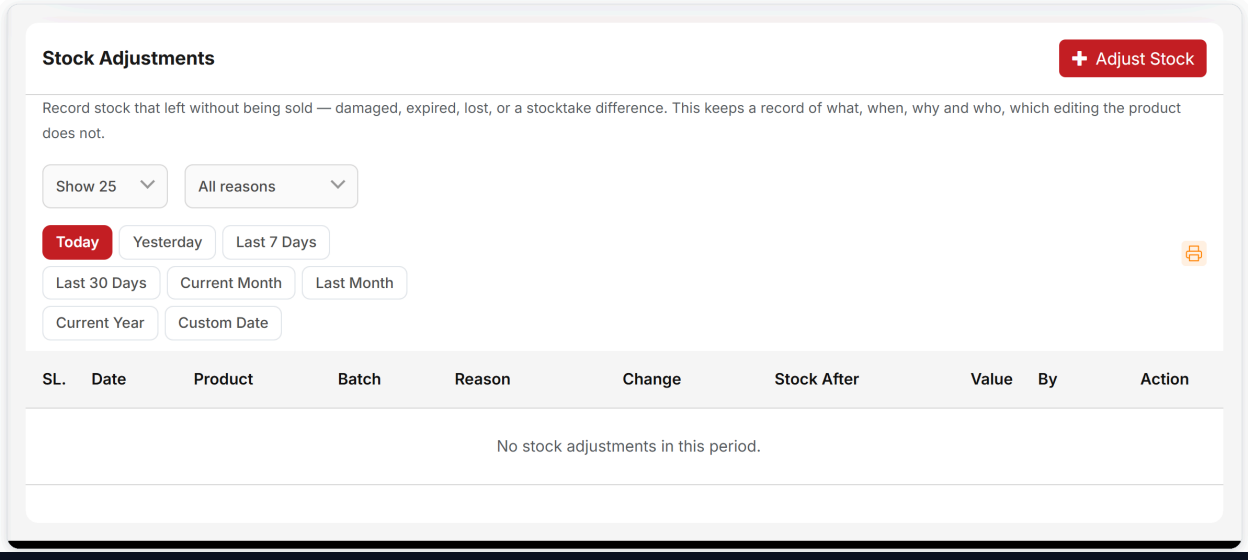
Adjust Stock

3 The cost as an expense

At the bottom is a tick box: **Also record the cost as an expense**. Leave it ticked and the loss reaches your profit report. Untick it and the stock still moves, but your money figures do not.

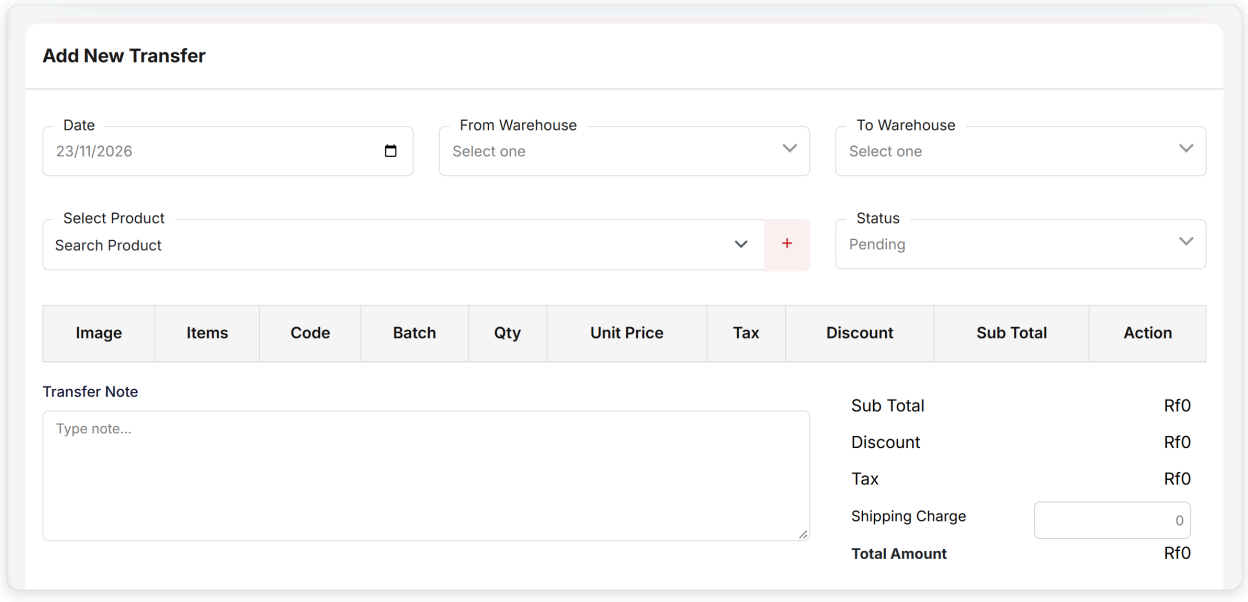
4 The adjustment history

Every adjustment is kept with its date, product, reason, change, stock after, value and the person who made it. Use the date buttons at the top to look at today, last week or last month.



5 Transfer between warehouses

Open **Stock List**, then **Transfer**, and press **Add new Transfer**. Choose the warehouse the goods are **from** and the one they are going **to**, search the product, set the quantity, and press **Save**. The count in each warehouse updates. The form also has a **Status** field.



Add New Transfer

6 Expired products

Open **Expired Products** to list anything past its expiry date. Give your products an expiry date when you buy them, and RekordPOS will tell you what to clear off the shelf. Medicines and food are the usual ones.

7 Good habits

Count the shelf now and then

Pick a few products each week, count them, and adjust any difference with a reason. Small errors found early stay small.

Never edit a product to change its stock

An adjustment leaves a record. An edit does not.

Transfer, do not sell and buy

Moving goods between your own warehouses is a transfer. It should not appear as a sale or a purchase.