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User Manual

Inventory Report

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## 1.0 Introduction

Many businesses face difficulties in obtaining accurate and comprehensive inventory reports specific to their different locations, products, and time frames. This information is crucial for effective inventory management, making informed purchasing decisions, and forecasting future demand. The Inventory Reports plugin for Odoo addresses the challenge of a lack of clear, location-based inventory reporting within the Odoo ERP system.

## 1.1 Features

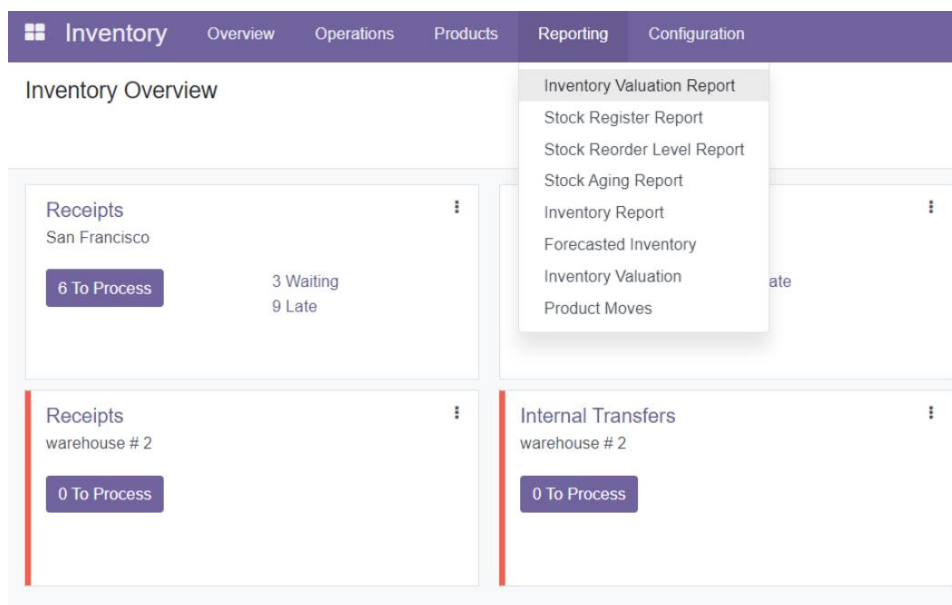
1. Inventory Valuation Report
2. Stock Register Report.
3. Stock Reorder Level Report.
4. Stock Aging Report.

## 1.2 Working

Inventory Valuation Report:

This report provides essential information such as the name, category, price, and current quantity of all products at a specific location. It offers businesses a comprehensive view of their inventory status and facilitates effective inventory management.

**1. To access the Inventory Evaluation Report:** Inventory Module -> Reporting -> Inventory Valuation Report



2. The report allows users to specify the desired location, and there is also a feature to filter the report based on product categories. Additionally, users can fetch the stock valuation of a particular product by entering its name.

**Inventory Valuation Report** ✕

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Location:

Product Category:

Product:

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3. Once the report is generated, users have the flexibility to download it in PDF or Excel format, enabling easy sharing, analysis, and further processing of the inventory data.



My Company (San Francisco)  
250 Executive Park Blvd, Suite 3400

San Francisco CA 94134  
United States

<b>Inventory Valuation Report</b>						
Location : WH/Stock						
SL NO	PRODUCT NAME	PRODUCT CATEGORY	PRODUCT LOCATION	SELLING RATE	QTY	UOM
1	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	16.00	Units
2	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units
3	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units
4	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units
5	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units
6	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units
7	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units
8	Acoustic Bloc Screens	Office Furniture	WH/Stock	295.00	1.00	Units



Product Name	Product Category	Product Location	Selling Price	Qty	UOM
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	16	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Acoustic Bloc Screens	Office Furniture	WH/Stock	295	1	Units
Cabinet with Doors	Office Furniture	WH/Stock	140	33	Units
Conference Chair	Office Furniture	WH/Stock	33	26	Units
Conference Chair	Office Furniture	WH/Stock	39	30	Units
Corner Desk Right Sit	Office Furniture	WH/Stock	147	12	Units
Customizable Desk	Office Furniture	WH/Stock	750	45	Units
Customizable Desk	Office Furniture	WH/Stock	750	50	Units
Customizable Desk	Office Furniture	WH/Stock	800	55	Units

### Stock Register Report:

This report offers comprehensive information on stock movements and the current stock of all products within a specified time span, as defined by the user. It enables businesses to track and analyse stock changes over a specific period, facilitating effective inventory management.

1. To access the Stock Register Report: Inventory module -> Reporting -> Stock Register Report.

The screenshot shows a software interface with a top navigation bar containing 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The 'Reporting' menu is expanded, displaying a list of report options. The 'Stock Register Report' option is currently selected and highlighted. Below the navigation bar, there are several dashboard widgets: 'Receipts San Francisco' with '6 To Process', '3 Waiting', and '9 Late' items; 'Receipts warehouse # 2' with '0 To Process' items; and 'Internal Transfers warehouse # 2' with '0 To Process' items.

2. Within the report, users have the flexibility to select a stock location and define a From Date and To Date to specify the desired time span. Additionally, users can apply a product category filter to further refine the report results.

## Stock Register Report x

**From Date**  **To Date**   
**Location**   
**Product Category**

3. Once generated, the Stock Register Report can be downloaded in PDF or Excel format, allowing for easy sharing, analysis, and further processing of the stock data.



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United States

Stock Register						
<b>From Date</b>		01/06/2023				
<b>To Date</b>		20/06/2023				
<b>Location</b>		WH/Stock				
PRODUCT	PRODUCT CATEGORY	LOCATION	IN QUANTITY	OUT QUANTITY	CURRENT QUANTITY	VALUE
Harpic	test category	WH/Stock	131.0	35.0	96.0	9504.0
Customizable Desk	Office Furniture	WH/Stock	60.0	2.0	58.0	46423.2
Customizable Desk	Office Furniture	WH/Stock	65.0	0.0	65.0	48750.0
Customizable Desk	Office Furniture	WH/Stock	70.0	0.0	70.0	52500.0
Corner Desk Right Sit	Office Furniture	WH/Stock	12.0	0.0	12.0	1764.0
Large Cabinet	Office Furniture	WH/Stock	500.0	150.0	350.0	112000.0
Storage Box	Office Furniture	WH/Stock	19.0	10.0	9.0	142.20000000000002
Large Desk	Office Furniture	WH/Stock	20.0	0.0	20.0	35980.0

Activate

Stock Register Report for My Company (San Francisco)							
My Company (San Francisco) 250 Executive Park Blvd, Suite 3400 San Francisco CA 94134 United States							
Location :WH/Stock							
From Date				01/06/2023			
To Date				20/06/2023			
Product	Product Ca	Location	In Quantity	Out Quant	Current Qu	Value	
Harpic	test catego	WH/Stock	131	35	96	9504	
Customiza	Office Furn	WH/Stock	60	2	58	46423.2	
Customiza	Office Furn	WH/Stock	65		65	48750	
Customiza	Office Furn	WH/Stock	70		70	52500	
Corner De	Office Furn	WH/Stock	12		12	1764	
Large Cabi	Office Furn	WH/Stock	500	150	350	112000	
Storage Bc	Office Furn	WH/Stock	19	10	9	142.2	
Large Desk	Office Furn	WH/Stock	20		20	35980	
Pedal Bin	Office Furn	WH/Stock	22		22	1034	
Cabinet wi	Office Furn	WH/Stock	33		33	4620	
Conferenc	Office Furn	WH/Stock	26		26	858	
Conferenc	Office Furn	WH/Stock	30		30	1182	
Customiza	Office Furn	WH/Stock	45		45	33750	
Customiza	Office Furn	WH/Stock	50		50	37500	
Customiza	Office Furn	WH/Stock	55		55	44022	
Office Cha	Office Furn	WH/Stock	10		10	1205	
Individual	Office Furn	WH/Stock	16		16	14160	
Corner De	Office Furn	WH/Stock	102	102			
Cable Man	Office Furn	WH/Stock					
Acoustic B	Office Furn	WH/Stock	31		31	9145	
Large Mee	Office Furn	WH/Stock					
Office Cha	Office Furn	WH/Stock					
Desk Coml	Office Furn	WH/Stock	60	32	28	12600	
Desk Stanc	Office Furn	WH/Stock					

## Stock Reorder Level Report:

The Stock Reorder Level Report is a valuable tool in the Inventory module of Odoo that assists businesses in determining when to initiate product purchases based on pre-set minimum quantity thresholds. This report enables efficient inventory management by ensuring that stock levels are maintained to meet demand without experiencing stockouts.


1. To set up a reorder rule: **Go to Inventory -> Products -> Open a product -> Click on Reordering Rules tab.**

0 Extra Prices
Go to Website
50.00 Units On Hand
48.00 Units Forecasted
In: 0 Out: 6
0 Reordering ...
Putaway Rules
More

Product Name

☆ **Door Mat**

Can be Sold  Can be Purchased



**Product Type** Storable Product

**Manufacturing Date** 06/02/2022

**Invoicing Policy** Ordered quantities

Storable products are physical items for which you manage the inventory level.

You can invoice them before they are delivered.

**Sales Price** \$ 50.00 (~ \$ 57.50 Incl. Taxes)

**Customer Taxes** Tax 16.00%

**Cost** \$ 0.00

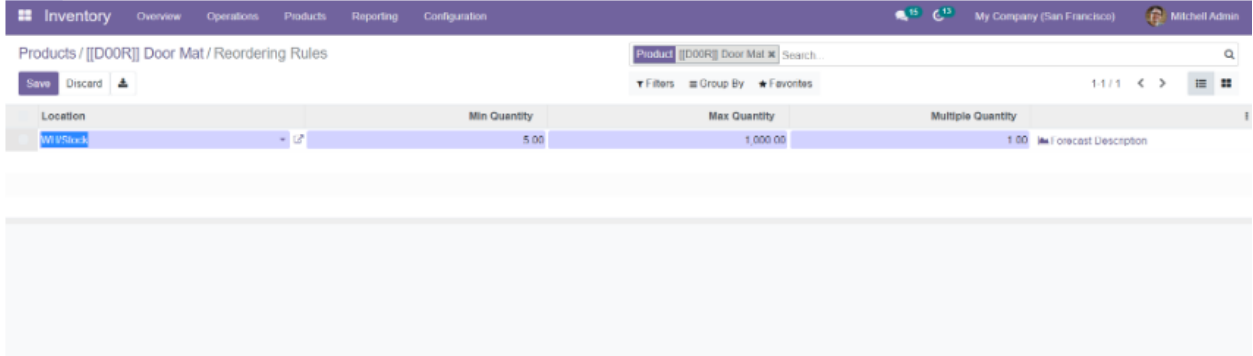
**Product Category** All / Saleable

**Internal Reference** [DOOR]

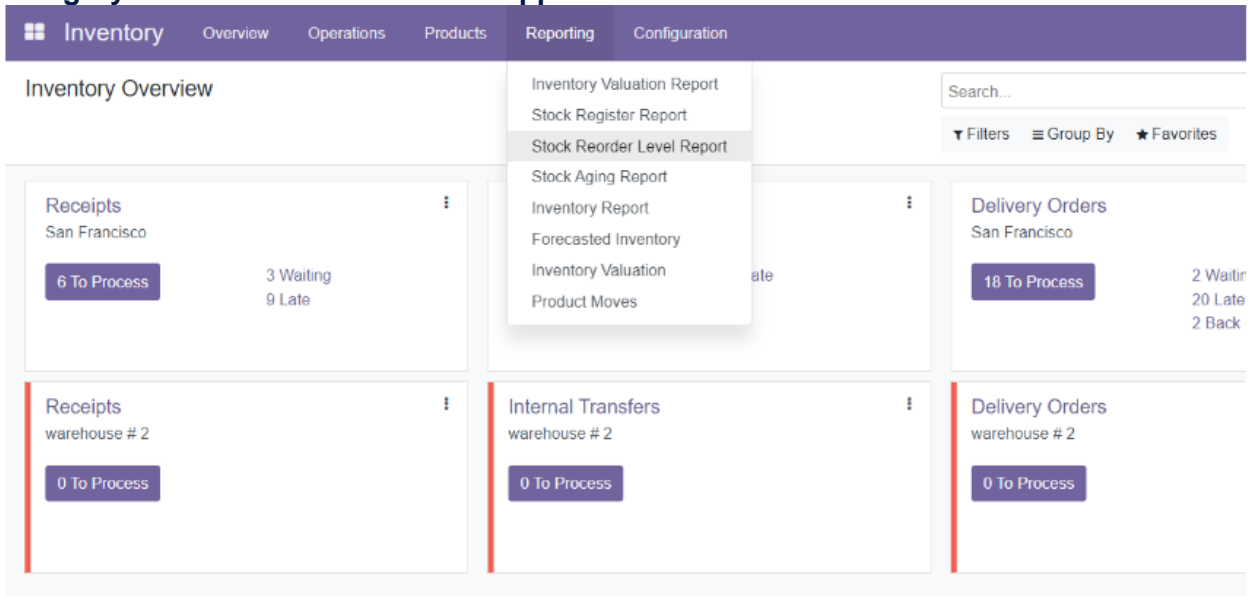
**Barcode**

**Company**

- By creating a new rule, users can specify the minimum and maximum quantities for the product, ensuring that when the stock reaches the minimum threshold, a purchase is initiated. **Create a new rule -> Enter min and max quantities -> Save.**



- Go to Inventory -> Reporting -> Stock Reorder Level Report Location, Product category and Product filters can be applied.**



- The report allows users to apply filters such as location, product category, and specific products to customize the results according to their requirements.





- Once the report is generated, it can be downloaded in PDF or Excel format, enabling users to review the reorder levels and take necessary actions to maintain optimal inventory levels and prevent stock outs.



My Company (San Francisco)  
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**Below Reorder Level Items**

SL NO	PRODUCT CODE	PRODUCT NAME	PRODUCT CATEGORY	LOCATION	CURRENT STOCK	REORDER LEVEL(PRODUCT MIN.QTY)
1	E-COM10	Pedal Bin	Office Furniture	WH/New Stock	1.0	5.0
2	E-COM08	Storage Box	Office Furniture	WH/New Stock	11.0	11.0
3	FURN_7777	Office Chair	Office Furniture	WH/New Stock	0.0	5.0

	A	B	C	D	E	F	G	H	I	J
1	<b>Stock Reorder Level Report for My Company (San Francisco)</b>									
2	<b>My Company (San Francisco)250 Executive Park Blvd, Suite 3400San Francisco CA 94134United States</b>									
3	<b>Location :WH/New Stock</b>									
4										
5										
6	<b>Product Code</b>	<b>Product Name</b>	<b>Product Category</b>	<b>Location</b>	<b>Current Qu</b>	<b>Reorder Level(Product Min.Qty)</b>				
7	E-COM10	Pedal Bin	Office Furniture	WH/New Stock	1	5				
8	E-COM08	Storage Box	Office Furniture	WH/New Stock	11	11				
9	FURN_7777	Office Chair	Office Furniture	WH/New Stock		5				
10										
11										
12										
13										

**Stock Aging Report:**

This report is useful for products that may have multiple stocks with different manufacturing dates. It provides insights into the age of inventory, facilitating effective inventory rotation, and ensuring the sale of fresh products. To track the age of stock items, users have two options: lots or unique serial numbers.

In the Inventory tab of the respective product, users can assign lots or unique serial numbers to each stock item. For lots, users manually set the lot name and manufacturing date. For unique serial numbers, users can assign specific serial numbers to individual stock items.

To generate the Stock Aging Report, follow these steps:



1. Open the Inventory module and access the desired product.

Open the Inventory module and access the desired product.

**Traceability**

**Tracking**

By Unique Serial Number  
 By Lots  
 No Tracking

**Detailed Operations** ×

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**Product** [FURN\_6666] Acoustic Bloc Screens  
**Demand** 4.00 Units  
**Quantity Done** 0.00 / 4.00 Units  
**First SN**   
**Number of SN**  Assign Serial Numbers Clear All

To	Lot/Serial Number Name	Manufactur...	Done
Add a line			

Confirm
Discard

7. If tracking by lots, manually set the lot name and manufacturing date for each lot.  
 If tracking set to no tracking, then manufacturing date captured from product's manufacturing date.

Products / [FURN\_6666] Acoustic Bloc Screens

Save Discard

**Product Name** ☆ Acoustic Bloc Screens

Can be Sold
  Can be Purchased

General Information
Attributes & Variants
Sales
Purchase
Inventory
Accounting

**Product Type** Storable Product  
**Manufacturing Date** 05/20/2023  
**Invoicing Policy** Delivered quantities

*Storable products are physical items for which you manage the inventory level.*  
*Invoice after delivery, based on quantities delivered, not ordered.*

**Sales Price** \$295.00  
**Customer Taxes**  
**Cost** \$287.00  
**Product Category** All / Saleable / Office Furniture  
**Internal Reference** FURN\_6666  
**Barcode**  
**Company**

Internal Notes

To generate the Stock Aging Report:

1. Go to the Inventory module.

**Detailed Operations** x

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**Product** [FURN\_6666] Acoustic Bloc Screens  
**Demand** 4.00 Units  
**Quantity Done** 0.00 / 4.00 Units

To	Lot/Serial Number Name	Manufactur...	Done
WH/Stock	LOT1	06/26/2023	0.00
Add a line			

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2. Navigate to the Reporting section.
3. Select the Stock Aging Report option.

**Inventory** Overview Operations Products **Reporting** Configuration 15

Inventory Overview

Receipts San Francisco

7 To Process

3 Waiting  
10 Late

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Receipts warehouse # 2

0 To Process

- Inventory Valuation Report
- Stock Register Report
- Stock Reorder Level Report
- Stock Aging Report
- Inventory Report
- Forecasted Inventory
- Inventory Valuation
- Product Moves

Delivery Orders San Francisco

18 To Process

2 Waiting  
20 Late  
2 Back Orders

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Delivery Orders warehouse # 2

0 To Process

Search...  
 Filters Group By Favorites

4. Apply various filters such as location, product, lot, serial number, and date range to customize the report results.

**Stock Aging Report** x

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**Product Category** All / Saleable / Office Furniture

**Product**

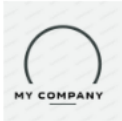
**Location**

**Lot/Serial Number**

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# Inventory Report



My Company (San Francisco)  
250 Executive Park Blvd, Suite 3400

San Francisco CA 94134  
United States

## Stock Aging Report

SL NO	PRODUCT CODE	PRODUCT NAME	PRODUCT CATEGORY	LOCATION	LOT	MANUFACTURING DATE	CURRENT STOCK	AGE
1	FURN_6666	Acoustic Bloc Screens	Office Furniture	WH/Stock		2023-05-20	16.0	37
2	FURN_6666	Acoustic Bloc Screens	Office Furniture	WH/Stock	1	2023-06-07	1.0	19
3	FURN_6666	Acoustic Bloc Screens	Office Furniture	WH/Stock	2	2023-06-01	1.0	25
4	FURN_6666	Acoustic Bloc Screens	Office Furniture	WH/Stock	3	2023-05-31	1.0	26

	A	B	C	D	E	F	G	H	I	J
1	<b>Stock Aging Report for My Company (San Francisco)</b>									
2	<b>My Company (San Francisco)250 Executive Park Blvd, Suite 3400San Francisco CA 94134United States</b>									
3	<b>Product Co</b>	<b>Product Na</b>	<b>Product Ca</b>	<b>Location</b>	<b>Lot/Serial I</b>	<b>Manufactu</b>	<b>Current Qu</b>	<b>Age</b>		
4	FURN_666	Acoustic B	Office Furn	WH/Stock		20-05-2023	16	37		
5	FURN_666	Acoustic B	Office Furn	WH/Stock	1	07-06-2023	1	19		
6	FURN_666	Acoustic B	Office Furn	WH/Stock	2	01-06-2023	1	25		
7	FURN_666	Acoustic B	Office Furn	WH/Stock	3	31-05-2023	1	26		
8	FURN_666	Acoustic B	Office Furn	WH/Stock	13	20-06-2023	1	6		
9	FURN_666	Acoustic B	Office Furn	WH/Stock	14	20-06-2023	1	6		
10	FURN_666	Acoustic B	Office Furn	WH/Stock	15	20-06-2023	1	6		
11	E-COM11	Cabinet wi	Office Furn	WH/Stock		02-06-2023	33	24		
12	FURN_555	Cable Man	Office Furn	WH/Stock/	CM-BOX-00		50	24		
13	FURN_555	Cable Man	Office Furn	WH/Stock/	CM-BOX-00		40	24		
14	E-COM12	Conferenc	Office Furn	WH/Stock		02-06-2023	26	24		
15	E-COM13	Conferenc	Office Furn	WH/Stock		02-06-2023	30	24		
16	E-COM06	Corner De	Office Furn	WH/Stock		02-06-2023	12	24		
17	FURN_009	Customiza	Office Furn	WH/Stock		02-06-2023	45	24		
18	FURN_009	Customiza	Office Furn	WH/Stock		02-06-2023	50	24		
19	FURN_009	Customiza	Office Furn	WH/Stock		02-06-2023	55	24		
20	DESK0004	Customiza	Office Furn	WH/Stock		02-06-2023	58	24		
21	DESK0005	Customiza	Office Furn	WH/Stock		02-06-2023	65	24		