# Stock Inventory

User Guide

Track materials, set low-stock alerts, generate reports,
and collaborate with your team — from Telegram or a browser.

**Quick Reference**

Command: /stock (Telegram) or Open in Browser
Access: Requires active subscription or trial
Web app: app.arklysolutions.com/inventory
Location codes: Aisle-Rack-Level (e.g. A-03-2)
QR scanning: Scan shelf labels from your phone camera

## Contents

# 1. Getting Started

The Stock Inventory feature helps you track materials, parts, and supplies across one or more inventory sites. Each site is a separate inventory that you can manage independently or share with team members.

To open Stock Inventory:

- Type /stock in the chat, or
- Tap Stock on the home screen keyboard

On your first visit, a default site called "My Inventory" is created automatically. You can rename it, create additional sites, or share access with your team.

> Tip: If you have multiple sites, you'll see a site picker first. Tap any site to open its menu, or use the top buttons for cross-site actions.

# 2. The Main Menu

Once you select a site, the main menu shows all available actions. The menu adapts based on whether you are the site owner or a shared member.

The menu header shows the site name and item count (e.g., " Warehouse #1 (7 items)") so you always know how much stock is at the selected site.

### Everyone sees:

| | |
|---|---|
| **Add Item** | Add a new item or increase quantity of an existing one. Quick +1 button for fast updates. |
| **Remove Item** | Decrease quantity of an existing item. Quick -1 button for fast updates. |
| **Low Stock** | Show items at or below their alert threshold, with threshold values displayed |
| **Set Alert** | Configure a low-stock threshold — shows current quantity and existing alert |
| **Report** | Export inventory as PDF report or CSV spreadsheet |
| **History** | View the last 20 inventory changes with who made them |
| **Switch Site** | Go back to the site picker to switch sites |

### Site owners also see:

| | |
|---|---|
| **Rename Site** | Change the site's display name (max 50 characters) |

| | |
|---|---|
| **Share Access** | Invite a team member by their @username |
| **Members** | View and remove shared members |
| **Delete Site** | Permanently delete the site and all its data |

Note: Only the site owner can rename, share, manage members, or delete a site. Shared members can view, add, remove items, and generate reports.

## 3. Adding Items

Tap Add Item from the menu. The flow adapts depending on whether your inventory already has items:

**If your inventory has existing items:**

- A quick-pick list appears showing current items sorted alphabetically with their quantities
- Tap an existing item to add more of it — you'll be asked for the quantity to add
- Tap the +1 button next to any item for a one-tap increment (no quantity prompt needed)
- Tap "New Item" to add something entirely new

**Adding a new item:**

- Step 1 — Category: Choose from Wire & Cable, Connectors, Hardware, Power, Readers, Controllers, or Other (or skip)
- Step 2 — Name: Type the item name (e.g., "Cat6 Plenum Cable")
- Step 3 — Quantity: Enter the amount to add

The item is created (or updated if it already exists) and the system records who made the change. You'll see a confirmation with the new total quantity.

Tip: Each item can have a unit type (each, ft, m, pair, etc.), a part number, and notes. These are tracked automatically and appear in reports.

## 4. Removing Items

Tap Remove Item from the menu. You'll see your current items listed alphabetically with their quantities.

- Tap an item to enter a custom quantity to remove
- Tap the -1 button next to any item for a one-tap decrement
- If you try to remove more than available, the quantity is capped at 0
- The change is logged with your name and a timestamp

> Note: Quantities cannot go negative. If you enter a number larger than what's in stock, the system sets it to zero and warns you.

## 5. Viewing Your Inventory

Your inventory is visible in several ways:

**Menu header:**
The main menu always shows the site name and total item count — e.g., " Warehouse #1 (7 items)" — giving you an instant snapshot without tapping anything.

**Add/Remove pickers:**
When you tap Add Item or Remove Item, you see all items sorted alphabetically with their current quantities. This doubles as a quick inventory view.

**Reports:**
For a detailed view with categories, part numbers, notes, and change tracking, use the Report button to generate a PDF or CSV export.

## 6. Low-Stock Alerts

Low-stock alerts help you stay ahead of shortages. There are two parts: setting thresholds and receiving automatic notifications.

**Setting a threshold:**

- Tap Set Alert from the menu
- Select an item — you'll see its current quantity and existing threshold
- Enter a number: the bot will alert you when quantity falls to this level or below
- Enter 0 to disable the alert for that item

**Viewing low-stock items:**

Tap Low Stock to see items at or below their alert threshold. Each entry shows the item name, current quantity, and the threshold value — so you know exactly how much to reorder.

**Automatic daily notifications:**

Every morning at 8:30 AM UTC, the bot checks all your sites. If any items are below their thresholds, you receive a notification listing up to 10 items with their current quantities, thresholds, and site names.

> Tip: Set thresholds based on your typical reorder lead times. If a cable takes a week to arrive, set the alert at enough stock to last that week.

## 7. Searching Across Sites

If you manage multiple inventory sites, the cross-site search lets you find an item everywhere it appears.

- From the site picker (shown when you have multiple sites), tap Search Items
- Select an item from the aggregated list
- The bot shows a breakdown: quantity at each site, total across all sites, and warning markers for low-stock locations

This is especially useful when you need to know if a part is available at any of your locations before placing an order.

# 8. Inventory History

Tap History to see the last 20 changes made to the current site. Each entry shows:

- Item name and the change amount (+ for adds, - for removals)
- New total quantity after the change
- Who made the change (by name)
- When it happened (timestamp)

History is useful for auditing who used what and tracking consumption patterns over time.

# 9. Reports & Exports

Tap Report from the main menu to choose your export format. The Stock Inventory offers three export options:

**PDF Report (per site)**

- Tap Report then PDF Report
- Optionally add notes (e.g., "Restocked for Monday job") or skip
- Generates a professional PDF with: report number, site info, date, item table (with quantity, change since last report, unit, alert threshold, status, last changed by), and a summary box
- Items below threshold are highlighted in red; healthy items in green
- The report tracks deltas — changes since the last time a report was generated

**Inventory Report (cross-site)**

- From the site picker, tap Inventory Report
- Aggregates all items across every site you own or are a member of
- Shows each item's total quantity and where it appears (with per-site breakdown)
- Highlights low-stock items
- Summary includes: unique items, total quantity, number of sites, and low-stock count

**CSV Export**

- Tap Report then CSV Spreadsheet
- Downloads a spreadsheet-ready file with columns: Item, Quantity, Unit, Category, Part Number, Notes, Alert Threshold, Last Changed By, Updated At
- Open in Excel, Google Sheets, or any spreadsheet application

> Tip: Generate a PDF report before and after restocking to document what was added. The delta column makes it easy to see changes at a glance.

## 10. Site Management

You can create multiple inventory sites to organize stock by location, vehicle, project, or any grouping that makes sense for your workflow.

**Creating a new site:**

- From the site picker, tap Create New Site
- Enter a name (max 50 characters)
- The new site is created empty and ready for items

**Renaming a site:**

- Open the site and tap Rename Site (owner only)
- Enter the new name

**Deleting a site:**

- Open the site and tap Delete Site (owner only)
- The bot shows a confirmation with the number of items and members that will be affected
- Tap Yes, delete everything to confirm
- This permanently removes all items, history, and member access

> Note: Deleting a site is permanent and cannot be undone. All items, history, and member access are removed immediately.

## 11. Sharing & Collaboration

Share your inventory sites with team members so everyone can view and update stock levels.

**Inviting a member:**

- Open the site and tap Share Access (owner only)
- Enter the team member's @username — they must have used the bot before
- The member receives a notification and can immediately access the site

**Managing members:**

- Tap Members to see everyone who has access — each member shows their full name and @username
- Tap the remove button next to a member to revoke their access

**What shared members can do:**

- View all items and low-stock warnings
- Add and remove items (changes are logged with their name)

- Set alert thresholds
- View history and generate reports

**What shared members cannot do:**

- Rename or delete the site
- Share access with others or manage members

## 12. Categories

When adding a new item, you can assign it to a category for better organization. The available categories are:

| Category | Examples |
| --- | --- |
| Wire & Cable | Cat6, 18/2 stranded, 22/4 shielded, fiber |
| Connectors | RJ45, BNC, terminal blocks, wire nuts |
| Hardware | Screws, anchors, mounting plates, brackets |
| Power | Power supplies, batteries, UPS, transformers |
| Readers | Card readers, keypads, biometric units |
| Controllers | Access control panels, I/O modules |
| Other | Anything that doesn't fit the above categories |

Tip: Categories are optional — you can skip the selection when adding items. They appear in reports and make it easier to scan large inventories.

## 13. Web Inventory Manager

In addition to managing inventory in Telegram, you can use the full web interface from any browser — phone, tablet, or laptop. The web manager offers the same inventory data with a spreadsheet-style view, QR scanning, and CSV export.

**Opening the Web Inventory:**

- In Telegram, tap /stock to open the stock menu
- Tap Open in Browser — a secure link opens in your browser
- The link is valid for 24 hours and tied to your account
- You can also bookmark the page for quick access (re-open from /stock for a fresh link)

**Web Interface Features:**

| | |
|---|---|
| **Site Selector** | Switch between inventory sites using the dropdown at the top |
| **Site Notes** | Click the gray notes bar to add location info, access codes, or hours for each site |
| **Search Bar** | Filter items by name, location code, barcode, or category in real time |
| **Sort Options** | Sort by name, quantity (lowest first for restocking), location, recently updated, or category |
| **Quick Adjust** | Tap + and - buttons to change quantity — includes Undo link in the confirmation toast |
| **Receive Shipment** | Tap Receive in the header — scan items continuously, each scan adds +1 to stock |
| **Group by Location** | When sorted by location, items are grouped under collapsible location headers |
| **Low Stock Highlight** | Items below threshold shown with red/pink background for instant visibility |
| **Last Updated** | Each item shows relative time since last change (e.g. 2h ago, 3d ago) |
| **Add / Edit / Delete** | Full item management with name, quantity, unit, location, barcode, category, notes |
| **Print Label** | Tap label button to download a QR label PNG for any item |
| **Print All Labels** | Download labels for all items with locations at once |
| **Batch QR Scanner** | Camera stays open between scans — walk the warehouse without closing and reopening |
| **CSV Export** | Download a spreadsheet of all items including updated timestamps |
| **Dark Mode** | Automatically follows your system theme preference (light or dark) |
| **Offline Mode** | If network is unavailable, shows cached data from your last visit |

Tip: The web interface and Telegram bot share the same database — changes made in the browser appear instantly in Telegram and vice versa.

# 14. Location System

The location system uses a simple code format to identify where every item is stored — in your warehouse, shop, vehicle, job-site storage, or stockroom. Each location gets a code in the format Aisle-Rack-Level (e.g. A-03-2).

### Location Code Format:

| Part | Meaning | Example |
|---|---|---|
| Letter (A-Z) | Aisle or zone | A = main aisle, B = back wall |
| Number (01-99) | Rack or shelf unit | 03 = third rack from left |
| Number (1-9) | Level or bin | 2 = second shelf from bottom |

### Examples:

| Code | Meaning |
|---|---|
| A-01-1 | Aisle A, Rack 1, Bottom shelf |
| A-03-2 | Aisle A, Rack 3, Second level |
| B-07-3 | Aisle B, Rack 7, Third level |
| C-12-1 | Aisle C, Rack 12, Bottom shelf |
| V-01-1 | Van shelf 1, Level 1 (use V for van) |

### Assigning Locations:

- When adding a new item, enter the location code in the Location Code field
- Format: letter + dash + number + dash + number (e.g. A-03-2)
- You can use any letters and numbers that make sense for your space
- Items without a location code are shown at the top of the list
- The web interface sorts items by location, so co-located items appear together

**Setting Up Your Warehouse:**

- Walk through your warehouse and assign a letter to each aisle or zone
- Number the racks/shelves from left to right (01, 02, 03...)
- Number the levels from bottom to top (1 = floor, 2 = waist, 3 = eye level, etc.)
- Print QR labels for each shelf position using the button in the web interface
- Stick labels on the front edge of each shelf

> Tip: Use V-01-1 through V-05-3 for vehicle shelves if your techs track mobile stock separately. Create a separate site per vehicle, warehouse, or job-site storage and use a prefix per location type.

# 15. QR Codes & Barcode Scanning

The web inventory manager includes a built-in QR scanner that uses your phone's camera. You can scan two types of codes: ArklyTech shelf labels (QR codes you print from the app) and manufacturer barcodes (UPC codes on product boxes).

**Printing QR Labels:**

- Open the web inventory at app.arklysolutions.com/inventory
- Find the item you want to label
- Tap the button next to the item
- A PNG image downloads showing: site name, location code (large), item name, and QR code
- Print the label using any printer (thermal label printers like Brady BMP21 work great)
- Stick the label on the shelf edge where the item is stored

**Scanning Shelf QR Labels (Batch Mode):**

- Open the web inventory on your phone
- Tap Scan at the top of the page
- Point your camera at the QR label on the shelf
- The app finds the matching item and opens its edit form
- The camera stays open between scans — no need to tap Scan again
- After adjusting one item, point at the next shelf label immediately
- A 2-second cooldown prevents double-scans of the same code
- Tap X to close the camera when finished

**Receiving a Shipment:**

- Tap Receive in the header bar (or use the Receive Shipment modal)
- The camera opens in receive mode — each scan automatically adds +1 to that item
- Scan each box as you unload — the quantity updates in real time
- A green toast confirms each scan: +1 Item Name (now 25)
- If you scan an unknown barcode, the add form opens with the barcode pre-filled
- For bulk quantities, use the Receive Shipment modal: select item, enter quantity, tap Add to Stock

**Undo Mistakes:**

- After any +/- quantity adjustment, a toast appears with an Undo link
- Tap Undo within 4 seconds to revert the change
- Works for both manual +/- and scan-based adjustments

**Warehouse Walk-Through Workflow:**

This is the fastest way to do a complete inventory count:

- 1. Open web inventory on your phone
- 2. Tap Scan
- 3. Walk to shelf A-01-1 — scan the QR label
- 4. Count the items on the shelf — tap + or − to match
- 5. Move to the next shelf — scan its label
- 6. Repeat until you've walked the entire warehouse
- 7. Done — your inventory is accurate and timestamped

> Tip: For a receiving workflow: scan the manufacturer barcode on each incoming box, tap +1 for each unit received, and the item's quantity updates instantly. If the barcode is new, you'll be prompted to create the item — enter the name and location once, and every future scan auto-finds it.

## 16. CSV Import

You can bulk-add items by uploading a CSV file from the web inventory manager. This is useful for initial setup of a new site or migrating from a spreadsheet.

**How to import:**

- Open the web inventory on your phone or laptop
- Tap Import in the header bar
- Tap Download Template CSV to get a pre-formatted file with example rows
- Open the template in Excel, Google Sheets, or any spreadsheet app
- Fill in your items — one row per item with columns: item_name, quantity, unit, location, low_stock_threshold, category, barcode, notes
- Save as CSV and upload via the file picker
- Preview the first 5 rows to verify the data looks correct
- Tap Import All — each row is added to the currently selected site

> Tip: The location column uses the same A-03-2 format (Aisle-Rack-Level). If you leave location blank, the item is created without a shelf assignment — you can add it later.

## 17. Transfers Between Sites

Move items between inventory sites without manually subtracting from one and adding to another. Transfers automatically decrement the source and increment the destination.

**How to transfer:**

- Open the web inventory and navigate to the source site
- Find the item you want to transfer
- Tap the transfer button (arrow icon) in the Actions column
- Enter the destination site name (must be a site you own or have access to)
- Enter the quantity to transfer
- The system decrements the source and creates/adds to the destination automatically

Example:

- You have 50 cable ties at Main Warehouse
- Tap transfer > type 'Truck 1' > enter 20
- Main Warehouse now has 30, Truck 1 now has 20
- If Truck 1 didn't have cable ties before, a new entry is created

## 18. Reorder & Low Stock Alerts

When an item drops below its low stock threshold, two things happen: the web interface shows a reorder link, and ArklyTech sends a daily Telegram notification.

**Reorder links:**

- In the web inventory, low stock items are highlighted with a red/pink background
- A Reorder on Amazon link appears below the item name
- Tap the link to open Amazon pre-filtered to that item — purchases support ArklyTech
- Reorder links only appear for items at or below their threshold

**Daily Telegram alerts:**

- Every morning at 7am UTC, ArklyTech checks all your inventory sites
- If any items are below their threshold, you receive a Telegram message
- The alert lists each low item with its current quantity, threshold, and location
- Alerts are sent to the site owner — shared members do not receive alerts
- To stop alerts for an item, set its threshold to 0

> Tip: Set thresholds based on your reorder lead time. If it takes 3 days to get cable ties, set the threshold to however many you use in 3 days — so you get the alert before you run out.

# 19. Data Privacy & Security

Your inventory data is private and secure. ArklyTech is designed so that only you and team members you explicitly invite can access your inventory sites.

| | |
|---|---|
| **Encrypted Backups** | Your database is backed up hourly to encrypted cloud storage (DigitalOcean Spaces). Daily snapshots are kept for 30 days. |
| **Token Authentication** | Browser sessions use unique tokens that expire after 24 hours. Each token is tied to your Telegram account. |
| **Site-Level Access Control** | Every API request verifies that you own or are an invited member of the site you are accessing. Unauthorized requests are rejected. |
| **No Data Sharing** | We never share, sell, or access your inventory data. Your items, quantities, locations, and notes are visible only to you and your invited team members. |
| **Data Deletion** | Use /deleteme in Telegram to permanently remove all your data including inventory, jobs, sessions, and account information. |
| **Secure Connection** | All data is transmitted over HTTPS (TLS encryption). Your inventory data is never sent in plain text. |

For full details, see our privacy policy at arklysolutions.com/privacy.html

# 20. Smart Reorder List

The Smart Reorder List gives you a single view of every low-stock item across all your sites, so you can place one order instead of checking each site individually.

- Tap "Reorder List" in the web inventory toolbar
- Shows ALL low-stock items across ALL your sites in one view
- Items are grouped by category with current quantity, threshold, and estimated need
- Each item has an "Order" link to Amazon (affiliate tagged)
- Use this for weekly ordering — one list instead of checking each site

> Tip: Review the reorder list every Monday morning before heading out. One consolidated order saves multiple trips to the supply house.

## 21. Job & Estimator Integration

Stock Inventory connects directly to your job workflow and the Job Estimator, so you never double-order materials you already have in stock.

- After completing a job (/done), tap "Update inventory" to open the web inventory and deduct materials used
- In the Job Estimator results, tap "Check stock before ordering" to see what you already have on hand
- This connects your job workflow to your inventory — no more double-ordering materials you already have in stock

> Note: The inventory link appears automatically after job completion and in estimator results. No extra setup required.

## 22. Usage Trends & Count Reminders

Trends and reminders help you stay proactive about inventory levels instead of discovering shortages on the job site.

**Trend arrows:**

- A red down arrow shows quantity decreased since the last change
- A green up arrow shows quantity increased since the last change
- Use trends to predict when you'll run out — if cable ties drop by 20 per week and you have 40 left, order now

**Weekly count reminders:**

- Every Friday at 8am UTC, site owners get a Telegram alert
- The alert lists items that have not been counted in 7+ days
- Helps ensure your inventory numbers stay accurate

> Tip: If an item shows a red down arrow every week, set a low-stock alert so you get warned before it hits zero.

# 23. Quick Reference

| Action | How |
| --- | --- |
| Open Stock (Telegram) | Type /stock or tap Stock on home screen |
| Open Stock (Browser) | /stock > Open in Browser |
| Add items | Add Item > enter name, qty, location |
| Quick adjust | Tap + or - buttons (web), includes Undo |
| Import from CSV | Web > Import > Download Template > fill > upload |
| Transfer items | Web > transfer button > pick site > enter qty |
| Set location | Edit item > enter code like A-03-2 |
| Scan QR label | Web > Scan > point at shelf label |
| Batch receive | Web > Receive > scan items (auto +1 each) |
| Print QR labels | Web > label button per item, or All Labels |
| Check low stock | Low Stock menu, or wait for 7am daily alert |
| Reorder | Tap Reorder on Amazon link on low stock items |
| Set alert | Set Alert > pick item > enter threshold |
| Export CSV | Web > CSV button |
| Share with team | Share Access > enter @username |
| Transfer between sites | Web > transfer icon > site name > qty |
| Switch sites | Site dropdown (web) or Switch Site (Telegram) |