

7. Supplies | Work'N'Roll

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7.1 Supplies [🔗](#)

7.1.1 On the main page, select the section Supplies

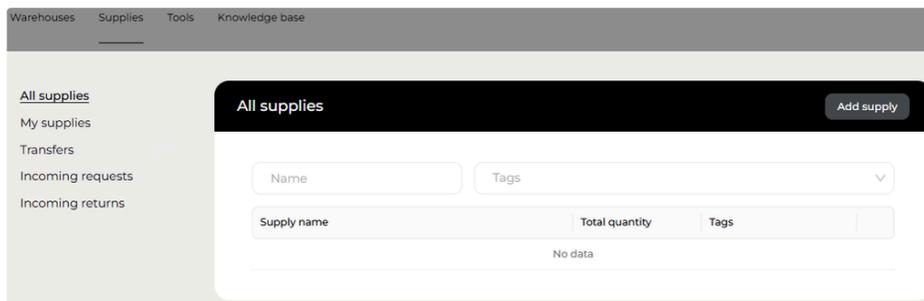
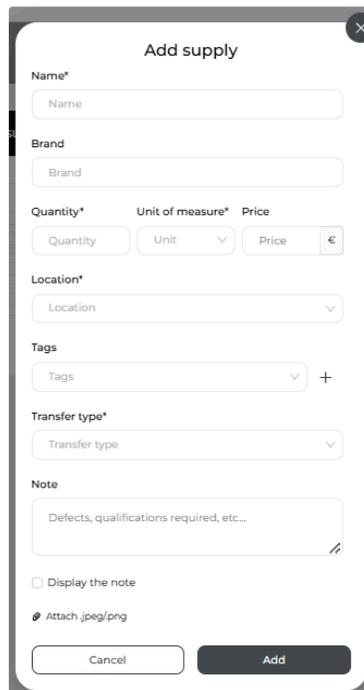


Figure 7.1 - Supplies

7.1.2 Click Add Supply



The screenshot shows the 'Add supply' form in the Work'N'Roll system. The form is titled 'Add supply' and has a close button (X) in the top right corner. The form fields are: 'Name*' (text input), 'Brand' (text input), 'Quantity*' (text input), 'Unit of measure*' (dropdown menu), 'Price' (text input with a Euro symbol), 'Location*' (dropdown menu), 'Tags' (dropdown menu with a plus sign), 'Transfer type*' (dropdown menu), and 'Note' (text area with a placeholder 'Defects, qualifications required, etc...'). There are also checkboxes for 'Display the note' and 'Attach jpeg/png'. At the bottom, there are 'Cancel' and 'Add' buttons.

Figure 7.2 - Add Supply

- 7.1.3 Enter the name of the supply (required field)
- 7.1.4 Enter the brand of the supply (required field)
- 7.1.5 Enter the quantity of supply (required field)
- 7.1.6 Choose a unit of measurement from the given options (required field)
- 7.1.7 Indicate the cost of the supply
- 7.1.8 From the drop-down list, select the location of the supply (required field)
- 7.1.9 Add tags
- 7.1.10 From the dropdown list, select the type of supply movement (required field)

NOTE.
Supply moves can be direct (without manager confirmation) and with manager confirmation

- 7.1.11 Leave a note
- 7.1.12 Check the box next to Show note
- 7.1.13 Attach the required file
- 7.1.14 Click Add

NOTE.
Only the owner and the manager can add new content
Added content becomes accessible to both the owner and the manager

7.2 Management [🔗](#)

7.2.1 In the field with the required supply, click on the icon with three dots

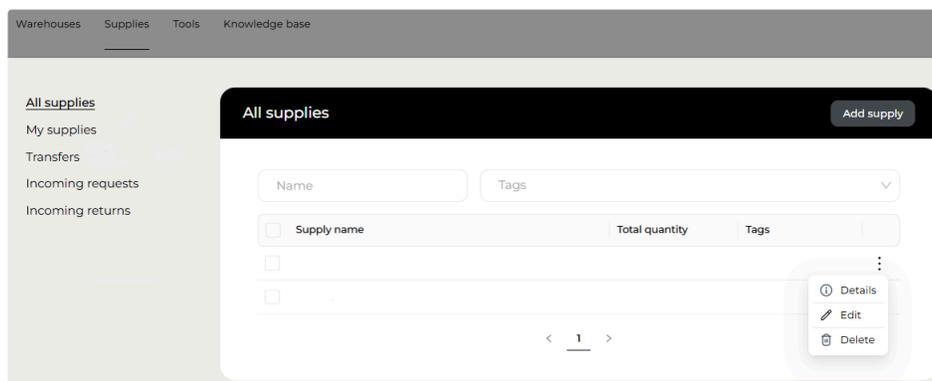


Figure 7.3 - Supplies management

- 7.2.2 Select what you need: Read More, Edit, Delete supply
- 7.2.3 Search by supply title or by tags
- 7.2.4 Go to the supply of your choice

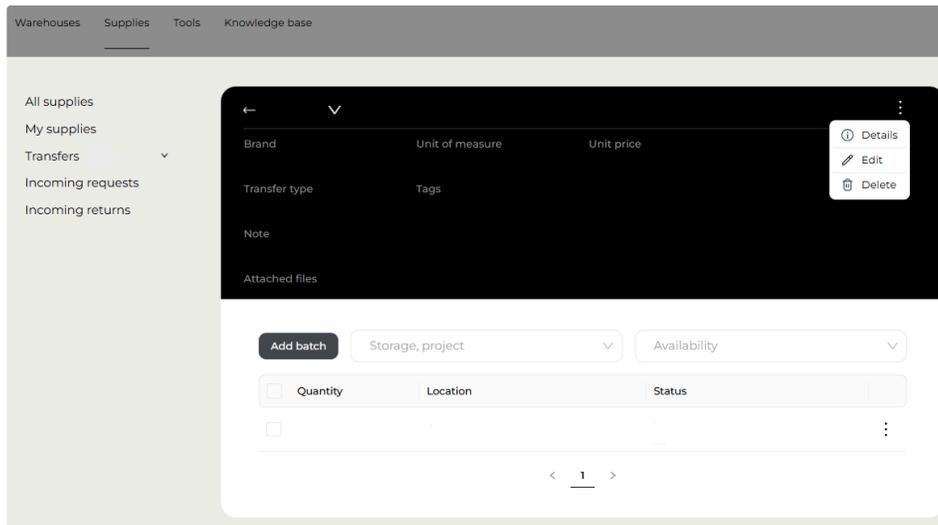


Figure 7.4 - Supply information management

7.2.5 Press the down arrow

7.2.6 View information about the supply

7.2.7 Click on the icon with three dots

7.2.8 Select what you want: Detail, Edit, Delete

7.2.9 Click on Add batch

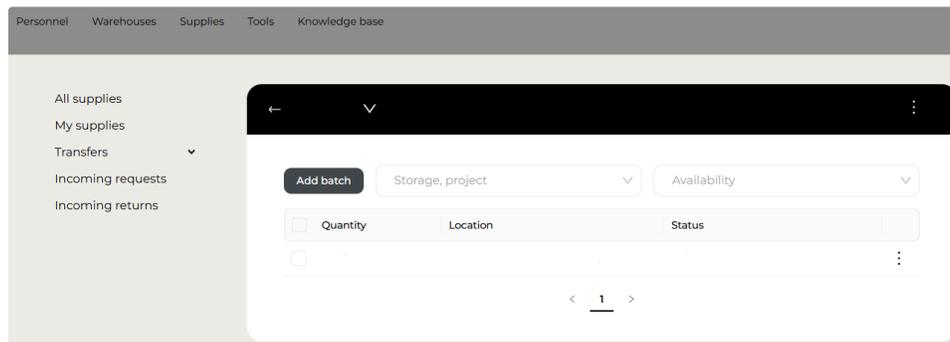


Figure 7.5 - Add batch

7.2.10 In the window that opens, enter the amount of supply (required field)

7.2.11 Unit and Cos' will be filled in automatically

7.2.12 From the drop-down list, select the location of the supply (required field)

7.2.13 Click Add

7.2.14 Click on the icon with three dots in the field with the desired supply

NOTE.

You will see a drop-down list with a list of actions

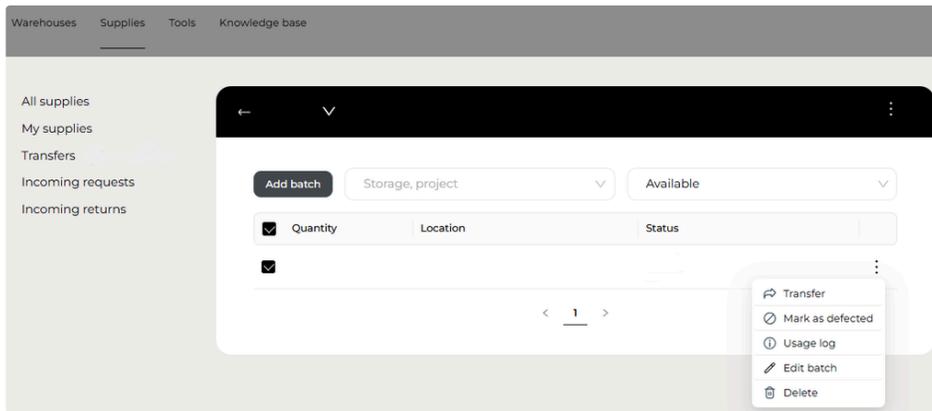


Figure 7.6 - Supply management

7.2.15 Select Transfer

i NOTE.

Supply can be moved to the company's warehouse or to the project

7.2.16 In the Transfer Supply window that opens, select the To Project tab

Figure 7.7 - Supply transfer

7.2.17 The lines Name, From, Unit of Measurement are filled in automatically

7.2.18 Specify the amount of supply movement required (required field)

7.2.19 From the drop-down list, select a project (required field)

7.2.20 Leave a note

7.2.21 Attach the required file

7.2.22 Click Move

i NOTE.

If a manager or owner moves supply from one project to another, confirmation of the transfer is not required. Information about this supply transfer is displayed in the Outgoing Transfers section. In the Incoming Transfers section, the received supply will be displayed. In this window, it is necessary to confirm receipt of the supply by clicking the Accept button.

If a manager or owner moves supply from one task to another with a transfer type of Direct, without manager confirmation, no confirmation is required.

If a manager or owner moves supply from one task to another with a transfer type of With manager confirmation, confirmation is required. In this case, the manager will have the supply displayed for confirmation in the Incoming Transfer section. In this window, the supply transfer must be approved by clicking the Accept button.

If a manager moves all supply to an employee and other employees have requested that specific supply, then when the transfer to the employee (1st) is permitted, all other pending moves should be automatically canceled. However, it is still possible to request parts of the supply.

A supervisor can transfer supply from one project to another. Information about the supply movement becomes available to both the owner and the manager in the Incoming Transfer section. The supervisor's status of the supply will be displayed in the Outgoing Transfer section.

7.2.23 In the Supply Transfer window, select the To Warehouse tab

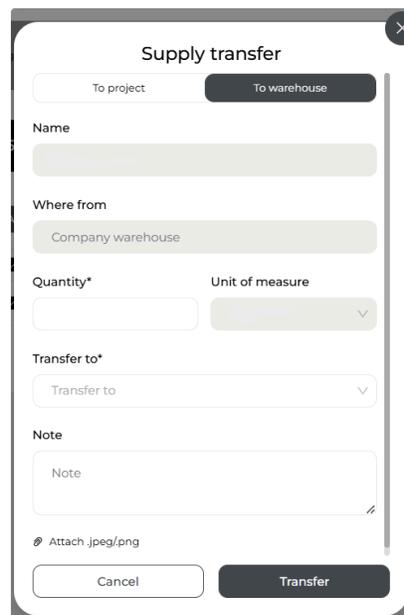
The image shows a mobile application window titled "Supply transfer". At the top, there are two tabs: "To project" and "To warehouse", with "To warehouse" being the active tab. Below the tabs, there are several input fields: "Name" (a text field), "Where from" (a dropdown menu showing "Company warehouse"), "Quantity*" (a text field), "Unit of measure" (a dropdown menu), "Transfer to*" (a dropdown menu showing "Transfer to"), and "Note" (a text area). At the bottom, there is an "Attach .jpeg/.png" option and two buttons: "Cancel" and "Transfer".

Figure 7.8 - Supply transfer to Warehouse

7.2.24 The lines Name, From, Unit are filled in automatically

7.2.25 Specify the amount of supply movement required (required field)

7.2.26 From the drop-down list, select the location where the supply is to be moved (required field)

7.2.27 Leave a note

7.2.28 Attach the required file

7.2.29 Press Transfer

NOTE.

If a manager or owner moves supply from a warehouse to a project, no confirmation is required.

Information about this supply transfer is displayed in the Outgoing Movements section.

The user will see the incoming supply in the Incoming Movements section. In this window it is necessary to confirm the supply movement by clicking on the Accept button.

7.2.30 Click on the icon with three dots in the field with the required material, select Assign to Task from the drop-down list

The screenshot shows a dialog box titled "Assign supply to task". It has a close button (X) in the top right corner. The form includes:

- A text input field for "Name".
- A dropdown menu for "Task*" with "Task" selected.
- Two input fields: "Quantity*" and "Unit of measure".
- A text area for "Note".
- An "Attach .jpeg/png" button with a file icon.
- "Cancel" and "Assign" buttons at the bottom.

Figure 7.9- Assign supply to task

7.2.31 In the opened window Assign material to task enter the task (required field)

7.2.32 The lines Name, Unit will be filled in automatically

7.2.33 Enter the quantity of material (required field)

7.2.34 Leave a note

7.2.35 Attach the required file

7.2.36 Click Assign

7.2.37 Click on the icon with three dots in the field with the required material, select Mark as defective from the drop-down list

The screenshot shows a dialog box titled "Mark as defective". It has a close button (X) in the top right corner. The form includes:

- The instruction "Enter the quantity of defective supply".
- Two input fields: "Quantity*" and "Unit of measure".
- "Cancel" and "Save" buttons at the bottom.

Figure 7.10 - Mark as defective

7.2.38 In the window that opens, enter the amount of defective material (required field)

7.2.39 Unit of measurement will be filled in automatically

7.2.40 Click Save

i NOTE.

In case the status of a supply is Defective, all requests/moves for that supply are unavailable

7.2.41 Click on the three-dot icon in the field with the desired supply, select Usage Log from the drop-down list

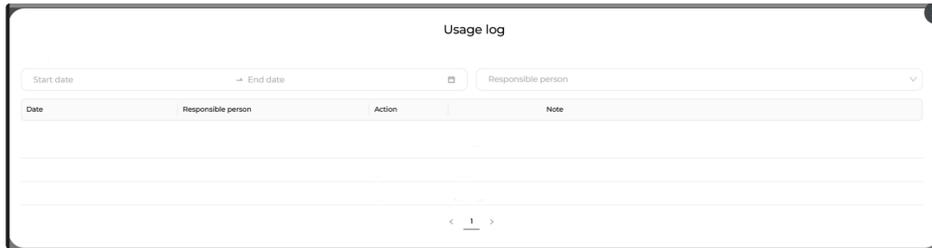


Figure 7.11 - Usage log

7.2.42 Use the search by supply receipt date, expiration date, or responsible person

7.2.43 Click on the three-dot icon in the field with the required supply, and select Edit batch from the drop-down list

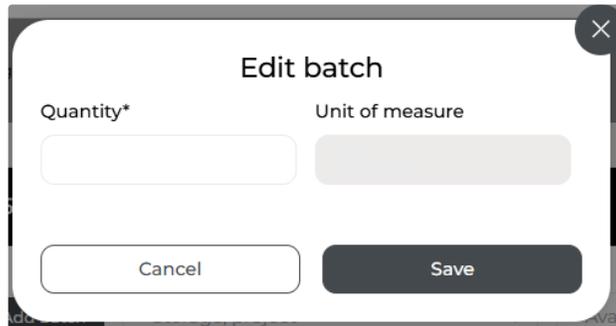


Figure 7.12 - Edit batch

7.2.44 In the opened window, enter the quantity of supply (required field)

7.2.45 Units will be filled in automatically

7.2.46 Click Save

7.2.47 Select Delete from the drop-down list

7.2.48 Delete the supply information

7.3 Search [🔗](#)

7.3.1 From the home page, select the Supplies section

7.3.2 Select either All Supplies

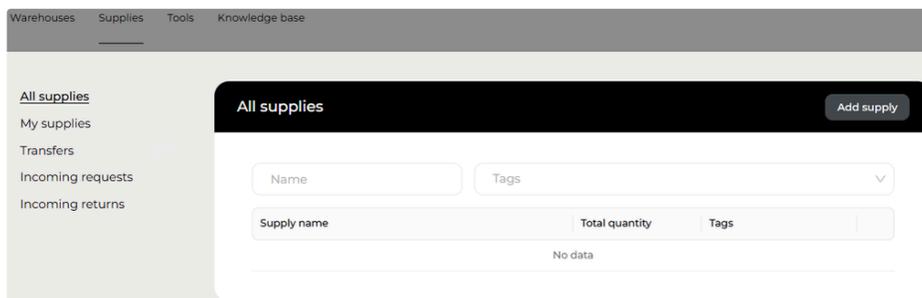


Figure 7.13 - Search for all materials

7.3.3 Use the drop-down list search by name, or by tags

7.3.4 Select either My Supplies

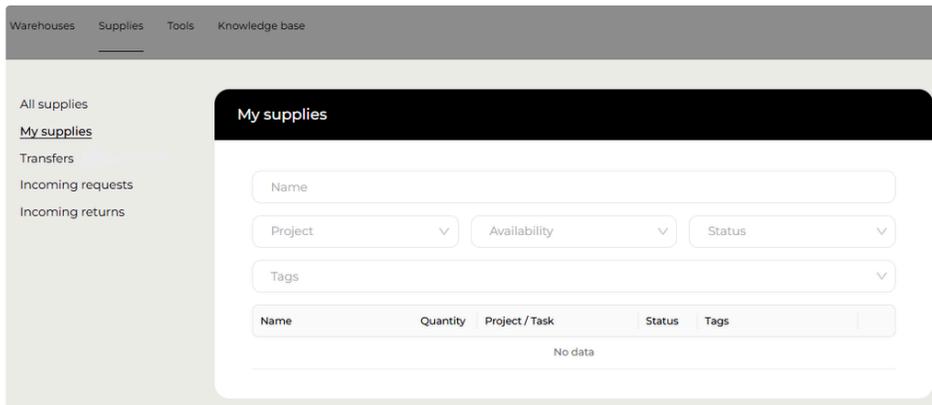


Figure 7.14 - Search for my materials

7.3.5 Use the drop-down search by name, project name, availability, material status, or tags

7.4 My supplies [🔗](#)

7.4.1 From the home page, select the Supplies section

7.4.2 Go to My Supplies

7.4.3 Click on the icon with three dots in the field with the desired supplies

i NOTE.

You will see a drop-down list with a list of actions

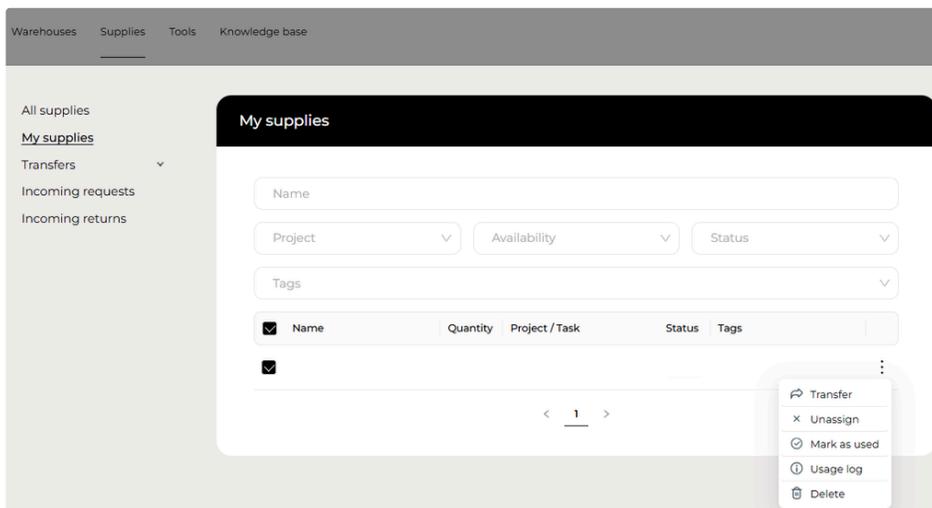


Figure 7.15 - My supplies

7.4.4 Select Transfer

Next Refer to par. 7.2.15

7.4.5 From the drop-down list, select Unassign

Figure 7.16 - Unassign supply

7.4.6 Name, Task and Unit will be filled in automatically

7.4.7 Enter the supply quantity (required field)

7.4.8 Click on Do not assign movement

7.4.9 After unassigning, this supply will be added to the list of available supply in the project

7.4.10 Click on the three dots icon in the required supply field, select Mark as used from the drop down list

Figure 7.17 - Mark as used

7.4.11 In the opened window enter the quantity of supply (required field)

7.4.12 The Unit of Measurement field will be filled in automatically

7.4.13 Click on Save

7.4.14 Click on the icon with three dots in the required supply field and select Usage log from the drop-down list

Next Refer to par. 7.2.35

7.4.15 Select Delete from the drop-down list

7.4.16 Delete the supply information

7.5 Supply transfer [🔗](#)

7.5.1.1 Incoming transfers

7.5.1.2 From the home page, select the Supplies section

7.5.1.3 Go to supply transfer

7.5.1.4 Select Incoming transfers

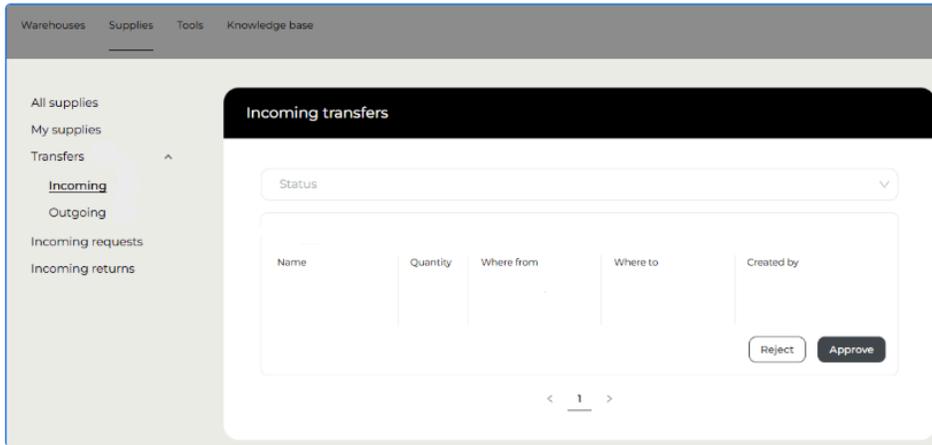


Figure 7.18 - Incoming transfers

7.5.1.5 Use the search by material status

7.5.1.6 Click Reject or Approve to transfer the supply

NOTE.

All information about incoming supply is displayed in the Incoming Transfers section

7.5.1.7 View information about incoming supply movement: supply name, quantity, where the supply is moved from and to, by whom it was created

7.5.2 Outgoing Transfers

7.5.2.1 From the home page, select the Supplies section

7.5.2.2 Go to Supplies Transfers

7.5.2.3 Select Outgoing Transfers

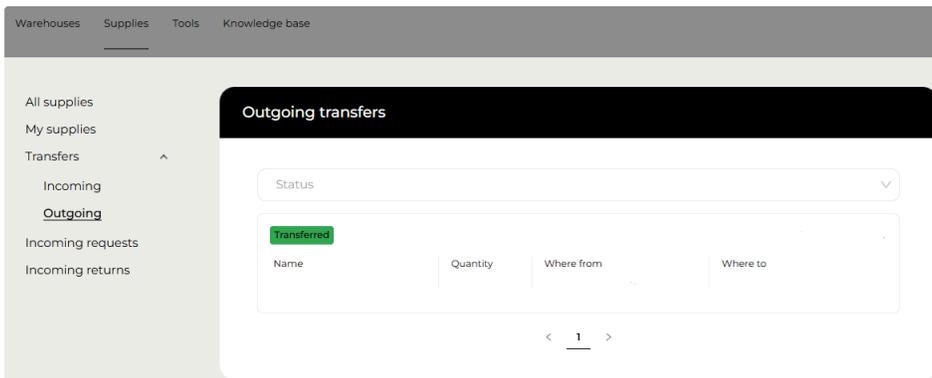


Figure 7.19 - Outgoing Transfers

7.5.2.4 Select supply status from the drop-down list

7.5.2.5 View information about the outgoing supply movement: supply name, quantity, where the supply is being moved from and where it is being moved to

NOTE.

All information about supply movement is displayed in the Outgoing Transfers section

7.6 Requests [🔗](#)

7.6.1 Incoming requests

7.6.1.1 From the home page, select the Supplies section

7.6.1.2 Go to Incoming requests

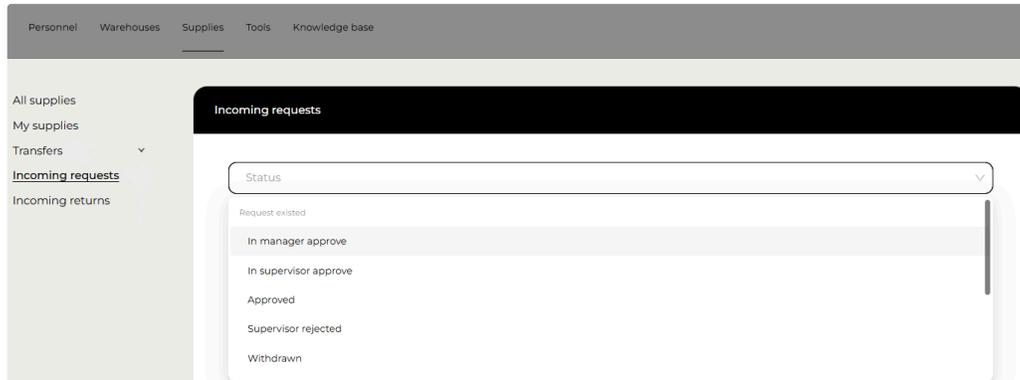


Figure 7.20 - Incoming requests

7.6.1.3 From the drop-down list, select the desired request status

i NOTE.

The supply request is displayed for the owner/manager in the Incoming Requests section. In this window, it is necessary to confirm receipt of the supply by clicking the Approve button

7.6.2 Incoming returns

i NOTE.

An supervisor may submit a supply request for either an item from the company's existing inventory or for a new purchase. Upon submission, the request must be approved by the company owner or manager

7.6.2.1 On the main page, select the section Supplies

7.6.2.2 Go to Incoming returns

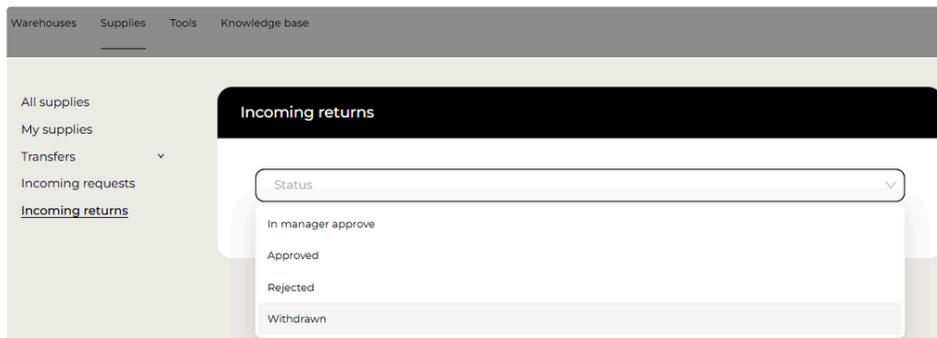


Figure 7.21 - Incoming returns

7.6.2.3 From the drop-down list, select the desired request status

i NOTE.

Information about the supply request is displayed in the Outgoing Requests section. The supply can be recalled using the Recall option

7.6.2.4 Go to My Supplies

7.6.2.5 Select Request supply

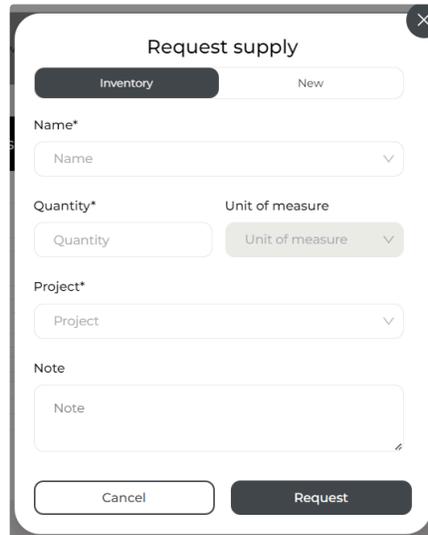


Figure 7.22 - Request supply

7.6.2.6 Go to Inventory

7.6.2.7 Select the supply name from the drop-down menu (required field)

7.6.2.8 Enter the quantity of the requested supply (required field)

7.6.2.9 From the dropdown list, select the required project (required field)

7.6.2.10 Add a note

7.6.2.11 Press Request

7.6.2.12 Go to the New section

7.6.2.13 Fill in the fields similar to the Inventory

7.7 Return of supplies [↗](#)

7.7.1 Go to My Supplies

7.7.2 Click on the icon with three dots in the field with the required material

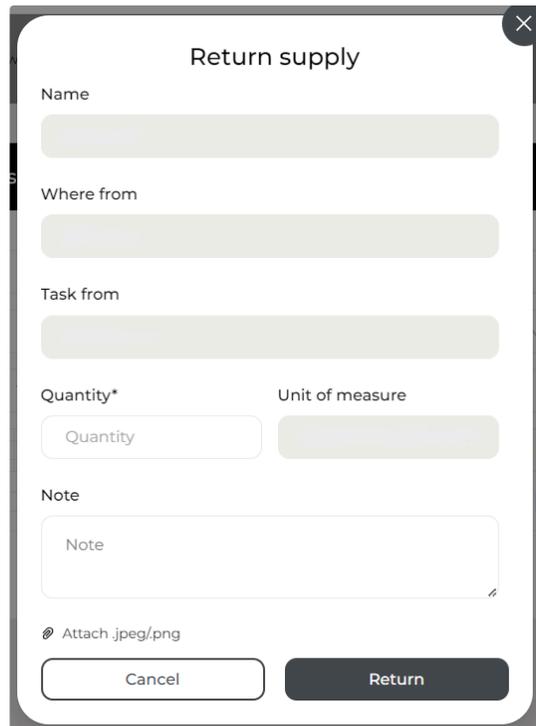
7.7.3 Select Return from the drop-down list

i NOTE.

The function of returning supply to the warehouse can be used by the supervisor

This movement will be displayed under Outgoing returns

The supply return will be displayed to the owner/manager in the Incoming returns section. In this window, confirm the acceptance of the supply by clicking on the Accept button and selecting the location of the supply

A screenshot of a mobile application window titled "Return supply". The window has a close button (X) in the top right corner. It contains several input fields: "Name", "Where from", and "Task from", each with a light gray placeholder bar. Below these is a "Quantity*" field with a "Quantity" placeholder and a "Unit of measure" field with a light gray placeholder. There is a "Note" field with a "Note" placeholder and a small icon in the bottom right corner. At the bottom left, there is an "Attach .jpeg/.png" icon and text. At the bottom, there are two buttons: "Cancel" and "Return".

Return supply

Name

Where from

Task from

Quantity*

Unit of measure

Note

Attach .jpeg/.png

Cancel Return

Figure 7.23 - Return supply

7.7.4 In the opened Return supply window, the name, source of the supply, task, and units of measurement will be filled in automatically

7.7.5 Enter the required amount of supply (required field)

7.7.6 Leave a note

7.7.7 Attach the necessary file

7.7.8 Press Return