



Document	Software User Documentation	Release	17/08/26 V1.0
Project	BRN WMS	Project code	200-WMS-26-001-00
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Objective

Provide operational users a guide to accessing and using BRN WMS: onboarding, warehouse/inventory operations, sales, purchasing, finance/accounting, reporting, and notifications.

1. Accessing the system

- Users access BRN WMS through a current standards-based browser (Chrome, Edge, or Firefox) at the URL configured for the deployment.
- The interface is responsive and usable on desktop and warehouse-floor (tablet/mobile) devices.
- New company owners register and complete onboarding; users invited by an Owner/Admin complete invited-user onboarding to join the correct company.
- Forgot-password recovery is available from the login screen.

2. Roles and access

BRN WMS enforces four roles: Owner, Admin, Staff, and Viewer. Menu items and actions shown to a user reflect their role and any additional application-access restrictions set by an Admin/Owner. A Viewer can see authorized screens and reports but cannot create or edit transactions.

3. Dashboard

The dashboard ([app/dashboard/](#)) summarizes stock status, low-stock items, and recent operational activity. An accounting-focused dashboard ([app/ac_dashboard/](#)) summarizes financial position. Dashboard figures refresh from scheduled aggregate jobs, so very recent transactions may briefly lag behind live data.

4. Master data setup

Before recording transactions, an Owner/Admin sets up:

- Warehouses, storage areas, and bins ([app/inventory/](#)) — either a simple single-level warehouse model or the full warehouse/storage/bin hierarchy.
- Product categories and products ([app/inventory/](#)).
- Contacts and contact types ([app/contact/](#)) — customers and suppliers.
- Company settings, SMTP, and application access ([app/setting/](#)).

5. Inventory and warehouse operations

Under the Inventory Control System area ([app/ics/](#)):

- Stock-in: record a receipt against a product, quantity, warehouse location, and source document, including lot/serial/expiry where applicable.
- Stock-out: issue stock against an authorized document; the system validates available balance before allowing the issue.
- Stock transfer: move stock between authorized locations as one linked transaction.
- Barcode labels: generate SKU and location barcode labels and use a barcode scanner (or manual entry) on supported screens.
- Stock reports: stock overview, movement history, capacity/occupancy, low-stock, expired-stock, and product-lot views are available under Reports ([app/reports/](#)).

6. Sales workflow

Under Sales/Revenue ([app/order/](#), [app/revenue/](#)):

1. Create a quotation for a customer. 2. Convert an accepted quotation to a sales order. 3. Issue an invoice against the order. 4. Process a return or credit note where applicable.

Each step follows the document's permitted status transitions; an invalid transition is rejected.

7. Purchasing workflow

Under Purchasing ([app/po/](#)):

1. Raise a purchase request. 2. Convert an approved request to a purchase order. 3. Record the purchase invoice on receipt of supplier goods/services. 4. Process a supplier return where applicable.

8. Finance and accounting

Under Finance ([app/finance/](#)) and Accounting ([app/accounting/](#), [app/journal/](#)):

- Receipt billing and receipts record incoming customer payments against invoices.

- Payment billing and payments record outgoing supplier payments against purchase invoices.
- Chart of accounts, departments, and account formulas are maintained by an Owner/Admin.
- Journals and general-ledger entries are posted from source documents or manually where permitted; entries must balance.
- Financial reports — trial balance, profit-and-loss, balance sheet, VAT, journal, and GL-movement — are available under Reports.

9. Document numbering and status

Every controlled business document (order, invoice, receipt, payment, journal entry, etc.) receives a system-generated document number following the configured sequence, and moves through a defined lifecycle of statuses. Users cannot force an invalid status transition.

10. Notifications

Authorized users receive real-time notifications (via the Node.js notification service) for relevant status transitions — for example, a new order, an approval request, or a low-stock alert — scoped to their authorized company/role context.

11. Reports

The Reports area (`app/reports/`) provides authorized users filter, view, print, and export access to the operational and financial reports listed in Sections 5 and 8, subject to their company and role scope.

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