

Stock Add / Remove / Adjust

How to keep your stock figures correct in WHIMS

A step-by-step handbook for warehouse and office staff. No technical knowledge needed — every screen, button and message is explained in plain English.

WHIMS — Inventory Management

DOCUMENT	Stock Add / Remove / Adjust — User Training Guide
VERSION	1.0
DATE ISSUED	27 July 2026
COMPANY	Go-Parts (placeholder — replace with your registered entity name)
APPLIES TO	WHIMS Inventory Management, admin area
AUDIENCE	Warehouse staff, stock controllers, office administrators
PREPARED BY	Inventory Systems Team

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Revision history

VERSION	DATE	CHANGE	AUTHOR
1.0	27 July 2026	First release. Covers Stock Take, Bulk Stock Take, Stock Change, Bulk Stock Change, the Adjust window on the product page, and Empty Location.	Inventory Systems Team

1 Introduction

What this feature does, when to use each option, and why getting it right matters to everyone who touches stock.

1.1 What is the Stock Add / Remove / Adjust feature?

WHIMS keeps a running count of how many units of every part you hold, and **exactly where each one sits** — which warehouse, and which shelf or bin inside that warehouse. That count is what salespeople, buyers and pickers rely on all day.

Most of the time the count looks after itself: receiving a purchase order adds stock, and selling or shipping removes it. But real warehouses are not tidy. Boxes turn up without paperwork, items get damaged, a shelf gets counted and the number on the screen simply does not match the number on the shelf.

The **Stock Add / Remove / Adjust** feature is the set of tools that lets a person step in and correct the count by hand. There are three things you can do:

- ✓ **Add stock** — increase the number in a location.
- ✓ **Remove stock** — decrease the number in a location.
- ✓ **Adjust stock** — replace the number with the correct figure, whatever it was before.

Every one of these actions is written into a permanent log called **Stock History**, together with your name, the date and time, and the reason you typed. Nothing you do here is anonymous, and nothing is silently overwritten.

1.2 Why we use it

A stock figure that nobody trusts is worse than no figure at all. Staff stop looking at the screen, start walking to the shelf, and the system quietly becomes decoration. These tools exist so that the moment somebody notices a difference, they can fix it properly — in seconds, with a reason attached — instead of leaving it for "someone else, later".

1.3 The three operations at a glance

ADD STOCK — use when units arrive or reappear

Use it when: goods arrive without a purchase order; a customer return is put back on the shelf; you find units that were never entered; you are setting up a brand-new shelf for the first time.

What it does: takes the number that is there now and **adds** your figure to it. If the shelf held 2 and you add 25, it becomes 27.

Where: [Stock Levels](#) → [Stock Actions](#) → [Stock Take](#), or the [Adjust](#) button on a product, choosing *Add to Stock*.

REMOVE STOCK — use when units leave outside the normal process

Use it when: items are damaged, scrapped, lost or stolen; samples are given away; parts are consumed internally; a shelf is cleared out.

What it does: takes the number that is there now and **subtracts** your figure from it. If the shelf held 14 and you remove 12, it becomes 2.

Where: the **Adjust** button on a product, choosing *Deduct from Stock*. To clear an entire shelf at once, use **Locations** → **Empty Location**.

ADJUST STOCK — use when you have counted and know the true figure

Use it when: you have physically counted a shelf during a stock take or cycle count and the system disagrees with what you found.

What it does: **replaces** the number with the figure you type. You do not work out the difference — you type what is actually there. If the system says 2 and you counted 18, you type 18.

Where: **Stock Levels** → **Stock Actions** → **Stock Change**.

IMPORTANT — THE DIFFERENCE THAT CATCHES PEOPLE OUT

Stock Take adds to the number that is already there. **Stock Change replaces** it. If a shelf holds 2 units and you meant to end up with 18:

- With **Stock Take** you would type **16** (the extra units).
- With **Stock Change** you would type **18** (the final figure).

Typing 18 into Stock Take would leave you with 20. When in doubt, use Stock Change and type the number you counted.

1.4 What the buttons are really called

This guide is titled "Add / Remove / Adjust" because that is what people say. The buttons on the screen use slightly different words. Here is the translation — keep this table handy for your first few weeks.

YOU WANT TO...	BUTTON IN WHIMS	WHERE YOU FIND IT	BEST FOR
Add stock	Stock Take	Stock Levels → Stock Actions	One product
Add stock	Bulk Stock Take	Stock Levels → Stock Actions	Many products, from a spreadsheet
Add stock	Adjust → Add to Stock	Products → open a product → Stock Locations & Quantities	One shelf you are looking at

YOU WANT TO...	BUTTON IN WHIMS	WHERE YOU FIND IT	BEST FOR
Remove stock	Adjust → Deduct from Stock	Products → open a product → Stock Locations & Quantities	One shelf
Remove stock	Empty Location	Locations → open a location	Clearing a whole shelf to zero
Adjust stock	Stock Change	Stock Levels → Stock Actions	One product
Adjust stock	Bulk Stock Change	Stock Levels → Stock Actions	Many products, from a spreadsheet

NOTE

"Stock Take" in WHIMS means *add these units to the shelf*. It does not mean "wipe the shelf and start again". If you are doing a full physical count and want to set the shelf to exactly what you counted, use **Stock Change**.

1.5 Benefits of accurate stock records

You can sell what you have

Sales staff quote from the screen. An overstated figure leads to an order you cannot fill; an understated figure loses a sale you could have made.

You buy the right amount

Purchasing decisions are made from these numbers. Bad numbers mean money tied up in parts you already had, or a shortage nobody saw coming.

Pickers find things first time

WHIMS stores the shelf, not just the quantity. Correct locations turn a five-minute hunt into a ten-second walk.

Your stock is worth what you say

Quantity multiplied by average price feeds the value of your inventory. Wrong counts distort that figure straight away.

Problems become visible

Every correction is logged with a reason. Patterns — repeated shortages on one shelf, one supplier, one shift — become obvious instead of invisible.

Counting gets easier

When the book figure is usually right, a stock take is a quick confirmation rather than a week of investigation.

1.6 How to read this guide

Numbered steps are things you do, in order. Bullet points are lists of possibilities. Names of things you click look like this: **Stock Actions**. Menu paths look like this: **Inventory** → **Stock Levels**. Screenshots

appear immediately after the step they illustrate, with numbered markers matching the steps.

Four kinds of coloured box appear throughout:

NOTE

Extra background — useful to know, but you can carry on without it.

TIP

A faster or safer way to do the same job.

WARNING

Something that commonly goes wrong. Read before you click.

IMPORTANT

A rule you must follow, or something that cannot be undone afterwards.

2 Prerequisites

What you need in place — and what you need to know — before you change a single number.

2.1 Access and permissions

To use any of these tools you need:

- ✓ A **WHIMS user account** (an email address and password issued by your administrator).
- ✓ Your account must be **active**.
- ✓ A web browser — Chrome, Edge or Firefox — and a network connection to the WHIMS address your administrator gave you.

WHIMS records three staff roles: **Administrator**, **Warehouse Manager** and **Operations**. Your administrator sets yours when your account is created.

IMPORTANT — WHO CAN CHANGE STOCK TODAY

In the current version of WHIMS the stock screens do **not** restrict these buttons by role. Anyone who can sign in to the admin area can run Stock Take, Stock Change, Adjust and Empty Location. Control of who can change stock therefore rests entirely on **who has an account**.

Two consequences worth taking seriously: never share your login, and never leave your session open on an unattended screen. Every movement is stamped with the signed-in user's name — if someone else uses your session, the record will say *you* did it.

2.2 Information to have ready

Before you open any form, collect the following. Trying to find it halfway through is how mistakes happen.

WHAT YOU NEED	WHY	EXAMPLE
Product ID	Identifies the exact part. WHIMS also lets you search by supplier part number or Partslink number.	06-335-1903L
Warehouse	Which site the stock is at.	Go-Parts GA
Location (shelf or bin)	Stock is held per location, not per warehouse. The same part on two shelves is two separate records.	4.2 F
The number of units	Either how many to add/remove, or the exact figure you counted.	25
A reason	Written into the permanent history. Make it useful to someone reading it in six months.	Received from supplier — delivery note DN-4471

WHAT YOU NEED	WHY	EXAMPLE
Unit price (optional)	Only when you are adding stock and know what this batch cost.	48.50

TIP

Write the reason before you open the form. A good reason answers *what happened* and *how you know* — "Cycle count 27 Jul, counted by R. Patel, 18 on shelf" beats "adjustment" every single time.

2.3 Records that must already exist

These tools change quantities. They cannot invent the things being counted. Before you start:

- 1 The product must exist in WHIMS.**
If you cannot find it when you search, it has not been set up. Ask whoever maintains the product catalogue to add it — do not attempt to work around it.
- 2 The warehouse must exist.**
Set up under [Settings](#) → [Warehouses](#).
- 3 The location must exist inside that warehouse.**
Set up under [Settings](#) → [Locations](#). A location belongs to one warehouse; you will only ever be offered the locations that belong to the warehouse you picked.

NOTE

The *stock record* itself does not need to exist. If a product has never been held on a particular shelf, Stock Take and Stock Change will create the record for you. The dropdown tells you which is which: (Current Qty: 2) means stock is already there, (No stock) means a new record will be created.

2.4 Rules to know before you start

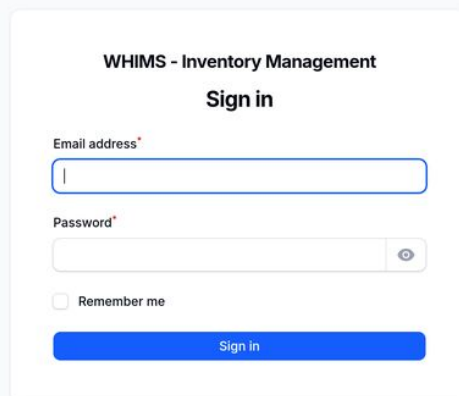
- ✓ **Stock is counted per location.** "How many do we have?" is really "how many on each shelf, added up". Always change the shelf that is actually wrong.
- ✓ **Quantity can never go below zero.** WHIMS blocks any removal that would take a shelf negative, and tells you how many are actually available.
- ✓ **Reserved units are already spoken for.** *Available* is quantity minus reserved. You cannot edit the reserved figure from these screens — it is managed by orders.
- ✓ **There is no undo.** None of these actions can be reversed with a button. A mistake is corrected by making a second, opposite entry — which also stays in the history.
- ✓ **Everything is logged.** Your name, the date and time, the before and after figures and your reason are written to Stock History and cannot be edited or deleted afterwards.

3 Feature Overview

A guided tour of the screens, so that nothing you see later is a surprise.

3.1 Signing in

- 1 **Open your browser**
and go to the WHIMS address your administrator gave you, followed by `/admin`.
- 2 **Type your email address and password.**
- 3 **Click** `Sign in`.



The screenshot shows a web form titled "WHIMS - Inventory Management" with a subtitle "Sign in". It contains two input fields: "Email address*" and "Password*", both with red asterisks indicating required fields. The "Email address*" field is a simple text input. The "Password*" field is a text input with a toggle icon (an eye) to the right, likely for showing/hiding the password. Below the password field is a checkbox labeled "Remember me". At the bottom of the form is a blue button labeled "Sign in".

Figure 1 — The WHIMS sign-in screen. If your password is not accepted, contact your administrator; repeated failed attempts will not unlock the account by themselves.

3.2 The main menu

After signing in you land on the Dashboard. The menu runs down the left-hand side and is divided into groups. Three of them matter for stock work:

MENU GROUP	ITEM	WHAT IT IS FOR
Inventory	Products	The catalogue of parts. Open a product here to see its shelves and use the Adjust button.
	Stock Levels	The main stock screen — quantities by product and location, and the Stock Actions menu.
Reports	Stock History	The permanent log of every movement, across all products.
Settings	Warehouses	Your sites.
	Locations	Shelves and bins. Also where Empty Location lives.

WHIMS - Inventory Management

Dashboard

Historical Inventory Value
Calculate inventory value as of any past date
[Lookup Historical Inventory Value](#)

Search products by ID, partslink, type, supplier, or stock history notes...

Today's Purchases
0
Same as yesterday ↗

Returns (30 days)
0
0 vs prev 30 days ↘

Inventory Value
\$259,651.13
4863 unique SKUs ⓘ

Single Unit Items
69%
3366 of 4863 SKUs ⓘ

Today's Movement
In: 0 | Out: 0
Net: 0 ↓

Weekly Turnover
2553 items
Moved in last 7 days ↻

Part Type Coverage
100%
90 unique part types ↻

Figure 2 — The Dashboard and the left-hand menu. Click a group heading to fold it away if the list gets long.

3.3 The Stock Levels screen

Go to **Inventory** → **Stock Levels**. This is the home of day-to-day stock work.

WHIMS - Inventory Management

Stock Levels > List

Stock Levels

Group by: Product Ascending

Search

1 Export Stock 2 Stock Actions

3 Filter icon

4 Search box

5 Product group heading

PRODUCT	WAREHOUSE	LOCATION	QUANTITY	RESERVED QUANTITY	AVAILABLE QUANTITY	AVERAGE PRICE	IS SELLING	CONDITION
Product: 06-335-1903L Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								
06-335-1903L	Go-Parts GA	4.2 F	2	0	2	\$17.08	✓	Add Stock
Product: 08-216-1965L-B Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								
08-216-1965L-B	Go-Parts GA	1.2 C	2	0				Add Stock
Product: 08-315-2022R-UD Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								
08-315-2022R-UD	Go-Parts GA	4 U	2	0	2	\$4.28	✓	Add Stock
Product: 08-33G-1103R Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								

This column always reads "Add Stock"

Figure 3 — The Stock Levels screen. **1** Export Stock (download everything as a spreadsheet). **2** Stock Actions (the menu containing all four bulk and single tools). **3** Filter icon. **4** Search box. **5** Product group heading, showing the totals across all locations for that part.

Rows are grouped by product. The grey heading row above each group gives you the summary at a glance — *Locations, Total Qty, Reserved* and *Available* — and the rows beneath it show each individual shelf. Click the small arrow at the right of a heading to fold that product away.

WARNING — A KNOWN DISPLAY QUIRK

The last column is headed **Condition**, but every row displays the same blue text, "Add Stock". It is not a button and clicking it does nothing. The real condition of a stock record (New, Used, Refurbished, Damaged) is not shown correctly in this column at present. If you need to work by condition, use the **Condition** filter in the filter panel instead. This has been reported to the systems team.

3.4 The Stock Actions menu

Click the blue **Stock Actions** button at the top right. Four options drop down.

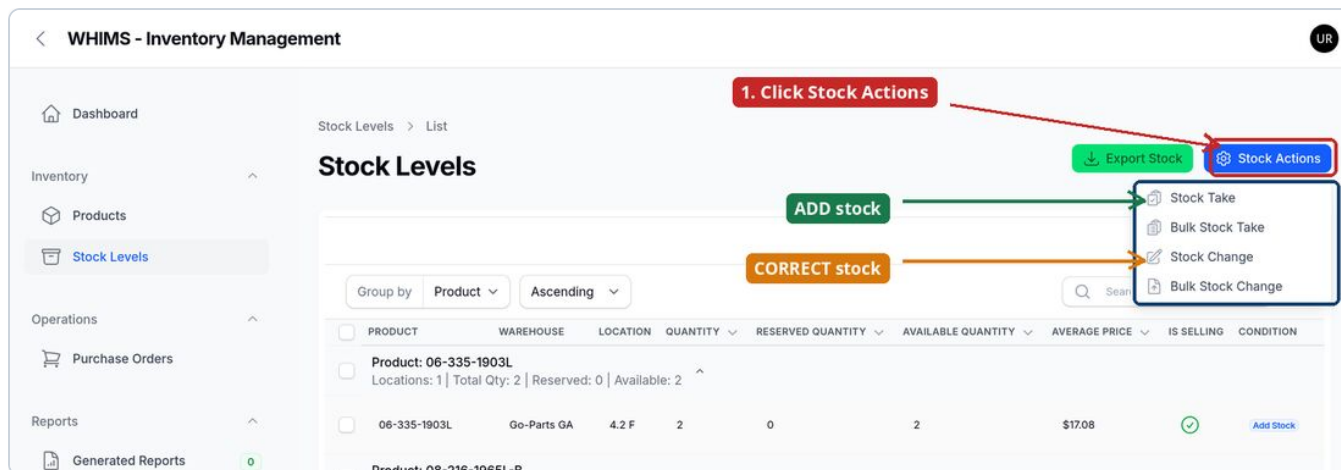


Figure 4 — The Stock Actions menu. The top two options *add* stock; the bottom two *replace* the figure with the number you type. "Bulk" means "from a spreadsheet".

MENU OPTION	EFFECT	USE IT FOR
Stock Take	Adds to what is there	One product, one shelf.
Bulk Stock Take	Adds to what is there	Many products at once, from a CSV spreadsheet.
Stock Change	Replaces the figure	One product, one shelf, where you know the true count.
Bulk Stock Change	Replaces the figure	Many products at once, from a CSV spreadsheet.

3.5 The filter panel

Click the funnel icon above the table to open the filters. Set as many as you like, then click **Apply filters**.

Reset clears them all.

WHIMS - Inventory Management

Dashboard | Stock Levels > List

Stock Levels [Export Stock] [Stock Actions]

FILTERS [Reset]

PRODUCT: All | WAREHOUSE: All | LOCATION: All | MIN QTY: 0 | MAX QTY: 999999

MIN PRICE: \$ 0 | MAX PRICE: \$ 9999 | SELLING STATUS: All | STOCK STATUS: All | RESERVATION STATUS: All

CONDITION: All | FROM DATE: mm/dd/yyyy | TO DATE: mm/dd/yyyy

[Apply filters]

Group by: Product | Ascending | Search: []

PRODUCT	WAREHOUSE	LOCATION	QUANTITY	RESERVED QUANTITY	AVAILABLE QUANTITY	AVERAGE PRICE	IS SELLING	CONDITION
Product: 06-335-1903L Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								
06-335-1903L	Go-Parts GA	4.2 F	2	0	2	\$17.08	✓	[Add Stock]
Product: 08-216-1965L-B Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								
08-216-1965L-B	Go-Parts GA	1.2 C	2	0	2	\$56.00	✓	[Add Stock]

Figure 5 — The filter panel. Useful combinations: *Stock Status* = *Out of Stock* to find empty shelves, or *Location* plus *Min Qty* to check one aisle before counting it. The small number beside the funnel tells you how many filters are currently switched on.

3.6 Buttons and actions reference

BUTTON	WHERE	WHAT HAPPENS WHEN YOU CLICK IT
Export Stock	Stock Levels	Builds a spreadsheet of every stock record and confirms with a green message. Changes nothing.
Stock Actions	Stock Levels	Opens the menu of four stock tools.
Apply filters / Reset	Filter panel	Narrows or clears the list. Changes nothing.
Adjust	Product page, Stock Locations & Quantities	Opens the add-or-remove window for that one shelf.
Export Stock	Location page	Downloads a spreadsheet of everything on that shelf.
Empty Location	Location page	Starts the two-step wizard that sets every product on that shelf to zero.
Submit	Any form	Saves. This is the point of no return.
Cancel / ✕	Any form	Closes without saving. Safe to use at any time.

3.7 Icons, colours and badges

WHAT YOU SEE	WHAT IT MEANS
Green button	Safe, read-only action — usually a download.
Blue button	The normal way forward: open a menu, apply filters, submit a form.
Orange button	Changes stock. Think before clicking.
Red button	Destructive and permanent. Empty Location is the only one here.
Green tick in <i>Is Selling</i>	This stock is available for sale.
Red cross in <i>Is Selling</i>	Held back — not offered to customers.
Green +5 in Stock History	Stock went up by 5.
Red -5 in Stock History	Stock went down by 5.
Red asterisk * beside a field name	You must fill this in.
Number beside the funnel icon	How many filters are switched on.
Green message, top right	Success — your change was saved.
Red message, top right	Refused — nothing was saved. Read it and try again.

4 Step-by-Step User Guide

Every task, from opening the screen to checking that your change landed. Follow the numbered steps exactly; the screenshot after each set matches the numbers.

4.1 Opening the Stock Management screen

- 1 Sign in to WHIMS.**
See section 3.1.
- 2 Find Inventory in the left-hand menu.**
If the group is folded up, click the word *Inventory* to open it.
- 3 Click **Stock Levels**.**
The Stock Levels screen opens (Figure 3 on page 10).

TIP

Bookmark this page in your browser. It is the screen you will use most, and it is one click from everything else in this guide.

4.2 Adding stock — Stock Take

Use this when units have arrived, or you have found units that the system does not know about, and you want to **increase** the figure on one shelf.

Step 1 — Open the form

- 1 Go to Inventory → Stock Levels.**
- 2 Click the blue **Stock Actions** button**
at the top right.
- 3 Click **Stock Take**.**
A window opens over the page.

Figure 6 — The Stock Take form when it first opens. Only three fields are visible. The rest appear as you fill these in — this is normal, not a fault.

Step 2 — Choose the product

- 1 **Click the Product box.**
A list appears with a search box at the top.
- 2 **Start typing the Product ID**
— for example `06-335-1903L`. The list narrows as you type.
- 3 **Click the correct product in the list.**
Its name now appears in the box.

TIP

You can also search by supplier part number, Partslink number or part description. If nothing at all is found, the product is not in WHIMS yet — see section 9.

Step 3 — Choose the warehouse and location

- 1 **Check the Warehouse box.**
WHIMS pre-fills the first warehouse. If you work at another site, click the box and pick the right one.
- 2 **Click the Location box**
and pick the shelf. Only shelves in the chosen warehouse are listed.

Figure 7 — The Location list tells you what is already on each shelf. 4.2 F (Current Qty: 2) means two units are there now. A shelf marked (No stock) has none — picking it creates a brand-new stock record, which is perfectly normal when you are putting a part somewhere for the first time.

WARNING

Changing the product or the warehouse **clears the location you had chosen**. Always work top to bottom: Product, then Warehouse, then Location. If you go back and change something above, re-check the location before you submit.

Step 4 — Enter the quantity, price and reason

- 1 **Type the number of units into Quantity to Add.**
This is **how many to add**, not the new total. Whole numbers only, minimum 1.
- 2 **Type the Unit Price if you know it.**
Optional. If you enter one, WHIMS blends it with the existing price to work out a new weighted average for that shelf. Leave it empty and the existing average price is kept.
- 3 **Replace the Notes text with a real reason.**
It starts off saying "Stock take". Change it to something a colleague could understand months later.

Step 5 — Save

- 1 **Read the whole form once more**
— product, shelf, quantity.

2 Click **Submit**.

Figure 8 — A completed Stock Take. **1** Product. **2** Warehouse. **3** Location, showing the two units already there. **4** Quantity to Add — 25 units will be *added*, giving 27. **5** Unit Price (optional). **6** Notes — the reason. **7** Submit saves it.

Step 6 — Read the confirmation

A green message appears at the top right:

- **Stock Take Successful** — *"Added 25 units. New total: 27"* when the shelf already held stock; or
- **Stock Take Successful** — *"Created new stock with 25 units"* when the shelf was empty and a new record was created.

If a red message appears instead, nothing was saved — see section 9.

NOTE — WHAT IF I GET IT WRONG?

There is no undo. If you added 25 when you meant 5, open the product page and use **Adjust** → *Deduct from Stock* for the difference (20), with a reason such as "Correcting over-entry on stock take". Both entries stay in the history, which is exactly what an auditor wants to see.

What happens if you submit an incomplete form

WHIMS checks the form before saving. Anything missing is marked in red and **nothing is written to your stock**.

Figure 9 — Submitting with fields empty. The box turns red and the message *"The product field is required."* appears underneath. Fill in every red field and click **Submit** again.

4.3 Adding stock for many products — Bulk Stock Take

When a delivery covers dozens of parts, typing them one at a time is slow. Bulk Stock Take reads a spreadsheet and adds every line in one go.

- 1 Go to Stock Levels → Stock Actions → Bulk Stock Take.**
- 2 Click Download Template**
in the grey helper text under the upload box. This gives you a spreadsheet with the correct column headings already in place.
- 3 Fill in one row per product/shelf.**
Columns are listed in section 6.5. Do not rename or reorder the headings.
- 4 Save the file as CSV**
(in Excel: *File* → *Save As* → *CSV*).
- 5 Drag the file onto the upload box**
, or click **Browse** and choose it.
- 6 Check Default Notes.**
This reason is used for any row where you left the notes column empty.
- 7 Click **Submit**.**

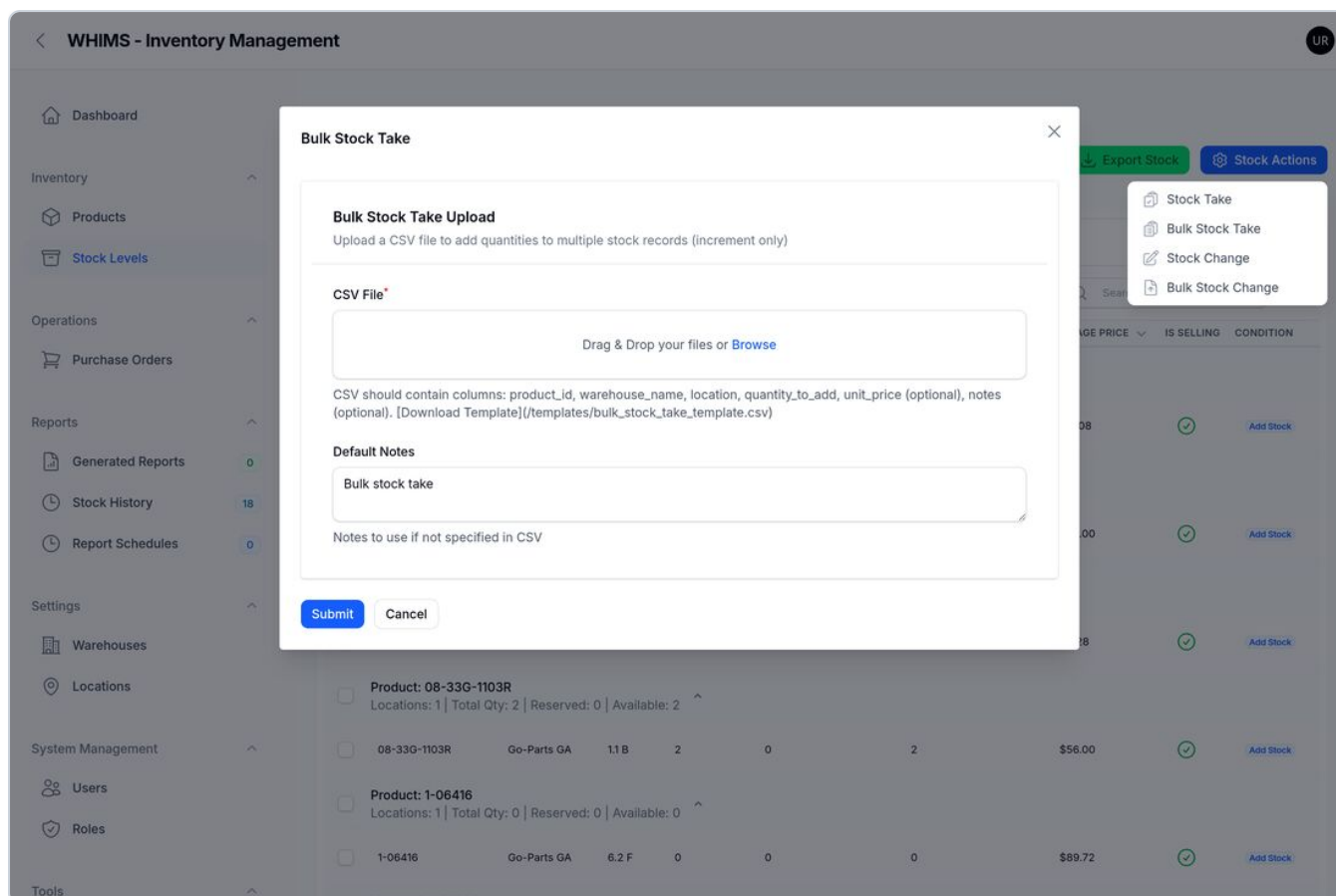


Figure 10 — Bulk Stock Take. The link to the blank template sits in the small grey text beneath the upload area.

When it finishes you get a message such as *"Processed 12 records successfully. 2 errors occurred."* followed by the first few problem rows. **Rows that succeeded are already saved** — only the listed rows failed. Fix those in the spreadsheet, delete the rows that worked, and upload again.

WARNING — DO NOT UPLOAD THE SAME FILE TWICE

WHIMS does not check whether it has seen a file before. Uploading the same spreadsheet a second time adds every quantity a second time. If you are unsure whether an upload went through, check [Reports](#) → [Stock History](#) before repeating it.

4.4 Adding stock from the product page

If you are already looking at a product and can see its shelves, this is the quickest way to add a few units.

- 1 **Go to Inventory** → **Products**.
- 2 **Search for the part and click its row** to open it.
- 3 Click the **Stock Locations & Quantities** tab if it is not already showing.
- 4 **Find the row for the shelf you want** and click the orange **Adjust** button at the end of that row.

WHIMS - Inventory Management

UR

Dashboard

Inventory

Products

Stock Levels

Operations

Purchase Orders

Reports

Generated Reports

Stock History

Report Schedules

Settings

Warehouses

Locations

System Management

Users

Roles

Tools

Products > List

Products

Import CSV

New Product

0

⋮

☐	PRODUCT ID	SUPPLIER P/N	PARTSLINK	PART TYPE	SUPPLIER	PRICE	STATUS	DIMENSIONS	
☐	00-316-1903R-S	00-316-1903R-S	MA2809102	Tail Lights	DEPO	\$26.05	active	-	⊞ ⚙
☐	00-332-1915R-S1	00-332-1915R-S1	GM2809109	Tail Lights	DEPO	\$37.17	active	-	⊞ ⚙
☐	00-332-1925L-S	00-332-1925L-S	GM2808111	Tail Lights	DEPO	\$4.93	active	-	⊞ ⚙
☐	00-333-1920L-S	00-333-1920L-S	CH2808102	Tail Lights	DEPO	\$0.00	active	-	⊞ ⚙
☐	01-333-1301N-C	01-333-1301N-C	CH2882101	Turn Signal Lights	DEPO	\$28.63	active	-	⊞ ⚙
☐	06-335-1903L	06-335-1903L	GM2815101	Tail Lights	DEPO	\$17.08	active	15.59×9.69×3.19 0.97lbs	⊞ ⚙
☐	06B115611R-URO Parts	06B115611R		ValueLine	ValueLine	\$3.00	active	-	⊞ ⚙
☐	06C103485N-URO Parts	06C103485N		ValueLine	ValueLine	\$4.44	active	-	⊞ ⚙
☐	08-214-2045L-UD	08-214-2045L-UD	MI2602100	Fog Lights	DEPO	\$5.44	active	-	⊞ ⚙
☐	08-216-1965L-B	08-216-1965L-B	FO2521444	ValueLine	DEPO	\$56.00	active	-	⊞ ⚙
☐	08-315-2022R-UD	08-315-2022R-UD	NI2603100	Fog Lights	DEPO	\$4.33	active	16.00×10.00×10.00 1.30lbs	⊞ ⚙
☐	08-331-2014N	08-331-2014N	GM2590105	Box Lights	DEPO	\$22.21	active	-	⊞ ⚙

Figure 11 — The Products list. Use the Search box to find a part by its ID, supplier part number or description, then click the row to open it.

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Products > View

View Product

Product Information

Product ID	Supplier Part Number	Partslink
06-335-1903L	06-335-1903L	GM2815101
Supplier	Average Price	Status
DEPO	\$17.08	Active

Stock Summary

Total Quantity	Stock Locations	Available Quantity	Reserved Quantity
2	1	2	0

Dimensions

Length	Width	Height	Weight
15.59 in	9.69 in	3.19 in	0.97 lbs

Timestamps

Three tabs on every product

- Stock Locations & Quantities
- Stock History
- Activity History

Stock Locations & Quantities

Adjust = add or remove here

WAREHOUSE	LOCATION	QUANTITY	RESERVED	AVAILABLE	AVG PRICE	TOTAL VALUE	SELLING
Go-Parts GA	4.2 F	2	0	2	\$17.08	\$34.16	Yes

Adjust

Figure 12 — The product page. The three tabs give you current stock, the movement history, and a record of edits to the product itself. Each shelf has its own **Adjust** button — make sure you click the one on the right row.

- 1 Leave Adjustment Type on Add to Stock.**
- 2 Type how many units to add in Quantity.**
Minimum 1.
- 3 Type a Reason / Comment.**
This one is compulsory — the form will not save without it.
- 4 Click **Submit**.**

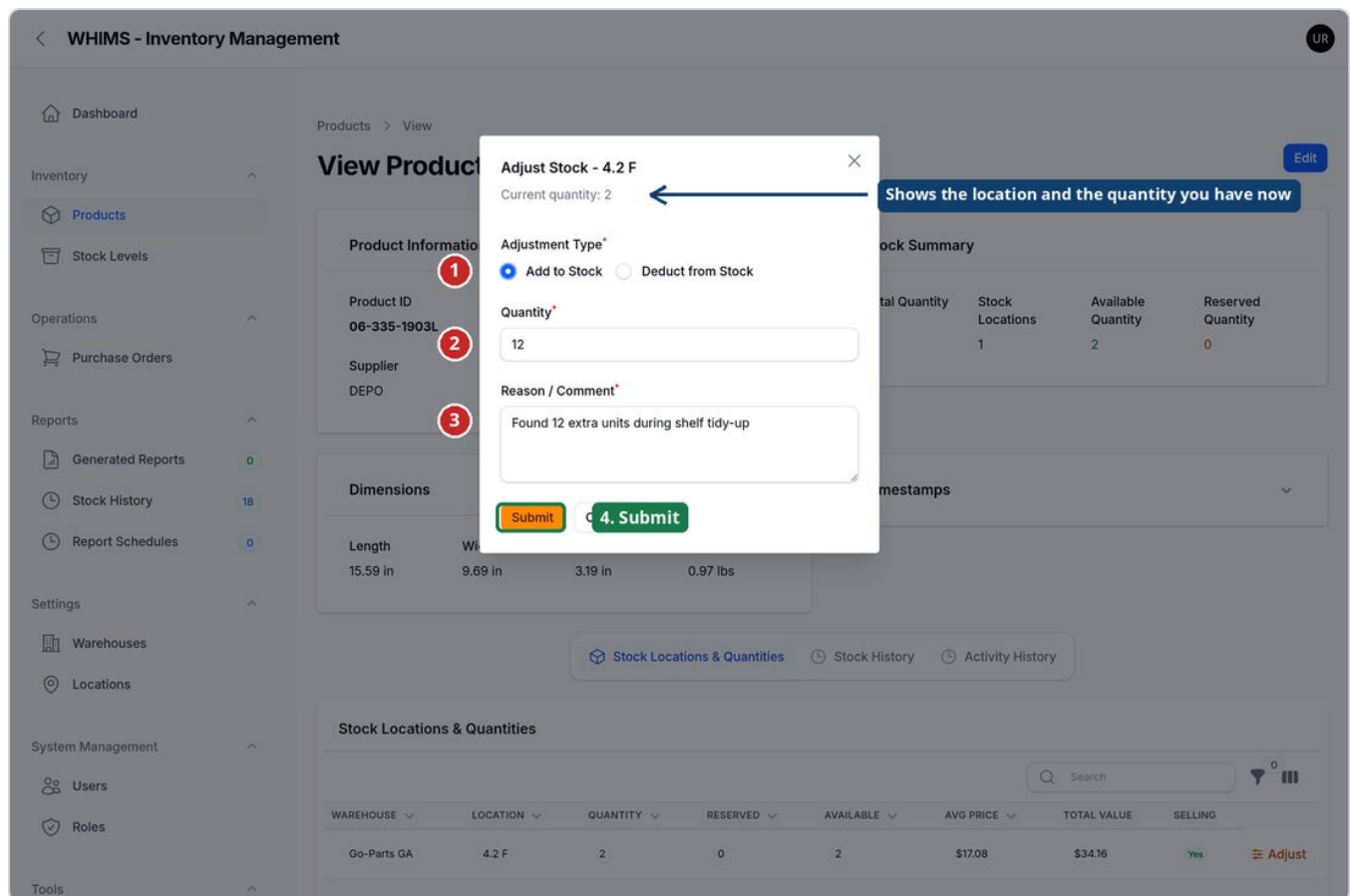


Figure 13 — The Adjust window. The heading names the shelf and the line beneath tells you the quantity there right now — check both before you type. **1** Add or Deduct. **2** Quantity. **3** Reason (required). **4** Submit.

A green **Stock Adjusted** message confirms the result, for example "12 units added to stock. New quantity: 14".

4.5 Removing stock — Deduct from Stock

Use this when units have physically left the shelf outside the normal sales process: damaged, scrapped, lost, used internally, or given away.

- 1** Open the product and its **Stock Locations & Quantities** tab (steps 1–4 of section 4.4).
- 2** Click **Adjust** on the correct shelf.
- 3** Click *Deduct from Stock* next to **Adjustment Type**.
- 4** **Type how many units to remove in Quantity.**
Enter it as a positive number — do not type a minus sign.
- 5** **Type the Reason / Comment.**
Required. Say what happened to the units.

- 6 Check the **"Current quantity" line at the top of the window.**
You cannot remove more than that.
- 7 Click **Submit**.

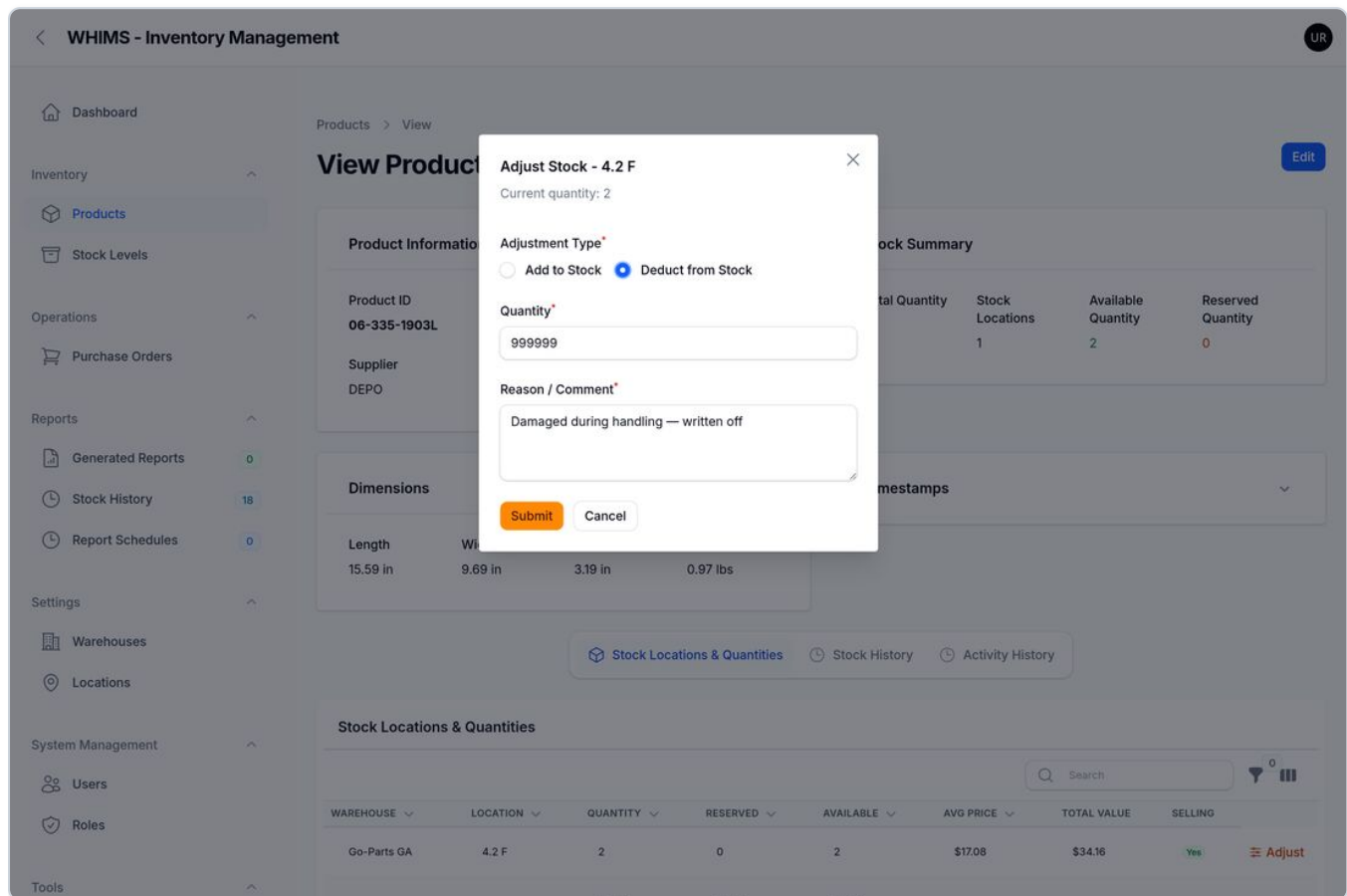


Figure 14 — The same window with *Deduct from Stock* selected. Everything else works identically; only the direction changes.

You will see **Stock Adjusted** — *"12 units deducted from stock. New quantity: 2"*.

If you try to remove too many

WHIMS refuses and tells you exactly what is available. **Nothing is saved** — the shelf keeps the figure it had.

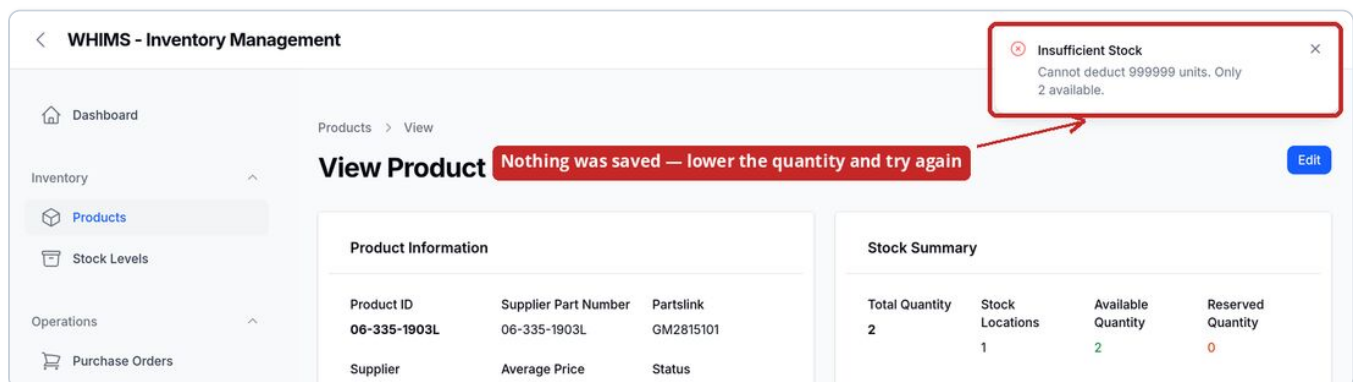


Figure 15 — *"Cannot deduct 999999 units. Only 2 available."* Close the message, correct the quantity, and submit again. If you genuinely believe more units left the shelf than the system thought were on it, the shelf figure itself was wrong — count it and use **Stock Change** instead.

4.6 Removing everything in a location — Empty Location

IMPORTANT

This sets **every product** on the shelf to zero in one step and **cannot be undone**. Only use it when a shelf is genuinely being cleared — for example when a bin is decommissioned or its entire contents have been written off. Export the shelf first, every time.

- 1 Go to **Settings** → **Locations**.
- 2 Click the location you want to clear.
The *View Location Stock* page opens, listing everything currently on that shelf.
- 3 Click the green **Export Stock** button first.
This downloads a spreadsheet of the shelf's contents — your only record of what was there.
- 4 Click the red **Empty Location** button.

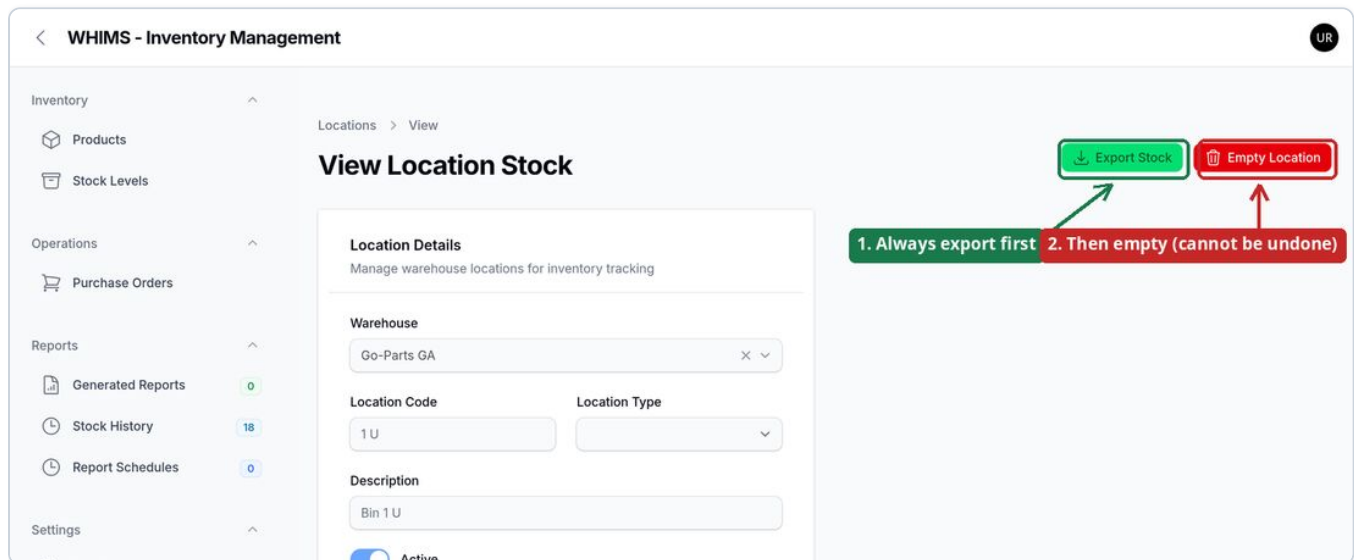


Figure 16 — The location page. Always use the green button before the red one.

- 1 Read the red warning box carefully.
- 2 Tick *I Confirm I have downloaded the Stock CSV*.
The wizard will not let you continue until you do.
- 3 Click **Next**.

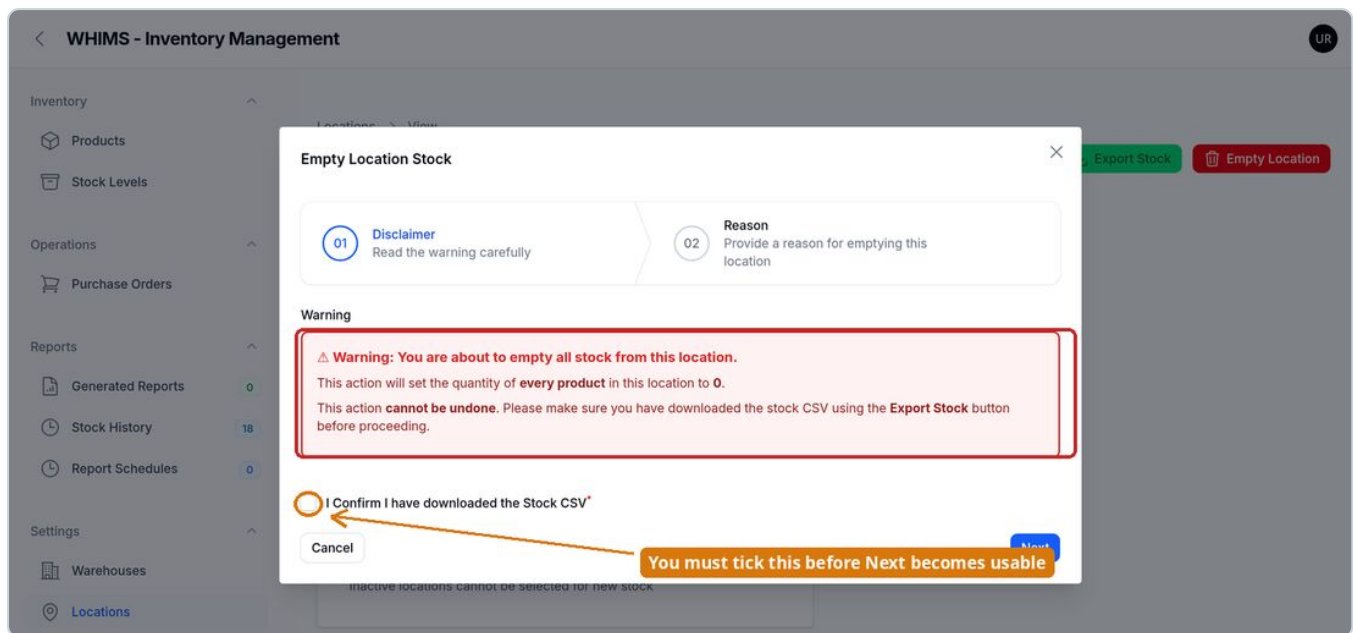


Figure 17 — Step 1 of the Empty Location wizard. Clicking **Next** without ticking the box shows "You must confirm that you have downloaded the Stock CSV before proceeding."

1 Type a full Reason.

Required. It is written against every single product on that shelf, so make it explain the whole clearance.

2 Click **Confirm and Execute**.

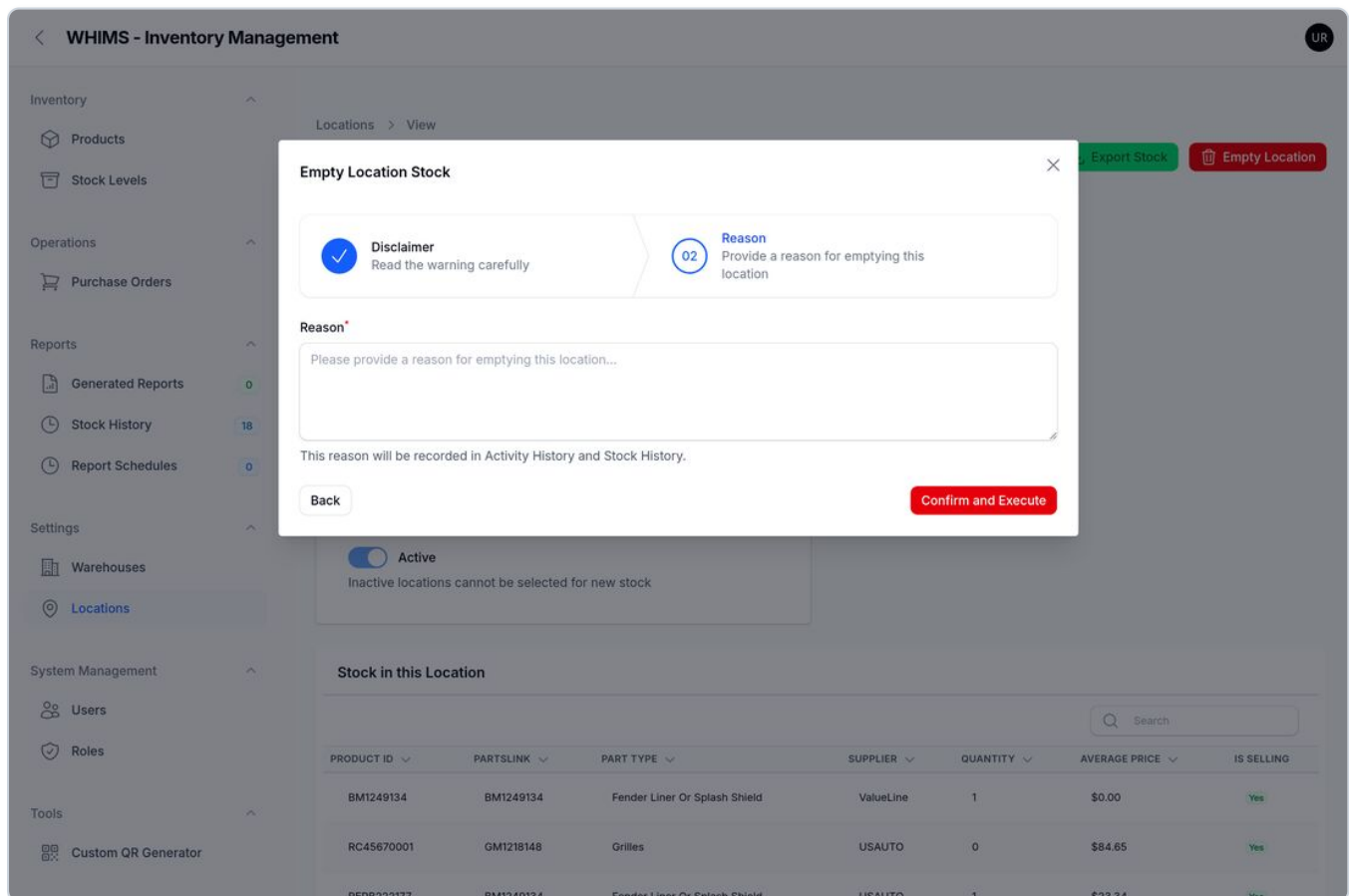


Figure 18 — Step 2. **Back** returns you to the warning; closing the window with × cancels everything safely.

A green **Location Emptied Successfully** message reports how many products were affected, for example *"Set stock to 0 for 8 product(s) in location 1 U."* Products that were already at zero are skipped; if the whole shelf was already empty you get *"No Stock to Empty"* instead and nothing changes.

4.7 Adjusting stock to a corrected count — Stock Change

Use this after a physical count. You type **the number you counted**, and WHIMS makes the shelf match it — whether that means going up or down.

1 Go to Stock Levels → Stock Actions → Stock Change.

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Stock Change

Stock Change Details
Change stock quantities, status, and other properties

Product*
Select an option

Warehouse*
Go-Parts GA

Location*
Select an option
Select warehouse first

Submit **Cancel**

Product	Warehouse	Location	Qty	Reserved	Available	Price	Status	Action
08-315-2022R-UD	Go-Parts GA	4 U	2	0	2	\$4.28	✓	Add Stock
Product: 08-33G-1103R Locations: 1 Total Qty: 2 Reserved: 0 Available: 2								
08-33G-1103R	Go-Parts GA	11 B	2	0	2	\$56.00	✓	Add Stock
Product: 1-06416 Locations: 1 Total Qty: 0 Reserved: 0 Available: 0								
1-06416	Go-Parts GA	6.2 F	0	0	0	\$89.72	✓	Add Stock
Product: 1-06670								

Figure 19 — The Stock Change form. Note the description at the top: *"Change stock quantities, status, and other properties"*. As with Stock Take, more fields appear once you have chosen a product and a location.

1 Choose the Product.

Type to search, then click it.

2 Check the Warehouse.

3 Choose the Location.

Here the list shows (Qty: 2, Available: 2) so you can see what the system currently believes.

4 Type the counted figure into New Quantity.

This is the final number, not a difference. Zero is allowed; negatives are not.

- 5 **Fill in New Average Price only if the price is also changing.**
Leaving it empty keeps the current price.
- 6 **Check the Is Selling? switch.**
On means the stock can be sold. Turn it off to hold the stock back — for quarantined or damaged goods, for instance.
- 7 **Type the Notes.**
Record who counted, and when.
- 8 **Click Submit.**

Stock Change

Stock Change Details
Change stock quantities, status, and other properties

Product*
06-335-1903L

Warehouse*
Go-Parts GA

Location*
4.2 F (Qty: 2, Available: 2)

Select location to change stock - will create if none exists

New Quantity*
18

Set exact quantity (not increment)

New Average Price
\$ 48.50

☒ **Is Selling?**
Enable if this stock is available for sale

Notes
Cycle count 27 Jul - corrected to counted figure

Reason for stock change

Submit Cancel

Figure 20 — A completed Stock Change. The shelf currently holds 2; after saving it will hold exactly 18, and the history will record a change of **+16**.

The confirmation reads **Stock Changed Successfully** — "Stock updated from 2 to 18", or "New stock created with quantity 18" if there was no record on that shelf before.

WARNING

Because Stock Change *replaces* the figure, typing the wrong number here has an immediate and total effect. Typing 1 instead of 100 wipes out 99 units. Read the number back to yourself before clicking Submit.

4.8 Adjusting many records at once — Bulk Stock Change

The spreadsheet version of Stock Change — the right tool after a full warehouse count.

- 1 **Go to Stock Levels → Stock Actions → Bulk Stock Change.**
- 2 **Download the template**
from the grey text under the upload box.
- 3 **Fill in one row per shelf**
using the columns in section 6.5. The `new_quantity` column is the counted figure, not a difference.
- 4 **Save as CSV, upload the file, and click [Submit](#).**

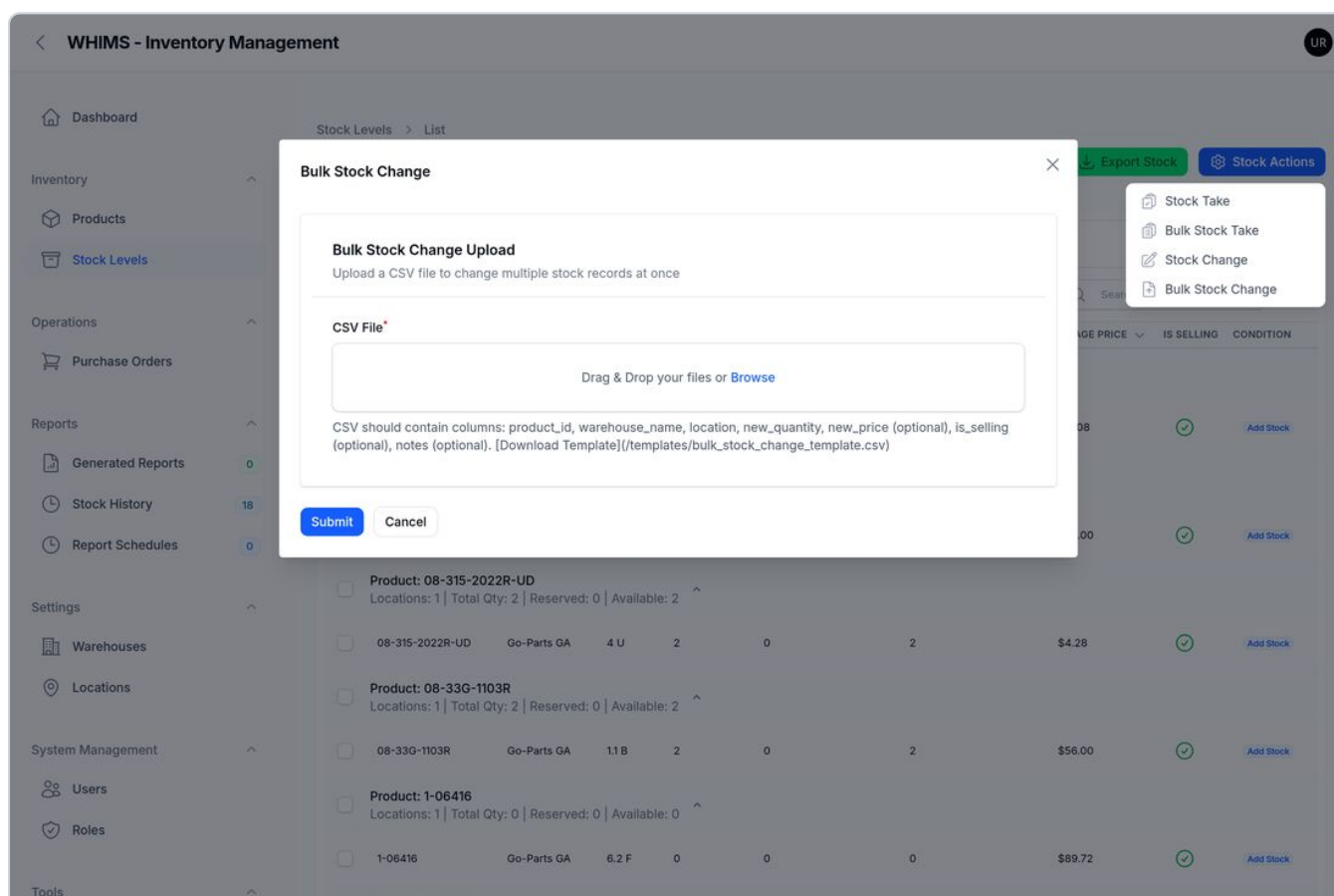


Figure 21 — Bulk Stock Change. Every row overwrites the quantity on the shelf it names — treat this file with the same care as the single form.

IMPORTANT

Check your spreadsheet before uploading, especially for blank quantity cells and stray rows at the bottom. A single mistyped row silently overwrites a good stock figure, and the only way back is a second correction.

4.9 Viewing and verifying updated stock

Never assume. Check every change.

- 1 **Go to Inventory → Stock Levels.**
- 2 **Type the Product ID into the Search box**
above the table. The list filters as you type.
- 3 **Read the group heading**
— it gives *Total Qty*, *Reserved* and *Available* across every shelf for that part.
- 4 **Read the row for the shelf you changed**
and confirm the **Quantity** column matches what you expected.
- 5 **If the figure looks unchanged, refresh the page**
with F5 before concluding anything is wrong.

TIP — READING THE THREE QUANTITY COLUMNS

Quantity is everything physically on the shelf. **Reserved Quantity** is the part of it already promised to orders. **Available Quantity** is what is left to sell — quantity minus reserved. Your stock movements change *Quantity*; reserved is managed by the order process and cannot be edited here.

4.10 Reviewing stock history

Every movement WHIMS has ever recorded is kept. There are two ways in.

All movements, across every product

- 1 **Go to Reports → Stock History.**
- 2 **The newest entries are at the top.**
- 3 **Use the funnel icon to filter**
by Action Type, Warehouse or Product, or type into the Search box.

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Stock History > List

Stock History

What happened

+ added / - removed

DATE/TIME	PRODUCT	WAREHOUSE	LOCATION	ACTION	QTY BEFORE	CHANGE	QTY AFTER	UNIT PRICE	REFERENCE
Jul 27, 2026 16:36	RM22130014	Go-Parts GA	6.5 A	Manual Adjustment	1	-1	0	\$58.53	Manual adju
Jul 27, 2026 12:14	RT10770006	Go-Parts GA	19 U	Deduction	2	-1	1		Order #1932
Jul 27, 2026 12:02	NI1038174	Go-Parts GA	2.1 D	Deduction	2	-1	1		Order #114
Jul 27, 2026 10:16	HO3113143	Go-Parts GA	1.4 B	Deduction	1	-1	0		Order #114
Jul 27, 2026 10:15	FO1320162	Go-Parts GA	4.2 H	Deduction	1	-1	0		Order #111
Jul 27, 2026 09:24	REPT762751	Go-Parts GA	35 U	Deduction	11	-1	10		Order #4141
Jul 27, 2026 06:33	RC22210007	Go-Parts GA	4.1 F	Deduction	1	-1	0		Order #10
Jul 27, 2026 06:32	JVW75ER-S	Go-Parts GA	4.2 C	Deduction	1	-1	0		Order #114
Jul 27, 2026 06:32	KVAC3443	Go-Parts GA	3.1 A	Deduction	1	-1	0		Order #113
Jul 27, 2026 06:31	324-2008R-AQ-Y	Go-Parts GA	1.2 C	Deduction	2	-1	1		Order #113

Showing 1 to 10 of 123,601 results

Per page 10

1 2 3 4 ... 12360 12361 >

Figure 22 — Stock History. The **Action** column says what kind of movement it was; the **Change** column shows the size and direction — green with a plus for stock in, red with a minus for stock out. **Qty Before** and **Qty After** let you follow the running balance.

Movements for one product

- 1 Open the product from **Inventory** → **Products**.
- 2 Click the **Stock History** tab.

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View Product

Product Information

Product ID	Supplier Part Number	Partslink
06-335-1903L	06-335-1903L	GM2815101
Supplier	Average Price	Status
DEPO	\$17.08	Active

Dimensions

Length	Width	Height	Weight
15.59 in	9.69 in	3.19 in	0.97 lbs

Stock Summary

Total Quantity	Stock Locations	Available Quantity	Reserved Quantity
2	1	2	0

Timestamps

Stock Locations & Quantities

Stock History

Activity History

Stock History

Group by

Search

DATE/TIME	WAREHOUSE	LOCATION	ACTION	QTY BEFORE	CHANGE	QTY AFTER	USER	NOTES
Jul 23, 2026 2:25 PM	Go-Parts GA	4.2 F	Purchase	1	+1	2	Admin	PO# PO-2026-00004 - Purchase

Figure 23 — The same information limited to one part, with the reason you typed in the **Notes** column. This tab refreshes itself about once a minute.

NOTE

Stock History is permanent and read-only. There are no edit or delete buttons anywhere on these screens, for anyone. That is deliberate — it is what makes the log trustworthy.

5 Screenshot Index and Capture Guide

Every figure in this guide, where it came from, and what to re-capture if the screens change in a future release.

All screenshots were taken from a live WHIMS system. If a screen is redesigned, use the table below to reproduce the figure: open the screen listed, put it in the state described, and highlight the elements named.

FIG.	SCREEN	ADDRESS	STATE TO CAPTURE / WHAT TO HIGHLIGHT
1	Sign-in	/admin/login	Empty form.
2	Dashboard	/admin	Left menu open, Inventory group expanded.
3	Stock Levels	/admin/stocks	Default view. Mark: Export Stock, Stock Actions, funnel, search box, group heading, Condition column.
4	Stock Actions menu	/admin/stocks	Dropdown open, all four options visible.
5	Filter panel	/admin/stocks	Filters expanded via the funnel icon.
6	Stock Take, empty	/admin/stocks	Form just opened, nothing filled in.
7	Location dropdown	/admin/stocks	Location list open, showing "(Current Qty: n)".
8	Stock Take, completed	/admin/stocks	All fields filled. Number the six fields and the Submit button.
9	Validation messages	/admin/stocks	Submit an empty form. Circle the red messages.
10	Bulk Stock Take	/admin/stocks	Upload form with the template link visible.
11	Products list	/admin/products	Default view.
12	Product stock tab	/admin/products/{id}	Stock Locations & Quantities tab. Mark the tab bar and an Adjust button.
13	Adjust — Add	/admin/products/{id}	Adjust window, <i>Add to Stock</i> selected, all fields filled.
14	Adjust — Deduct	/admin/products/{id}	Same window, <i>Deduct from Stock</i> selected.
15	Insufficient Stock	/admin/products/{id}	Submit a deduction larger than the quantity held. Box the red message.
16	Location page buttons	/admin/locations/{id}	Box Export Stock (green) and Empty Location (red).
17	Empty Location, step 1	/admin/locations/{id}	Wizard open on the Disclaimer step. Circle the confirmation tick box.
18	Empty Location, step 2	/admin/locations/{id}	Reason step, empty.

FIG.	SCREEN	ADDRESS	STATE TO CAPTURE / WHAT TO HIGHLIGHT
19	Stock Change, empty	/admin/stocks	Form just opened.
20	Stock Change, completed	/admin/stocks	All fields filled, location showing "(Qty: n, Available: n)".
21	Bulk Stock Change	/admin/stocks	Upload form.
22	Stock History	/admin/stock-histories	Default view. Box the Action and Change columns.
23	Product stock history	/admin/products/{id}	Stock History tab.

IMPORTANT — CAPTURING SCREENSHOTS SAFELY

Figures 8, 13, 14, 19 and 20 show **completed forms that were never submitted**. When re-capturing, fill the form, take the picture, then close the window with **Cancel** or ✕. Do not click Submit on a live system purely to take a screenshot.

6 Field Descriptions

Every box you can type in or choose from, what it does, and what WHIMS will accept.

In the tables below, Yes means the form will not save without it. A red asterisk beside a field name on screen means the same thing.

6.1 Stock Take form (Stock Levels → Stock Actions → Stock Take)

FIELD	DESCRIPTION	REQUIRED	EXAMPLE	RULES
Product	The part you are adding stock for. Type to search the catalogue.	Yes	06-335-1903L	Must be chosen from the list. Searches Product ID, supplier part number, Partslink and description.
Warehouse	The site holding the stock. Pre-filled with the first warehouse.	Yes	Go-Parts GA	Changing it clears the Location.
Location	The shelf or bin. The list shows what is on each shelf already.	Yes	4.2 F (Current Qty: 2)	Only appears once a warehouse is chosen. Only shelves in that warehouse are offered. " (No stock)" means a new record is created.
Quantity to Add	How many units to <i>add</i> to the shelf — not the new total.	Yes	25	Whole number, minimum 1. Default 1. Appears once product and location are set.
Unit Price	What this batch cost per unit. Used to recalculate the shelf's weighted average price.	No	48.50	Number, 0 or more, two decimal places. Leave empty to keep the current average price.
Notes	Why you are adding stock. Written to the permanent history.	No	Received from supplier — delivery note DN-4471	Free text. Pre-filled with "Stock take" — always replace it with something meaningful.

6.2 Adjust window (product page → Stock Locations & Quantities → Adjust)

FIELD	DESCRIPTION	REQUIRED	EXAMPLE	RULES
Adjustment Type	Whether the units are going on or off the shelf.	Yes	Add to Stock	One of two choices. Defaults to <i>Add to Stock</i> .

FIELD	DESCRIPTION	REQUIRED	EXAMPLE	RULES
Quantity	How many units to add or remove.	Yes	12	Whole number, minimum 1. Always positive — the direction comes from Adjustment Type. A deduction that would take the shelf below zero is refused.
Reason / Comment	Why the shelf is changing.	Yes	Damaged during handling — written off	Free text, compulsory. Stored in the history against this movement.

The window heading names the shelf (for example "Adjust Stock — 4.2 F") and the line beneath shows the quantity held right now. Neither can be typed into — they are there to confirm you picked the right row.

6.3 Stock Change form (Stock Levels → Stock Actions → Stock Change)

FIELD	DESCRIPTION	REQUIRED	EXAMPLE	RULES
Product	The part being corrected.	Yes	06-335-1903L	Chosen from the list.
Warehouse	The site.	Yes	Go-Parts GA	Changing it clears the Location.
Location	The shelf. The list shows "(Qty: n, Available: n)".	Yes	4.2 F (Qty: 2, Available: 2)	Only shelves in the chosen warehouse. "(No stock — will create new)" means a new record is created.
New Quantity	The figure the shelf should hold after saving — what you counted.	Yes	18	Whole number, 0 or more. Replaces the existing figure. Negatives are not accepted.
New Average Price	Replaces the average price for this shelf.	No	48.50	Number, 0 or more. Leave empty to keep the current price.
Is Selling?	Whether this stock may be sold.	No	On	Switch, on by default. Turn off to hold stock back from sale.
Notes	Why the figure changed.	No	Cycle count 27 Jul — corrected to counted figure	Free text. Strongly recommended even though it is not enforced.

6.4 Empty Location wizard (Locations → open a location → Empty Location)

FIELD	DESCRIPTION	REQUIRED	RULES
I Confirm I have downloaded the Stock CSV	Your acknowledgement that you have a record of the shelf before it is wiped.	Yes	Must be ticked. <i>"You must confirm that you have downloaded the Stock CSV before proceeding."</i>
Reason	Why the whole shelf is being cleared. Recorded against every product on it.	Yes	Free text. Written to both Stock History and the product's Activity History.

6.5 Spreadsheet (CSV) columns for bulk work

Download the blank template from the upload window rather than building the file yourself — the column headings must match exactly.

Bulk Stock Take — adds to what is there

COLUMN	REQUIRED	EXAMPLE	NOTES
product_id	Yes	TEST-001	Must match a Product ID already in WHIMS.
warehouse_name	Yes	Main Warehouse	The warehouse <i>name</i> , spelled exactly as in WHIMS.
location	Yes	A-01-01	Must exist inside that warehouse.
quantity_to_add	Yes	10	Whole number to add to the shelf.
unit_price	No	99.99	Recalculates the weighted average price when supplied.
notes	No	Stock replenishment	Falls back to the <i>Default Notes</i> box if left empty.

Bulk Stock Change — replaces the figure

COLUMN	REQUIRED	EXAMPLE	NOTES
product_id	Yes	TEST-001	Must match a Product ID already in WHIMS.
warehouse_name	Yes	Main Warehouse	Exact warehouse name.
location	Yes	A-01-01	Must exist inside that warehouse.
new_quantity	Yes	100	The final figure for the shelf. Overwrites whatever was there.
new_price	No	99.99	Replaces the average price when supplied.
is_selling	No	true	true or false .
notes	No	Stock adjustment	Reason for the change.

6.6 Columns on the Stock Levels screen

COLUMN	WHAT IT SHOWS
Product	The Product ID. Click it to open the product page.
Warehouse	The site holding this stock.
Location	The shelf or bin.
Quantity	Units physically on that shelf.
Reserved Quantity	Units already promised to orders. Not editable here.
Available Quantity	Quantity minus reserved — what can still be sold.
Average Price	Average cost per unit on this shelf.
Is Selling	Green tick if this stock may be sold, red cross if held back.
Condition	Intended to show New / Used / Refurbished / Damaged. Currently displays "Add Stock" on every row — see the warning in section 3.3. Use the Condition filter instead.
Created at / Updated at	Hidden by default. Switch them on with the columns icon beside the funnel.

6.7 Columns on the Stock History screen

COLUMN	WHAT IT SHOWS
Date/Time	When the movement was recorded. Set by the system.
Product	The part. Click to open it.
Warehouse / Location	Where the movement happened.
Action	The kind of movement — Manual Adjustment, Stock Received, Sold, Physical Count, Transfer In/Out and so on.
Qty Before	What the shelf held immediately before.
Change	The size and direction. Green + for in, red – for out.
Qty After	What the shelf held immediately after.
Unit Price	Price per unit applied to this movement.
Reference	The paperwork behind it — an order number, or "Manual adjustment" when a person typed it.
User	Who did it. Shows "System" for automatic movements.
Notes	The reason typed at the time.

6.8 Fields the system fills in for you

Some things people expect to type are recorded automatically. You will not find a box for these, and that is deliberate — it stops them being back-dated or mis-attributed.

FIELD	HOW IT IS SET
Transaction date and time	Stamped from the server clock the moment you click Submit. It cannot be changed or back-dated.
User	Taken from whoever is signed in. Another reason never to share a login.
Quantity before / after	Calculated by WHIMS from the shelf's figure at that instant.
Available Quantity	Always quantity minus reserved. Never typed.
Product average price	Recalculated across all shelves whenever any stock record changes.
Reference	Set to "Manual adjustment" for the Adjust window, or to the order that caused an automatic movement.

NOTE — SKU

WHIMS does not use the word "SKU". The equivalent is **Product ID**. Parts also carry a *supplier part number* and a *Partslink number*, and you can search on any of them.

7 Business Rules

The rules WHIMS enforces, and the rules your team is expected to follow.

7.1 Rules the system enforces

RULE	WHAT IT MEANS IN PRACTICE
Stock can never go below zero	A deduction larger than the quantity on the shelf is refused outright with the message <i>"Insufficient Stock"</i> , and nothing is saved. Stock Change will not accept a negative figure either.
Quantities must be whole numbers	WHIMS counts units, not fractions. 2.5 is not accepted.
Added quantities must be at least 1	Stock Take and the Adjust window both require a minimum of 1. Stock Change accepts 0, because "the shelf is empty" is a legitimate count.
One stock record per product, per location	The same part cannot have two separate records on the same shelf. WHIMS finds the existing record and updates it, or creates the first one.
Locations belong to warehouses	You can only pick a shelf that exists in the warehouse you selected. Change the warehouse and the location resets.
Available = Quantity – Reserved	Calculated by the system and never typed. Reserved units belong to orders and cannot be edited from these screens.
Every movement is logged	Product, warehouse, location, before, change, after, unit price, your user account, the timestamp and your reason.
History cannot be edited or deleted	There are no edit or delete buttons on Stock History for any user.
Nothing saves halfway	Each movement is written as a single unit of work. If anything fails partway, the whole movement is rolled back rather than left half-applied.
Emptying a location skips empty shelves	Only products with a quantity above zero are touched. If the whole shelf is already empty you are told <i>"No Stock to Empty"</i> .
Average price is recalculated automatically	Adding stock with a unit price produces a new weighted average for the shelf; the product's overall average price is then recalculated across all its shelves.
All stock screens are open to every signed-in user	The current release does not restrict these buttons by role. See section 2.1.

7.2 Rules your team should follow

These are not enforced by the software. They are what separates a stock system people trust from one they work around.

- ✓ **Always give a reason, even when the box is optional.** Stock Take and Stock Change will save without one. A movement with no explanation is nearly useless six months later.
- ✓ **Count before you adjust.** Stock Change should record a physical count, not a guess.
- ✓ **Correct the right shelf.** If a part sits on three shelves and one is wrong, fix that one. Dumping the difference on whichever shelf is convenient hides the real problem.
- ✓ **Report, do not silently fix, large differences.** Agree a threshold with your supervisor — for example anything above 10 units or a set value — and escalate rather than quietly adjusting.
- ✓ **Never use Delete to remove stock.** Deleting a stock record removes the row entirely and writes *no* history entry. Removing units is what the Adjust window is for.
- ✓ **Do not adjust stock that is reserved for an order** without telling whoever owns the order.
- ✓ **One person, one shelf, at a time.** Two people adjusting the same shelf within minutes of each other will produce a figure neither of them expects.

7.3 Duplicate transactions

WARNING

WHIMS does **not** detect duplicates. Submitting the same Stock Take twice adds the quantity twice. Uploading the same spreadsheet twice applies every row twice. There is no "you have already done this" prompt.

If you are not sure whether something went through — the page seemed slow, the browser was refreshed, you clicked twice — **check Stock History before repeating it.** That check takes ten seconds; unpicking a double entry takes considerably longer.

Note that duplicate *Stock Change* submissions are harmless: setting a shelf to 18 twice still leaves 18. It is *Stock Take*, *Bulk Stock Take* and the *Adjust* window that accumulate.

7.4 Audit logging

Every action described in this guide writes a permanent Stock History entry containing:

- the product, warehouse and location;
- the quantity before, the change, and the quantity after;
- the unit price applied;
- the type of movement and its reference;
- the user account that performed it;
- the date and time, from the server clock;
- the reason or note you typed.

Empty Location writes twice — once to Stock History and once to the product's Activity History, which additionally records the network address the request came from.

8 Validation Rules

What WHIMS checks before it saves, the exact message you will see, and how to clear it.

Validation happens **before** anything is written. If you see a red message, your stock has not changed — you have lost nothing but a moment.

8.1 Required fields

MESSAGE ON SCREEN	WHY	HOW TO FIX IT
<i>"The product field is required."</i>	No product was chosen.	Click the Product box, type part of the ID, and pick from the list.
<i>"The warehouse field is required."</i>	No warehouse chosen.	Pick the site. It is usually pre-filled — check it was not cleared.
<i>"The location field is required."</i>	No shelf chosen. Often happens after changing the product or warehouse, which clears the location.	Pick the shelf again, then re-check the rest of the form.
<i>"The quantity field is required."</i>	The quantity box is empty.	Type a whole number.
<i>"The reason field is required."</i>	The Adjust window and the Empty Location wizard both insist on a reason.	Type what happened and how you know.
<i>"You must confirm that you have downloaded the Stock CSV before proceeding."</i>	The confirmation box in the Empty Location wizard was not ticked.	Click Export Stock first, then tick the box.

8.2 Invalid quantities

SITUATION	WHAT HAPPENS	HOW TO FIX IT
Zero or a negative number in Stock Take or Adjust	Refused — the minimum is 1.	To reduce stock, use <i>Deduct from Stock</i> rather than a negative number.
A negative number in Stock Change	Refused — the minimum is 0.	Type the counted figure. If the shelf is empty, type 0.
A decimal such as 2.5	Refused or rounded by the browser.	Enter whole units only.

SITUATION	WHAT HAPPENS	HOW TO FIX IT
Letters or symbols in a number box	The box will not accept them.	Digits only — no commas, no "pcs", no spaces.

8.3 Not enough stock

The single most common refusal. It appears as a red message in the top-right corner:

TITLE	MESSAGE
Insufficient Stock	<i>"Cannot deduct 999999 units. Only 2 available."</i>

The number after "Only" is what is actually on that shelf. Either reduce your quantity to that figure or below, or — if you are certain more units left the shelf than WHIMS ever knew about — the shelf figure itself was wrong. Count it and use **Stock Change** to set the true figure, with a reason explaining the discrepancy.

8.4 Problems in a bulk spreadsheet

Each row is checked on its own. Good rows are saved; bad rows are reported. The summary message lists up to five problems.

MESSAGE	CAUSE AND FIX
<i>"Product TEST-001 not found"</i>	The <code>product_id</code> does not match any part in WHIMS. Check spelling, leading and trailing spaces, and that Excel has not converted the ID into a number or date.
<i>"Warehouse Main Warehouse not found"</i>	The <code>warehouse_name</code> does not match. Copy the name exactly as it appears in Settings → Warehouses .
<i>"Location A-01-01 not found in warehouse Main Warehouse"</i>	The shelf does not exist in that warehouse. Either you named the wrong warehouse or the location needs creating first.
<i>"Row error for product ..."</i>	Something else on that row is unusable — most often a blank or non-numeric quantity.
<i>"Failed to process CSV: ..."</i>	The whole file could not be read. Usually the wrong file type, missing heading row, or headings that have been renamed. Start again from the downloaded template.

IMPORTANT

After a partial upload, **delete the rows that succeeded** before uploading the corrected file. Otherwise a Bulk Stock Take will add those quantities a second time.

8.5 Other refusals

MESSAGE	MEANING
No Stock — <i>"There are no stock records in this location to export."</i>	You clicked Export Stock on an empty shelf. Nothing to download.
No Stock to Empty — <i>"There are no products with stock greater than 0 in this location."</i>	The shelf is already clear. Nothing was changed.
Error — <i>"Failed to complete stock take: ..."</i>	An unexpected system fault. Nothing was saved. Note the wording and contact support.
Error — <i>"Failed to change stock: ..."</i>	As above, for Stock Change.
Error — <i>"Failed to empty location: ..."</i>	As above, for Empty Location. The shelf is left exactly as it was.

9 Common Errors and Troubleshooting

What you see, why it happens, and what to do about it.

WHAT YOU SEE	LIKELY CAUSE	WHAT TO DO
Nothing found when searching for a product	The part is not in WHIMS, or you are searching on a number WHIMS does not hold.	Try the supplier part number or Partslink number, and try a shorter fragment. If it is still missing, the product has not been created — ask whoever maintains the catalogue. Do not substitute a similar part.
<i>"The location field is required." after you had already chosen one</i>	You changed the product or warehouse afterwards, which clears the location.	Choose the location again. Always work top to bottom.
The Location list is empty	No warehouse chosen yet, or that warehouse has no locations set up.	Pick a warehouse first. If it is still empty, locations need creating under Settings → Locations .
Insufficient Stock — <i>"Cannot deduct n units. Only m available."</i>	You tried to remove more than the shelf holds.	Reduce the quantity to <i>m</i> or less. If you believe the shelf figure is wrong, count it and use Stock Change instead.
Quantity went up when you expected it to go down	<i>Add to Stock</i> was left selected in the Adjust window.	Make a matching deduction for twice the quantity, with a reason noting the correction. Both entries remain in the history.
The new total is higher than expected	Stock Take <i>adds</i> — you typed the intended final figure instead of the amount to add.	Deduct the difference from the product page, or use Stock Change to set the correct final figure.
Red messages under several fields	Required fields are empty.	Fill in every field marked in red, then Submit again. Nothing was saved.
Permission denied / the page will not open	Your session has expired, or your account is not active.	Sign in again. If that fails, contact your administrator — do not use a colleague's login.
The screen hangs or times out after Submit	Connection dropped, or the server was busy.	Do not click Submit again. Refresh the Stock Levels screen and check the quantity, or look at Stock History. Only repeat the action if it definitely did not go through.
Save failed — <i>"Failed to complete stock take: ..."</i>	A system fault. The movement was rolled back.	Note the exact wording and the time, then try once. If it fails again, contact support with those details.
You clicked Submit twice	Slow response, impatient second click.	Check Stock History for two identical entries. If there are two, deduct the extra quantity with a reason such as "Reversing duplicate entry".
The bulk upload reports errors	One or more rows name something WHIMS cannot find.	Read the listed rows, fix them, delete the rows that already succeeded , and upload again.

WHAT YOU SEE	LIKELY CAUSE	WHAT TO DO
The quantity has not changed after saving	The page is showing a cached view, or a filter is hiding the row.	Refresh with F5 and clear any filters. If it is genuinely unchanged, check Stock History to see whether the movement was recorded at all.
The Condition column says "Add Stock" on every row	A known display fault on the Stock Levels screen.	Ignore the column and use the Condition filter instead. Already reported to the systems team.
Available is lower than Quantity	Some units are reserved against orders. This is normal.	Nothing to fix. Reserved units cannot be edited from these screens.
You emptied the wrong location	Empty Location was run on the wrong shelf.	Open the CSV you exported beforehand and restore each product with Bulk Stock Change. Tell your supervisor immediately — this is why the export step is compulsory.

TIP — WHAT TO TELL SUPPORT

Include: the exact message, the Product ID, the warehouse and location, what you typed, the time, and a screenshot if you can. "Stock Take failed" alone cannot be investigated; the details above can be traced in seconds.

10 Frequently Asked Questions

The questions people actually ask in their first month.

Q. When should I use Add Stock?

Whenever units arrive on a shelf outside the normal purchase-order process, or you find units the system does not know about. Goods delivered without paperwork, returns put back on the shelf, or a part being placed on a new shelf for the first time. Use **Stock Take**, or **Adjust** → *Add to Stock*.

Q. When should I use Remove Stock?

Whenever units physically leave a shelf and no order accounts for it — damaged, scrapped, lost, stolen, used internally, or given away as samples. Use **Adjust** → *Deduct from Stock*. Do not use it for ordinary sales; those are handled by the order process.

Q. When should I use Adjust Stock?

After you have physically counted a shelf and the system disagrees with what you found. Use **Stock Change** and type the number you counted. You do not need to work out the difference — WHIMS does that for you and records it as the change.

Q. What is the difference between Stock Take and Stock Change?

Stock Take adds to what is there. **Stock Change replaces** it. If a shelf holds 2 and you want 18: Stock Take needs 16, Stock Change needs 18. When you have counted a shelf, Stock Change is almost always the right tool.

Q. Can I edit or delete a stock transaction after saving?

No. Stock History is permanent and has no edit or delete buttons for anyone. You correct a mistake by making a second, opposite entry with a reason that explains it. Both entries stay visible — which is exactly what an auditor expects to see.

Q. What happens if I enter the wrong quantity?

Nothing dramatic, as long as you fix it promptly. Work out the difference and correct it: add the shortfall with **Adjust** → *Add to Stock*, remove the excess with *Deduct from Stock*, or set the shelf to the right figure with **Stock Change**. Always say in the reason that you are correcting an earlier entry.

Q. How can I verify that the stock has been updated?

Three ways, in increasing detail. Read the green confirmation message — it states the new total. Go to **Inventory** → **Stock Levels**, search for the product and read the Quantity column. Or open **Reports** → **Stock History** and check the newest entry shows your name, your reason and the expected before/after figures.

Q. What should I do if the stock quantity looks wrong?

Count the shelf first — do not adjust from memory. Then open the product's Stock History tab and read the recent movements; the cause is often obvious. If the difference is small and clearly explained, correct it with Stock Change and a full reason. If it is large, unexplained, or looks like it might be theft or a system fault, report it before changing anything.

Q. Why can I not type a minus sign?

You never need one. Quantities are always positive; the direction comes from the choice you make — *Add to Stock* or *Deduct from Stock*.

Q. The location dropdown says "(No stock)". Is that a problem?

No. It simply means this part has never been held on that shelf. Continuing creates the first stock record for it, which is exactly right when you are putting a part somewhere new. Just make sure you meant that shelf.

Q. Do I have to enter a unit price?

No. If you leave it empty the shelf keeps its existing average price. Enter one when you know what this batch actually cost — WHIMS then blends it with the existing stock to produce a new weighted average, which keeps your inventory valuation honest.

Q. What is Reserved Quantity, and can I change it?

Reserved units are already promised to orders. *Available* is quantity minus reserved. You cannot change reserved figures from these screens — they are managed by the order process.

Q. Can two people work on the same product at once?

Technically yes, but avoid it. Each save is applied to the figure as it stands at that moment, so two people adjusting the same shelf within minutes will produce a result neither expects. Agree who is handling which aisle before you start.

Q. I clicked Submit twice. What now?

Check Stock History for two identical entries a few seconds apart. If there are two, deduct the extra quantity with the reason "Reversing duplicate entry". Note that duplicate *Stock Change* entries are harmless — setting a shelf to 18 twice still leaves 18.

Q. Is Empty Location reversible?

No. That is why the wizard makes you confirm you have downloaded the CSV first. If you run it by mistake, use that spreadsheet with Bulk Stock Change to restore each product, and tell your supervisor.

Q. Why does the Condition column always say "Add Stock"?

A known display fault on the Stock Levels screen. It is not a button and it is not the real condition. Use the Condition filter in the filter panel instead. It has been reported.

11 Best Practices

Habits that keep stock figures trustworthy.

11.1 Before you type

- ✓ **Count first, type second.** Adjusting from memory is guessing with extra steps.
- ✓ **Confirm the product.** Part numbers differ by one character far more often than you would like. Read the whole ID back before moving on.
- ✓ **Confirm the shelf.** The Adjust window shows the location and the current quantity in its heading — use it. A correction applied to the wrong shelf creates two errors instead of fixing one.
- ✓ **Know which tool you need.** Adding? Stock Take. Removing? Adjust → Deduct. Counted it? Stock Change.

11.2 While you type

- ✓ **Double-check every quantity before submitting.** Especially in Stock Change, where the number you type replaces everything that was there.
- ✓ **Write reasons a stranger could understand.** "Damaged in transit, 3 units, claim CLM-2231" is worth something. "adj" is not.
- ✓ **Work top to bottom.** Product, warehouse, location, quantity, reason. Going back and changing something near the top clears the fields below it.
- ✓ **Never leave a default reason in place.** "Stock take" tells nobody anything.

11.3 After you save

- ✓ **Read the confirmation message.** It states the new total — check it is what you expected.
- ✓ **Confirm on the Stock Levels screen** for anything significant.
- ✓ **Do not resubmit if you are unsure.** Check Stock History instead. Duplicates are not detected, and unpicking one takes far longer than a ten-second check.
- ✓ **Report discrepancies immediately.** Large or unexplained differences are information your supervisor needs today, not at month-end.

11.4 Working in bulk

- ✓ **Always start from the downloaded template.** Do not build the spreadsheet yourself.
- ✓ **Export before you import.** Use **Export Stock** to keep a snapshot of how things looked beforehand.
- ✓ **Try a small file first.** Two or three rows will expose a naming problem before it affects two hundred.
- ✓ **Delete rows that already succeeded** before re-uploading a corrected file.
- ✓ **Watch out for Excel.** It loves turning part numbers into dates and dropping leading zeros. Check the file after saving as CSV.

11.5 Housekeeping

- ✓ **Never share your login.** Every movement is stamped with the signed-in user.
- ✓ **Lock or sign out** when you leave a shared terminal.
- ✓ **Never delete a stock record** to remove units — deleting writes no history at all.
- ✓ **Adjust as you go.** Small corrections made the same day are easy; a year of accumulated drift is a project.

12 Quick Reference Guide

One page. Print it and keep it by the terminal.

ADD STOCK · Stock Levels → Stock Actions → Stock Take

1. Choose **Product** (type to search).
2. Check **Warehouse**, choose **Location**.
3. **Quantity to Add** = how many extra units (not the new total).
4. **Unit Price** if known · replace **Notes** with a real reason.
5. **Submit** → "Added 25 units. New total: 27"

REMOVE STOCK · Products → open product → Stock Locations & Quantities → Adjust

1. Click **Adjust** on the correct shelf row.
2. Select **Deduct from Stock**.
3. **Quantity** = how many to remove (positive number).
4. **Reason / Comment** is compulsory.
5. **Submit** → "12 units deducted from stock. New quantity: 2"

ADJUST STOCK · Stock Levels → Stock Actions → Stock Change

1. Choose **Product**, check **Warehouse**, choose **Location**.
2. **New Quantity** = the figure you counted (replaces what is there).
3. Price and **Is Selling?** only if they are changing · add **Notes**.
4. **Submit** → "Stock updated from 2 to 18"

Golden rule

Stock Take ADDS to what is there.

Stock Change REPLACES it.

Shelf has 2, you want 18 → Stock Take: **16** · Stock Change: **18**.

Messages you will see

Green = saved. Read the new total.

Red = refused, nothing saved.

"Insufficient Stock" → you tried to remove more than the shelf holds.

"The ... field is required." → fill in the red boxes.

Never

- Share a login.
- Delete a stock record to remove units.
- Re-submit when unsure — check Stock History first.
- Run Empty Location without exporting first.

Always

- Count before adjusting.
- Write a reason a stranger could follow.
- Read the confirmation message.
- Report large differences the same day.

WHERE TO GO	ADDRESS
Stock Levels	<code>/admin/stocks</code> — Inventory → Stock Levels
Products	<code>/admin/products</code> — Inventory → Products
Stock History	<code>/admin/stock-histories</code> — Reports → Stock History
Locations	<code>/admin/locations</code> — Settings → Locations

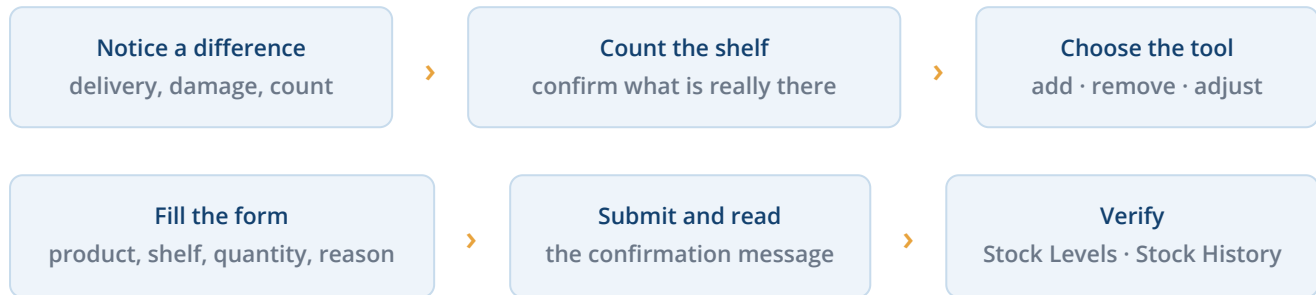
SUPPORT

Inventory Systems / IT Helpdesk — telephone *[insert number]* · email *[insert address]* · hours *[insert]*.
Have ready: the exact message, Product ID, warehouse and location, what you typed, and the time.

13 Summary and Final Checklist

Where everything fits together, and the checks to run before every save.

13.1 The process end to end



Three tools cover almost everything you will meet:

- ✓ **Stock Take** — units have arrived; add them to the shelf.
- ✓ **Adjust → Deduct from Stock** — units have gone; take them off the shelf.
- ✓ **Stock Change** — you have counted; make the shelf match your count.

Two more handle volume and clear-outs: **Bulk Stock Take** and **Bulk Stock Change** apply a spreadsheet in one go, and **Empty Location** zeroes an entire shelf after you have exported it.

Behind all of them sits the same principle: every change is attributed, dated, explained, and permanent. Nothing in WHIMS quietly rewrites the past — which is what makes the numbers worth trusting in the first place.

13.2 Final checklist — run through this before every Submit

- ☐ **Right product?** The full Product ID matches the part in your hand, character for character.
- ☐ **Right warehouse and shelf?** Especially if you changed anything above — the location may have been cleared.
- ☐ **Right tool?** Adding units → Stock Take. Removing units → Adjust / Deduct. Counted the shelf → Stock Change.
- ☐ **Right number?** "How many extra" for Stock Take · "how many to remove" for Deduct · "the final figure" for Stock Change.
- ☐ **Direction correct?** In the Adjust window, is *Add* or *Deduct* selected as you intend?
- ☐ **Reason written?** Meaningful, specific, and useful to someone reading it in six months.
- ☐ **Price entered** — if you are adding stock and know what the batch cost.
- ☐ **Exported first?** Compulsory before Empty Location; wise before any bulk upload.

- ☐ **No duplicate?** If you are unsure whether an earlier attempt saved, check Stock History before submitting again.
- ☐ **Confirmation read?** After saving, the green message should state the total you expected.
- ☐ **Verified?** For anything significant, check the Stock Levels screen or Stock History.

TIP

If you are ever unsure which tool to use, stop and ask. A thirty-second question costs far less than a correction that has to be explained at the next stock audit.

A Glossary

Words used in WHIMS and in this guide.

TERM	MEANING
Available Quantity	Quantity minus Reserved Quantity — what can still be sold.
Average Price	The average cost of one unit on a shelf. Recalculated when you add stock with a unit price.
Bulk	Doing something for many products at once by uploading a spreadsheet.
Condition	New, Used, Refurbished or Damaged. Filterable, though the Stock Levels column does not currently display it correctly.
CSV	A plain spreadsheet file. Excel can save one with <i>File</i> → <i>Save As</i> → <i>CSV</i> .
Location	A shelf, bin or rack position inside a warehouse. Stock is counted per location.
Partslink	An industry part-numbering scheme. Searchable in WHIMS.
Product ID	The code identifying a part in WHIMS. The equivalent of a SKU.
Reserved Quantity	Units already promised to orders. Not editable from the stock screens.
Stock Change	The tool that <i>replaces</i> a shelf's quantity with a figure you type.
Stock History	The permanent, read-only log of every movement.
Stock record	One product on one shelf, with its quantity, price and status.
Stock Take	In WHIMS, the tool that <i>adds</i> units to a shelf.
Sub-location	An optional finer position within a location.
Warehouse	A physical site. Contains locations.
Weighted average	A price averaged across quantities, so a large batch influences it more than a small one.

Stock Add / Remove / Adjust — User Training Guide · Version 1.0 · 27 July 2026
 Go-Parts · WHIMS Inventory Management · Confidential — internal training use only
End of document