

Oracle® Hospitality BellaVita
Master Data
Release 2.7

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Preface

This document has been created to provide a general training on master data, so that you can have information how to set up BellaVita. This documentation has been prepared based on Microsoft Windows 2003, 32bit server technology.

Audience

This guide is intended for system administrators and support familiar with BellaVita.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/ module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at

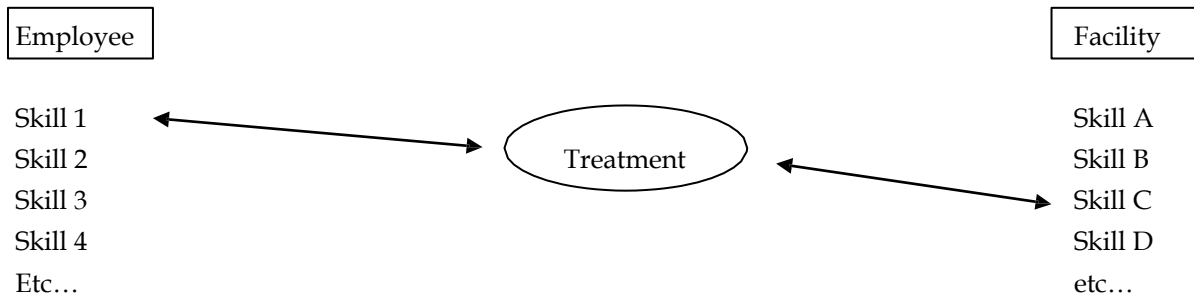
<http://docs.oracle.com/en/industries/hospitality/>

Revision History

Date	Description of Change
July 18, 2011	<ul style="list-style-type: none">• Initial publication. Document Version Number: 1.0
April 10, 2012	<ul style="list-style-type: none">• Updated and Tested Document Version Number: 1.1

1 Master Data

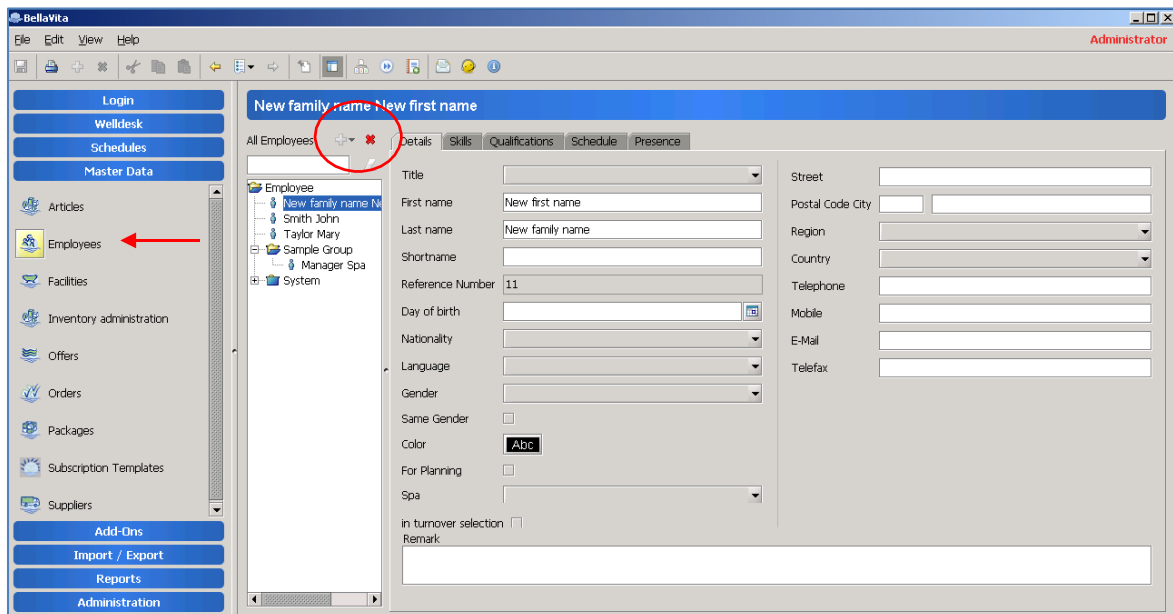
Master data contains the information which is mainly static, such as employees, treatment rooms, treatments, etc. The resources (therapists and treatment rooms) are linked to treatments by the skills that each employee represents and what is possible in the treatment rooms. You can add new skills to any employee and facility, which can be later selected in the treatment as a required skill.



Employees

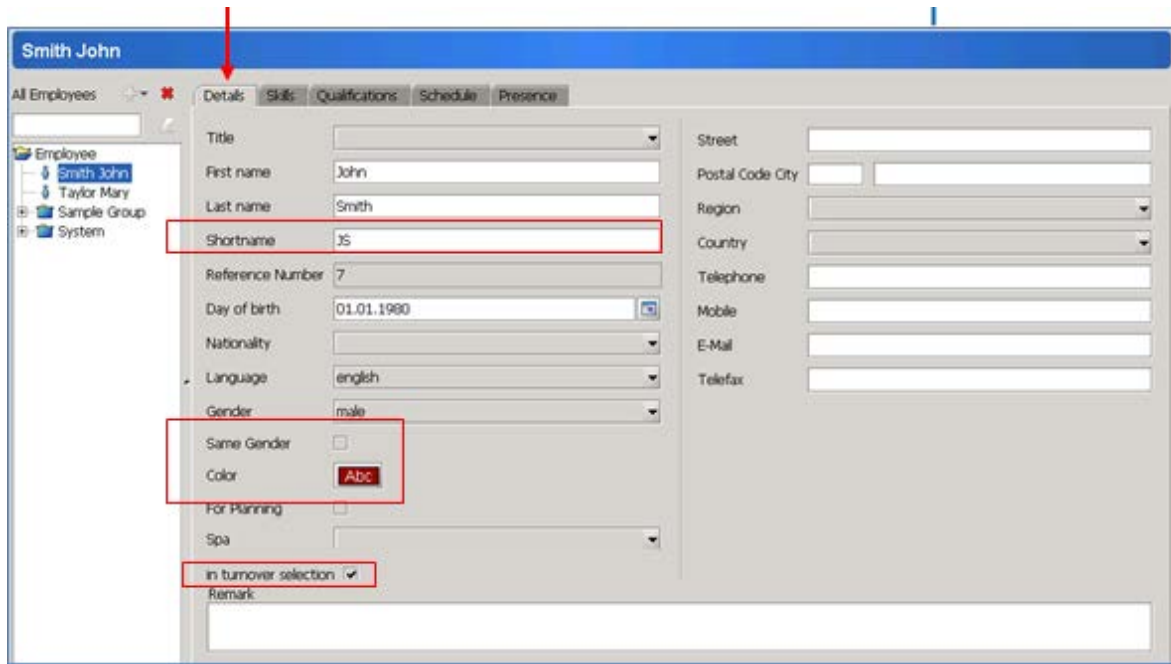
Employees can be found in the *Master Data > Employees*. You can create employees in groups or even subgroups. Click on the yellow cross **to create a new group** or employee. Highlight the group you would like to add the new employee or group to and press the yellow cross to create it. Double click or press F2 on the *new group* and give it a new name *Press Enter* to save it. For **regrouping**, right click on the group or employee and it gives you the option to do so.

To **delete** an employee, highlight it first, then click on the red X next to the yellow + sign, and verify.

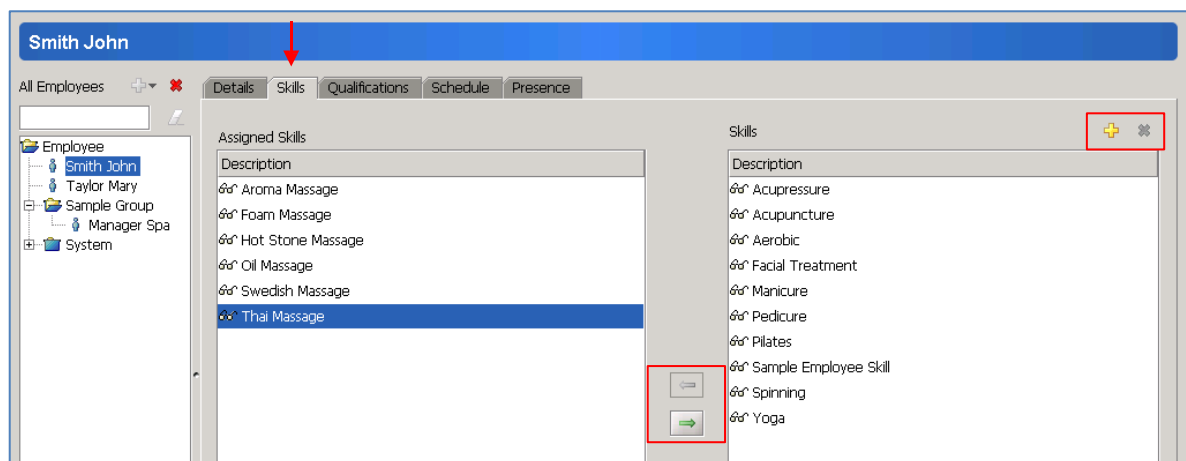


Once you created a new employee start to fill out the information on the **details tab**. All personal information can be added, as well as internal remarks. Most fields are self-explanatory, the others are listed below:

- *Short name* - relevant for journals and reports, practical when you print something where there is no space for the full name to appear. Also you can setup Bellavita to show the short names on the schedules. It is recommended for Spas with many employees.
- *Same Gender* - in case any of your employees can only treat guests the same gender as theirs.
- *In turnover selection* - when this field is ticked, the employee is administered in the commission records. This way the employee appears on the commission reports; showing all product sales that are linked to them, including the treatments they have completed.
- *Color* - a possibility for identification in the way their presences appear on schedules.



On the **skills tab** you can either create new skills and add them or add the already existing ones to the employees.



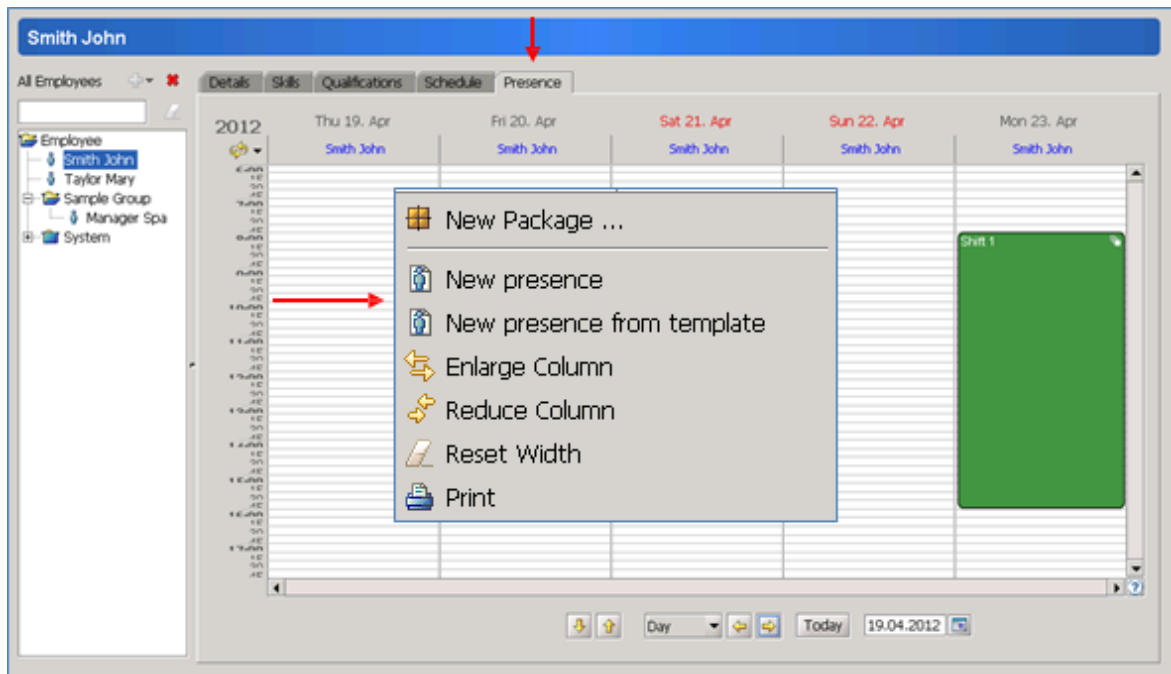
Use the yellow plus to add new, and rename it by double clicking or pressing 'F2' on it while highlighted and then press enter to save. To assign the skills to this employee, select the skill on the right column and press the arrow pointing to the left.

To unassign a skill, select it on the left, and press the arrow pointing to the right.

Employee skills are always indicated with a glasses icon.

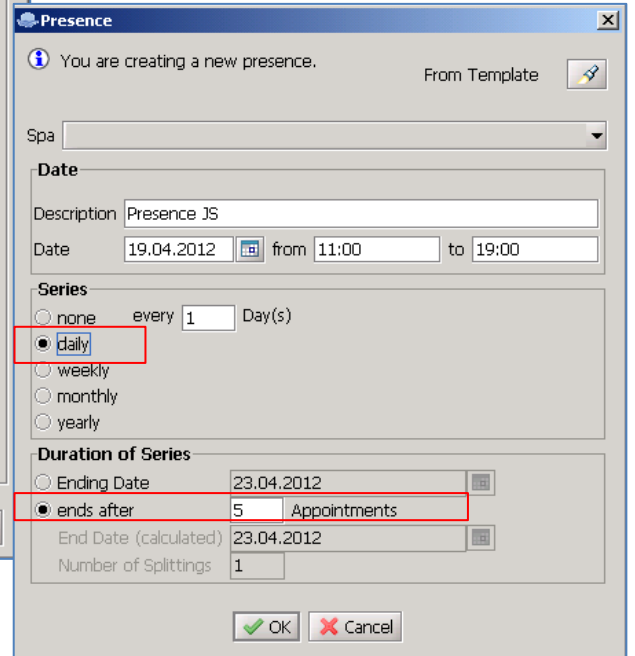
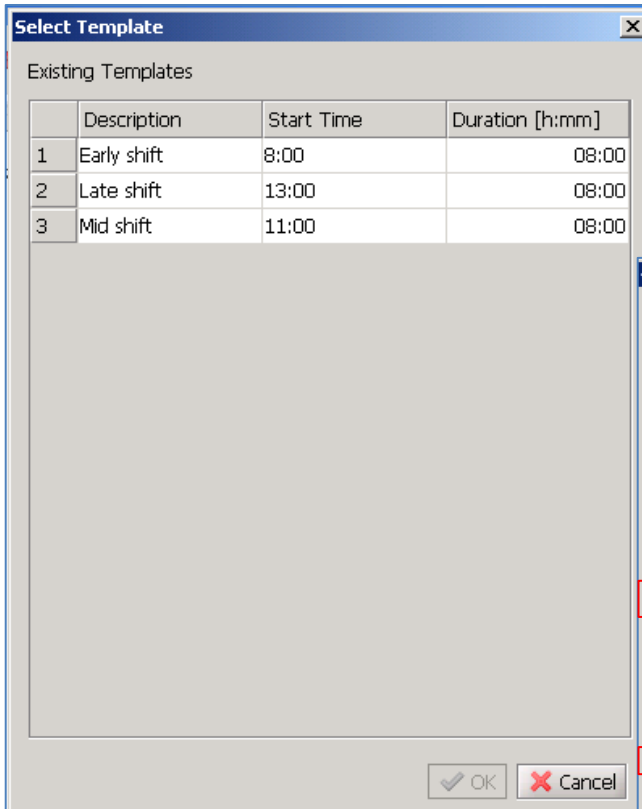
Presences are the working hours/shifts of the employees. You always need presence to make a booking for an employee.

Right click on the calendar to add a presence. Choose from the options of adding a presence using template or not. (Templates set up in administration are useful if the shifts are mainly fixed hours. For example: Early Shift, Middle Shift, Late Shift, etc.)

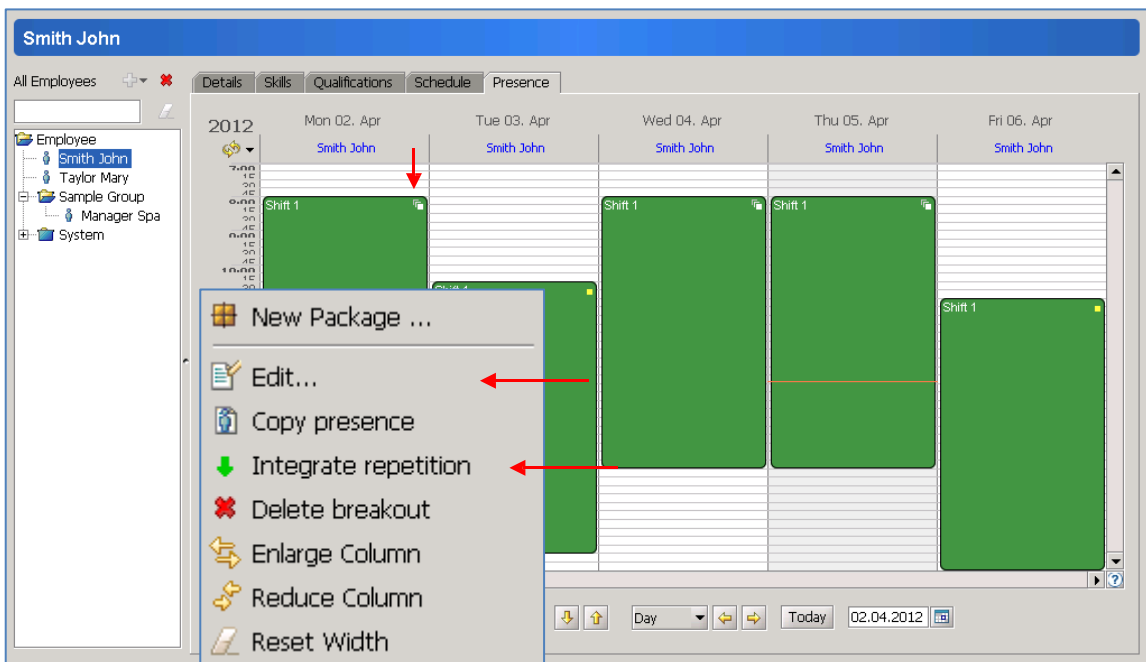


Enter or change the "from" and "to" times; select the series for the repetition of this shift; and edit the duration with an end date or "end after" the number of repetitions. Several presences can be extended, reduced and moved in time on this presences tab, so it is practical to enter the series as repeating daily, end after as many days as they work in one row.

The repetitions can be used in daily, weekly, monthly and yearly periodicity. Select weekly if the employee is only available on a certain day every week.



Once confirmed, all the presences are displayed. If you would like to change the whole series all together, just use the right click menu and edit series.



Use drag and drop to move one presence – this means that it will automatically be separated from the series and will be edited on its own. (The white squares at the top right corner of the presence show that it is part of a series, yellow means it is independent.)

Pressing the shift button and holding your cursor on the beginning or end of one shift, the cursor changes to a vertical arrow, which means that you can extend or shorten the selected shift.

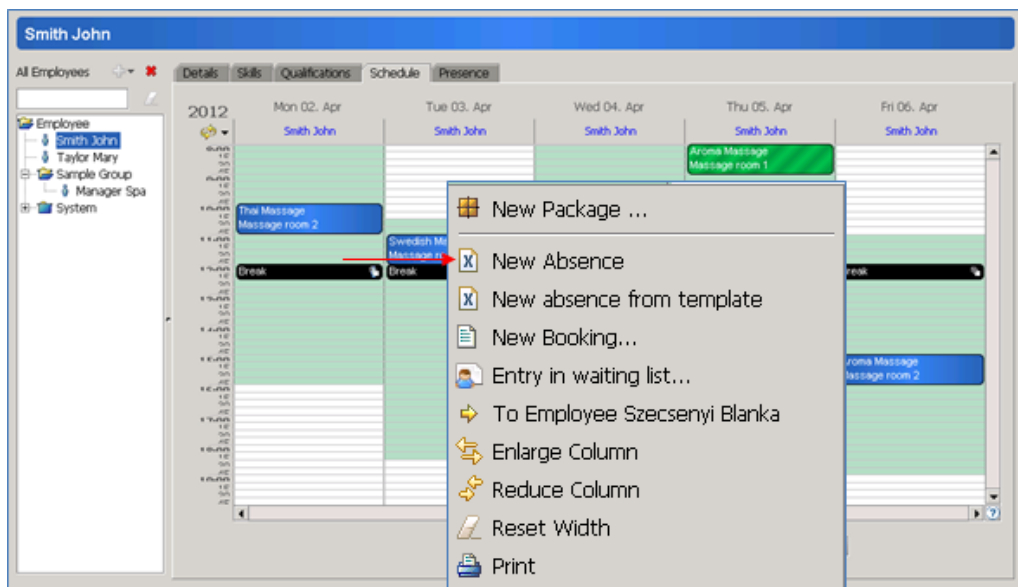
The presences will be displayed on the schedule. You can only delete a presence (right click menu option on the presence: delete breakout) if there are no bookings or absences on it.

Use the 'Copy Presence' option to copy the selected shift(s) then select the future date where you would like to paste the same shift(s). This speeds up the process, and by editing the inserted presences, makes the presence creation much easier.

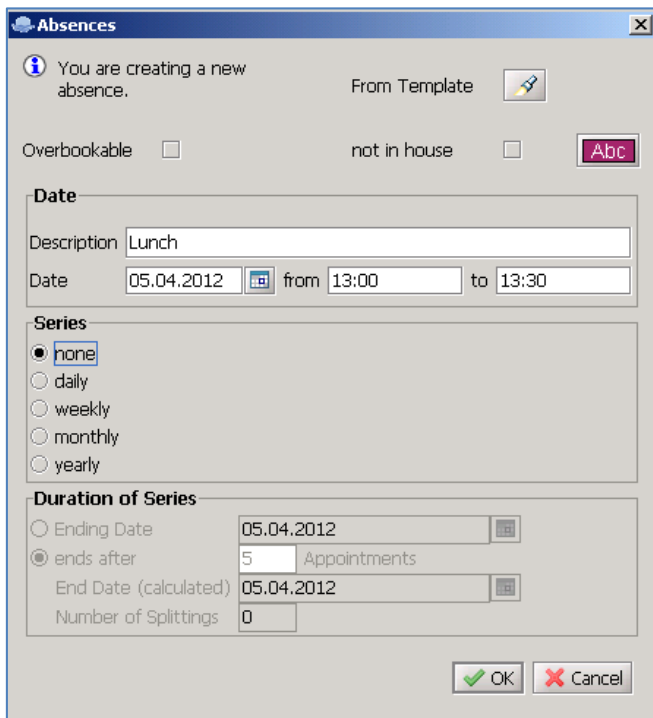
From the Presences Tab you can print out the selected employees shifts for the certain time range by right clicking to the white area in the calendar, and selecting the 'Print' option.

Absences are set on schedules. To Set up an Absence, first you need to enter the Presences of the selected Employee.

Right click on a displayed presence and select new absence from template or not. Set up the details as it is explained for presences.



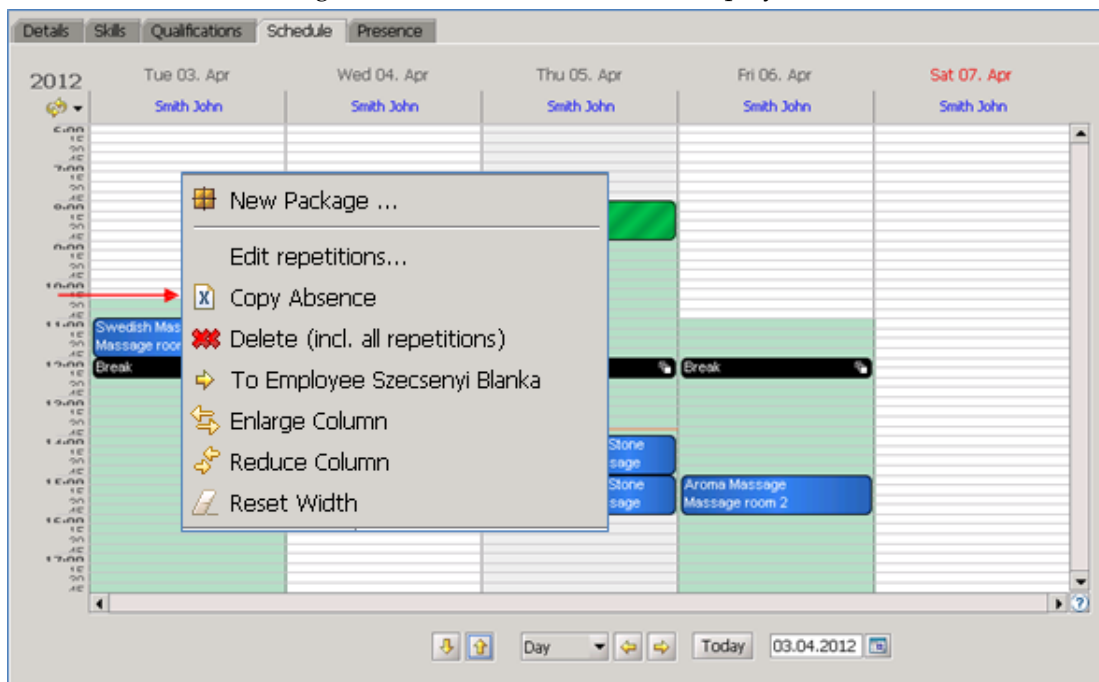
- *Not in house* option is used for example in case of an absence set up for an external meeting.
- *Overbookable* can be used in case you want to arrange the breaks flexible to the occupancy of the spa. This means that when making a booking, the system takes the overbookable absence as a bookable time of the employee – which helps you to complete the booking creation and you are able to change the absence later.



Changing absences can be done the same way as the case of presences, but on the schedules tab (and other schedules where the employee is displayed) instead of the presences tab.

It is practical to add the absences on the main daily schedule – so you can see the occupancy of the day and compare the schedule of all your employees. You can also use the option to copy absence, and paste it on other employees' presence.

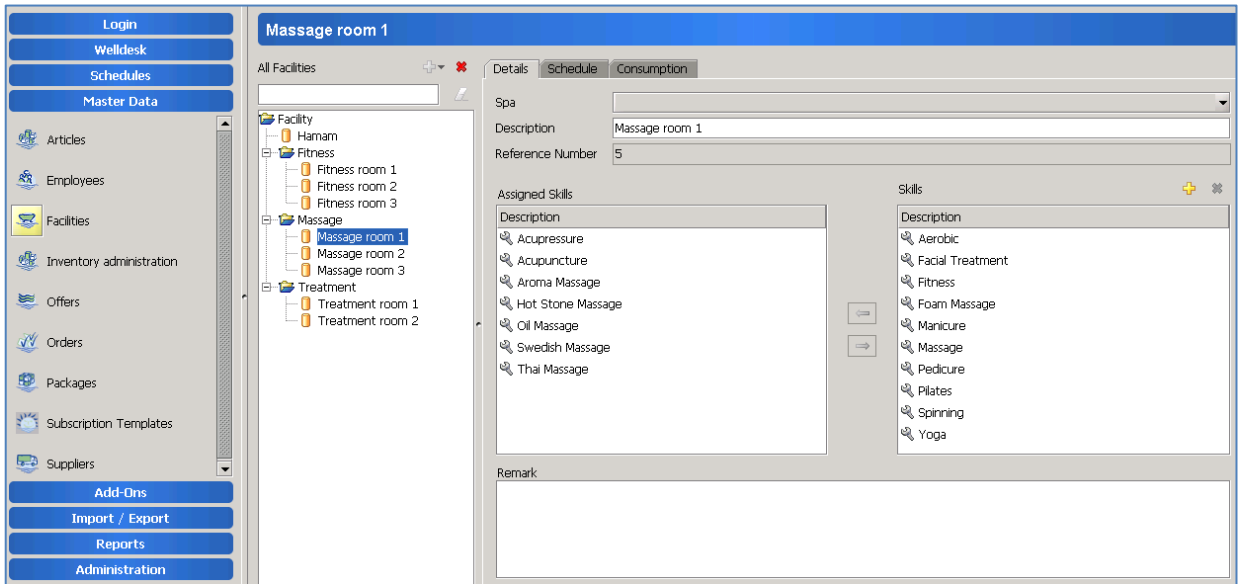
You can also make bookings from this tab for the selected employee.



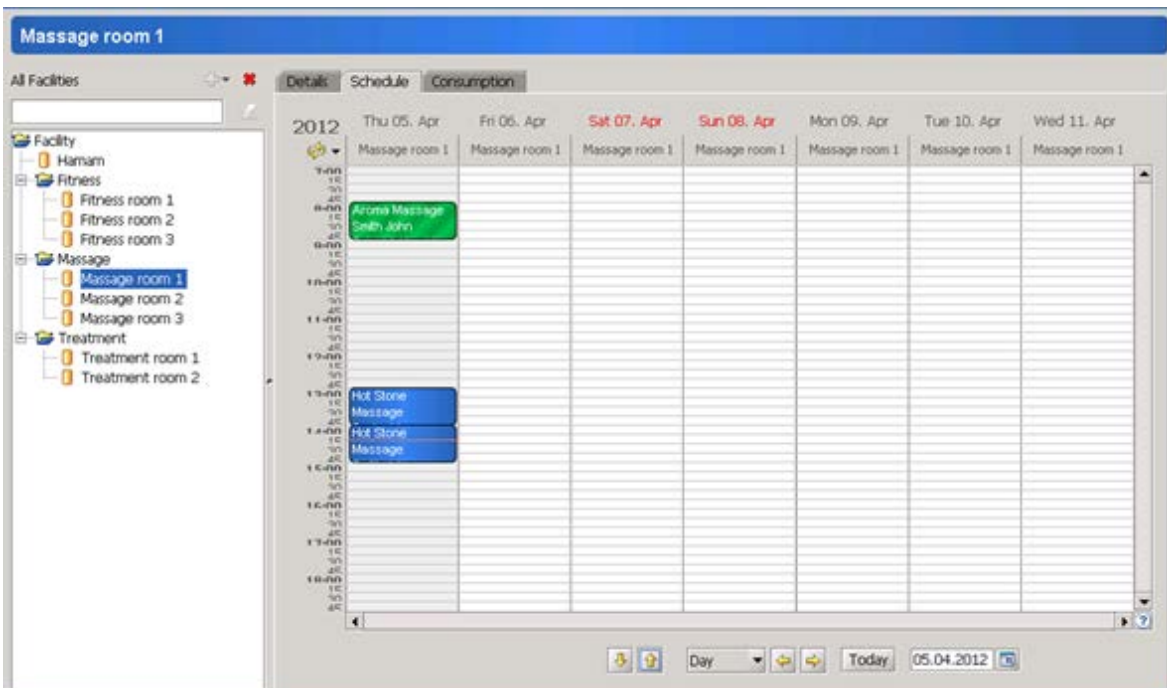
Facilities

Create and group facilities (treatment rooms) the same way as it is explained with employees. Add a description/name on the **details tab**; create, assign and unassign skills for the facility under the description as described in the case of employees.

You can add a remark in the bottom of this tab, such as detailed description of the room, location, etc.



The **schedules tab** shows the bookings which are allocated in this room, and you can create new bookings here as well for the selected facility.



Treatments – Offers

Create and group offers (treatments) the same way as it is explained with employees.

On the **details tab**, give the description (name), use the offer number option if necessary and not set to automatic, and the duration of the treatment. You can set up preparation and clearing time as well if required. In the remark section you can add any text you would like as internal note.

- *Package Offer only:* - Make this tickbox active, if the selected offer can ONLY be sold as a part of a package, and not separately.
- *Guest is overbookable:* - It is mandatory to tick this box if the guest can attend on another treatment parallel with the selected one. For example this field is active on treatments like pedicure, manicure etc.

(To book a 2nd treatment at the same time for the same guest, you also have to tick the 'Overbookable' box on the guest profile as well)

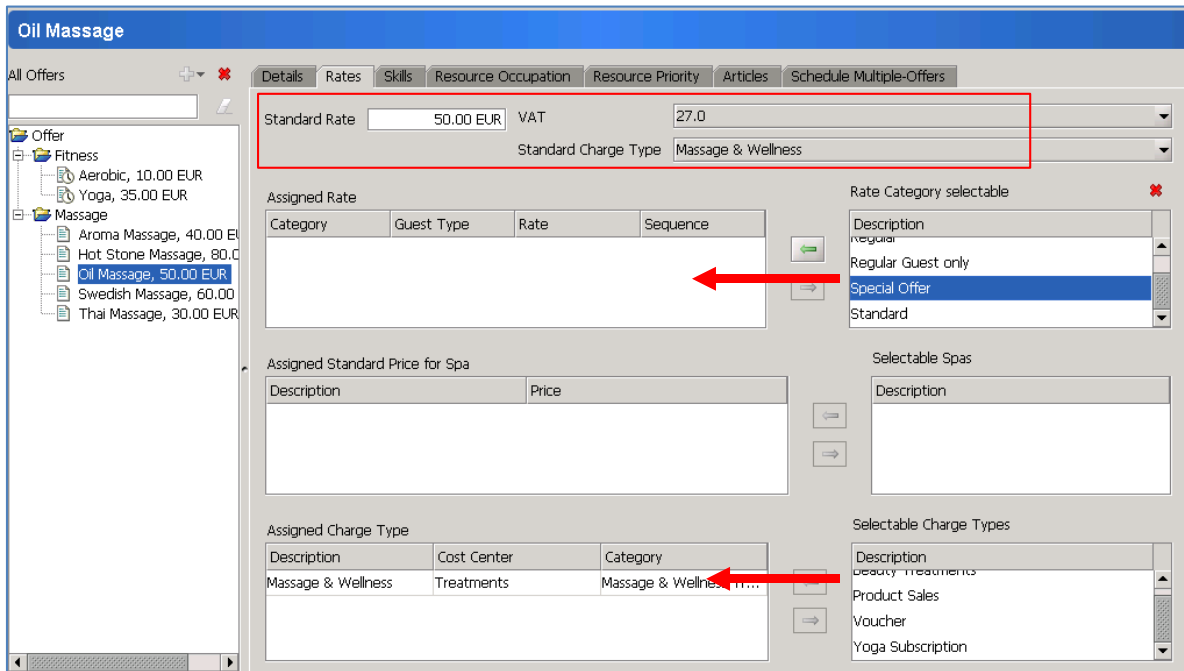
- *Max Participants:* - You can setup the maximum number of guest that can attend to the selected treatment. The offer has to be either a Group Offer or a Multi Offer to setup the number of participants.
- *Group Offer – Multi Offer:* - The only difference between them is the way of the payment:
 - Select Multi Offer when the participating guests pay separately, e.g. Aerobic course
 - Select Group Offer when there is only 1 payment, for example, when a company pays for all the participating guests.

The **rates tab** contains the accounting information.

At the bottom you need to select the charge type previously set up in Administration. Highlight the one you need on the right, and use the arrow pointing to the left to assign it. If you would like to assign any additional rate categories (rates) that can be chosen that the time of charging apart from the standard, highlight them on the right, assign with the arrow pointing to the left and enter the rate you would like to have on this category.

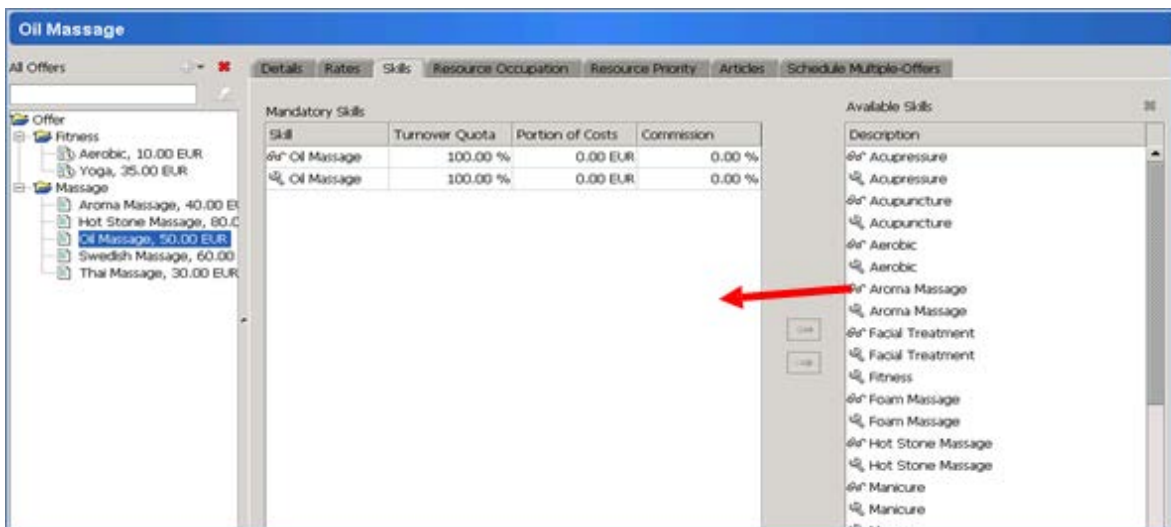
In the Rate Category window you can also select, and setup the special / discount price for certain guest types, seasons, etc.

On the top, select the VAT category, the standard rate, and from the drop down menu choose the same charge type as at the bottom.



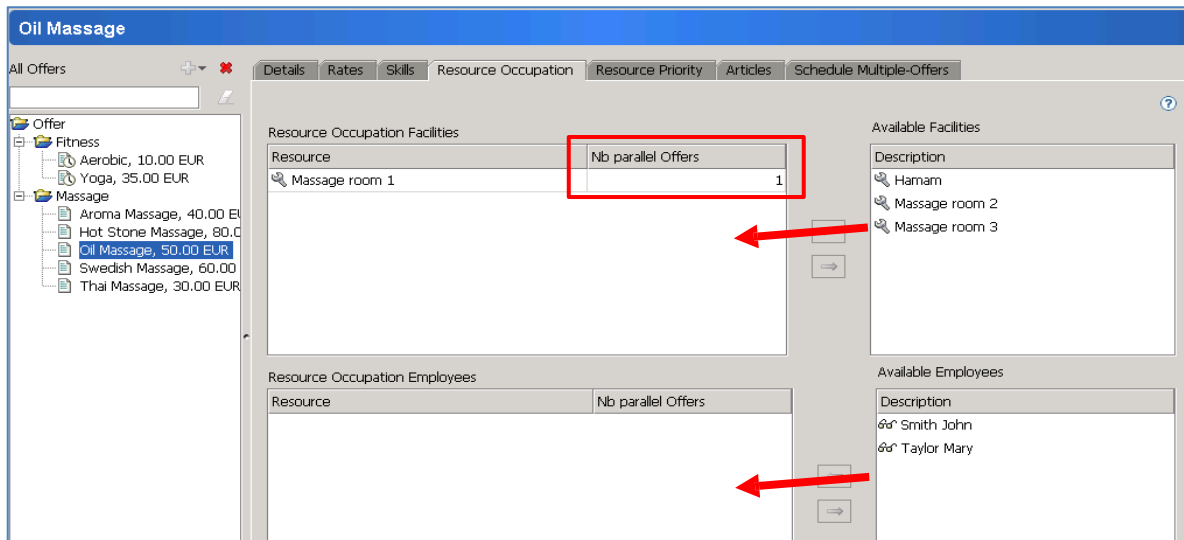
As mentioned before, the link between the treatments and the resources is the skill. On the **skills tab**, you need to select at least two skills (one which is of an employee, another which is of a facility) that is required to complete the treatment.

The skills indicated by glasses are the skills of employees; the screwdrivers are skills of the facilities. The reason why you cannot add a new skill here is that you should not create an offer which you are unable to perform in the lack of skilled resources. Assign the required skills as explained earlier.



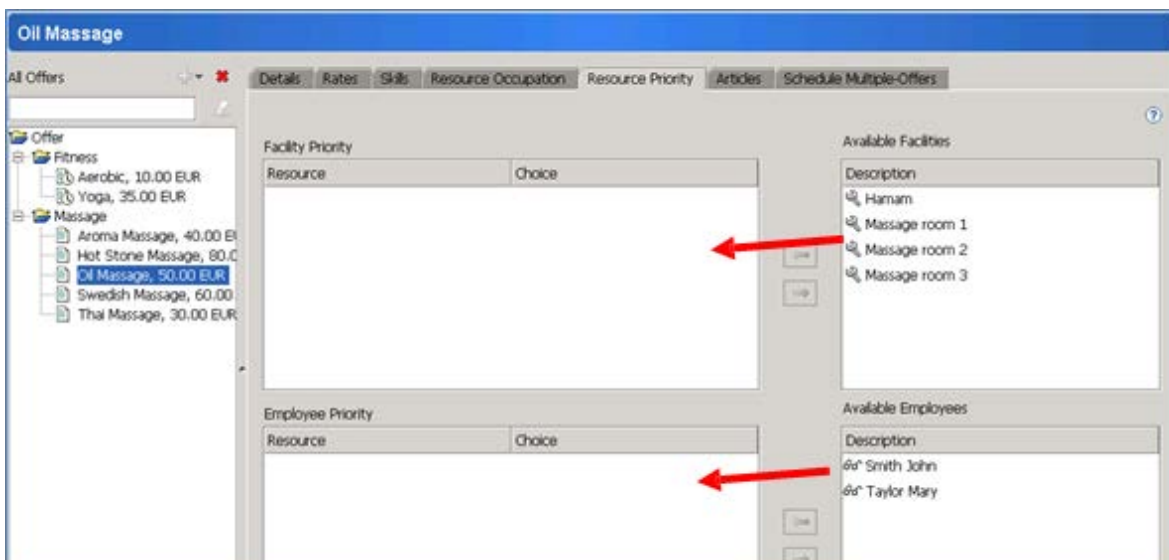
In certain occasions some resources may be overbookable for certain reason. If this is required, select the available facility and/or employee on the **Resource occupation tab** and once it is assigned (by highlighting and using the arrows) you can enter the number of parallel activities that one employee can do or what one treatment room can accommodate.

For example if a guest can have a manicure and pedicure at the same time, the two treatments have to be in the same room, so the room needs to accommodate two parallel treatments. (In this case the guest will need to be overbookable as well, which will be set later, explained on the guest profile.)



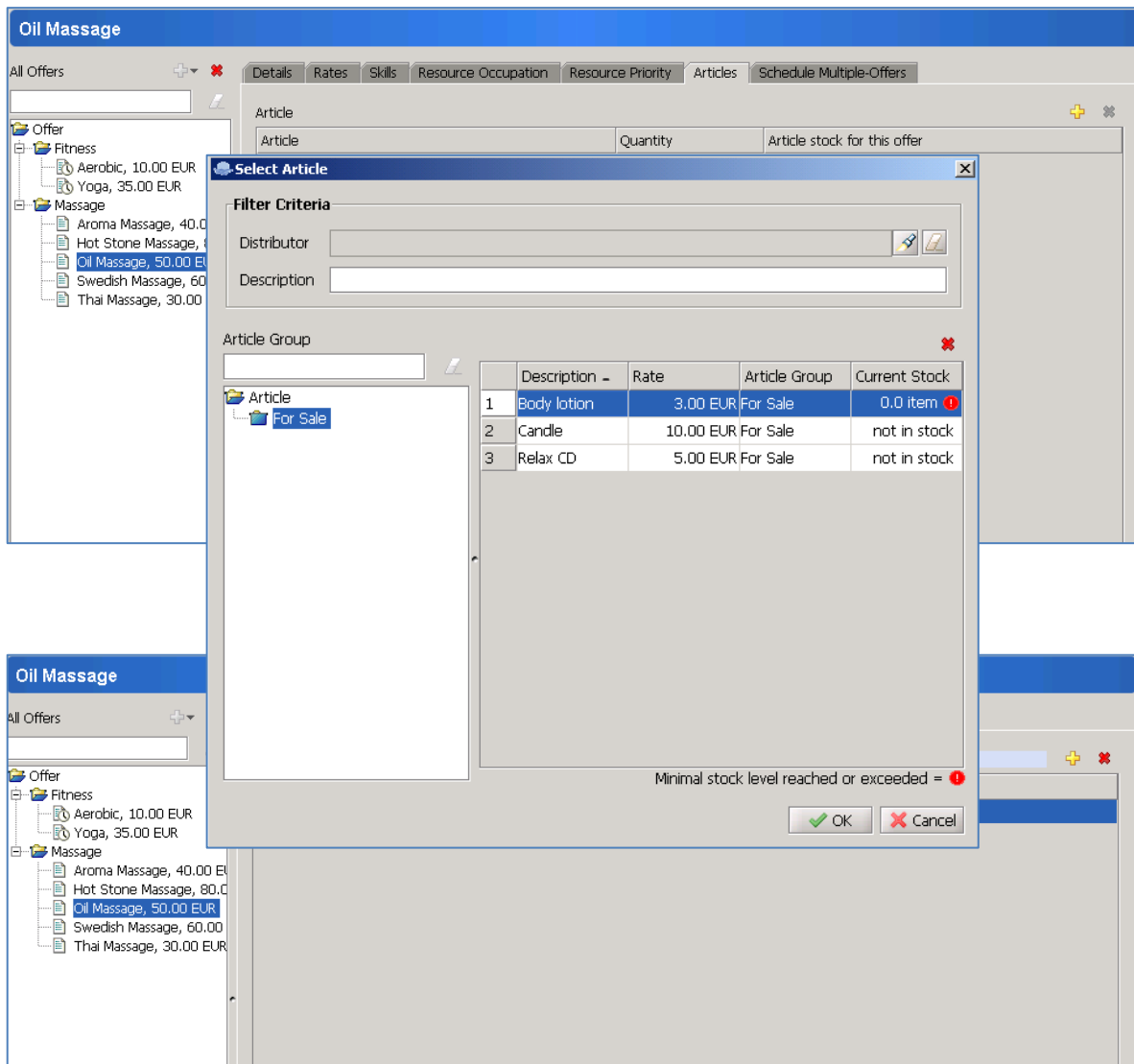
If you would like to set up a priority list for the resources to be selected by the system in a certain order, you can arrange this in the **Resource priority tab**.

You can select one resource that should be used before others if it is available, or set up the complete list with the required order. Do this by highlighting the resource on the right, and move it to the left with the arrow, then enter a number in the choice column. If the prioritized resource is not available, the system assigns the next one in line and informs you at the time of booking.



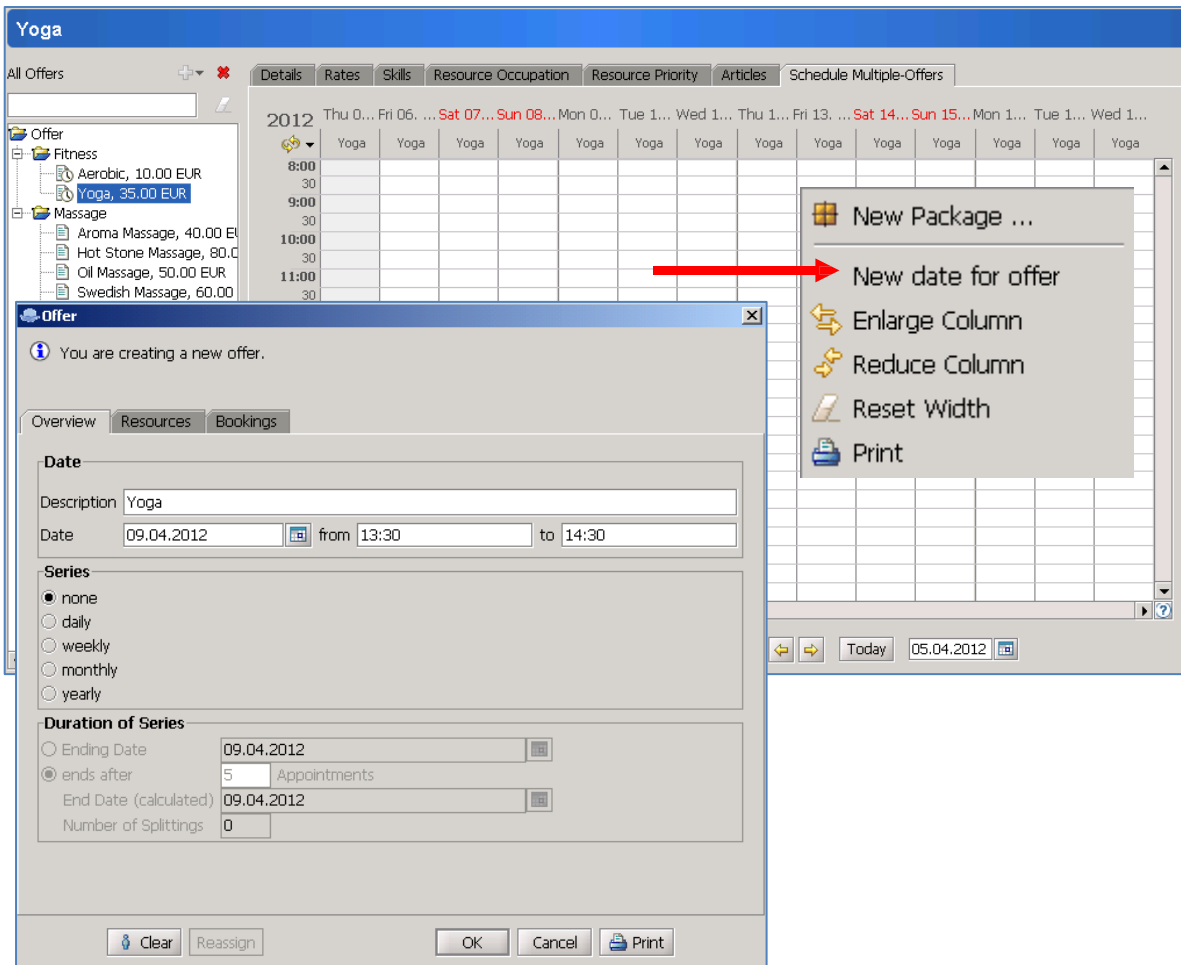
To keep track of the products used in a treatment, you can create a recipe on the **articles tab**.

Add the articles (products), the amount required, the stock will be taken from by the yellow cross. This can be only done once the inventory details are set up.



If your offer is not a treatment but a class that more people attend, the offer is handled as a Multi Offer or a Group Offer in Bellavita. This has to be selected on the details tab of the offer, indicating the maximum number of participants.

The schedule of the classes is edited on the **Schedule multi offer tab**. With the right click menu on the schedule you can enter a new date for the offer which is basically making a booking for this multi offer.



When creating a new date, you need to add the required details, the time and the series details (like it was explained at the presences and absences). When making a booking, you just need to double click on the booking in the schedule, select the bookings tab and add the booking as it will be explained later in the bookings section.

Packages

Packages can be found in the *Master Data > Packages*. You can create packages in groups or even subgroups. Click on the yellow cross **to create a new** group or package. Highlight the group you would like to add the new package or group to and press the yellow cross to create it. Double click or press F2 on the *new group* and give it a new name Press Enter to save it. For **regrouping**, right click on the group or package and it gives you the option to do so.

To **delete** a package, highlight it first, then click on the red X next to the yellow + sign, and verify.

Details tab

The screenshot shows the 'Weekend Package 20%' details form. The left sidebar has 'Packages' highlighted. The main window shows a list of packages with 'Weekend Package 20%' selected, indicated by a yellow cross icon in a red box. The details form includes fields for Description, Short Description, Package Number (16), Duration (2), Rounding Amount (0.00 EUR), VAT (27.0), and Remark.

Edit the name of the package in the description field. Choose the charge type as *packages*.

- Duration has to be changed from 0 to the number of days the treatments in this package has to be consumed in. Do not leave it 0.
- Set VAT
- Rounding amount: the amount the total price for package differs from the total value of treatments/products included in it.

Offers tab

The screenshot shows the 'Weekend Package 20%' offers tab. The 'Offers' section contains a table with two rows:

Quantity	Offer	Charge Type	Unit Rate incl. ...	Total Amount i...	Price reduction,...	replaceable
1	1 Swedish Massage	Massage & Well...	60.00 EUR	60.00 EUR	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	1 Oil Massage	Massage & Well...	50.00 EUR	50.00 EUR	<input type="checkbox"/>	<input type="checkbox"/>

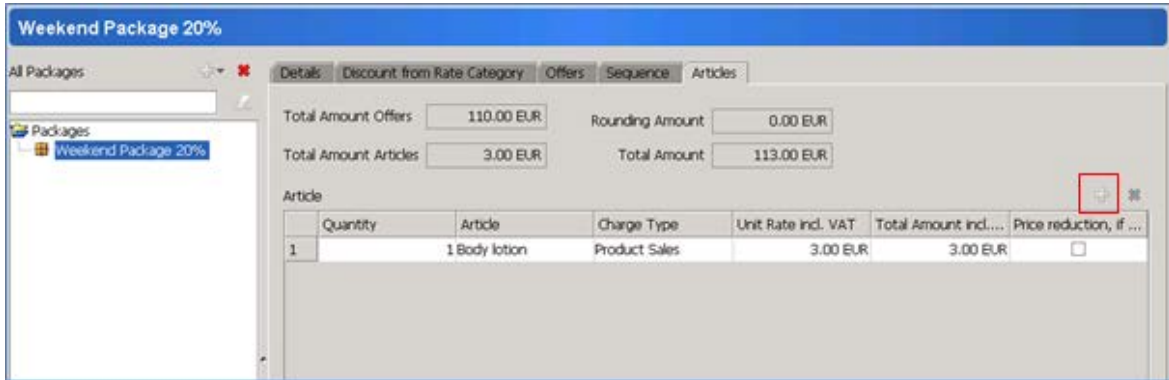
A yellow cross icon is highlighted in a red box next to the table header.

Use the yellow + to add the offers included in this package.

Price reduction, if removed means that if someone does not consume the whole package, the price of this offer will be deducted.

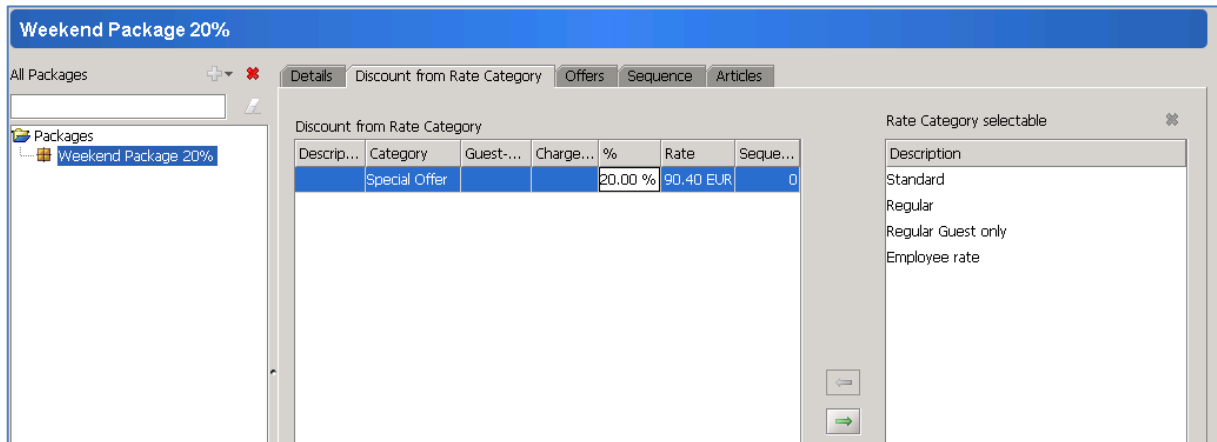
Replaceable means that when the booking for this package is made, this offer can be changed to another similar one.

Articles tab



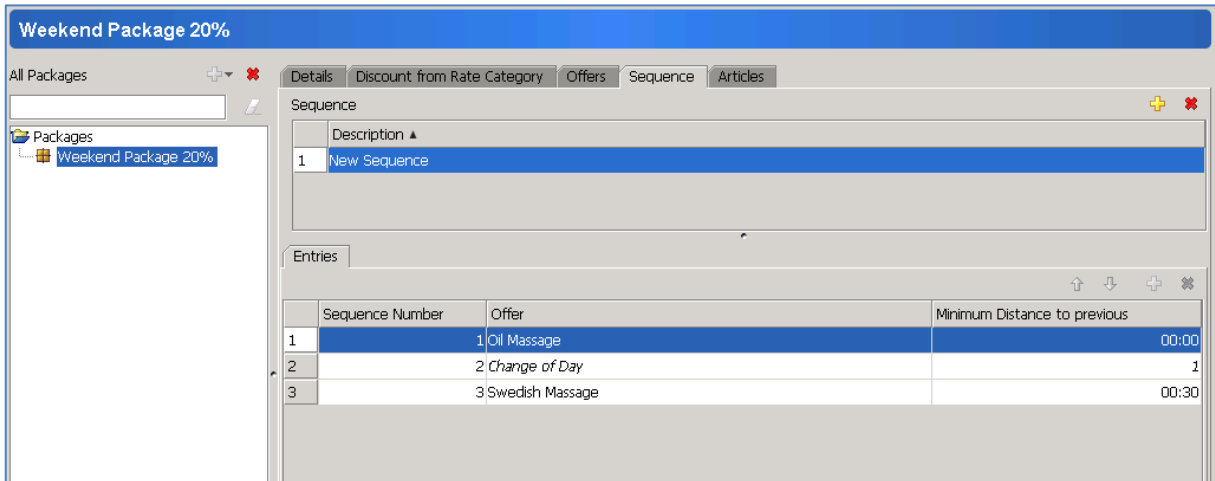
If your package includes sales articles, you can add them here by the yellow cross. You can see that the total amounts are changing on the top of the window as you add the treatments/products. The rounding amount set in the details tab appears and the total amount shows the price of the package.

Discount from Rate Category tab



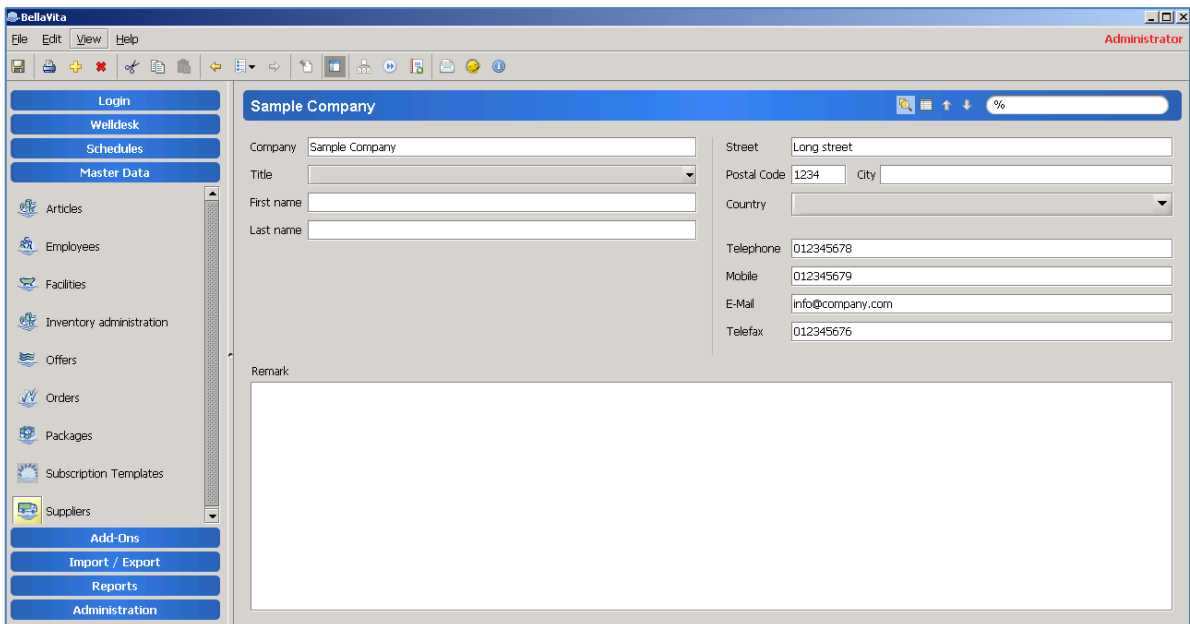
If you want to give discount from the whole package, you can do it on this tab. Select the rate category on the right column and press the arrow pointing to the left. You can put the percentage rate of discount manually into the cell.

Sequence tab



The sequence of offers in New Sequence is defaulted from the sequence you added the offers to the package. When you click new sequence, the details are displayed below. You can change the sequence by highlighting the offers and using the up and down arrows. You can also set up "minimum distance to previous" if any of the treatments cannot be done right after each other.

When you click on any treatments, the yellow + becomes active on the top of the list in the line of Entries. Using this you can add "day break" when you have multi day packages.

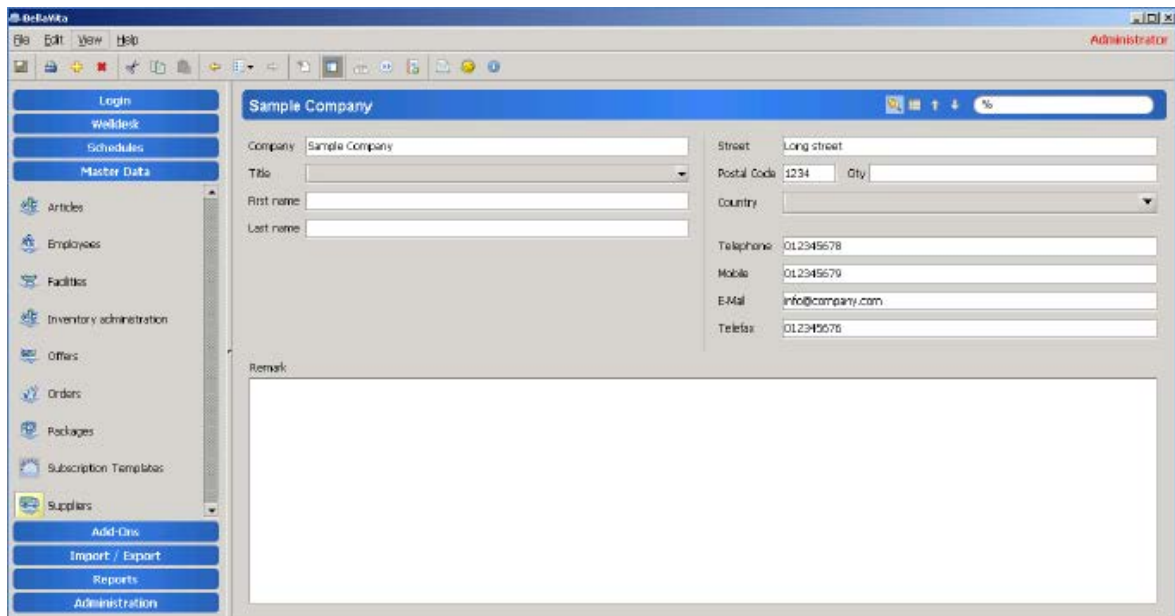
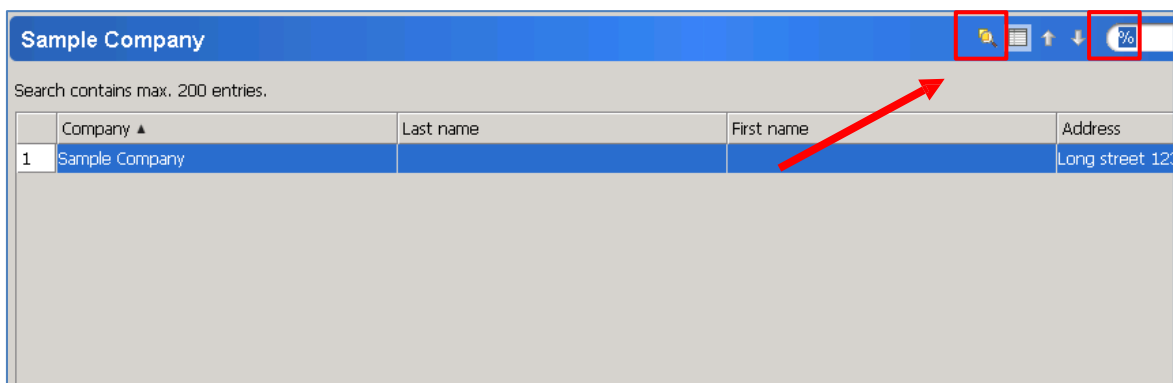


Inventory

Inventory management can be used as basic or as advanced as you need it. The general idea is that there are two types of products in the inventory: **retail products used for sale** and **products used during treatments**. Starting with suppliers, the products can be grouped by categories with separate subcategory for the non-retail products; and once it is done we can work with orders and inventory administration.

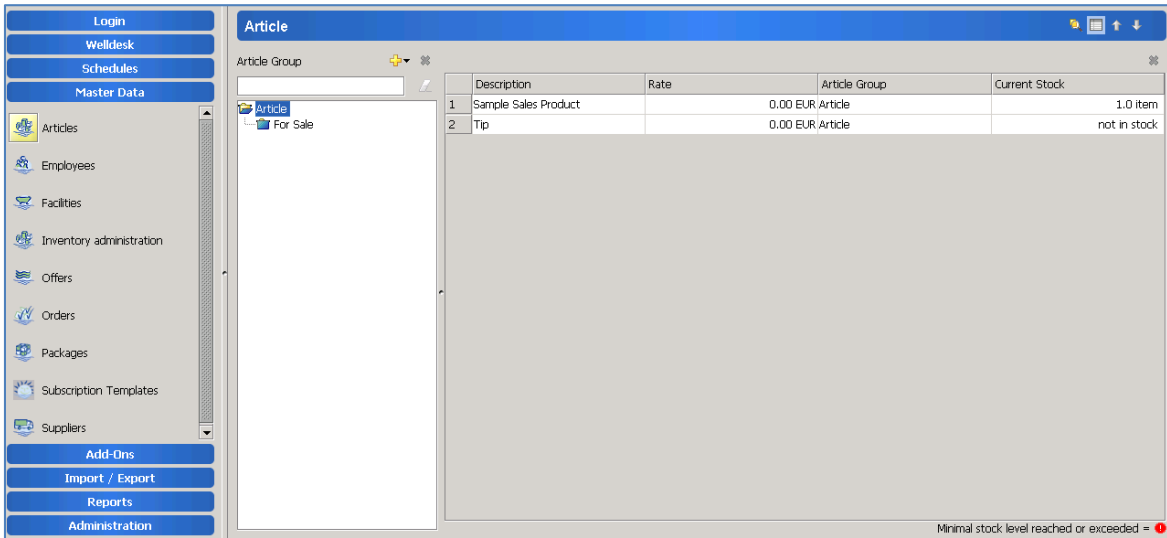
Suppliers

After clicking on Suppliers in Master data, add a new supplier by the yellow cross. Fill out all the details, but please note that apart from the remarks section all details will be printed on the order form. If there is more than one supplier, you can access the list with the 'list' icon on the top right corner, and typing a % in the search field.

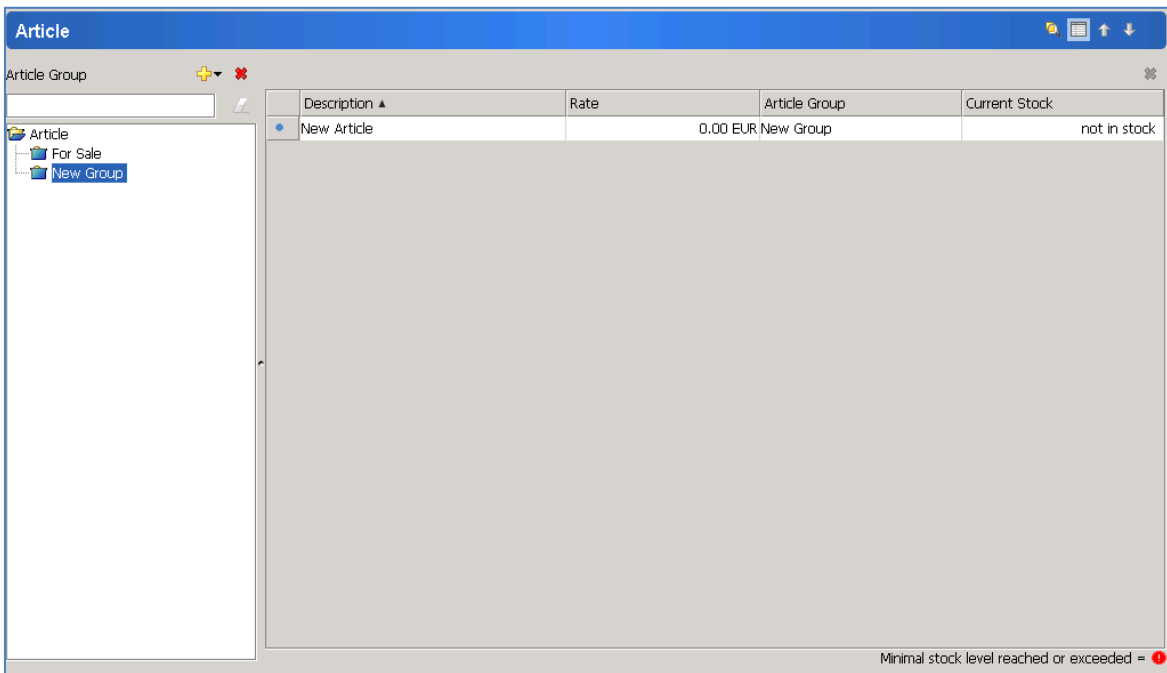


Articles / Products

Select Articles in Master data. Highlight the group you would like to add a new group or article to, and press the yellow cross. The groups appear in the left column, while the articles within the groups show on the right in a list. Double click or 'F2' on the group to rename, and right click on the item to regroup.



The new article will show on the right hand side, as 'New Article':

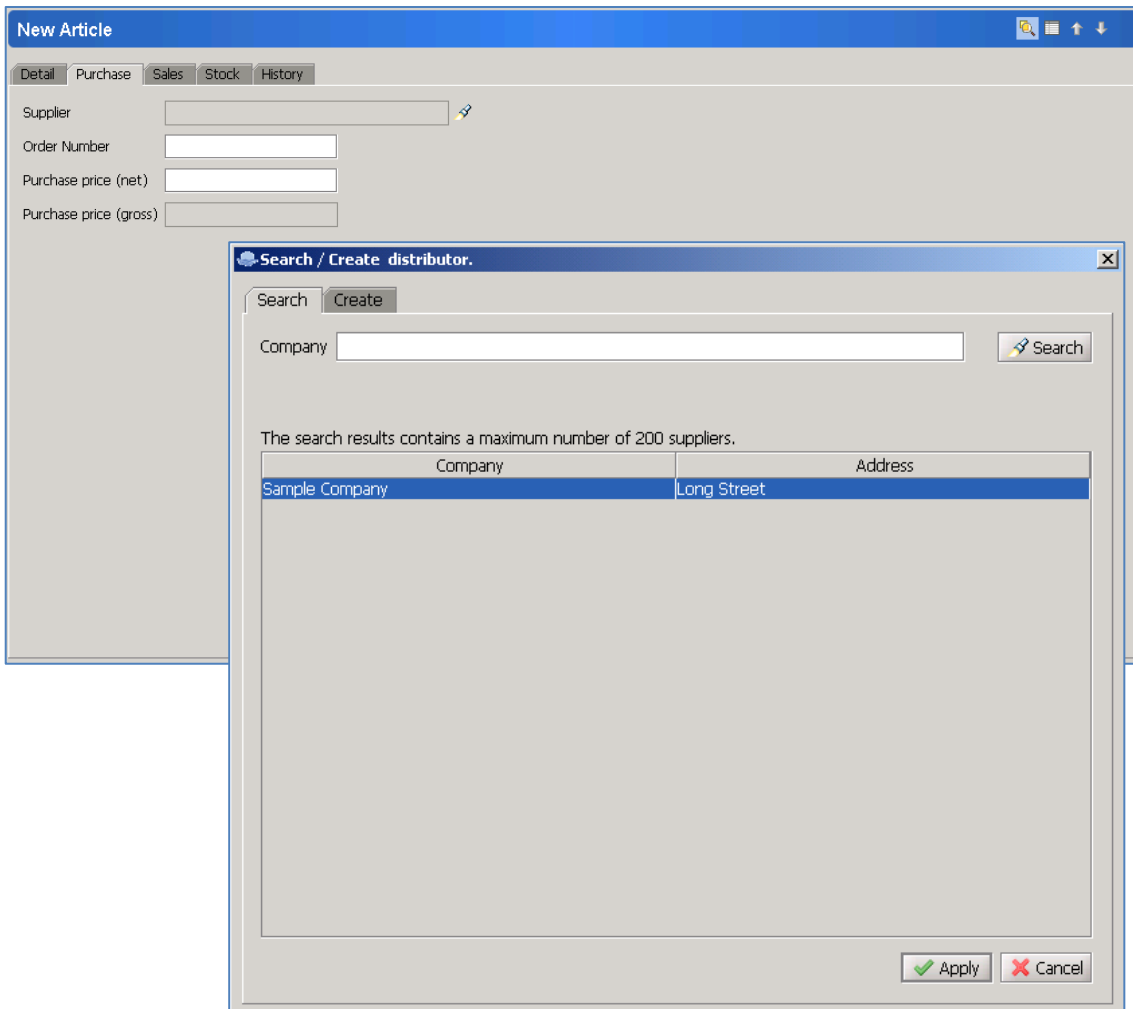


To edit the new article, double click on it to be transferred to the next window where you can rename it and add additional information.

- Change the *Description* to the name of the article.
- *Article Number* is automatic.
- *Article group* is showing in which group you created/moved this article to.
- *EAN-13* is the barcode of the product – used only when you have a barcode reader
- *Quantity unit* is item for all retail products. Choose litre, kg, etc for the salon products.
- *Turnover relevant* will make this product become commissionable. Only tick it for the sales products.
- *Card Validity (months)* is used if you are setting up membership cards for sale.
- *Remarks* are for your internal notes.

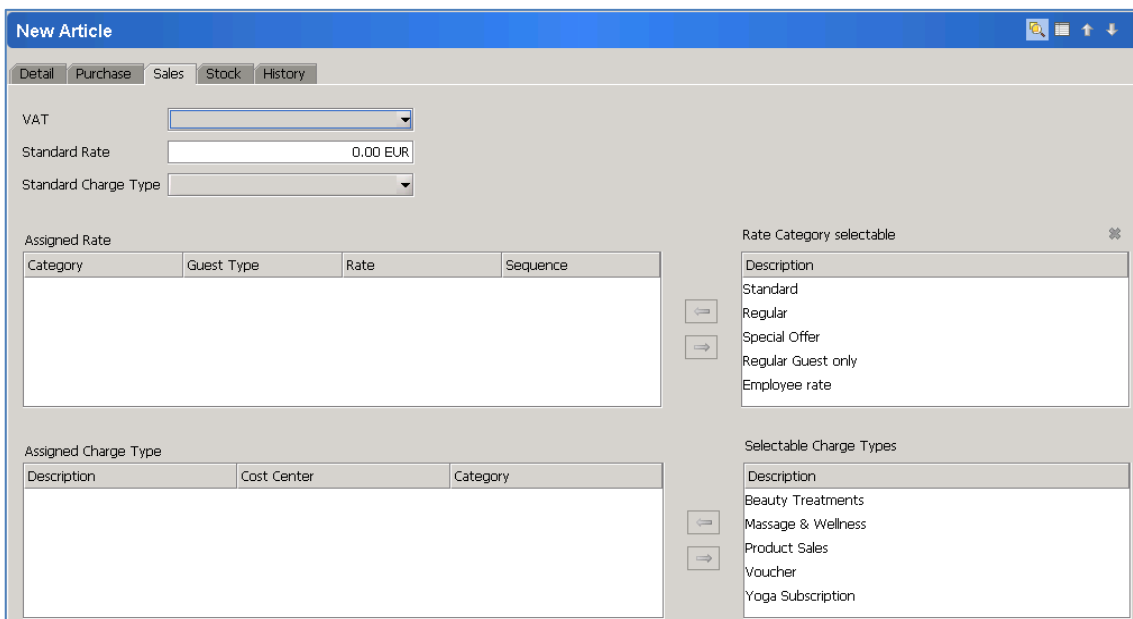
The **purchase tab** requires information of your supply of this product.

- *Supplier*: - Search for supplier with the torch, and apply the selected company.
- *Order Number*: - This can be entered as the code of the product used by the supplier on your orders.
- *Purchase price (net)*: - Enter the last price you had on your order for this product. (It can be updated on every order in the future.)
- *Purchase price (gross)*: - This field will be automatically populated after you enter the VAT on the next tab.



On the **sales tab** you need to add the information relevant to your sale **in the case of retail items**. In case of **salon products** all you need on this tab is the **VAT**.

Fill it out as it was described in the case of offers' the sales tab.

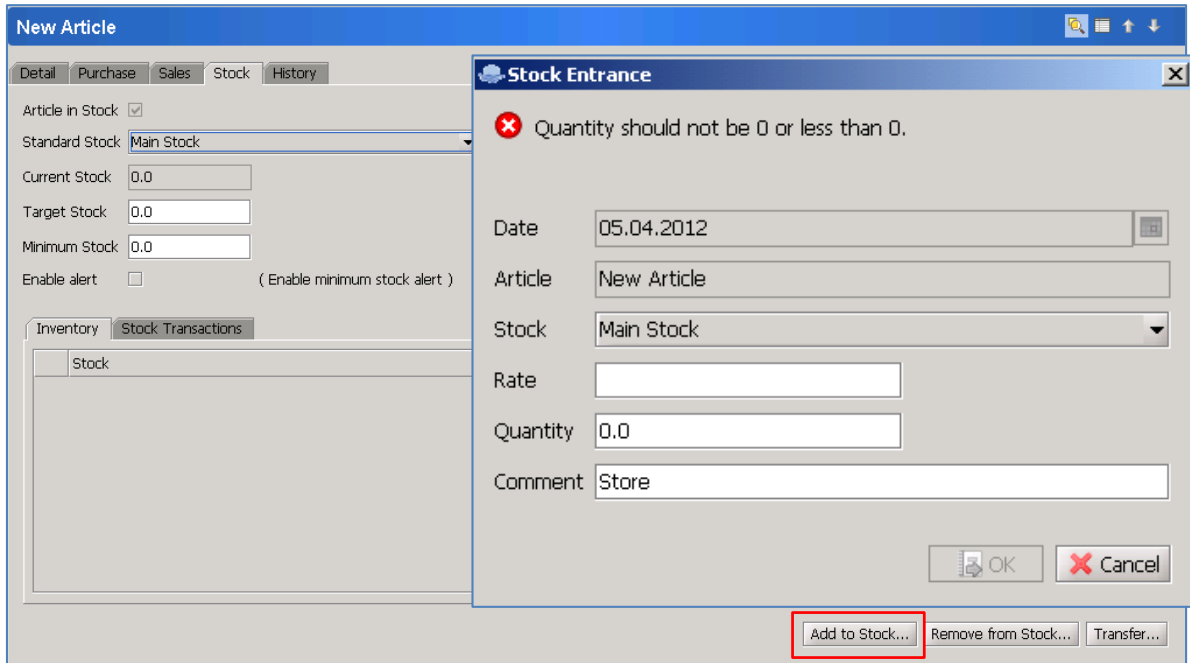


The **stock tab** allows you to select the stock information of the product. Select from the drop down list the standard stock you keep these items administered in.

Once it is done, the 'add to stock' button becomes active and you can add the existing items to your stock.

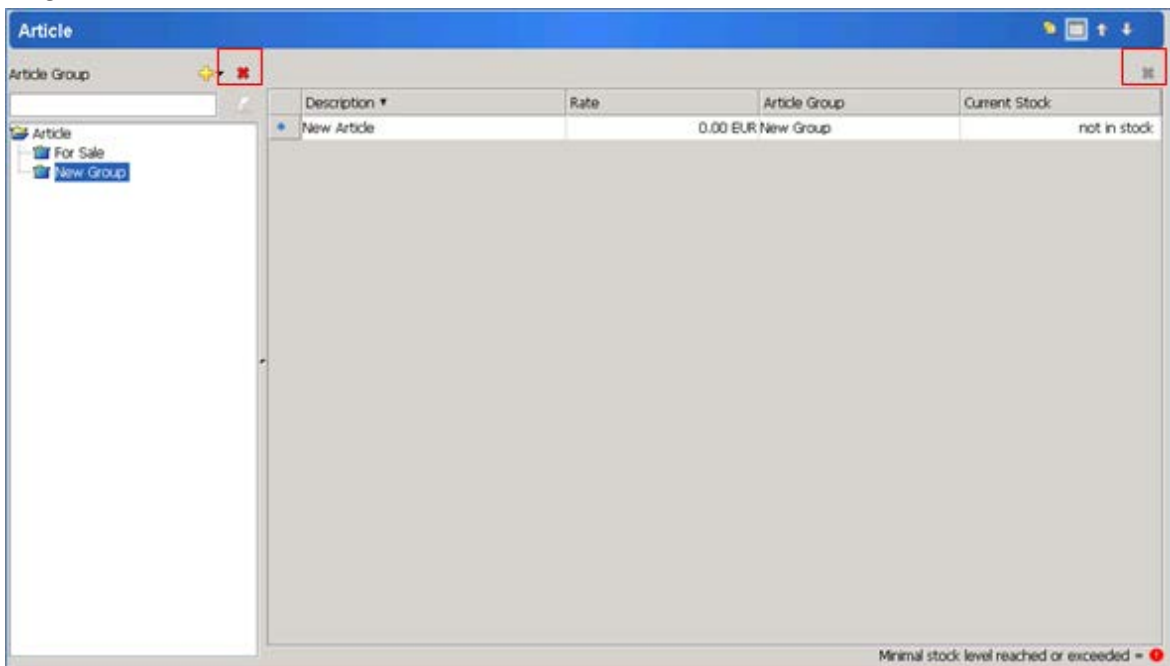
"Remove from Stock..." lets you remove any items from the stock.

"Transfer..." lets you select another stock to move items to.



Your current stock will appear on the top in the *Current Stock* line, as well as on the list on the bottom. You can check any stock transactions, sales on the **stock transactions tab**.

To get back to the main list of articles double click on the title of the article in the blue field.



To delete an article, highlight the article on the list on the right and use the red cross in the top right corner.

To delete a group of articles, highlight the group and use the red cross on the top of the list of groups on the left side. Groups can only be deleted if there are no articles in them.

Orders

Select Orders from Master data and add a new order by the yellow cross. Add the details of the supplier first – as this determines what you can put on this order. Select the supplier as explained in the articles – stock tab section.

Article	Purchase Rate	Quantity	Total delivered
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! = This article does not belong to the chosen supplier.

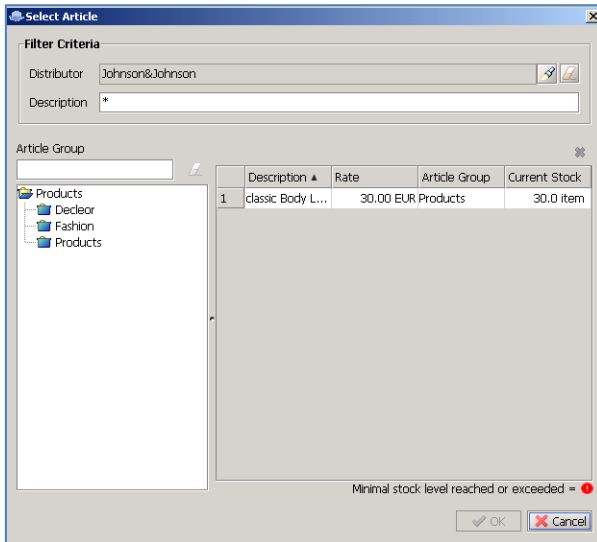
The order number is automatic. Depending on the details you added to your supplier, fill up the fields. You can add the *Title*, *First name*, *Last name* of your contact of the supplier so be shown on the order form.

Order status shows if it is in progress, sent, completed or partially completed (the delivery differs from the order in any way).

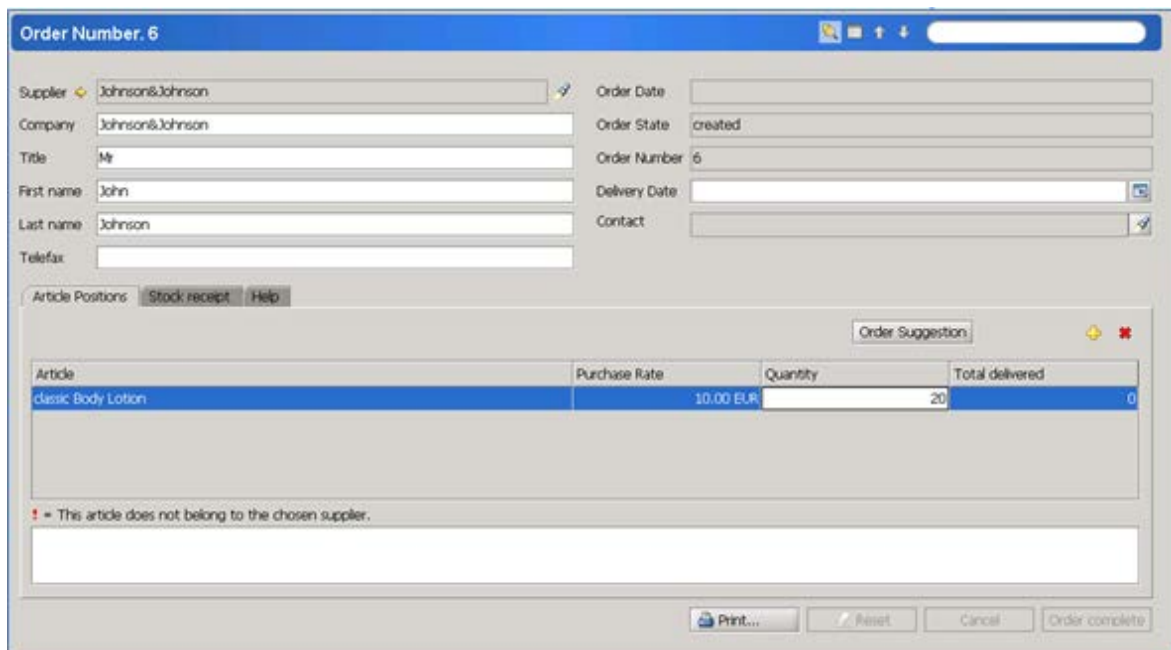
Delivery date can be set as required.

The *contact* will be the Spa Manager as set up in the configuration.

Using Order Suggestion means that Bellavita comes up with a list of articles according to the target stock level that was set up. Every article that is below the target stock will appear with the quantity that is required to be on the target level. With the yellow cross you can add any articles that you wish to order:



Every selected article appears on the list of articles on your order screen where you can change the quantity and purchase rate as you wish:



Once you have the complete list of the articles you wish to order, click **PRINT** at the bottom of the page which created the order form that you can print or save and e-mail. This print button submits the order and the Order state changes to dispatched.

To review your orders: either double click the top line of the order or enter a % in the search field and press enter. This is the screen where all your orders will appear:

Order Number. 5

Orders Order Proposal

Search contains max. 200 entries.

	Order Date	Order Number	Company	Order State
1	Aug 23, 2011 11:50:27 AM		1 Johnson&Johnson	partially delivered
2	Sep 16, 2011 12:26:19 PM		2 Johnson&Johnson	completely delivered
3			5 Dermanor	created
4	Apr 5, 2012 5:14:59 PM		6 Johnson&Johnson	dispatched

Double click on the order you need to edit – when the stock gets delivered:

Order Number. 6

Supplier: Johnson&Johnson Order Date: Apr 5, 2012

Company: Johnson&Johnson Order State: dispatched

Title: Mr Order Number: 6

First name: John Delivery Date:

Last name: Johnson Contact:

Telefax:

Article Positions Stock receipt Help

Article Date

Stock: placed into stock

Buttons: Bill of Delivery, Place into Stock, Print..., Reset, Cancel, Order complete

Select Article Position

Article Positions Articles:

Article	Purchase Rate	Quantity
1 classic Body Lotion	10.00 EUR	20

Buttons: OK, Cancel

Select the **Stock receipt tab** and press the yellow cross to select the articles that arrived. Article Positions will list all items you ordered, while from the Articles tab you can select any articles that you received but were not on the original order.

Order Number. 6

Supplier: Johnson&Johnson Order Date: Apr 5, 2012

Company: Johnson&Johnson Order State: partially delivered

Title: Mr Order Number: 6

First name: John Delivery Date:

Last name: Johnson Contact:

Telefax:

Article Positions Stock receipt Help

Article	Date	Rate	Quantity	Stock	placed into stock
classic Body Lotion	17:32	10.00 EUR	20	Main	

Bill of Delivery Place into Stock

Print... Reset Cancel Order complete

Highlight the item on this list, edit the quantity and price if required and use the *Place into Stock* button to put it in your stock. Once you have put ALL the received items in stock, press the *Order complete*.

Inventory administration

Inventory administration is used to check your stock. It prints you a count list, you check the exact numbers and enter them in the system. Then the current stock will be updated in the system according to your calculations.

Select Inventory Administration from Master Data.

Administrator

place into stock pending

Inventory administration

Name	Document	Start	End	Closure	Active lock
New					

Create inventory procedure
With the dialogue you can create a new inventory procedure.

Description: new inventory proced

Countlets: 1

Start date: 05.04.2012 17:34

Please choose a template

Existing template New template

Name: new template

Filter type: Bitte wählen...

Filter:

Stock movements locked

Cancel

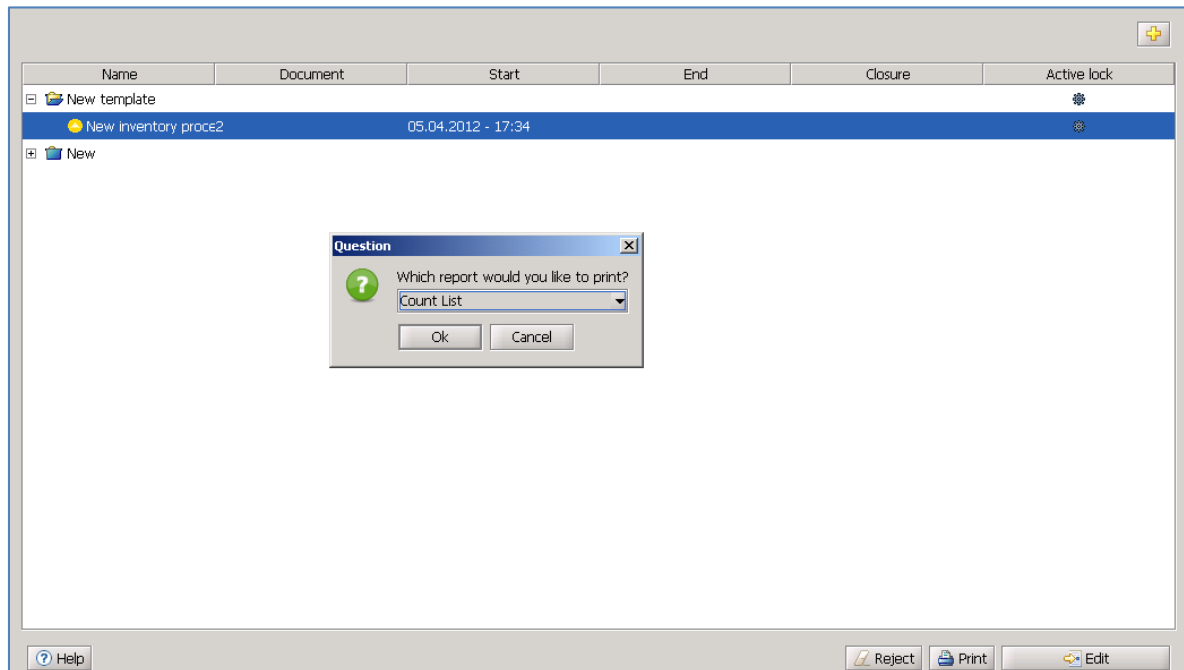
Add new by the yellow cross. Fill out the details on the pop up window according to your needs.

- *Description* can be changed to a title that makes the look up easier in future, for example: “monthly inventory September”
- *Countlists*: this is how many copies of countlists you want to print.
- *Start date and time* can be set for any time in future, but as the “*Stock movements locked*” is ticked, that means that from the start time until you update the numbers, you will not be able to sell any products or use any products in the treatments – according to Bellavita. So it is practical to do this when you actually start your check.

The first time you use this, you will be creating a *template*. You can rename it to anything, for example: monthly check. The *filter type* can be selected as supplier, stock, etc., then the *filter* will list you all the possibilities within that filter from which you need to use one.

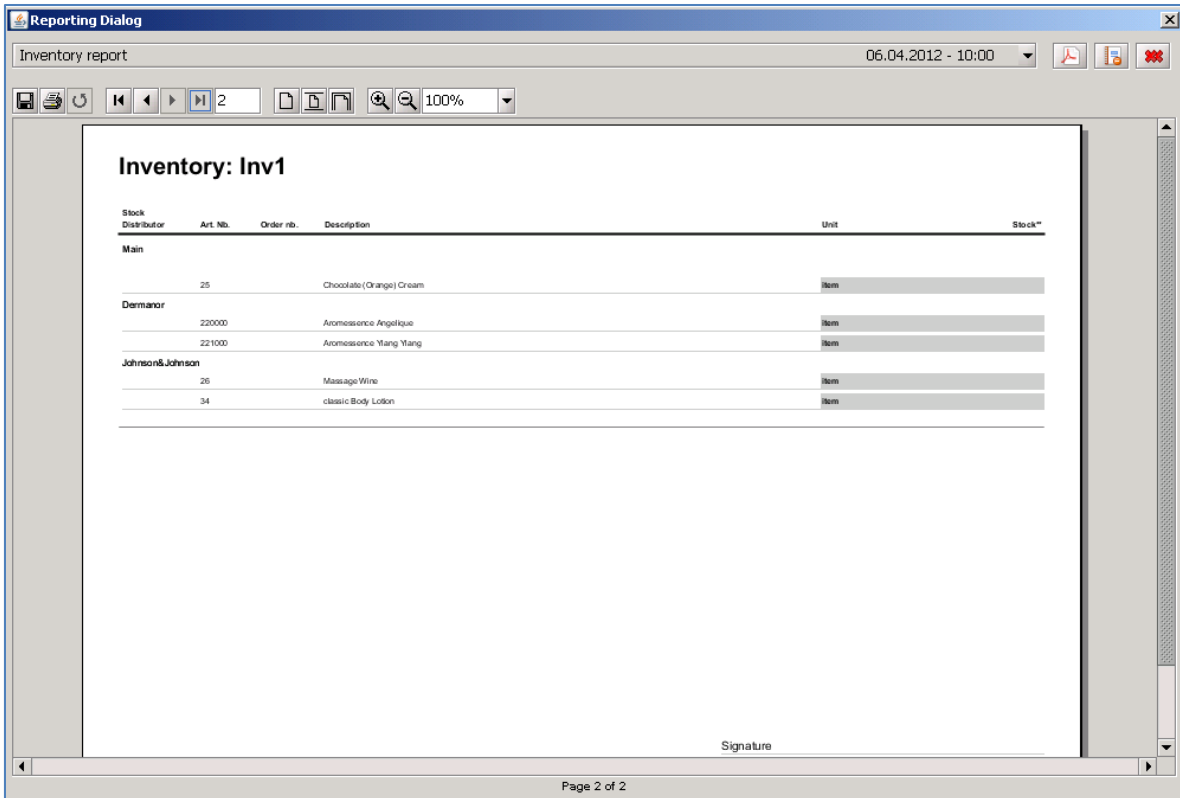
The *Stock movement locked* is practical to set so the calculations will be accurate, however in this case you need to make sure that there are no sales at the time of the check.

Once you click OK, the process appears on your list:



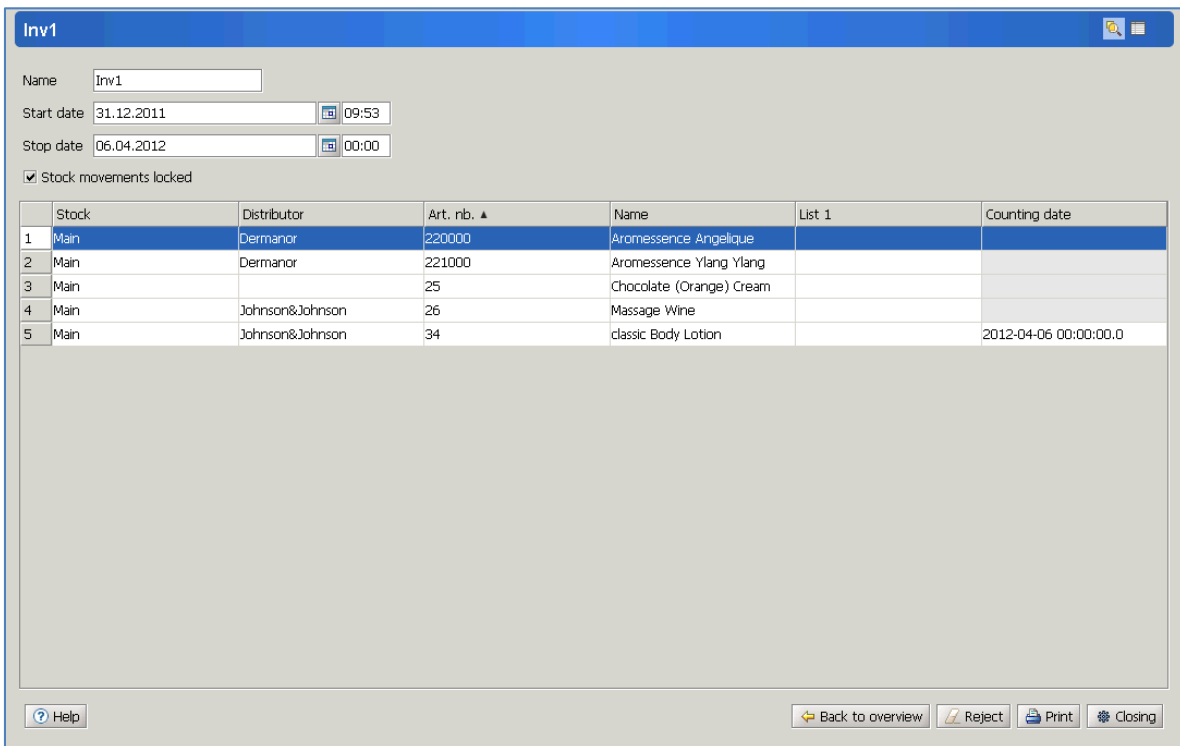
Click print when the process is highlighted on the list and print the count lists.

You can navigate from this list back to your actual inventory process as explained in your orders.

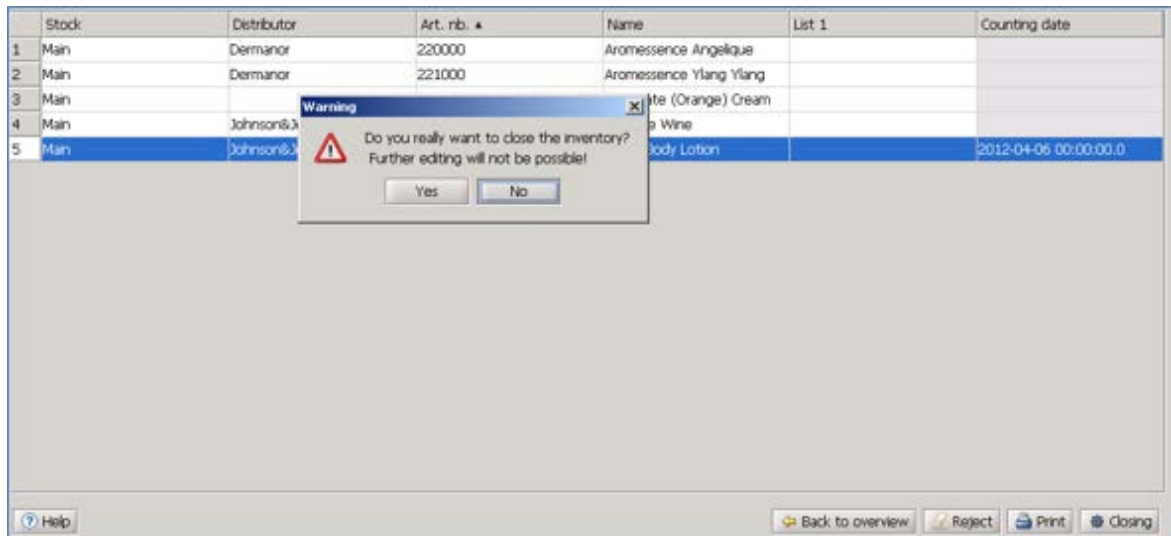


Please note that only the products that had any stock movements (added to stock in the beginning) will appear on this list no matter which filter you use.

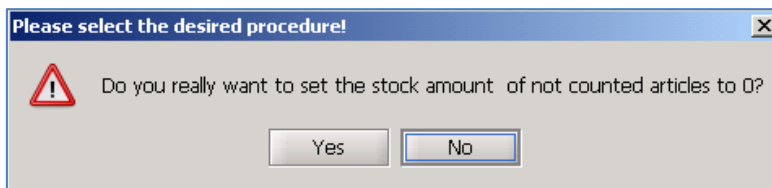
Once you have it filled out, go back to the list of inventory processes and select the one you are dealing with and use the button "Edit" at the bottom of the screen.



Add the stop date and time when you finish. Go through the list and put in the relevant numbers in the list 1 column. Only when you have a stop date will the Closing button become active.



Once you chose Closing, a security message appears. If you select yes, another message comes up:



This means that any articles that you did not put an amount to, will be updated as if you found 0 quantity. If this is not the case, select NO.

Then the system goes through every line and warns you if any articles have gone below the minimum stock. At the end you get this screen with a message that the process is completed.

Inv1 (Closed)

Name: Responsible:

Start date: Stop date:

Closing date:

	Stock	Distributor	Art. nb.	Name	List 1	Counting date	Old stock	Correction	New stock
1	Main		25	Chocolate (Orang...				none	0
2	Main	Dermanor	220000	Aromessence Ang...				none	2
3	Main	Dermanor	221000	Aromessence Yla...				none	1
4	Main	Johnson&Johnson	26	Massage Wine				none	0
5	Main	Johnson&Johnson	34	classic Body Lotion		Apr 6, 2012 12:0...		none	50

Now your stock is updated with the new values – only where you gave any information, but the ones left empty stay on the value they were. You have the option to choose to print the list, export it to a csv file, or go back to the overview of your inventory processes.

Creating your Inventory Templates

To create a new inventory, go to Master Data / Inventory administration.

The screen will show all existing templates. To create a new template click on the yellow cross.

You now have the choice to create a new template or use an existing one. If no inventory exists then click on New Template.

Now choose a name for your category, either the product line, type of product or Stock. Then choose your filter type to correspond with your name.

Once you have chosen your filter type, you can choose your corresponding filter. Then click on OK to finish.

If the chosen inventory already exists, then you do not have to create a new one but instead choose the existing template and confirm with OK.

Once you have chosen your template then it will automatically have the status working

To open just double click and then choose the Print button to print out the actual inventory.

Once you have filled in your inventory sheet with the actual count, you can then input the totals under the column "LIST 1". Just double click and enter the number. You can descend to the next line with the "down arrow" on your keyboard.

When all articles have been entered you can close the inventory by clicking on the Stop date.

Once the date has been chosen, the time will be automatically filled when you click on the button "Closing".



The system will ask if you are sure to close the inventory, choose Yes.

The next question is whether all articles that have not been filled should be changed to ZERO. You should always choose NO. If any articles should really have a 0 amount it is easier and less dangerous to fill the field with zero manually.

After a successful inventory count, then a message will appear.

Once you have clicked on OK, a screen will appear with the total inventory including the inventory before the count and the new count with the difference. The new count will automatically update your stock within BellaVita without having to go to each individual article and updating it manually.

Click on the Print button and you can print out your new stock

The last page will give you the total, Gross & net prices.

Inventory that has been completed can be retrieved under the Inventory Administration button and can be opened by a double click, reprinted or exported in xls or CSV format.