whitespace work software

Guidance – Stock Control Email Functionality

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Guidance – Stock Control with Email Functionality

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1. Amendment History

Date	Version	Author	Changes Made
06/09/2023	0.1	SS	Draft document
10/09/2023	0.2	DP	Business review
22/09/2023	1.0	SS	Baseline Version

2. Introduction

This document guides Whitespace users through Stock Control functionality at a high level, and the reintroduction of email output functionality which alerts users when stock values have reached their re-order threshold.

Typically, Stock Control in Whitespace relates to Bins, Sack Bundles or Bin Components (i.e., lids, wheels, locks etc.) that are delivered or returned via Worksheets.

Stock Control is implemented via Consultancy as it often entails bespoke Worksheet Workflows with activities to increase or decrease stock values at the expected time. And you will need to have non-standard menus made available to your users.

We lost the ability to send out Stock Control emails due to necessary security restrictions as Whitespace was moved on to newer servers. These servers would not allow Whitespace to "talk directly to the internet" – which is effectively what the DBMail function associated with Stock Control was doing.

We are pleased to confirm that we have now reintroduced this functionality in Whitespace V11.2+ by communicating with a trusted email server or Smarthost.

However, there are limitations that we've had to impose.

- For example, we log and retry if there is an error in connectivity between Whitespace and Smarthost, but we would have no way of knowing if an email has failed between Smarthost and the recipient.

- There are limits on how many emails can be sent with a single event. We've allowed for multiple recipients for an event but note that the field to enter email addresses is limited to 255 characters.

- Therefore, the recommendation is that you consolidate recipient emails to a shared email address. This also reduces the burden of managing recipients if someone leaves the target organisation.

Despite the limitations, we trust this will be welcome news for our existing customer base who have been using Stock Control. And for new users who are interested in the functionality, this document should serve as a useful overview.
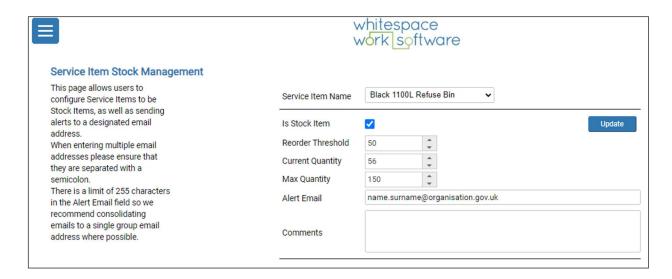
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3. How it works

Stock Control is managed in **Management > Stock Control > Service Item Stock Management**.

It works alongside worksheet workflows that reduce or increase stock levels for specified Service Items based on worksheet activities.

The checkbox is selected indicating that this Service Item is subject to stock control.

Each stock item contains a Reorder Threshold, Current Quantity and Max Quantity.

One or more semi-colon separated email addresses can be entered to receive an alert email.

There is a character limit of 255 characters in the email field, so it is recommended that group email addresses are configured to be the recipients of the alert emails.

The Comments box contains details from the last worksheet that influenced the Stock level for the specified Service Item. Note that this is legacy functionality that we have elected to keep.

The Stock Alert email will always come from noreply@whitespacews.com. As it is governed by DBMail and the Smarthost server, it is not possible to specify an alternative domain (i.e., the email looks like it comes from your organisation). This is not the case for emails that come from Worksheet or Contract Workflows directly.

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3.1. Rules governing when a Stock Alert Email is Sent

The recipient(s) will receive an alert email when the Current Quantity reaches Reorder Threshold minus 1 for the first time.

No further alert emails are received until the Current Quantity reaches 0.

Thereafter, every time a worksheet reduces stock further (into negative figures), an alert email is sent until an administrator updates the Current Quantity based on current stock levels.

3.2. Stock Control Reporting

3.2.1. Stock Item Logs

Navigate to **Reports > Management Reports > Stock Item Logs**.

Contains logs of all Worksheets that have influenced Stock Levels in Whitespace.

The user must specify the Start and End Date for the worksheets and make one or more Service Item selections prior to Viewing the Report.

This report was previously found under Data Playgrounds in older versions of Whitespace.

3.2.2. Stock Items

Navigate to **Reports > Management Reports > Stock Items.**

Lists all Service Items alphabetically that are designated as Stock Control Service Items.

This report was previously found under Data Playgrounds in older versions of Whitespace and there are no filter criteria to enter.

The report contains the current Stock Quantities and Reorder Thresholds for each Service Item, as well as details of configured Email addresses to receive the Stock Alert Email.
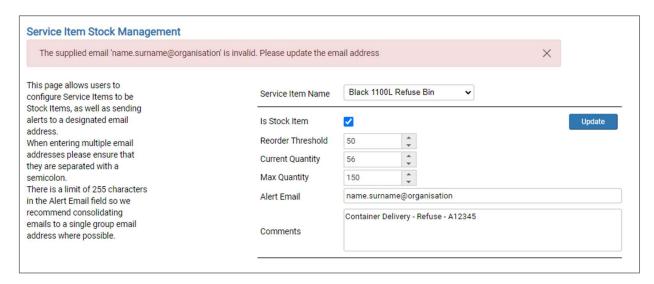
3.3. Troubleshooting

3.3.1. Supplied Email is Invalid

There is basic validation to ensure that supplied email addresses contain an '@' and period '.' in it.

It also checks that there are no commas. If you are entering more than one email address, ensure you use a **semi-colon** ';' to separate addresses.

Service Item Stock Management

The supplied email 'name.surname@organisation' is invalid. Please update the email address   ✕

This page allows users to configure Service Items to be Stock Items, as well as sending alerts to a designated email address.
When entering multiple email addresses please ensure that they are separated with a semicolon.
There is a limit of 255 characters in the Alert Email field so we recommend consolidating emails to a single group email address where possible.

Service Item Name	Black 1100L Refuse Bin
Is Stock Item	☑
Reorder Threshold	50
Current Quantity	56
Max Quantity	150
Alert Email	name.surname@organisation
Comments	Container Delivery - Refuse - A12345

Update

3.3.2. Recipient is not receiving the Alert Email

Check that the supplied email address is correct. There is no way for us to know if an email has failed after it has successfully been received by the Smarthost server.

If the email address is correct and you believe an email has not been sent, raise a support desk ticket with us. We may already be aware of the issue as we have logs and monitoring for if connectivity to the Smarthost server is impacted.

Any Smarthost outage is not expected to be more than an hour, and there is an automated retry process in place for when connectivity is restored.