


















Complete Features List

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Inventory

INVENTORY LIST

View all your products as a complete list or split by different filters. Every product on the list can display its stock-on-hand (for each location), committed stock (for each location), cost, moving average cost (MAC), re-order point, and stock history.

PRODUCT LIST

You can edit every product by image, variants, SKU code, barcode, supplier code, color, size, weight, buy price, wholesale price, retail price, sellable option, taxable option, description, and notes.

PRODUCT STATUS

"Active state" refers to products that your business is currently selling. "Disabled state" refers to products which you have stopped selling, or products that you're not selling at this point in time (such as seasonal products). You can exclude these "Disabled" products from your reports for clearer reporting.

PRODUCT HISTORY

View the stock history of each product, including details of each restock such as quantity, date and the team member who placed the purchase order.

STOCK ON HAND SYNCED WITH SALES ORDERS

Stock on hand values are updated when orders are fulfilled.

VARIANTS

Each product can contain different variants for different weight, size and color.

STOCK ON HAND SYNCED WITH RECEIVED PURCHASE ORDERS

Mark a purchase order as 'Received' and the stock on hand is updated.

COMPOSITE VARIANTS

A bundle of different variants, sold as a single unit.

PACK SIZES

A group or pack of the same variant, sold as a single unit.



Batch & Expiry Tracking

CREATE OR EDIT BATCH TRACKED PRODUCTS

Improve product traceability by assigning batches to products and keep track of their journey from purchase orders, stock adjustments, and sales orders.

SELL BATCH TRACKED INVENTORY USING SALES ORDERS

Sell with confidence knowing that you have the right stock going to the right customer using FIFO (first in first out) fulfillment logic. You can also reserve specific batches or lots for your preferred customers.

BULK ASSIGN BATCH TRACKING TO YOUR INVENTORY

Save time by enabling batch tracking for multiple products via CSV.

COUNT YOUR BATCH TRACKED INVENTORY WITH THE STOCKTAKE TOOL

Maintain accurate inventory levels by scanning the barcode of the products you're tracking.

STOCK ADJUSTMENTS WITH BATCH TRACKED INVENTORY

Control inventory fluctuations by using stock adjustments to remove defective / damaged batches from your inventory.

STOCK TRANSFERS WITH BATCH TRACKED INVENTORY

Keep inventory levels healthy by transferring batch tracked products across multiple warehouse locations.

RECEIVE PURCHASE ORDERS FOR BATCH TRACKED INVENTORY

Track your incoming products by when they're received or by their expiry dates to reduce spoilage and having to discount short dated stock.

KNOW WHAT BATCHES ARE EXPIRING SOON

Keep track of what stock is expiring soon to communicate and empower your sales team to sell off short dated stock.

MANAGE YOUR PRODUCT RECALL PROCESS

See which sales orders, purchase orders, stock adjustments, stock transfer, shipments, and returns specific batches are linked to, so you can reach out to affected customers.

KEEP UP TO DATE WITH YOUR CUSTOMER'S TRACEABILITY REQUIREMENTS

Sell to larger customers with stricter traceability requirements by providing all the information requested while maintaining consistent branding across all your touchpoints.



Locations

MULTIPLE WAREHOUSES

Create multiple stock locations, transfer stock between them, receive and send goods to / from a specific location.

UPDATE STOCK LOCATION VIA CSV

Update reorder points and bin locations for a location with ease using CSV.

BIN LOCATIONS & PICK LISTS

Track the locations of your product variants in different warehouses, and print out Pick Lists once your orders reach the Shipping stage.

CONSIGNMENT

Set up a stock location and do a Stock Transfer to move stock into that consignment location. You can then create sales orders from that location.

CRM

CUSTOMER AND SUPPLIER DATABASE

All your customer and supplier data in one place.

NOTES

Assign notes to customers and suppliers that can be viewed by the team.

CUSTOMER ORDER HISTORY

See all the orders with their details and status made by every customer in your database.

SET DEFAULT DISCOUNT LEVEL PER COMPANY

A default tax rate and discount level can be set for a company.

Alerts

OUT OF STOCK

Set a notification to warn you that you have insufficient stock when fulfilling orders.

RE-ORDERING

Re-order point alert.



Sales Orders

CREATE AND EDIT SALES ORDERS

Create sales orders from your wholesale requests, or automatically add them via your online sales channels.

EMAIL STATUS

See details of email opens/clicks on Sales Order activity feed.

MARK TAX INCLUSIVE/EXCLUSIVE

A Sales Order can be marked as Tax Inclusive/Exclusive.

CREATE FILTERS FOR SALES ORDERS

Manage your sales orders easily using filters.

CREATE CUSTOM PRICE LISTS

Create separate price lists for different seasons or groups of customers and select them when creating a sales order.

PRINT AND SAVE SALES ORDERS

Download your sales orders complete with your branding theme, company logo and company information to send to your customers.

ORDER STATES

Draft state is for tentative orders. You can use this to send your customer a Sales Quote, and edit it to add or remove items from it. In the Active state, stock has been assigned to the order, but not deducted from total stock just yet. The stock is 'committed' to the order and, for example, it will not be available on your online shop front.

You can also receive full or partial payments for your order in this mode. Once you are ready to begin fulfilling the order, choose to 'Finalize' your order. You can mail an invoice to your customer and also mark the Sales Order as paid/unpaid.

If you are fulfilling part of the order, you can partially fulfill the order. Once you have completely fulfilled the order, choose to 'fulfill' the order. The fulfilled state indicates that all the goods in the order have been shipped out. You can still use this mode to print invoices and mark the order as paid/unpaid.

GIVE WHOLESALE BUYERS A NEW WAY TO ORDER

Your customers can place orders themselves, using their unique price lists and discount rates, using our private B2B eCommerce Store.



Sales Quotes

SALES QUOTES

Create simple, professional sales quotes for customers with one click.

EMAIL SALES QUOTES

You can email sales quotes directly from TradeGecko.

Payments

PAYMENT TERMS

Payment terms define the amount of time you allow the buyer to pay for the goods. The payment terms will define the due date of the invoices.

PAYMENT METHODS

Manage your sales paid through different payment methods e.g Cash, Bank Transfer, Credit Card, Paypal or create your own.

Sales Channels

DATA SYNCED WITH SALES ON OWNED ONLINE SHOPS

Sync sales on your online shop built with WooCommerce, Shopify, or Magento with stock levels in real time.

DATA SYNCED WITH SALES ON MARKETPLACES

Sync sales on marketplaces like Amazon with stock levels in real time.





Purchasing

Costs

MULTI-CURRENCY

Buy in different currencies while keeping your accounting records in your base currency.

LANDED COSTS

Add extra costs to your purchases, like transport costs and taxes.

MAC (MOVING AVERAGE COSTS)

Automatically add the product's purchase cost with additional landed costs to reflect the total cost.

CREATE YOUR PRICE LISTS

Create new price lists that can be selected in purchase orders according to your business needs.

Purchase Orders

CREATE AND EDIT PURCHASE ORDERS

Instead of manually extracting and entering information from multiple spreadsheets, the Purchase Order function puts all your supplier information at your fingertips.

ADD ITEMS ON A PO VIA A BARCODE SCANNER

Simply scan the barcode of a product you want to restock and it will appear on your purchase order.

EMAIL PURCHASE ORDERS

Email purchase orders to your suppliers directly from TradeGecko.

PARTIAL RECEIVING OF PURCHASE ORDERS

Select the lines you want to receive or the quantity per line.

PURCHASE ORDER STATES

The draft state is for tentative purchase orders. The active state is perfect for when you want to start receiving the goods on the purchase order. You can choose to partially receive purchase orders or receive all the goods.

You can also add landed costs to your received delivery and edit the Purchase Order if required. Once you have received all your goods, the Purchase Order's status is changed to 'Received'. The received state indicates that all goods have been received. You can also print or mail the purchase order in this state.



Manufacturing

Manufacturing

BILLS OF MATERIALS

Create and manage single-stage Bills of Materials and account for a finished good's complete list of component parts, including additional costs like labor, shipping, etc.

PRODUCTION ORDERS

Account for each Bill of Materials' start state and end state as a finished good by creating and completing Production Orders.

INSUFFICIENT STOCK ALERTS

If you have insufficient stock to complete a Production Order, TradeGecko will notify you so that you can adjust the Production Order volume and order additional components.

BATCH TRACKING

If your Bill of Materials' components are batch tracked, TradeGecko will allow you to select from which batch you'll supply your Production Order. Once finalized, you can assign a batch to your completed manufactured variants.

PRODUCTION RECONCILIATION

Automatically reconcile production run efficiency with accounting applications, tracking wastage and recommitting unused stock back to inventory.





Accounting

Taxes

TAX TYPES

If you're selling in multiple locations, you can create custom tax types. You can predefine "bundles" of taxes (sales tax, local sub taxes, compound tax etc.), in various percentages or combined. You can create as many tax types as you want, and you can use them when you create sales or purchase orders. Very useful for selling in multiple locations.

Invoicing

ACCOUNTING SYNC

No matter what currency you are selling in, TradeGecko will convert your invoices back to your base currency before pushing the invoice into Xero or QuickBooks Online.

INVOICES

Create invoices from orders with just one click.

RELATIONSHIPS SYNC

Relationship information from TradeGecko syncs with your accounting integration, so you can manage your debtors and creditors in your accounting software.

SEND AN INVOICE TO A CUSTOMER

Rather than juggling with your email browser, you can send customers an invoice directly from the TradeGecko app without exiting.

SPLIT INVOICING

You can now invoice part of a Sales Order without having to split it into multiple orders, greatly streamlining the backordering process.

TRACK RETURNS FROM SALES ORDERS

Your returns are synced with accounting integrations to keep your ledgers up to date.

CUSTOM SALES LEDGERS

You can assign different customer types, sales channels, and variants to different custom ledger accounts to track and monitor sales based on the ledgers.



Reporting

SALES HISTORY REPORT

Check the list of all sales orders with their details and status. Each sales order will show: issue date, shipment date, customer name, invoice number, payment status, fulfillment status, sales volume, sales value, tax, cost, profit, and profit margin.

SALES ORDER REPORT BY CUSTOMER

Sort your top customers by generated revenue or profit. For each customer, it displays the generated sales volume, sales value, COGS, number of orders, average sales, average profit and projected profit.

SALES ORDER REPORT BY PRODUCT OR VARIANT

Sort your top products/variants by revenue or profit generated. For each product / variant, it displays the generated sales volume, sales value, COGS, number of orders, average sales, average profit and projected profit.

SALES HISTORY BY PRODUCT OR VARIANT

Filter the sales history report by product name or variant name.

SALES HISTORY REPORT BY CHANNEL

Filter the sales history report by sales coming from each specific online shop.

SALES ORDER REPORT BY CUSTOMER NAME

Filter the sales history report by customer name.

SALES HISTORY REPORT BY ASSIGNEE

Filter the sales history report by your personnel or sales representatives.

SALES ORDER REPORT BY PRODUCT TYPE

Understand your top performing product categories when it comes to revenues and profit.

SALES ORDER REPORT BY BRAND

Understand which product brand is generating more revenue or profit among different brands.

SALES ORDER REPORT BY CHANNEL

Understand which sales channels are generating more revenue or profit among your B2C or B2B online shops.

SALES ORDER REPORT BY SALES REP

Understand who amongst your sales team is generating the most revenue or profit.



Reporting *Continued*

SALES ORDER REPORT BY TIME PERIOD

See your daily, weekly or monthly sales reports, showing sales value, sales volume, costs, profits and profit margins.

SALES ORDER REPORT BY LOCATION

See which warehouse or stock location is generating the most revenues.

INVENTORY STOCK ON HAND REPORT

See your total units on hand, total costs for the stock on hand, total retail value for the stock on hand, and the total profit value for the stock on hand. For each product or variant, see the number of units in stock, if they are taxable or not, the MAC, the retail price, the inventory value, the retail value, the profit value and the profit margin.

INCOMING STOCK REPORT

Understand your top incoming stock by supplier and the top cost by supplier. For each product or variant it displays the supplier name, the number of purchase orders, the stock on hand, the incoming stock, and the total cost of incoming stock.

LOCATION REPORT

Select a warehouse or stock location and check its stock on hand, committed stock, last ordered stock, last purchased stock, inventory value, profit value, and profit margin.

SALES ORDER REPORT BY LOCATION

Check the overall total stock on hand, total stock available, and total units committed. You can also filter by individual product and variant details.

REORDER REPORT

Run a report that lists all products and variants that have fallen below the reorder point. This list displays the supplier name, number of products / variants to reorder, and a link to the reorder page.

DEMAND FORECASTING

Our intelligent system helps you to work out how many units you're likely to sell, and exactly when you should restock. Now you can avoid stock-outs and minimize costs from holding excess inventory.



B2B eCommerce Store

Setting Up

B2B STORE SETTINGS

Configure your B2B store according to your business needs, including fixed cost shipping, price lists fallback, tax treatment, stock location fallback, and more.

ENABLE MINIMUM ORDER QUANTITY

Set up minimum order quantity to specify the lowest quantity of a certain product that you are willing to sell to your business customer on the B2B eCommerce Portal.

PUBLISH PRODUCTS

Choose products from your inventory to publish to your B2B store in a few clicks.

CUSTOMIZE THE STORE

Customize the store design to match your brand by uploading logos, photos and choosing brand colours. In addition you can select products to feature and upload graphics to showcase special offers and promotions. You can also use your own URL.

Shipping

ZONAL SHIPPING RATES

At the checkout, buyers can calculate shipping rates based on their delivery location.

Payments

ACCEPT INSTANT PAYMENTS

Take instant credit card payments from wholesale customers with TradeGecko Payments.

Access Management

INVITE CUSTOMERS TO YOUR B2B STORE

Invite specific customers to view and create orders on your B2B store.

SEND CUSTOM EMAIL INVITES

Create custom B2B email invitations for buyers.



Payments

Setting up TradeGecko Payments

SET UP TRADEGECKO PAYMENTS SECURELY

Set up TradeGecko Payments on your TradeGecko account to process and receive payments securely. TradeGecko Payments is PCI compliant and utilizes TLS 1.2 encryption for both transaction and checkout.

ADDITIONAL VERIFICATION AND ADDITIONAL OWNERS

Additional verification and additional owner information (for UK and SG only) is required under local KYC regulations when paying out funds to individuals and businesses.

Buyer's Experience

BUYER'S CHECK OUT EXPERIENCE

Set a notification to warn you that you have insufficient stock when fulfilling orders.

CONTROL VISIBILITY OF TRADEGECKO PAYMENTS FOR BUYERS

Control which customers can pay directly from invoice using credit card by enabling (or disabling) access to specific Relationships.

Payout and Fees

PAYOUTS

Payout to your linked bank account from TradeGecko Payments easily.

TRANSACTION FEES

Enjoy cost savings when you process payments with TradeGecko Payments' transparent fees.





Mobile App

Mobile Dashboard

ACCOUNT SYNC

Sync account with TradeGecko and view sync status, pull new data and push local changes.

SETTINGS

Configure the app, choose price list and tax type to display and set a security passcode.

HELP

View the entire TradeGecko knowledge base and submit a support request from inside the app.

DATA SORTING

Sort data by date range.

DASHBOARD AND REPORTS

View graphs for sales, profit and cost, stock, customers and product data. You can also sort data by date range.

Inventory

PRODUCT CATALOG

- View entire product catalog with all products, variants, information and images.
- View stock levels by status and location. View prices in all price lists as well as cost prices and MAC. Search inventory and filter by type, supplier, brand and tags. Add products to a new order.
- Add new product images using device camera or select from saved photos.

Relationships

CRM

- View and search all customers and suppliers in your TradeGecko account. plus add a new relationship.
- View all information for a relationship including contacts, details, addresses, notes and order history.
- View addresses on maps and open in Google / Apple Maps for directions. Touch phone numbers to call or send SMS, touch email address to send an email, touch web URL to open in browser.





Mobile App *Continued*

Orders

MANAGE AND EDIT SALES ORDERS

- View recent orders and filter by status, assignee, shipping location and price list. Edit orders and advance status.
- Email quotes and invoices.

Cart

CREATE A NEW SALES ORDER

- View products added to cart and quick add new products, edit product quantities and discounts.
- Scan barcodes using device camera or Socket Mobile bluetooth scanner.

User Permissions

USER PERMISSIONS

The app respects all user permissions to restrict access for each team member.

Login

LOGIN MULTIPLE WAYS

- TradeGecko Login.
- AppDirect Login.



Fulfillment

GENERATE A PICK LIST OR MULTIPLE

Create a pick list automatically based on your fulfillment on TradeGecko.

SHIPPING DOCUMENTATION

Send shipping documentation along with your deliveries and save time.

MULTIPLE FULFILLMENTS FOR A SALES ORDER

Add the ability to fulfil a Sales Order in multiple fulfillments.

ENABLE EMAIL NOTIFICATIONS OF SHIPMENTS TO ORDER RECIPIENTS

Notify your customers from TradeGecko that a shipment is on the way.

PARTIAL FULFILLMENT

You can create one Sales Order and send one good at a time, or half of the goods at any given time etc (while still being marked and updated accurately in the system).

SHIPPING DOCUMENTS EXPORT TO 3PL

If you ship with 3PL Central or Tigers, you can send your orders to them in their template through TradeGecko. Use the free 3PL exporter add-on to enable this.

Stock Control

STOCK TRANSFERS

Move stock between your different warehouses and stock locations.

STOCK ADJUSTMENTS

Absorb cost of stock for returns, promotions or damaged goods. This can be multi-item Stock Adjustments.

CREATE BACKORDERS

Backordering lets you close orders that you can't fulfill. TradeGecko also lets you consolidate all sales orders for an unavailable item into one purchase order per supplier.



Stock Control *Continued*

Stocktake Tool

MANUAL STOCKTAKE

Update your stock levels when you do a manual stocktake, including purchase order creation.

STOCK TAKE USING BARCODE SCANNER

Use barcode scanners for doing a stocktake in warehouses. Easily connect your scanners to your mobile devices.

Admin

BULK EDIT

Allows you to bulk edit: SKUs, Variant Names, Tags, and Prices (Wholesale, Buy, Retail).

CUSTOMIZABLE DOCUMENT NAMES

You can edit document titles under the Settings tab.

MULTI-USER

Invite team members to join the platform and enable your entire team to work together with real-time updates.

USER SWITCHING

If you manage multiple inventories for different businesses, you can switch between your separate TradeGecko accounts in one click.

USER PERMISSIONS

Control how your team members access TradeGecko by specifying read, write and visibility status for inventory, relationships, sales orders, stock control, intelligence reports and settings. Advanced permissions include access to buy price, assigned orders and assigned customers.

TEAM TIMELINE

All actions of your team are recorded so you can see who has done what and when. This creates transparency and also eliminates the “who did that?” questions.



Data Import

SALES ORDERS

Create Sales Orders via CSV.

PURCHASE ORDERS

Create Purchase Orders via CSV.

ADJUSTMENTS AND TRANSFERS

Create Adjustments & Transfers via CSV.

PRICE LISTS

Import Price Lists via CSV.

INITIAL COST PRICE

Import initial cost price via CSV.

PRODUCTS

Import products via CSV.

BARCODE SCANNER

Import products via Barcode Scanner.

RELATIONSHIPS

Import relationships via CSV.

SUPPLIERS

Import suppliers via CSV.

Data Export

PRODUCTS

Product export via CSV.

CUSTOMERS

Customer export via CSV.

SUPPLIERS

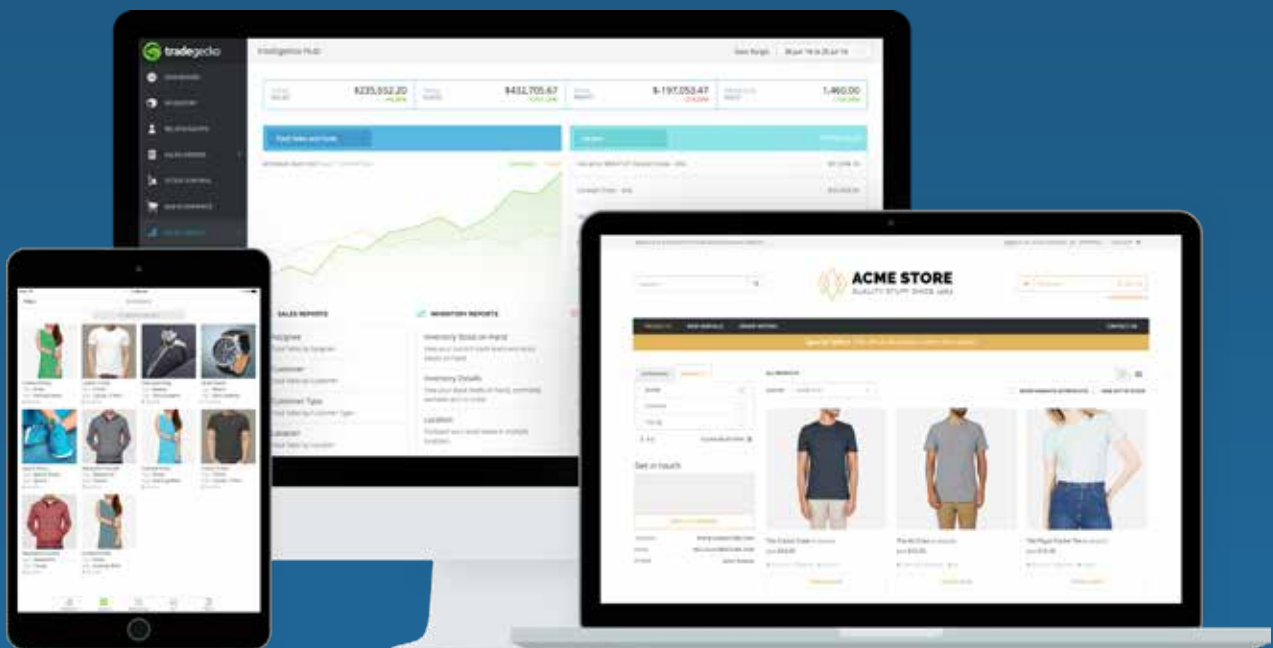
Supplier export via CSV.





Try our **powerful inventory and order management software** completely free for 14 days, and see how we can help you take control of your business

www.tradegecko.com



About TradeGecko | www.tradegecko.com

TradeGecko is powerful inventory and order management software on web and mobile. Every product, order and customer is managed in one place along with the best eCommerce, accounting and shipping integrations. It also includes a customizable B2B eCommerce Store so you can sell wholesale online with unique prices for each customer.