Retail & E-commerce | UAE

A UAE retailer replaced store spreadsheets with configured forms and approval steps

A multi-store retailer added store-specific fields, forms and approval steps to its stock processes in Asset Infinity, so every store records the same information in one system.

AT A GLANCE

INDUSTRY
Retail

REGION
UAE

SIZE
Multiple stores and regional stock teams

PREVIOUSLY
Spreadsheets and paper forms

FEATURES USED
Platform | Stores

01 The client

The client is a large retailer headquartered in Dubai, with stores across the UAE and regional teams that manage stock between them.

Its stock was already run centrally in Asset Infinity. What sat outside the system was the store-level detail: internal checks, stock requests and the approvals each one needed, which every location kept in its own way.

02 The challenge

The central stock process worked, but stores needed to capture information the standard setup did not ask for. So each location filled the gap with its own spreadsheets and forms.

- Stores kept separate spreadsheets and paper forms for internal checks, stock requests and approvals.
- Each location recorded things differently, so the records were scattered and inconsistent.
- Approval information lived outside the stock records it belonged to.
- The team did not want a separate stock application or to rebuild the core process.

03 What they set up in Asset Infinity

Asset Infinity was configured, without code, to carry the store-specific fields, forms and approval steps inside the existing stock process.

Platform

Custom fields and forms

Store-level fields and forms were added to stock records, so the information once kept in spreadsheets now sits with the item it describes.

Platform

Approval steps

Stock-related requests follow approval stages set up for the retailer, with the right store or regional manager approving at each stage.

Platform

Access by role

Roles decide which store staff and managers can see, submit and approve each step, so actions stay with the people responsible for them.

Stores

Stock stays in one place

Stock levels, counts and requests stay in Asset Infinity's Stores feature, with the new fields alongside them.

04 How it works day to day

Here is how a store-level stock request runs now.

STORE STAFF	**Fill in the store form** Staff open the stock request in the web or mobile app and complete the retailer's own fields. Required fields cannot be skipped.
SYSTEM	**Routes it for approval** The request moves to the first approval stage and the approver is notified. A reminder follows if it waits too long.
STORE MANAGER	**Approves or sends back** The manager sees the request with its details and approves it, or returns it with a comment.
REGIONAL MANAGER	**Signs off where needed** Requests that need regional approval move to the next stage. Each decision is recorded with who made it and when.
STOREKEEPER	**Acts on the approved request** Stock is issued or adjusted against the approved request, so the stock record and the approval trail stay together.
STORE STAFF	**Record internal checks** Store checks are captured on the same configured forms, instead of on paper kept at the store.
HEAD OFFICE	**Reviews across stores** Reports show requests, approvals and store information for every location in one place.

05 Before and after

	BEFORE	WITH ASSET INFINITY
Store information	Separate spreadsheets in each store	Custom fields on the stock records
Stock requests	Paper forms, filled in differently	One configured form for every store
Approvals	Kept outside the system	Approval stages recorded in Asset Infinity
Who can act	Anyone with the spreadsheet	Actions limited by role
Consistency	Each location worked its own way	The same process in every store
Visibility	Records scattered across stores	One place for head office to look

06 How it rolled out

1

Processes reviewed. The team reviewed store stock processes and picked out the ones that needed extra fields, forms or approvals.

2

Forms and stages configured. Fields, forms, approval stages and role permissions were set up for store and management teams.

3

Teams trained and supported. Store teams were trained on the new steps, and the setup was refined as requirements changed.

07 The results

- Separate store spreadsheets and paper forms retired
- The same process followed in every store and regional team
- Store information kept with the stock it describes, in one system
- Workflow actions limited to the store and management roles responsible
- No extra application to buy, host or maintain

08 Why it worked

The core process stayed

Stock already ran in Asset Infinity, so the retailer added to it instead of replacing it or buying another application.

Changes are settings

Fields, forms, stages and roles are settings the team can change as store needs change.

One way for every store

Every location fills in the same form and follows the same approvals, so records can be compared across stores.

09 Looking ahead

The retailer kept its central stock process and brought the store-level detail into it. Every store now records the same information in the same place, and managers see it without asking for a spreadsheet.

Because the extra steps are configuration, the retailer can change a form or add an approval as its stores change, without a development project.

See it on your own assets

A 30-minute demo, set up for a multi-store retailer.

The client's name is withheld for confidentiality. Results are as reported by the client.

Book a demo

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