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Using Stock Take

1. On the left hand side of the screen, double click on the 'Stock Control'



2. Double click on the 'Stock Take Tool'



3. Click on the 'Stock Take Sheet' tab and click 'Create'.

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4. A new window will appear asking you to 'Print', 'Preview' or 'Cancel'. Preview

the table (if you wish) and then click 'Print'.

Ŀ	Stock Take Tool							
	Criteria Stock Take Sheet Import File Custom List Handheld Files							
¢	Creates a printable list of all the Product Codes currently available on the system. This List is designed to be used as Stock Take recording sheet.							
	Stock Take Sheet Report							
	Email							
	रि Create							
Stock Take Tool								

5. Your Stock Take Report will have a blank **'Qty Found'** column whereby you can fill in the correct figures. Once this has been done, go back to the **'Stock Control Menu'** and click on the **'Import File'** icon.

Stock Take Sheet								
Product Code	Qty Found	Description	Brand	Category 1	Category 2			
MUG-CAMBRIDGE		Cambridge Mug		Mugs	Coloured			
MUG-MARROW		Marrow Mug		Mugs	Coloured			
MUG-METRO		Metro Mug		Mugs	Coloured			
PEN-COLOURED		Multi-colour Pen		Pens	Multifunction			
PEN-HIGHLIGHT		Highlighter 2-in-1 Pen		Pens	Multifunction			
PEN-LASER		Laser Pen		Pens	Laser			
PEN-PENCIL		2-in-1 Pen and Penci		Pens	Multifunction			
PEN-STYLUS		Stylus Pen		Pens	Stylus			
PEN-TORCH		Torch Pen		Pens	Torch			
PEN-USB		2-in-1 Pen and USB		Pens	Multifunction			



6. Click on 'Save As...'. Save it in a location where you can remember but make

sure you put 'sq' before the file name. For Example, 'sqFILE NAME'.

b Save Stock Sty Import File	×
Save in: Desktop 💌 🖛 🛍 📸 🎫	
CneDrive	Â
User	
This PC	~
File name: sqStockTake Save	
Save as type: Stock Qty Import File (sq*.csv) Cance	

7. Once you have clicked save, open the file up on your PC. Input the figures onto

excel and then click save.

Microsoft Excel - sqStockTake								
Eile Edit View Insert Format Tools								
: D 😂 🛃 👌 🖨 🗛 🗇 🖏 🗼 🗈								
D9 Save 🔻 fx								
	A	В	С					
1	MUG-CAMBRIDGE	4						
2	MUG-MARROW	5						
3	MUG-METRO	2						
4	PEN-COLOURED	8						
5	PEN-HIGHLIGHT	6						
6	PEN-LASER	9						
7	PEN-PENCIL	13						
8	PEN-STYLUS	18						
9	PEN-TORCH	3						
10	PEN-USB	2						
11								
12								

8. On Back Office, double click on the 'Utilities' icon on the left hand side.



9. Double click on the 'Import File'



10. Next to the 'File Name' click on the ellipsis (...) to browse for the file.

Filename			
Import Type -	Status -		
ະ Check 🛃 Import	*b Open		
(2) Abort	Look in: Desktop	•	
First line is column headings	Microsoft Office Excel Com 145 bytes		
Overwrite existing records	a, sqStockTake Microsoft Office Excel Com 144 bytes		
Total Lines: Lines Accepted:	sqUntitled Microsoft Office Excel Com		
Lines Rejected: Problems:	File name: sgStockTake	Open	
🛱 Error Report	Files of type: Any File (*.csv)	✓ Cance	

11. Retrieve the file and click **'Open'**. On the left hand side of the window, click on the **'Check'** icon.

Import File Import File Filename C:\Users\User\Desktop\sqStockTake.csv Import Type Stock Qtys Status						3
ະ Check (→ Import	Line	ProductCode	Qty	Colour	MainSize 🔺	
(2) Abort	1	MUG-CAMBRIDGE	4	1		×
First line is column headings Stock Take Type © Partial C Full	3 4 5 6 7	MUG-M PEN-CC PEN-HI PEN-LA PEN-PE	Do you wis	h to view t	he Stock Quant	ity Differences Report?
Summary	8	PEN-ST	l	Yes	<u>N</u> o	
lines Accented: 10	9	PEN-IQ PEN-USB		2		
Lines Rejected: 0 Problems: 0	<				~	
				Im	port File	9

A window will open asking if you would like to view the Stock Quantity Differences Report. Click 'Yes' or 'No'.

13. On the 'Import File' window, click on the 'Import' Click 'OK' and 'OK' again.The status at the top of the window should say 'Import SuccessfullyCompleted'.

b Import File				×
Filename	C:\Users\User\De	sktop\sqSt	ockTake.csv	
Import Type	Stock Qtys	Status	Import successfully completed.	