

Items - Getting Inventory Levels Accurate (if data from old system is inaccurate)

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Overview

What can you do if you start using **1place**, and you have physical inventory in stock, but the system used before did not track it accurately? The following is a step by step option that can help you function while the levels are inaccurate--but also help you get them accurate.

Step by Step

1. Contact OneSource to purchase (or get temporary access to) **osScan online** (and then buy or rent x handheld scanners).
 - See kba called: **osScan: How to Buy, Setup, & Use osScan with OneSource (MS Access version) or 1place**
2. Ask OneSource to set the 'TYPE' for all inventory items to 'Non-Inventory'. (This will stop the system from forcing items to be 'In-Stock' to ship and invoice the item.)
3. When a call or email comes in enter the **item#**, the **Qty Ordered**, and the **Qty Shipped, price**, etc. (even if you are not 100% sure you have them in stock).
4. When done taking the Sales Order print a **Stock Picking Ticket** and give it to Warehouse to Pick. (On the settings of the Stock Picking Ticket make sure both Bin Location options are checked. The default 'bin location' will print out in parenthesis on the Stock Picking Ticket).
5. Warehouse employee picks item and hand writes the quantity picked (shipped out the door) on the line in far right column.
6. After picked, Warehouse employee sends **Stock Picking Ticket** back into office and given to whomever will make manual inventory adjustments.
7. Adjust Quantities in Stock. On the printed Stock Picking Ticket...
 - If the **Qty Ordered** = **Qty Shipped** **THEN STOP**...No adjustment necessary. move to next item to adjust.
 - If the **Qty Ordered** is **NOT** = **Qty Shipped** then
 - Press **F10** to look up item and then click the **Stock** tab.
 - Look for a record of a Stock receipt. (If no Receipt exists that shows the Qty in Stock, Bin Location, etc...**THEN STOP**...there is nothing to adjust. Move to next item to adjust.)

- If Stock DOES Exists...click **Adjust Quantities in Stock**
 - Click **Remove From Inventory** and enter the **Quantity** to reduce/remove from stock. (If necessary select a Receipt in the Receipt ID field).
 - Click **Save** and move to next item.
8. When scanners arrive see kba called **osScan: How to Buy, Setup, & Use osScan with OneSource (MS Access version) or 1place** and refer to the following KBA articles:
- **How to Use the Count Items by Bin Screen** (*Receive and Count By Bin Screen*)
 - As each item is scanned, the Item TYPE (which was set to 'non-inventory') will automatically get set to 'inventory' which will turn on the Inventory tracking for that item back on.
 - **How to Use the Receive PO to Bins Screen** (*Receive and Count through 'Receive PO to Bins Screen'*)
 - As each PO Line Item is received and scanned, the Item TYPE (which was set to 'non-inventory') will also be automatically set to 'inventory' (which will turn on the Inventory tracking for that item as well).
 - **(1) How to Use the Return Items > Request Credit Screen; (2) How to Use the Return Items > Credit Authorization Screen; (3) How to Use the Return Items > Inspect Returns Screen; (4) How to Use the Return Items > Put Away Returns Screen** (*Receive and Count Item Returns through Credit Memo*)
 - As each Item Return is received and scanned, the Item TYPE (which was set to 'non-inventory') will also be automatically set to 'inventory' (which will turn on the Inventory tracking for that item as well).
 - Once the item is received back, it is scanned in on the 'Inspect Returns' screen and deemed 'Good for Stock' or 'Bad for Stock'. This is where the Item Type will adjust.
 - After it's been marked 'Good for Stock', 'Put Away Returns' is used to move it from the returns area to an actual bin.
 - Note: If you are using QuickBooks Online with **1place**, each time **1place** adjusts inventory levels up or down a related adjustment will be synced into QuickBooks Online for you.
 - When all items have been counted contact OneSource support to ask them to update all of the items still set to non-inventory to inventory.
9. Now you can discontinue manually adjusting inventory levels from this point out, as the system will adjust inventory automatically each time the Qty Shipped is set to a value > 0.
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