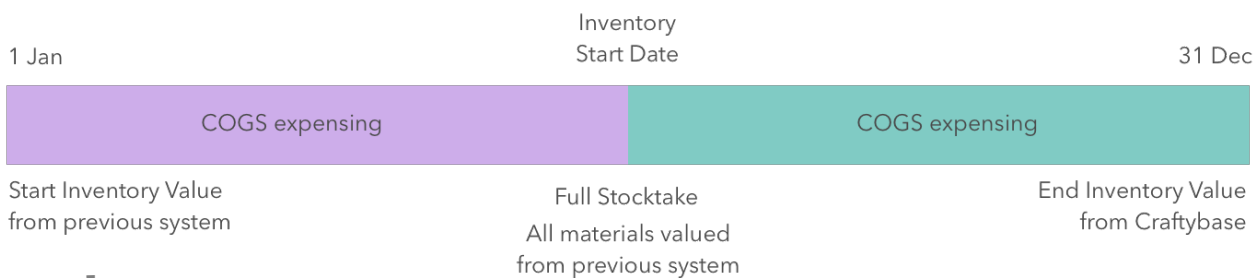


Section 4: Switching from another Inventory System

If you have been previously using another system to track your inventory, it's typically much easier to set a switchover date and work forward from here.

We recommend using the current date as this way you'll reduce your backdating tasks and as you can use your tallies from both systems for your next tax return. If you switched to Craftybase during the last year but never really got going, then you might want to consider resetting your account to remove all historical data and use 1st Jan of the current year as your starting point in Craftybase instead. In this case, you'll be filing this years return with data from your previous system (see *Section 2* for more details).



Tasks

- Reset your account to remove any historical data if necessary
- Set your Account Start Date to your switchover date
- Download the material import spreadsheet, then manually stocktake all materials you currently have on hand, entering all materials with current stock numbers (Starting Quantity) and an accurate cost of each unit purchased (Item Unit Price).
- Import your spreadsheet to create your material records in Craftybase
- Import your sales channels, ensuring that your first import uses your switchover date to prevent past orders and expenses being created in the system (or alternatively create your products manually if you don't use sales channels)
- Perform a stocktake of all products you have on hand on the switchover date
- Set your Starting Adjustments for each of your products to match your current stock numbers with an accurate cost of materials to produce a single unit