

Stock Take via CSV

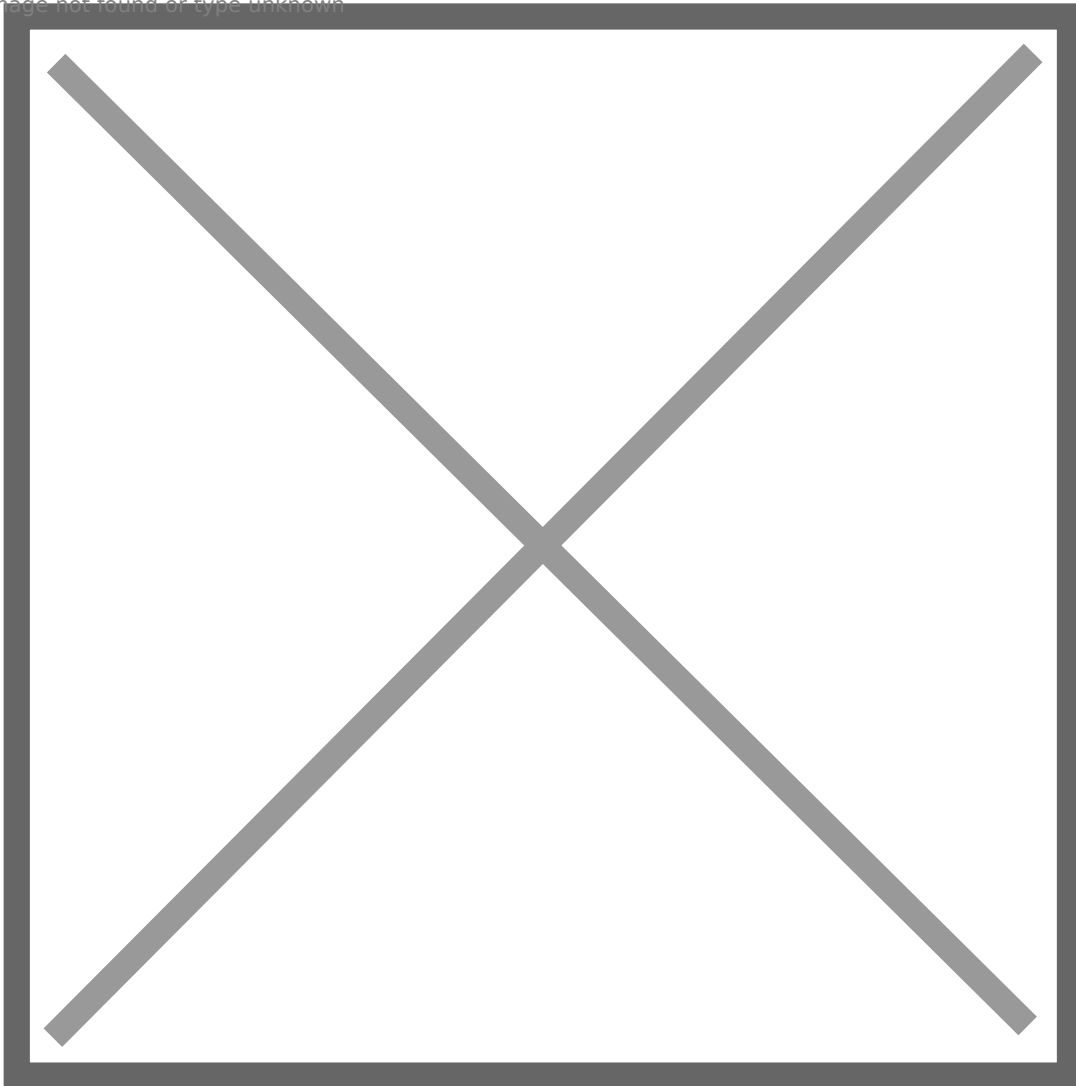
A full history of Stock Takes will be found within the [Stock History](#) report.

There is a separate record of [Stock Discrepancies](#).

Choose your Store and Location

1. Choose the Store to Stock Take

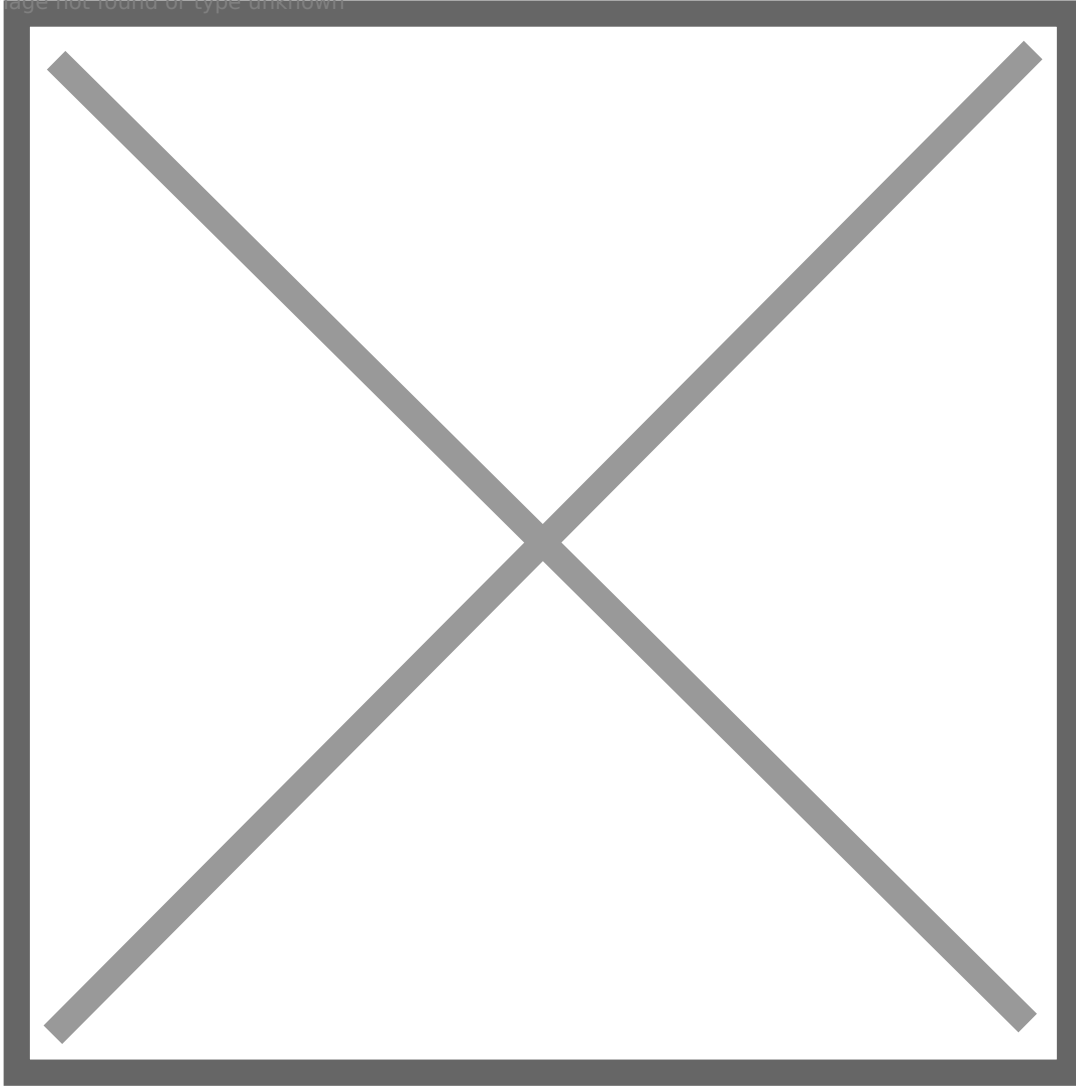
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Tip: Filtering by Store and Location is mandatory

2. Choose the Location to Stock Take

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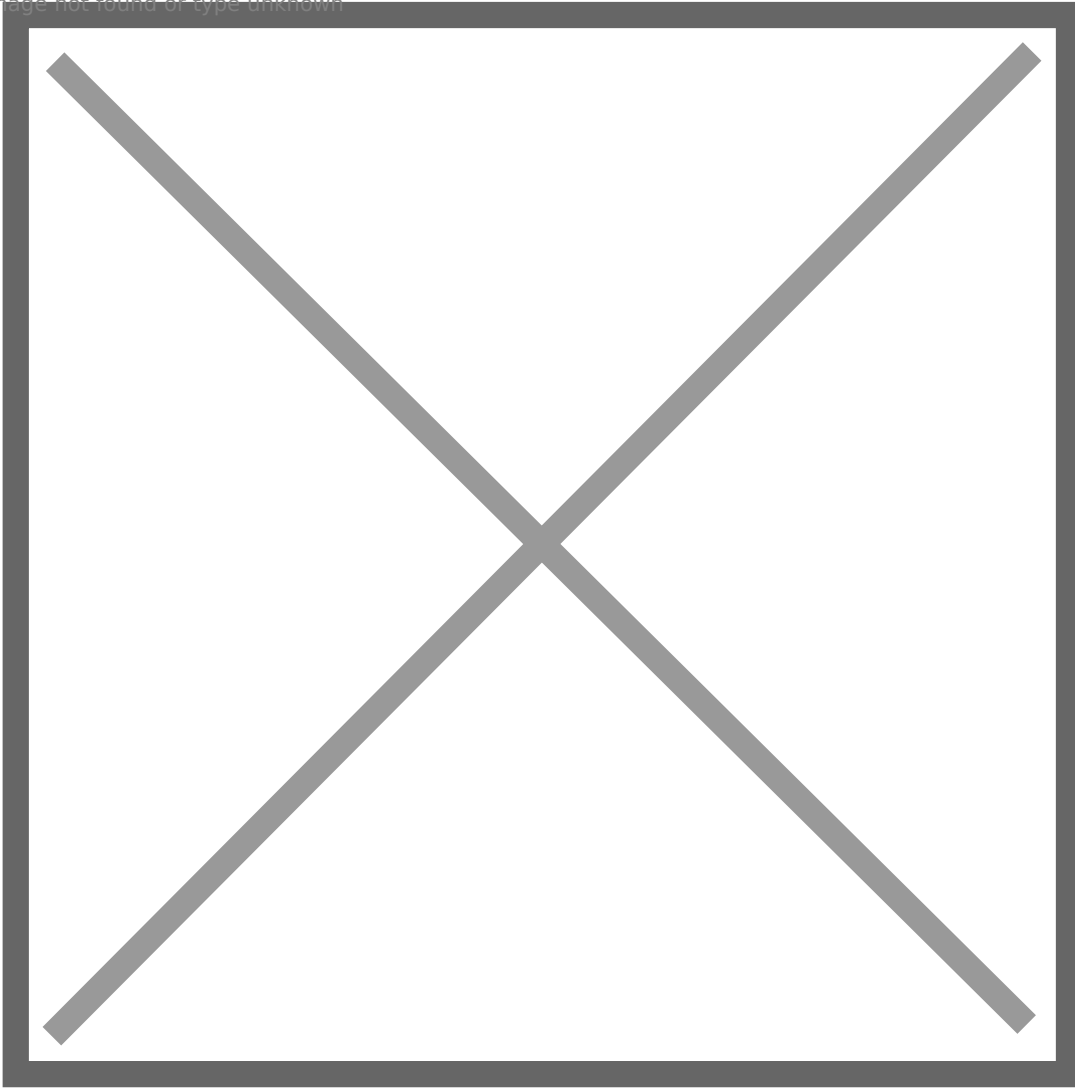
Apply Other Filters

Tip: You can apply further filters to complete a Stock Take for a specific Category, Supplier, Brand or Collection

Alternatively, search for a specific Product to Stock Take

3. Apply your filters

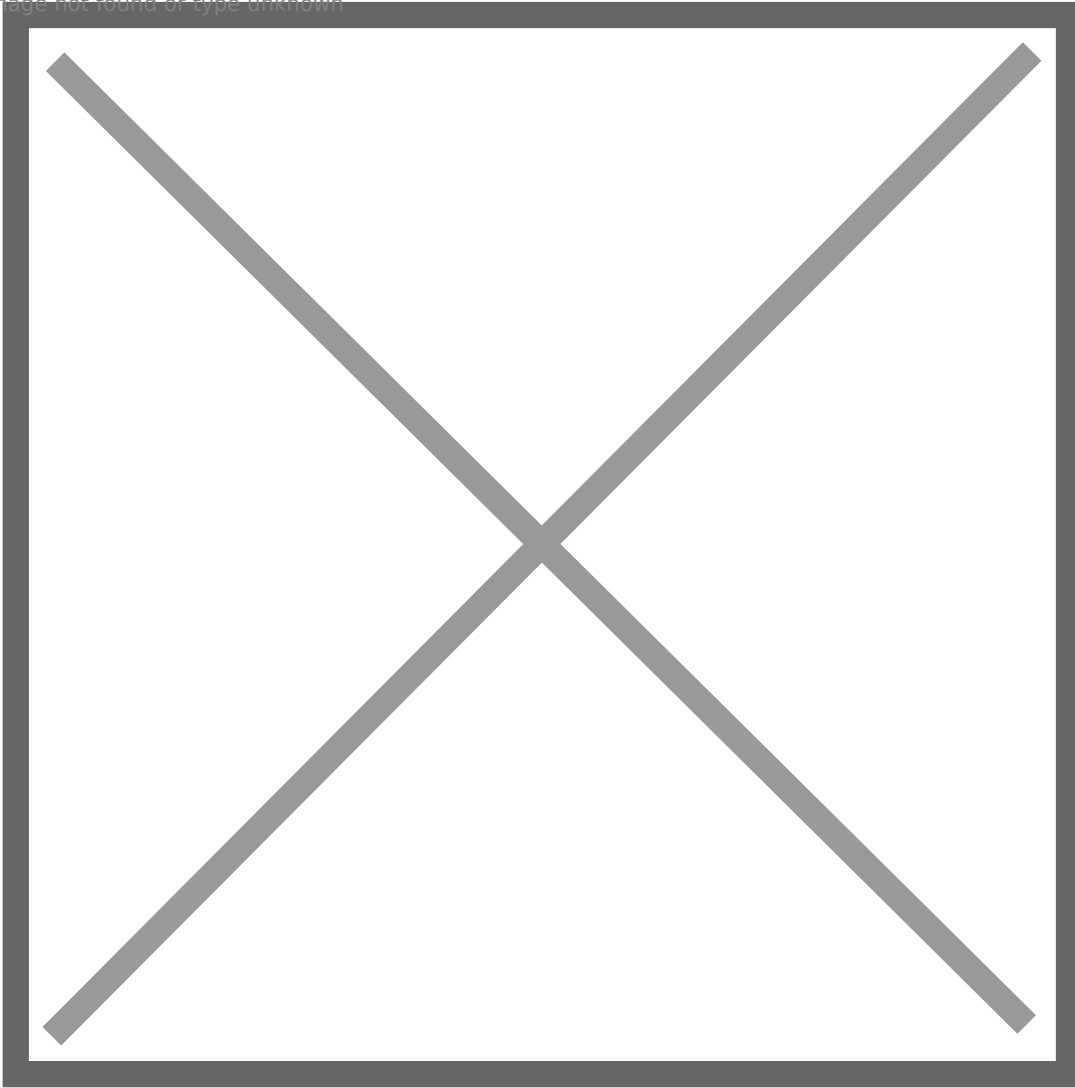
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Export your file

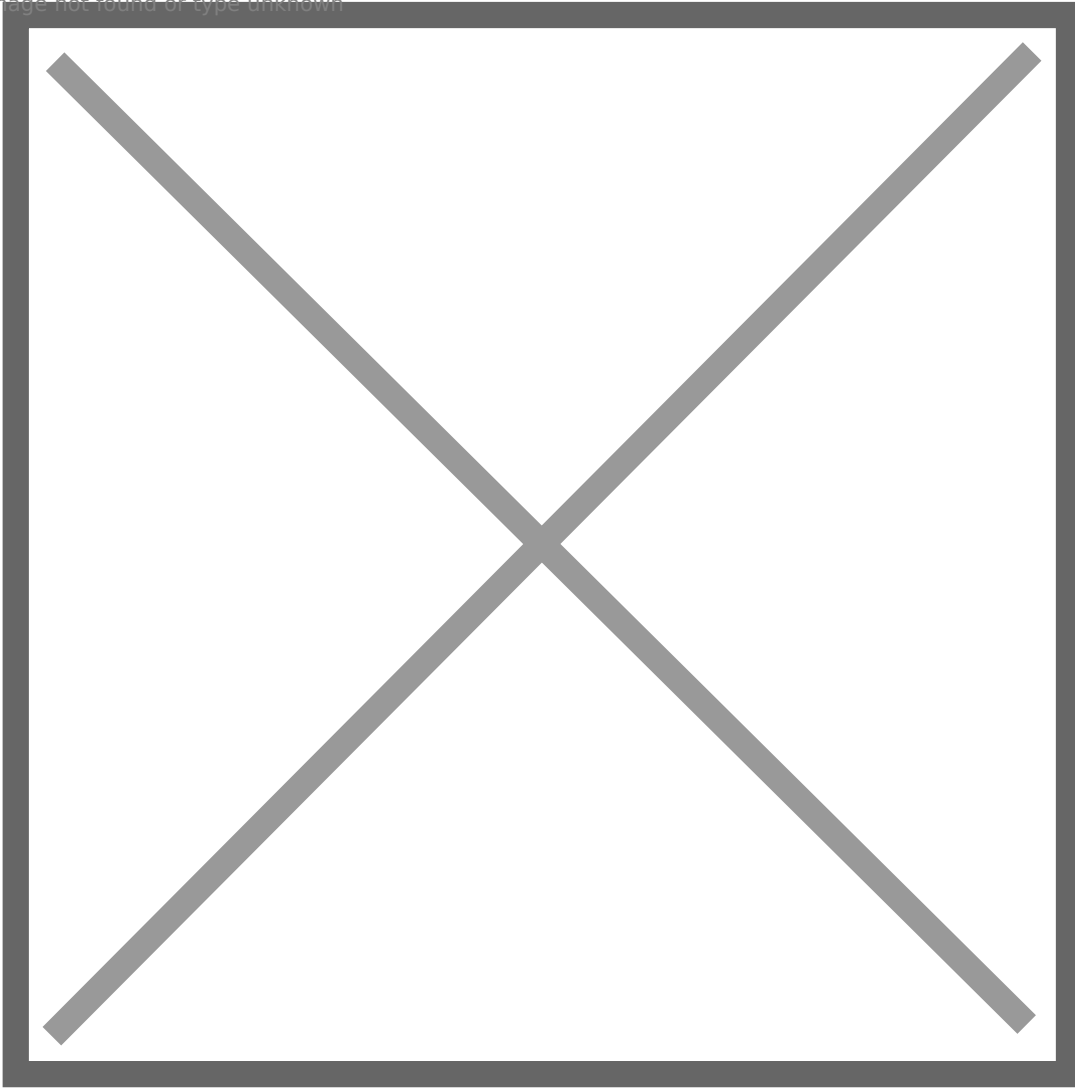
4. Click "Import / Export CSV"

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5. Click "download as csv"

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Update your spreadsheet

6. Update quantities as required

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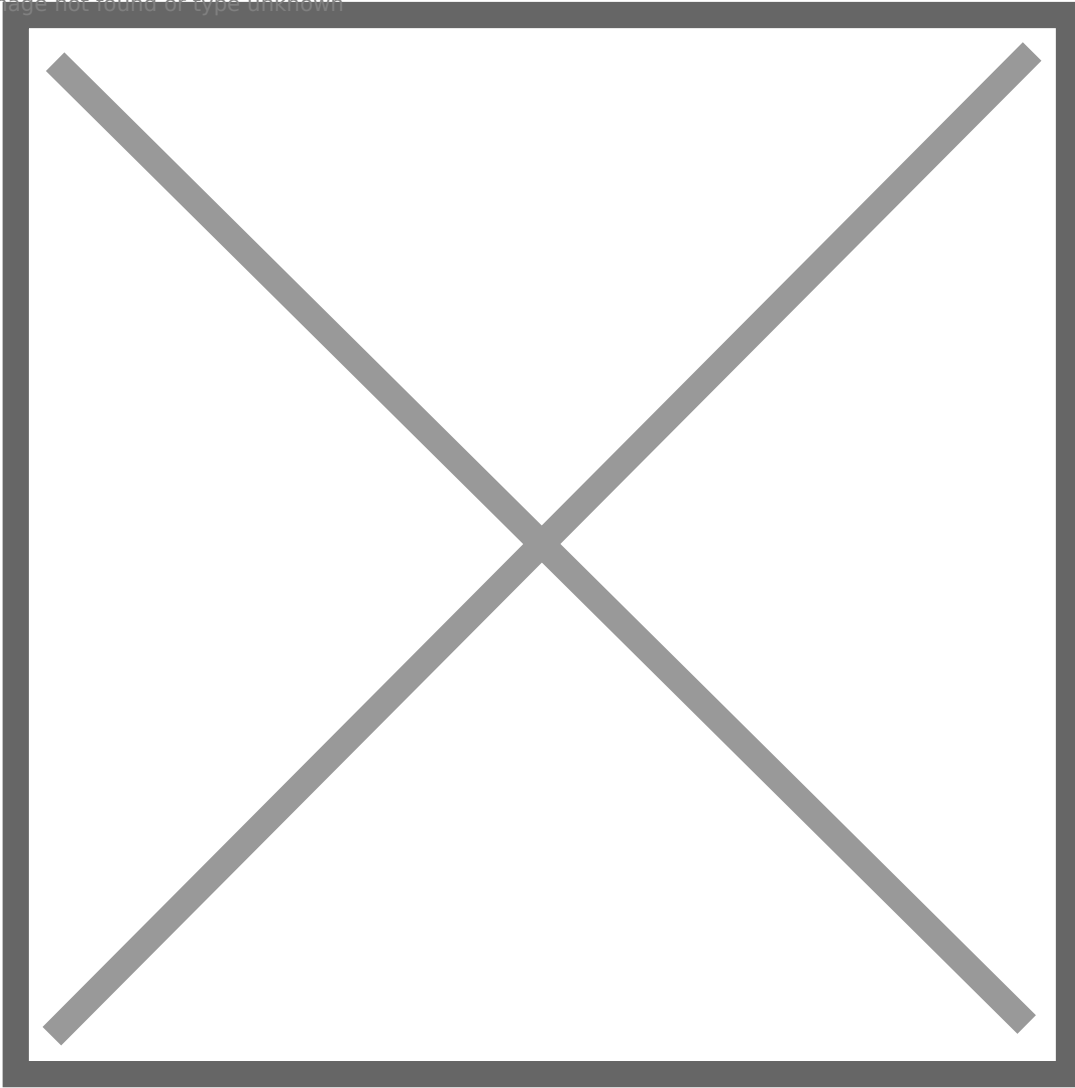


Tip: Stock adjustments will require a reason; enter these in bulk in column G

7. Enter new products/lines as required by adding the SKU Codes

In the case of USRs, enter the barcode (see below)

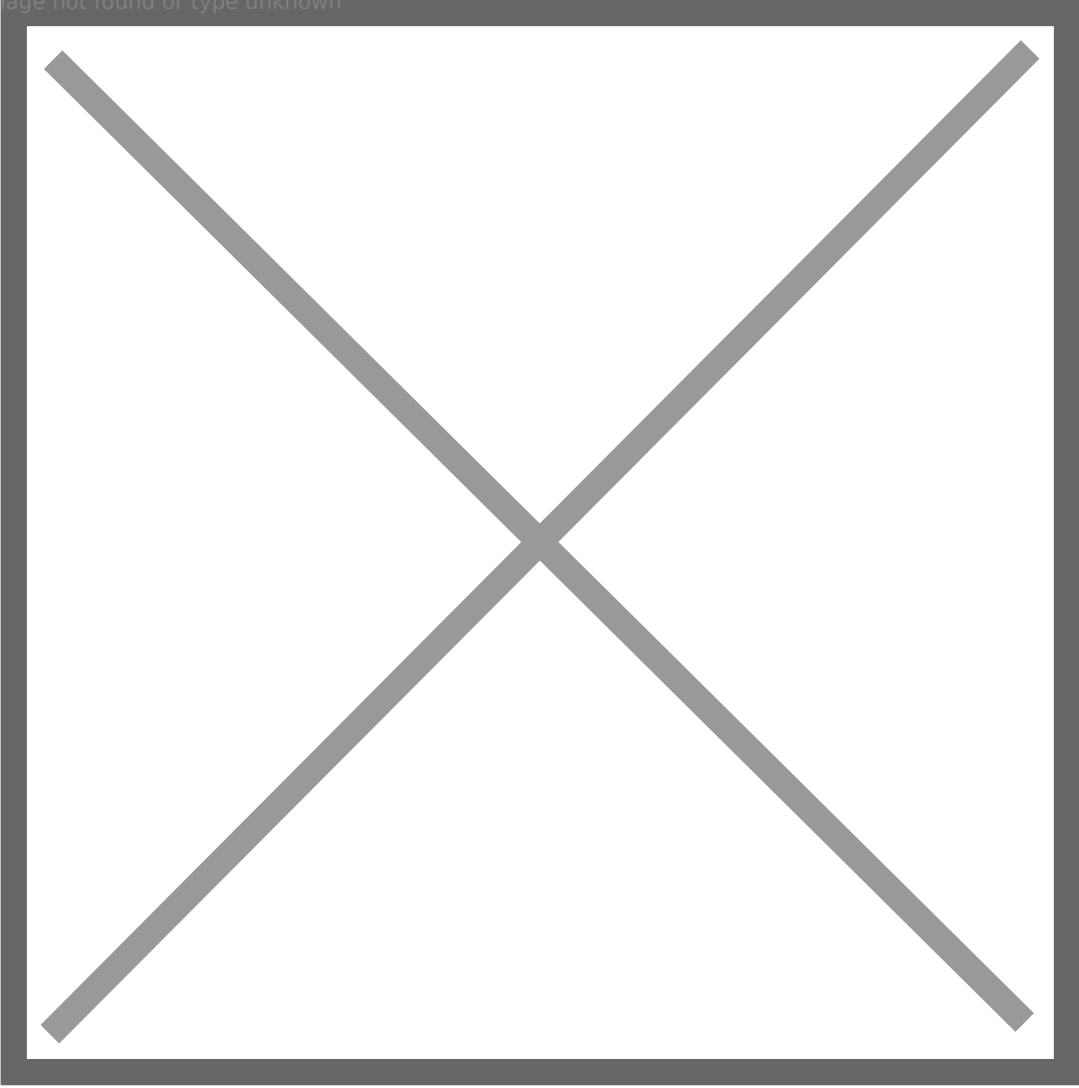
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Upload your file

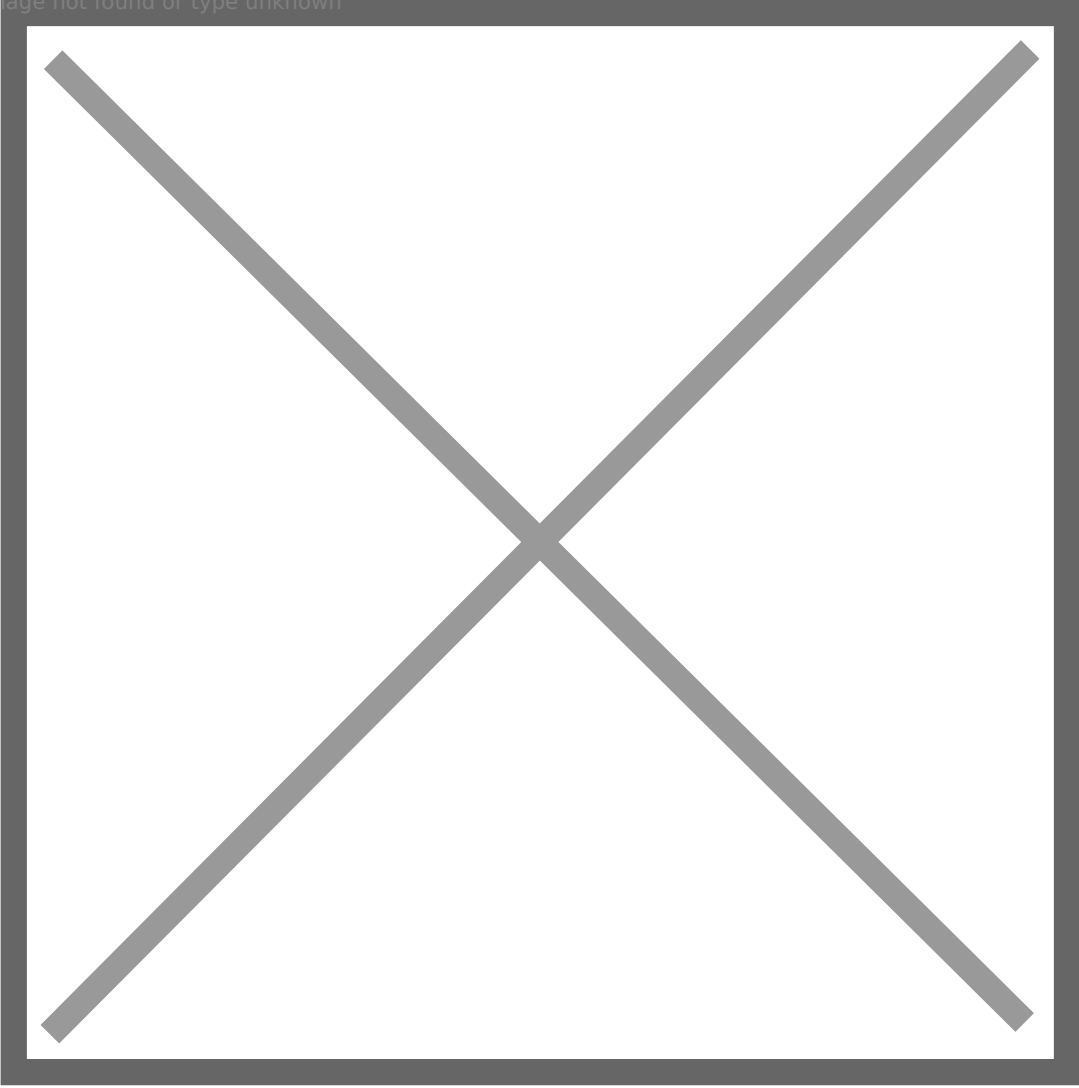
8. Click to select your file

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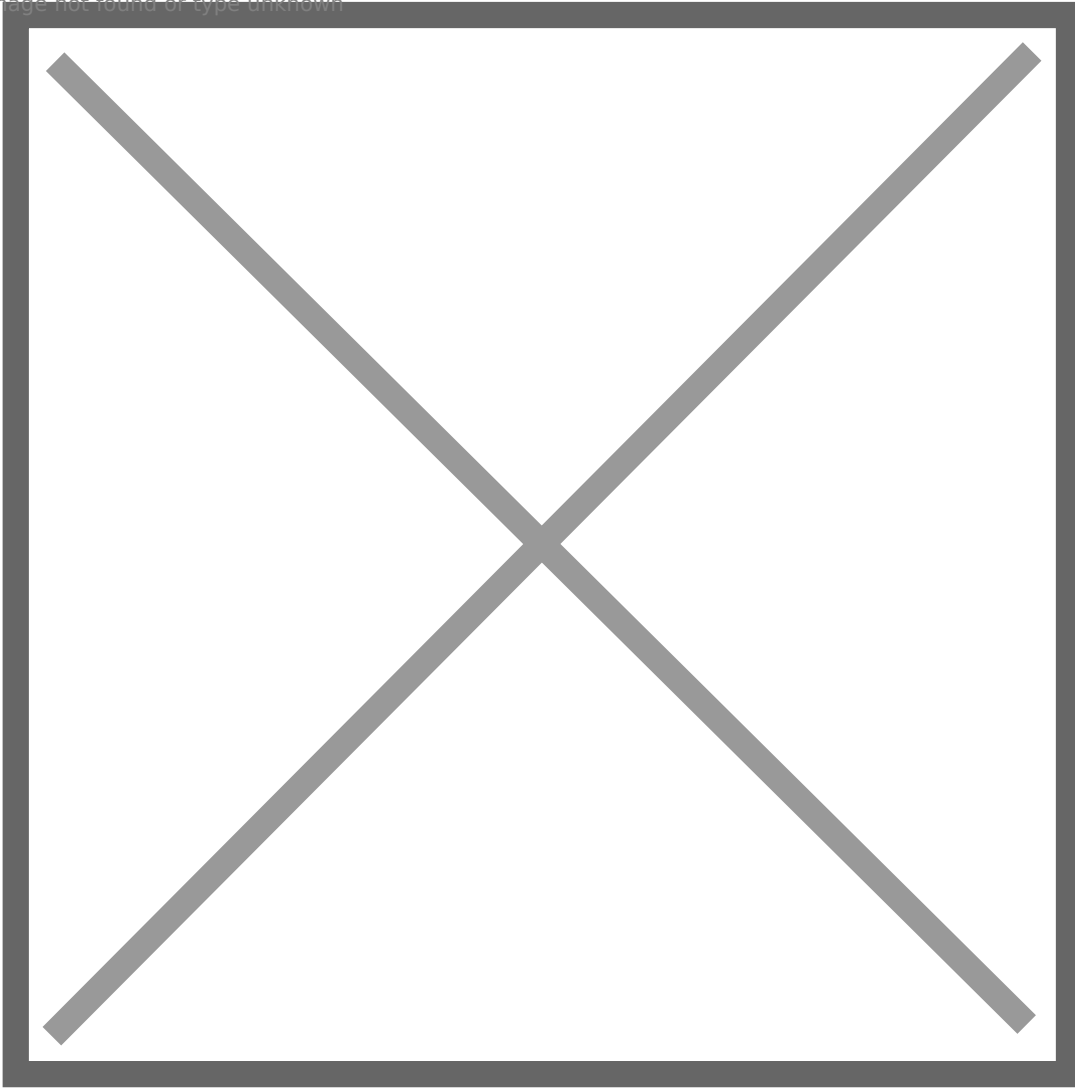
9. Click "upload file"

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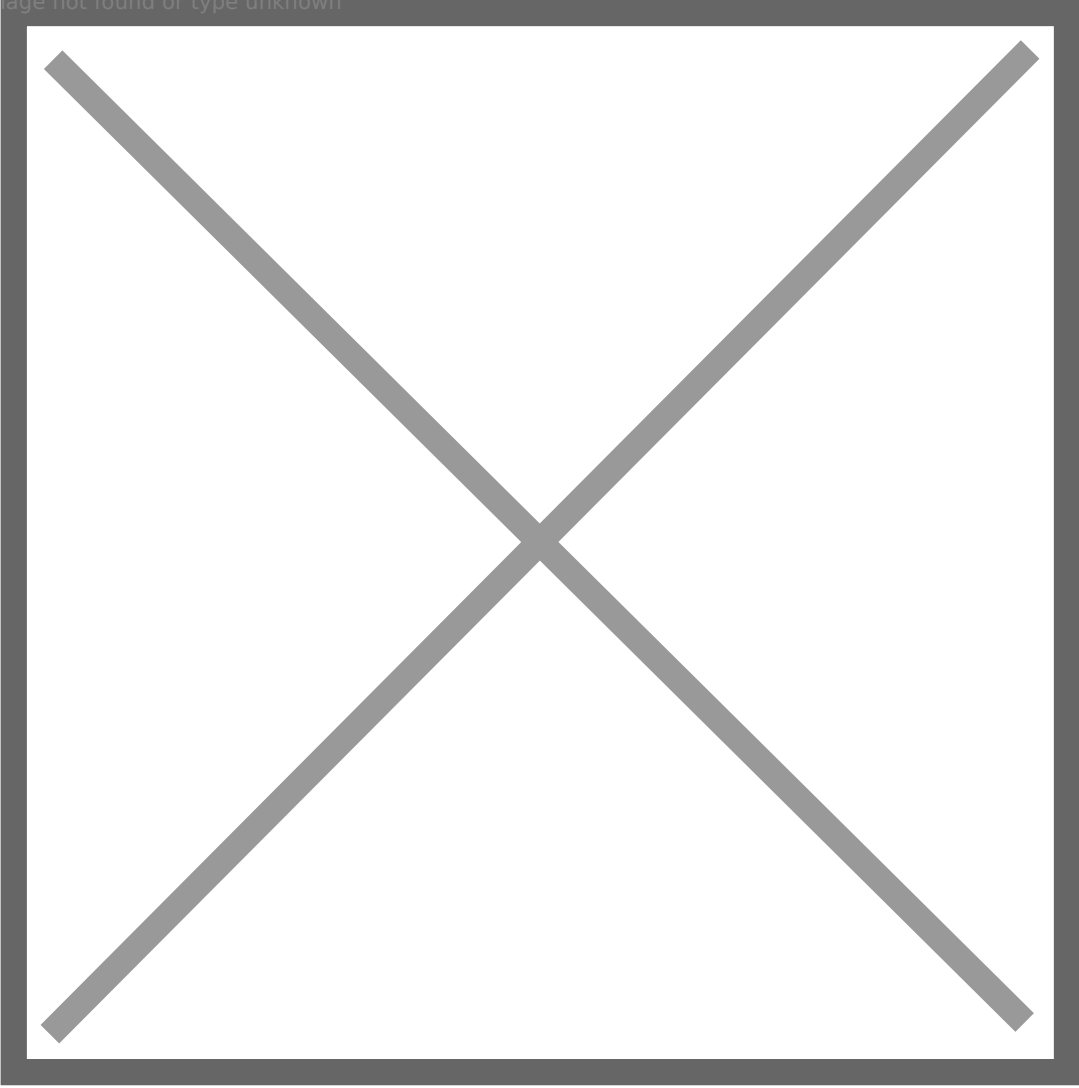
10. Map fields and click "confirm import"

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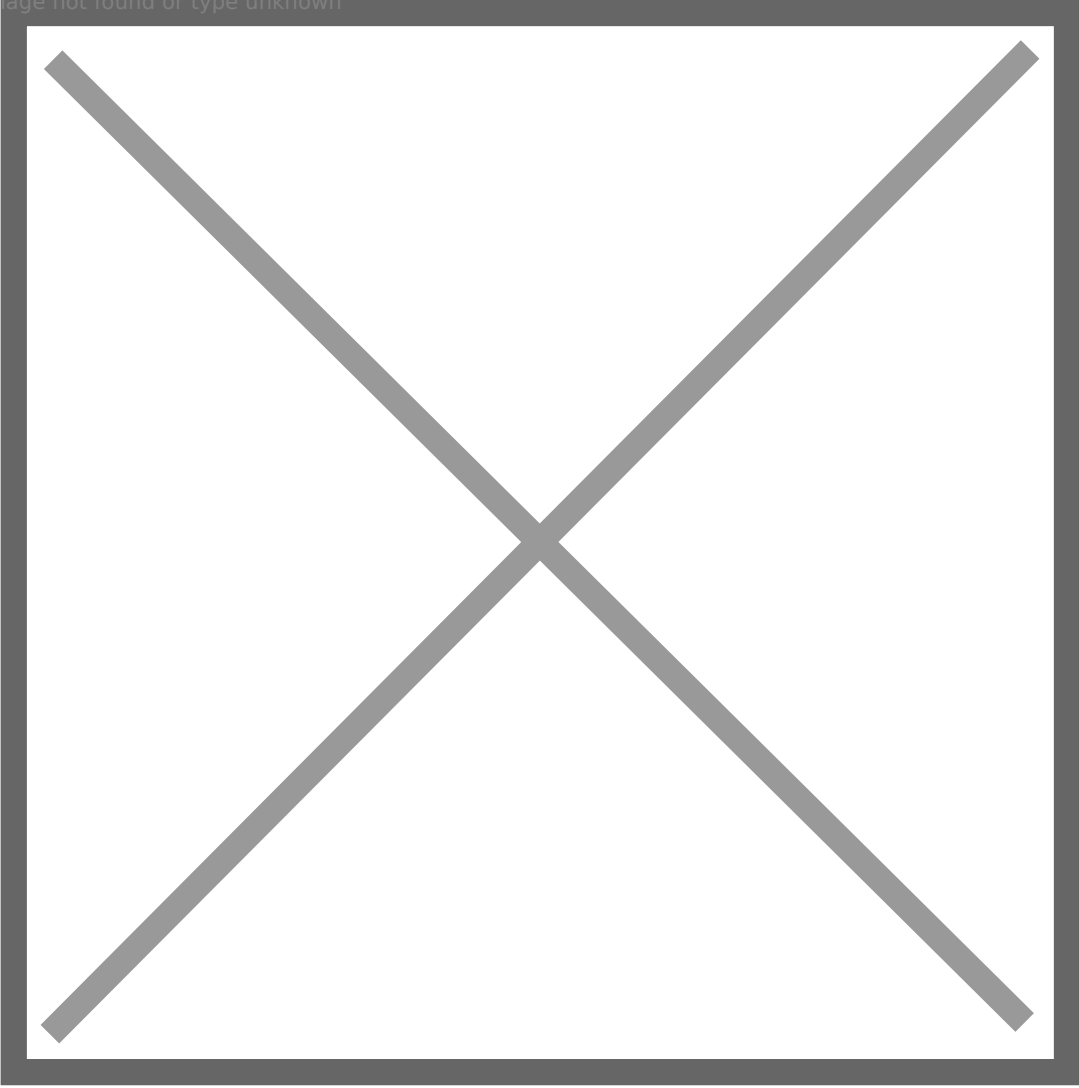
11. If you did not enter them in the CSV, you will need to add reasons for adjustments at this stage (these may be applied one at a time, or in bulk at the bottom of the screen)

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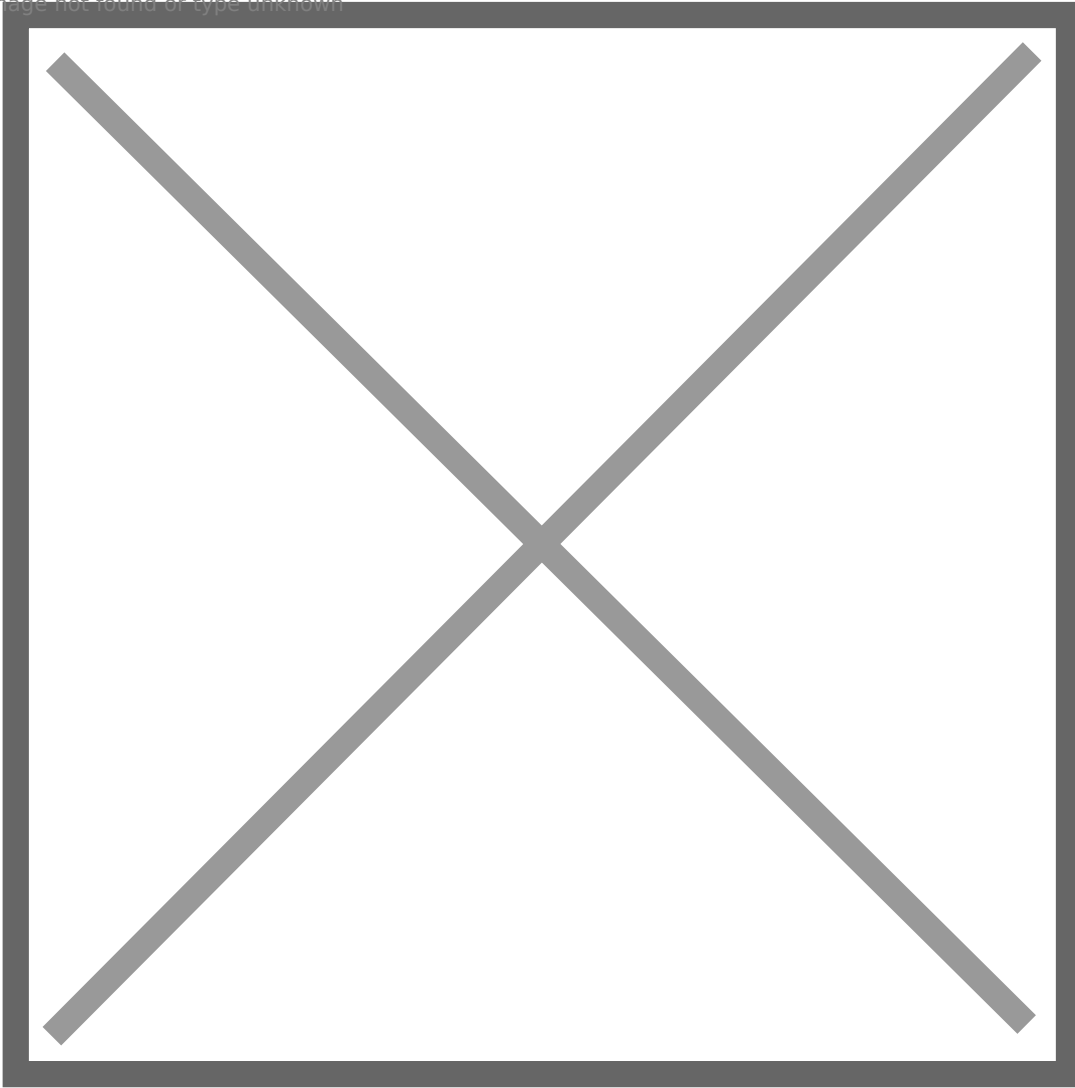
12. Click "commit changes"

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13. Click "ok"

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Revision #3

Created 27 October 2025 13:39:38 by Mike

Updated 19 June 2026 15:32:20 by Mike