April 2023

Lightspeed & Inventory

Recording and tracking inventory will be a new feature that we start using in Lightspeed. We will start this by recording inventory for Residential & Commercial soil test kits. As we develop this process and gain a better understanding, we will eventually branch out and apply this to all tangible items in your MSU Extension Office.

Lightspeed staff with a <u>manager</u> role assigned will be performing this task. If your office does not have a Lightspeed manager, please reach out immediately to find an alternative solution.

Inventory counts are performed once a month and done by the last working day, which should somewhat align with the deposit reporting periods.

Recording stock received is performed when the order is received.

Transferring stock between offices is performed 1. When the office moves the stock out of the office and 2. When the new office receives the new stock.

If you intend to move kits between counties, it will be imperative to update this in Lightspeed as well. Reporting to AABI & Kelli when there are discrepancies will be critical as well.

<u>Recording Stock Received</u>
This is completed when you receive your stock from an order you placed through AABI.

[Tango Clip - Receiving Stock](#)

- Inventory
- "Stock Control"
- "Receive Stock"
- Supplier: From the drop-down menu: AABI – soil test kits 2023
- Delivery recipient: Choose your county location that is receiving the stock.
- Invoice – include this if AABI has provided this detail.
- Delivery date – enter the date your location received the stock.
- Order number –on AABI's invoice/packing slip
- Note: optional

    <u>Section: Products</u>
- In the search field, look for the necessary skus or name of the product.
- You can do one or multiple products at a time.
    - SKU – 11321 – Residential Soil Test Kit
    - SKU – 11322 – Commercial Soil Test Kit

Recording Monthly Inventory Count:

Tango Clip – Recording Monthly Inventory Counts

This is when you perform a physical count of the items you have in your MSU Extension Office. Done by physically touching the kits and counting them. Should be done monthly and reported on the last reporting period of the month.

- Inventory
- "Inventory Counts"
- "Add Inventory Count"
- "Start Date" – This is the start date of the inventory count (the last working day of the last deposit reporting period) This can't be changed to a date in the past.
    - Should take place during the 16th – end of the month report, on the last working day.
- Outlet: Select the location you are performing this task
- Count Name: Name it the date the count is performed and the location.
    - This will auto-populate when you enter the start date, time & location.
- Select the Partial Count Option (should default to this):
    - In the search field, look for the necessary sku or product name.
    - You can do one or multiple products at a time.
- "Start Count"
- Click on the product from the list.
- Quantity – enter the amount that you counted.
    - Physically count the inventory on hand. Do not just take the number from the screen – touch the inventory you have on hand and count. Record this number under the quantity.
- Repeat this process until all items are counted.
- "Review"
- One you have recorded all inventory on hand, click complete.

A new screen will pop up allowing you to generate PDF reports & Download report.

Do NOT select Generate PDF report -this combines all products and doesn't provide helpful data. Simply click File, then print and submit to AABI. When you download the report, this combines products and rolls the data up- not showing helpful details. Therefore, it's best to print the screen, like other reports: File, print, save document.

Lightspeed managers are to report monthly inventory counts during the 16th – end of the month reporting period. Submit reports to msusoiltest@msu.edu using the below structure:

- Email subject line: COUNTY NAME MONTH YEAR INVENTORY
- Example: Spartan County May 2023 Inventory

Please do not send them to Kelli or msue.vend@msu.edu – reports will not be forwarded to the correct destination.

Transferring Stock between MSU Extension Offices

This is done when you have stock at MSU Extension location A and need to move it to MSU Extension location B. This is a 2-step process that requires actions by all offices involved. The office giving the inventory will complete the transfer stock action and the offices receiving the inventory will complete the

For the example below, Barry County has the original stock and wants to transfer quantity 10 Test Product – SKU 11350 to Test Outlet for Training.

Step 1: Barry County performs the 1st step which is initiating the transfer.

- Inventory
- "Stock Control"
- "Transfer Stock"
- **Section: Transfer Details**
- "Source Outlet" – this is the location that first had the stock or where the stock is coming from.
- "Destination Outlet" – this is the location that is now in possession of the stock.
- "Reference" – this is a prepopulated field – you should make note of this to inform the other county what the number would be – this makes finding easy in Lightspeed.
- "Date" – enter the date the transfer took place.
  Section: Products
- Select the "Choose products" (should default to this)
- In the search field, look for the necessary skus or name of the product.
- Record the Quantity that you are transferring out of your Extension office.
- "Save Transfer" (This doesn't mean you're done, there's still one more step)
- Then a new screen is showing; once you've sent the inventory to the other office, click – "mark as sent" This will now make it available for the receiving office to record the new inventory.

Step 2: Test outlet receives the transfer of stock.

- Inventory
- "Stock Control"
- From Drop down menu – select sent orders.
- Click update.
- Find the correct transfer – looking at the from county and reference #
    o On the right, click Receive - Be sure you are accurately counting what you received- this could cause problems if the full stock wasn't received.

  Section: Transfer Details

- Select the Date that you are receiving the stock being transferred.

  Section: Products

- Find the product transferred and enter the quantity received – do not change any other fields in this row.
- Click Receive
- A new window will pop up asking "You're about to receive this transfer which will update our inventory – this action is permanent and can't be undone". Select Receive if you've taken possession of the new inventory.
- Your new inventory is now updated.