How to Create and Complete a Take-Out

Rose 3.0 · Take-Outs

In each screenshot, the **yellow boxes** show what to click. Numbers give the order.

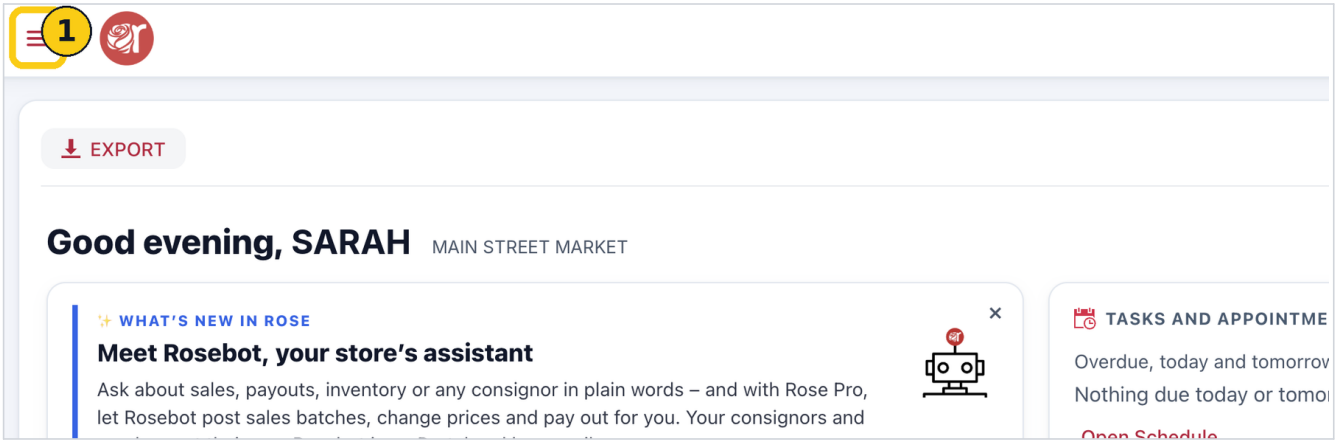
Overview

A take-out removes items from your stock and records why they left: damaged, donated, lost and so on. You build a take-out in three parts: create it, add the items, then complete it. Stock doesn't change until you complete the take-out.

Where to find it: Dashboard › menu (☰) › **Take-outs**.

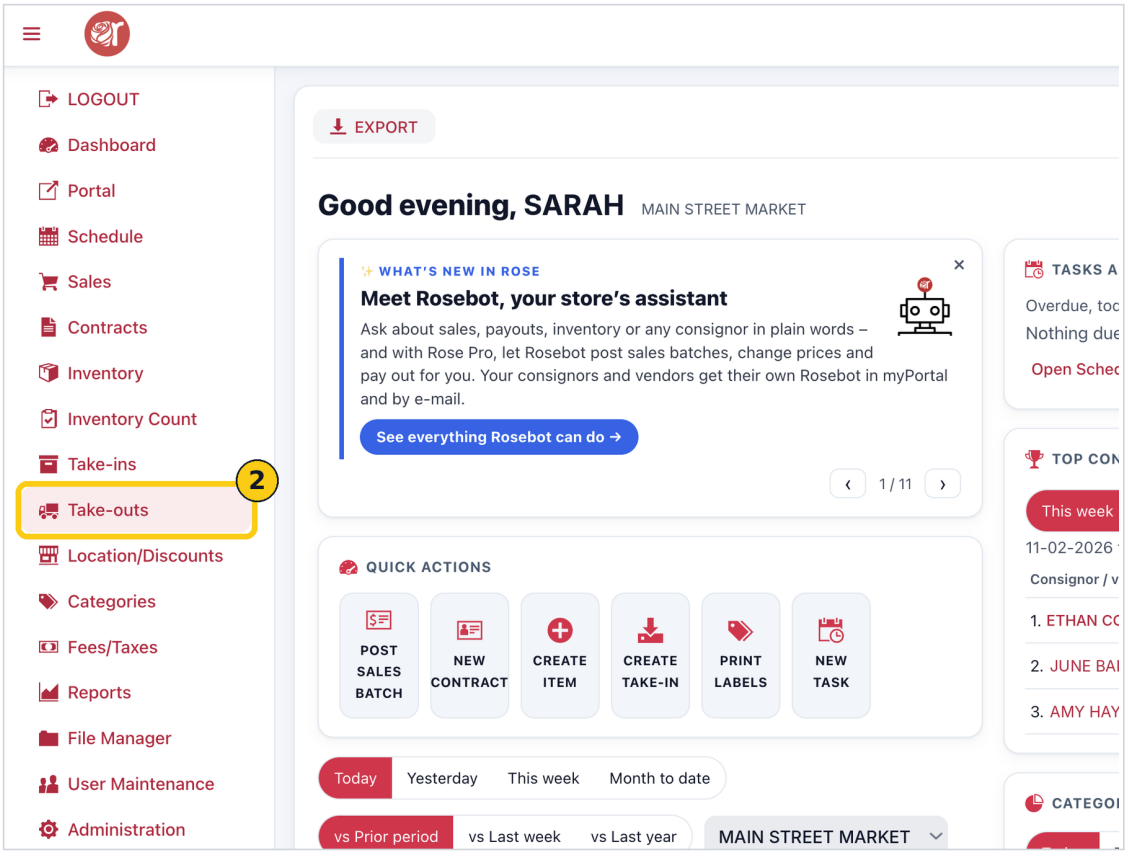
Step 1: Open Take-Outs from the Dashboard

1 On your Dashboard, click the menu icon (☰) in the top-left corner.



Open the menu from the Dashboard.

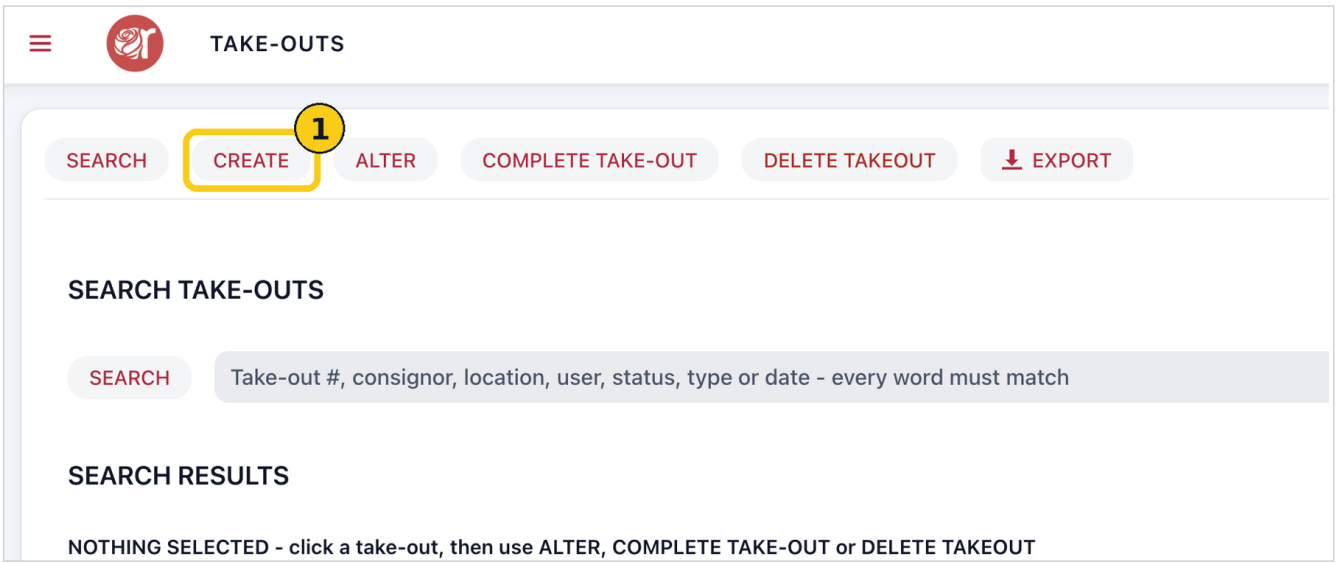
2 Click **Take-outs**.



Click Take-outs.

Step 2: Create the take-out

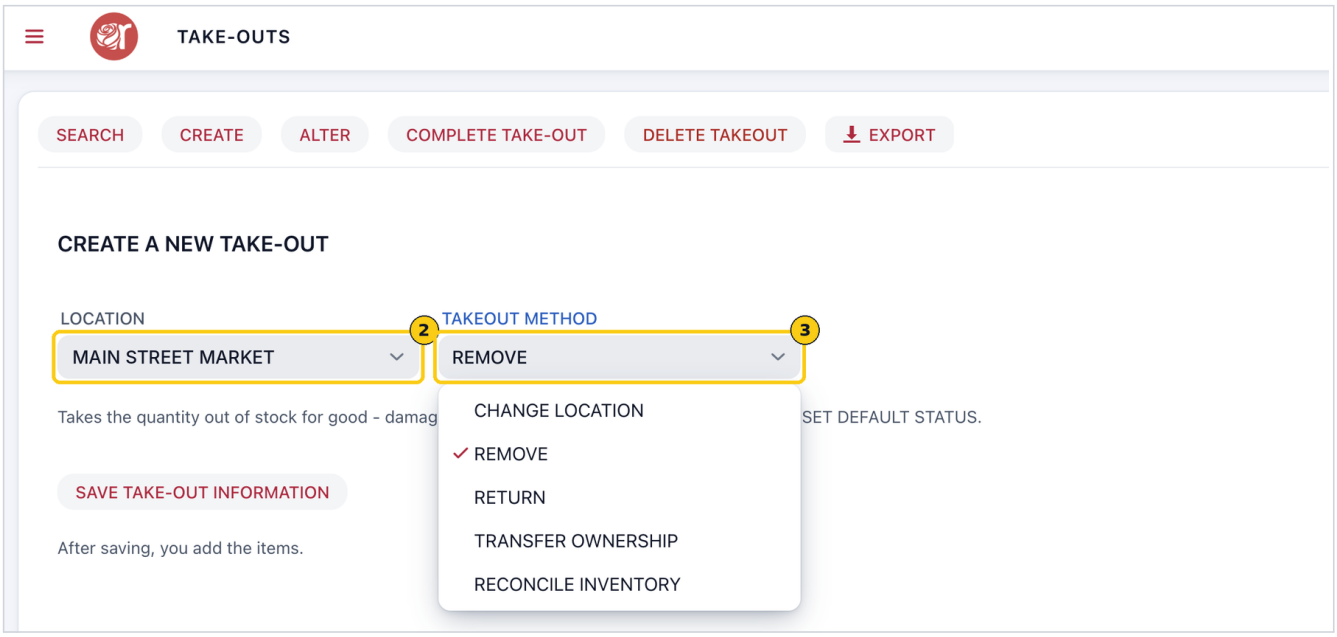
1 On the Take-Outs screen, click **CREATE**.



Click CREATE.

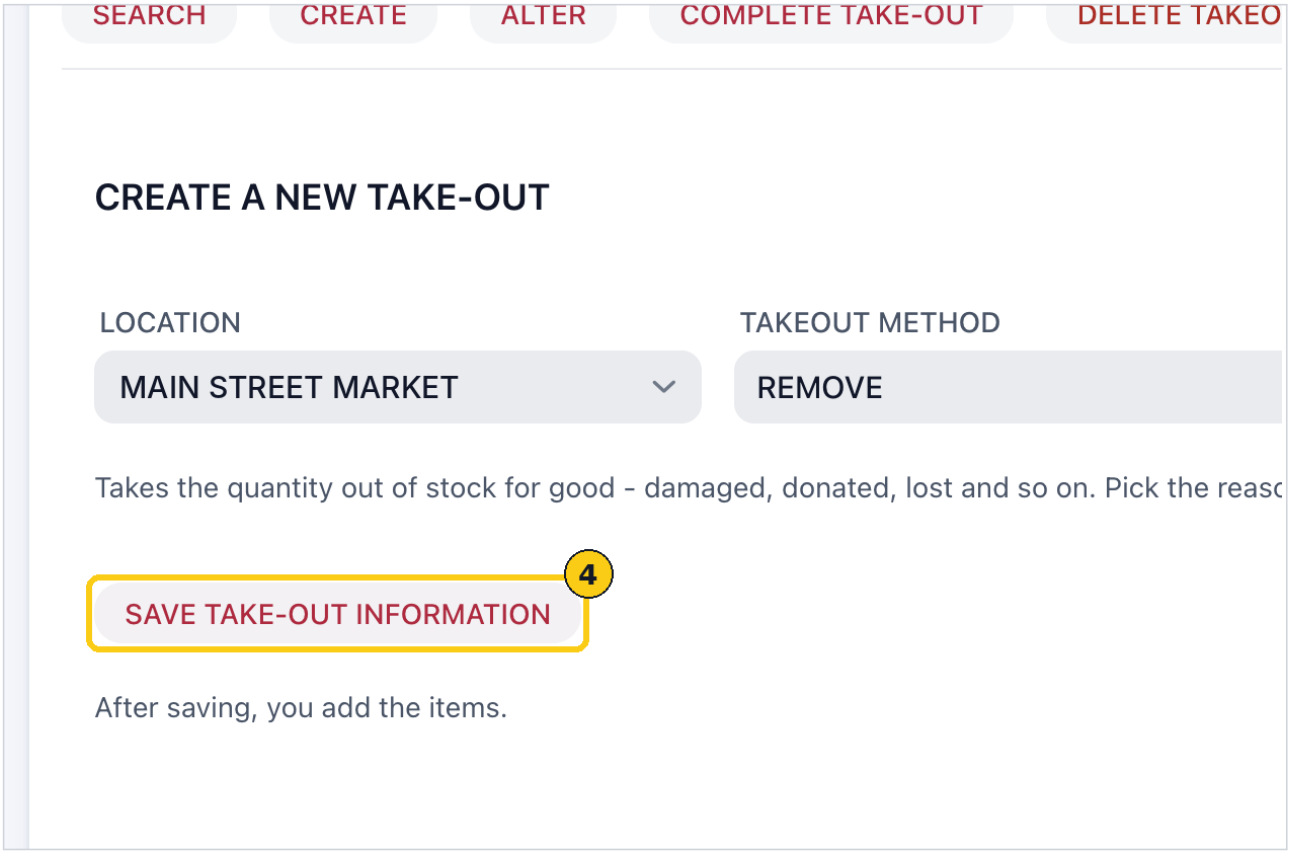
2 Pick the **LOCATION** the items are leaving from.

3 Pick the **TAKEOUT METHOD**. This guide uses **REMOVE**, which takes the quantity out of stock for good.



Choose the location (2) and the takeout method (3).

4 Click **SAVE TAKE-OUT INFORMATION**. Rose saves the take-out and opens it so you can add items.



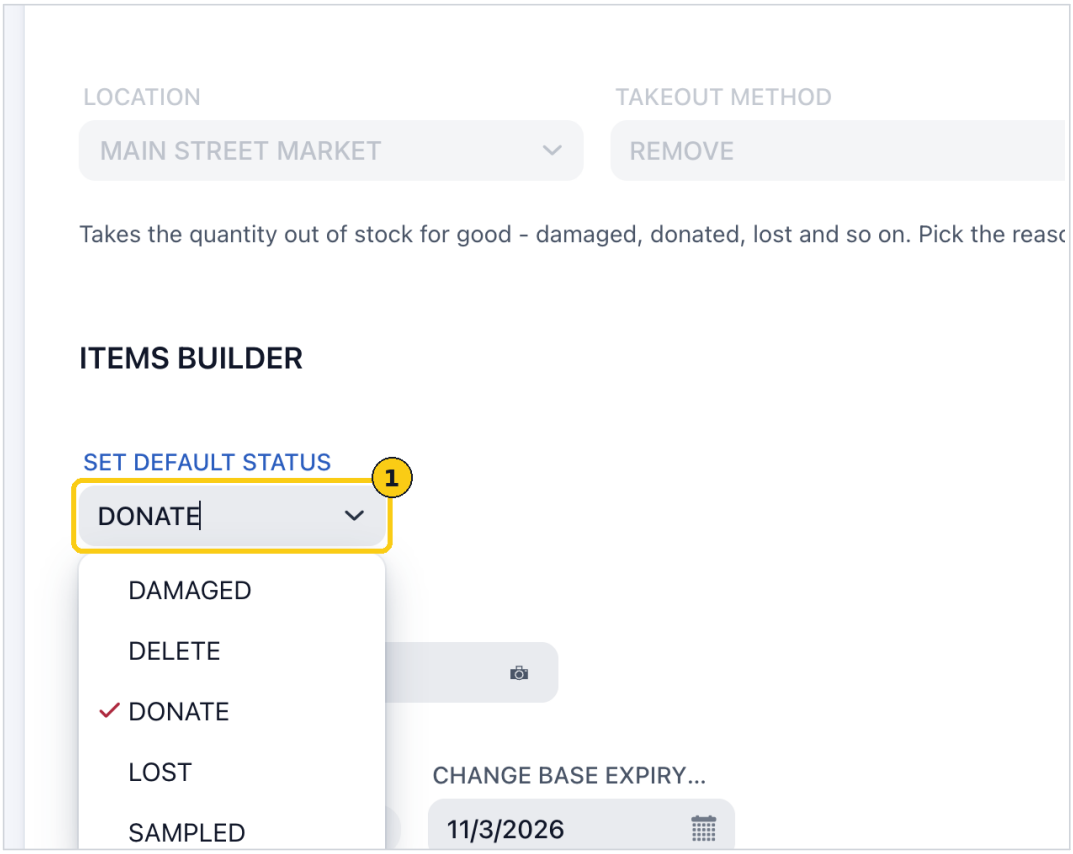
Click SAVE TAKE-OUT INFORMATION.

The **TAKEOUT METHOD** list also includes Change Location, Return, Transfer Ownership and Reconcile Inventory. Once saved, the location and method can't be changed.

Step 3: Add the items

The **ITEMS BUILDER** opens under **ALTER TAKE-OUT** with the take-out number.

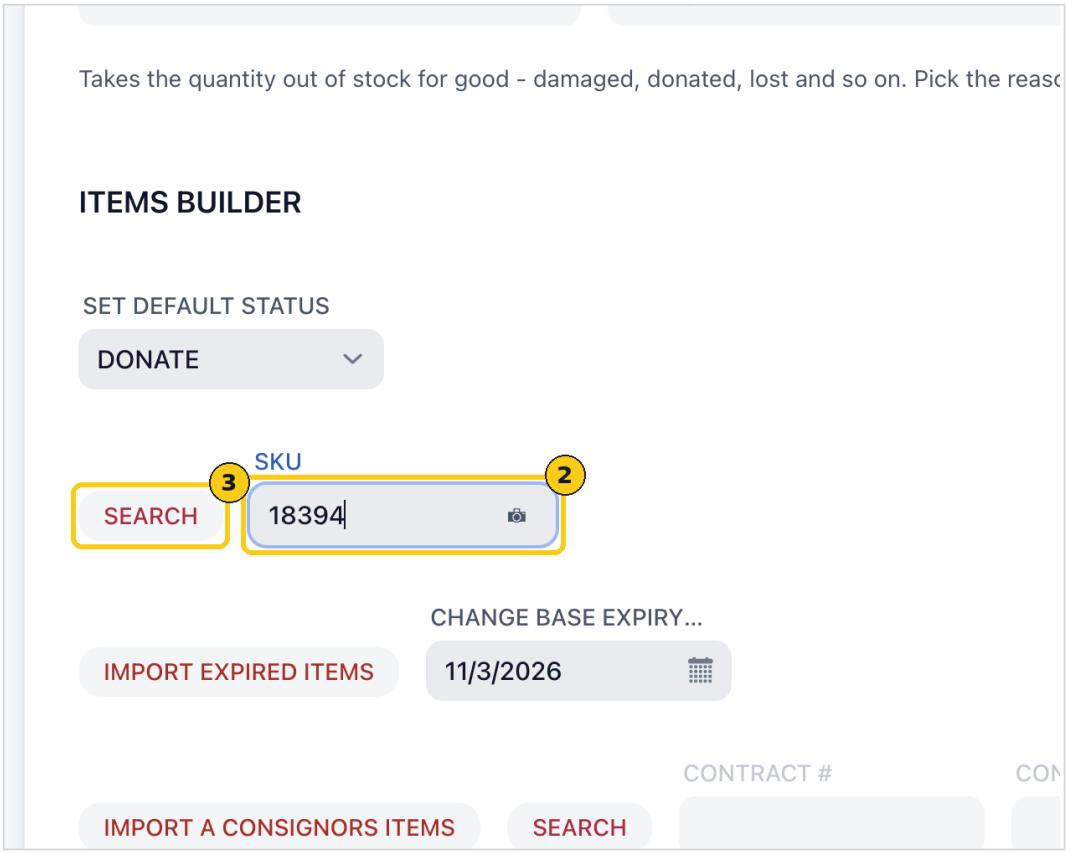
1 Choose the reason in **SET DEFAULT STATUS**: Damaged, Delete, Donate, Lost or Sampled. Every item you add next gets this status.



Pick the reason in SET DEFAULT STATUS.

2 Type the item's SKU in the **SKU** box, or click the camera icon to scan its barcode.

3 Click **SEARCH**. The item is added to the **TAKE-OUT ITEMLIST** below.



Enter or scan the SKU (2), then click SEARCH (3).

4 Repeat for each item.

Add many items at once

- **IMPORT EXPIRED ITEMS** adds items that have expired by the date in **CHANGE BASE EXPIRY** (today by default).
- **IMPORT A CONSIGNORS ITEMS** adds one consignor's items. Use the **SEARCH** button beside it to pick the contract first.
- **TAKE OUT THE FULL ON-HAND QUANTITY** takes every unit of each imported item. Untick it to take 1 of each.

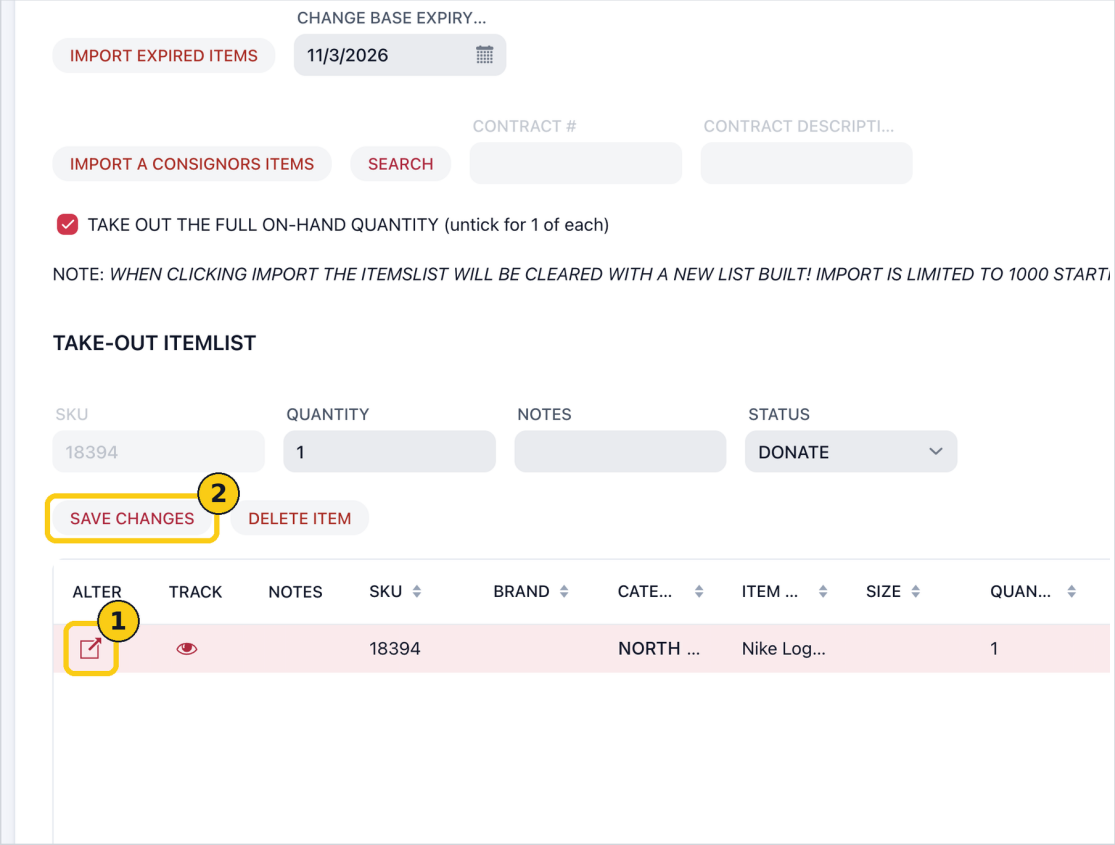
Note: an import clears the item list and builds a new one. Imports are limited to 1,000 items, starting from the oldest expired.

Step 4: Check the item list

Every item you've added is listed in the **TAKE-OUT ITEMLIST** with its SKU, quantity, price, expiry, contract and status.

1 To change an item, click the edit icon in its **ALTER** column. Its SKU, quantity, notes and status fill in above the list.

2 Change the **QUANTITY**, **NOTES** or **STATUS**, then click **SAVE CHANGES**. To drop the item from the take-out, click **DELETE ITEM** instead.



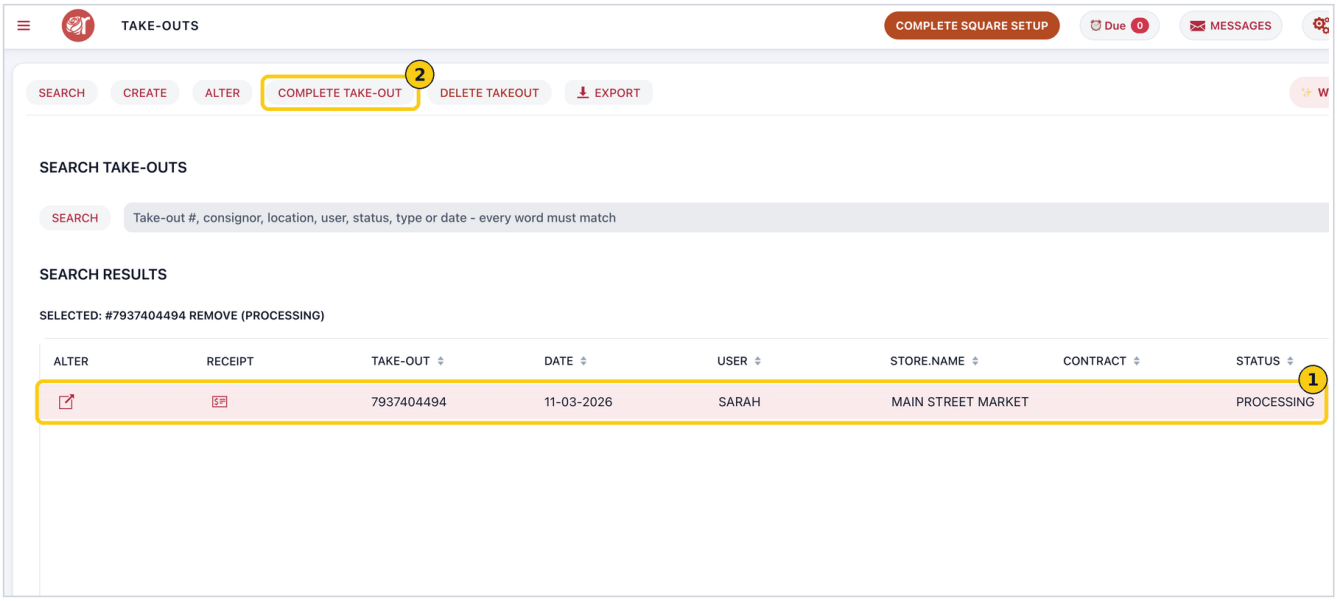
Click the item's edit icon (1), make changes, then click SAVE CHANGES (2).

Step 5: Complete the take-out

Until you complete it, the take-out shows as **PROCESSING**, and nothing has been taken out of stock.

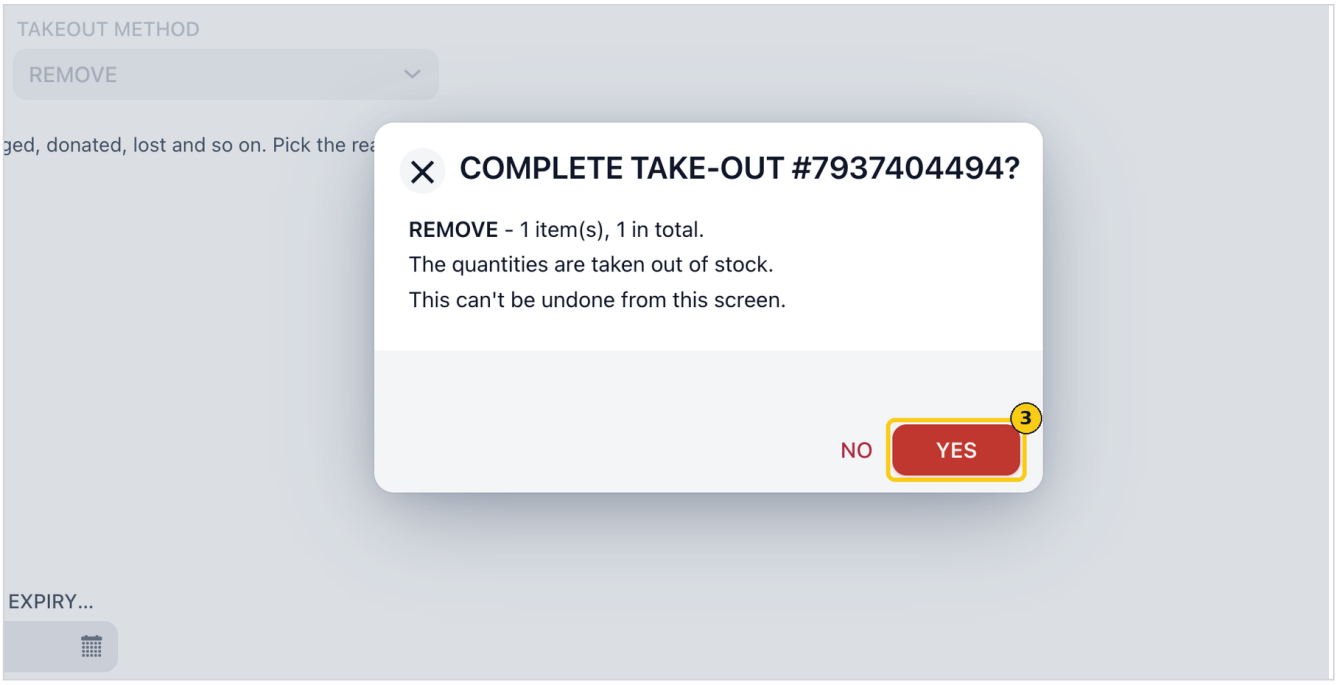
1 Click **SEARCH** in the Take-Outs toolbar and click the take-out's row to select it.

2 Click **COMPLETE TAKE-OUT**.



Select the take-out (1), then click COMPLETE TAKE-OUT (2).

3 Check the summary: the method, the number of items and the total quantity. Click **YES**.



Confirm with YES.

The quantities are taken out of stock. **This can't be undone from this screen**, so check the item list carefully before you confirm.

FAQ

Can I come back to a take-out later?

Yes. It's saved as soon as you click SAVE TAKE-OUT INFORMATION. Find it under SEARCH, click its row, then click ALTER to keep adding items.

Can items in one take-out have different reasons?

Yes. SET DEFAULT STATUS sets the reason for items as you add them. Change any single item's status in the item list.

What does the receipt icon do?

The icon in a take-out's RECEIPT column opens its receipt.

How do I get rid of a take-out I don't need?

Select it under SEARCH and click DELETE TAKEOUT.