



Getting Started Checklist

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Choose your account start date

This is the date you began inventory tracking in Craftybase. We recommend starting with today's date, or backdating to (at most) the start of the current month.

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Connect your sales channels

Connecting your sales channels will import and create your products and variations, along with any orders received between your start date and today. Restructure and merge together any duplicates if necessary.

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Count your on hand materials

Create a list of all materials on hand, and add these to Craftybase (use our [printable template](#) or [spreadsheet](#)). Your starting adjustment will be the quantity and the unit cost of each on your chosen account start date.

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Count your on-hand products

Create a list of all products on hand, and add these to Craftybase (use our [printable template](#) or [spreadsheet](#)). Any products you have made and not yet sold should be included in this tally. Set your starting adjustment to be the quantity and material unit cost of each on your chosen account start date.

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Add recipes

If you make batches of your products, create recipes for each to speed up your future manufactures.

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Compare your stock levels

Review the calculated stock levels in Craftybase to your original list of stock-on-hand to ensure that they match. If you are not starting your tracking on the current date, add manufactures, orders and expenses to account for any stock changes between the start date and today.



CRAFTYBASE

Inventory & Bookkeeping for Handmade

