

SOS Inventory Limitations



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Theoretically, SOS Inventory has no limit to the number of items, customers, vendors, and transactions that can be entered into the system. However, our software does have practical limitations of which you should be aware. They affect the system's response time when you conduct searches, create and retrieve transactions, run reports, import bulk data, etc.

Items

- **2000 items or less.** No issues. Some reports that include *all* items may need to be emailed and require more time to calculate.
- **2000-20,000 items.** Some slowing of response time will occur when conducting searches for items in the Items list and on transactions.
- **Over 20,000 items.** Searching for items in the Items list and on transactions may require an extended time to calculate. Utilization of categories to subdivide item lists into smaller groups can allow reports and lists to be more efficiently run.

Customers and vendors. No real limit, but running customer- or vendor-based reports can take an extended period of time if all customers or vendors are included. The greater the number of non-archived customers or vendors in the account, the longer it will take for the system to search for a customer or vendor on the associated transaction.

Data imports. It may be necessary to break the data contained in a spreadsheet file into multiple sheets to facilitate faster uploads of data.

- **Items.** If adjusting inventory, limit the import to 200 items. If not adjusting inventory, limit the import to 5000 items.
- **Customers and vendors.** Limit the import to 5000 customers or vendors.

Transactions. The more transactions that are performed in the system, the greater the system transactions are entered.

- **Transaction list searches.** The system can slow down when thousands of transactions are searched. Archiving historical transactions and searching only for non-archived transactions can reduce the load on the system.
- **Auto-created transactions.** Transactions that automatically create other transactions can place great load on the system. Exercise caution when using auto-created transactions (such as when using AOP Rules) and ensure that the most optimized solution is utilized. If

you use auto-created transactions, please contact our Support Team at support@sosinventory.com before recreating historical transactions of accounts.

- **QuickBooks Online transaction retrieval.** If you import into QuickBooks Online more than 1000 of any transaction type into SOS Inventory, QuickBooks will send only the most recent 1000. You can use the **Data Utilities** options to obtain the rest. If using automated processes to create transactions from QuickBooks Online's synced transactions, ensure you upload less than 1000 transactions into QuickBooks Online and allow them to sync to SOS Inventory before importing additional transactions into QuickBooks Online.

Item, vendor and customer drop-down lists on transactions

- **Type intelligence.** To narrow the list to display fewer items, vendors or customers, use type intelligence. Rather than clicking the drop-down arrow to retrieve all items, vendors or customers, click in the data field and type part of the name of the item, customer or vendor. This narrows the list to display results that match your typed text. Backspacing to change the text you are entering may cause the list to run more slowly.

Locations

- **Unlimited locations.**
- **Running reports with multiple locations selected will take a longer time to process.** The more locations, the longer it may take to produce a report. Consider reducing the amount of data to a subset of items, customers, etc., when running reports for all locations.

Assembly bills of materials (BOMs)

- **Number of different BOM components.** Although the number of components is unlimited, long BOMs do slow the system down and make changes to the BOM edit page more time consuming.
- **Improving system function for BOMs.** When entering a build transaction, the system retrieves the current stock level of each component. To speed the display of a BOM with many components, you can enable **Don't Show Quantity on Builds and Shipments** in the Inventory Settings. This will bypass retrieving stock levels.

Ways to enhance list retrieval time

- **Specify fewer lines per page.** Use the Change Filter's **Results to Display** to control the number of lines shown on a list page.
- **Display only the columns of data required.** The more columns added, the more system calculations must be accomplished.
- **Archive transactions, items, customers, vendors, etc., that are no longer expected to be used.**

If you have additional questions about the practical limitations of SOS Inventory and how they may impact your business, please contact us at support@sosinventory.com.