Eagle Mobile (EM) Physical Inventory

There's a lot to think about when you're getting ready to conduct a physical inventory: clearing out old records so you have an accurate count file, scheduling it so that no Point of Sale or Receiving activity is taking place, dividing the counts among your teams… the list goes on.

One thing you don't want to have to worry about is the accuracy of your counts.

That's where using Eagle Mobile can help you out.

The Eagle Mobile Physical Inventory function helps to reduce the amount of time it takes to do an inventory count and cuts down on mistakes that are made when transferring numbers from a paper to the Physical Inventory Posting screen.

In this lesson, you will learn how to use Eagle Mobile to view and make changes to the physical inventory file.

After learning how to modify the Physical Inventory settings, you'll walk through the steps of a physical inventory count.

Topics

- Setup EM Options
- Using EM Physical Inventory

Setup EM Options

Before you start using Physical Inventory, you should verify a few settings that affect the information you see.

As with all Eagle and Eagle Mobile applications, your security level determines whether you will be able to make changes to the settings.

Begin by signing on to the Mobile device and select the Physical Inventory tools button.

This opens a screen where you can review the default settings for Physical Inventory and change those that can be modified.

Keep in mind, changing a setting here affects the current session only.

Once you exit the session, the system reverts to the defaults.

Changes to the defaults must be made in Options Configuration in Eagle.

At the top of the screen are 4 fields that allow you to control which values you see when you're doing a count.

Check them over to make sure they are the fields that are the most beneficial to you.

To make a change, simply tap the drop-down arrow for the field you want to change, and then select the new value.

The values selected here should assist you while performing the count.

Review the other settings and use the arrows to change the selections as necessary.

Notice that Count First Scan as 1 can be set to Yes or No.

If you set this option to No, the gun will display the scanned item upon your first scan.

You would then need to enter the count in manually or begin scanning each item to enter your counts.

If you set this option to Yes, the device will display the sku and enter a counted quantity of 1 upon your first scan.

You can then continue scanning the remaining items to be counted.

Each time you scan a product the total counted quantity for that product will increase by one.

Whenever you make changes on the setup screen, tap OK to save them.

When you return to the main menu, the Physical Inventory tool button is now highlighted yellow, which indicates that changes were made.

Using EM Physical Inventory

Now that the settings are the way you want them, it's time to open the Physical Inventory app and start counting.

When an item is scanned, pertinent information for the item displays on the Eagle Mobile screen.

Notice that the UPC appears here, followed by the Location and Count fields.

The four fields that you chose to display are shown here.

If an item does not have a location code, you may be prompted to add it when you enter your count.

It is always recommended to add a location code when one is missing.

If you have set your device up to count the first scan as one, continue scanning the items to count or, In the count field, enter the current value and then tap Add.

The best practice for performing a physical inventory is to scan every item.

If you have already counted an item once during this count cycle, the system displays the Replace field here.

Just enter the new count and tap Replace to adjust the previous count or if you are adding to the previous count enter the quantity counted and the system will add the new value to the previous count for a total quantity counted.

The location field and Count are the only two changeable fields on this screen.

However, if you open the Details menu, you will have the ability to print a label, capture a UPC code and clear previous location fields.

When you have completed your count, place the Eagle Mobile in its charging cradle.

The remainder of the work to verify counted quantities, review variances, and finalize work will all be done at the Eagle terminal.

If you want to learn more about finalizing counts, be sure to review the Physical Inventory Overview and the Physical Inventory Process modules.

As you've seen in this lesson, Eagle Mobile's Physical Inventory app makes it easy to keep your records up to date.

Maintaining accurate inventory information reduces lost sales, provides better re-ordering information, and helps give an overall picture of the true value of your inventory.

More importantly, this helps to increase your store's margins and turns.

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Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298