

Stock Counting Overview

Andrew

The new season is just around the corner and I'm not sure we're ready for it. With our inventory scattered throughout the store and warehouse, and I can't tell what we're short on. How do we manage this?

Robert

It looks like it's time to do a stock count. That will tell us what we need to order and help us organize to meet customer demand.

Andrew

That sounds complicated when you consider all the stuff we sell. How do we do a stock count?

Robert

Well, it just takes a little preparation and follows a few simple steps. Pick a topic and we'll walk through it.

Topics

- Preparing
- Four Steps of a Stock Count
- Browser

Preparing

Like most of the things we do, the key to a successful stock count is preparation.

The first step is to enter the stock receipts for any new merchandise that has arrived and have not been entered into the system.

This helps us eliminate accidental doubling of quantities.

Then we receive any transfers delivered from other branches.

Like Stock Receipts, this ensures that we won't double the quantity when we count it.

It's also important to issue stock for sales orders that customers have picked up or we've delivered but haven't invoiced.

This avoids variances with stock that is no longer available for counting.

Use the Order Monitor function for this task.

Lastly, you should complete any Customer Credit Notes for returned merchandise and Supplier Returns.

You can do any of these tasks after creating the count, but you must do them before activating the count. Topic Four Steps of a Stock Count

There are four steps to stock counting.

The first is to Create the Count.

This is the step where you select the products that you'll physically count.

You can do this the day before and the system allows you to save the criteria for use with future counts of the same products.

In the second step, you Activate the Count.

It is important to do this step immediately before you tell your staff to begin the count. Activating the count sets the system quantities that you'll compare to the actual counted quantities.

You can print count sheets right after activating the count.

The third step is to Enter the Count.

This is the part where your staff does the actual counting and enters the data on their count sheets.

Entering the count includes verifying any variances and printing count reports.

Finally, you Complete the Count.

In this step, you mark the count as Complete in the system.

Completing the count updates any products with a count variance and completes appropriate stock adjustments.

Browser

When you want to create a new stock count or look at the details of an existing count, you do it from the Stock Count browser.

You can find it in the Stock section of the Inventory tab.

From the toolbar or the right click menu, you can create a new count, view the properties of a count, or copy the properties of a count to create a new one.

Use the View dropdown menu to choose the type of Counts that you want to show in the Browser area.

Use Stock Counts to show saved Count data that you haven't activated.

Choose Active Stock Counts when you want to show counts-in-progress.

Select completed Stock Counts when you want to see updated counts. They give historical information.

Choose Templates when you want to set up standard count data that you can reuse.

Use the Branch setting to select, and display counts from a specific Branch or All Branches.

Your choices display in the Stock Count browser.

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