Webinar - Inventory Counts for the New Year

Overview

- Create the Count in Order Time
- Perform Count and populate the 'Quantity Counted'
- If the item is not counted, leave blank
- Change Status to Approved
- Click Finalize
- Adjustment is created
- A Count does not adjust inventory until the Count is Finalized

Considerations

- **Location:** Counts are Location specific
- **Date:** An 'As Of' date. The 'Quantity in System' is reflective of Quantity On Hand at the end of the day for the date selected. Subsequent transactions will NOT be reflected in the Count
- **Account:**   Do not select an Inventory account, typically a Costs Account should be used. E.g. Inventory Adjustment
- **Rules:**
  - Quantity in System is called On Hand NOT called Available
  - Ship Docs not shipped [Committed] ARE On Hand
  - Transfers and Receivers marked In Transit ARE NOT On Hand
  - Components Allocated on Work Orders ARE On Hand

Performing the Count

- Filtering and Sorting the List
- Updating Quantity Counted

- Manually
- Import
- All Orders Mobile
- Adding an Item not on the Count
- Changing Bins on the Count

Helpful Resources

- **Article - Generate a Cycle Count**
- **Article - Complete an Inventory Adjustment**
- **Video - Inventory Count Adjustments**
- **Article & Video - All Orders Mobile (Windows Mobile Scanner) - Count Inventory**