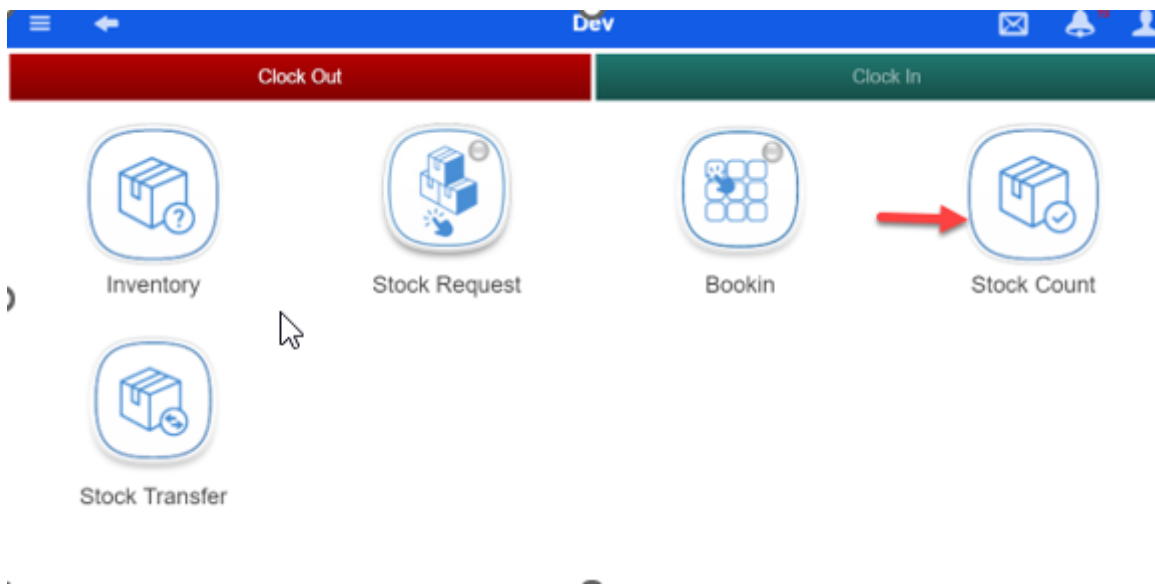


Stock Count Process

The stock count function is a feature on the Webatar App that allows one to do stock takes or cycle counts. These counts can then be processed to various documents including stock takes.

On the Webatar App, go to Inventory, Stock Counts



There are Multiple ways to add items to the count

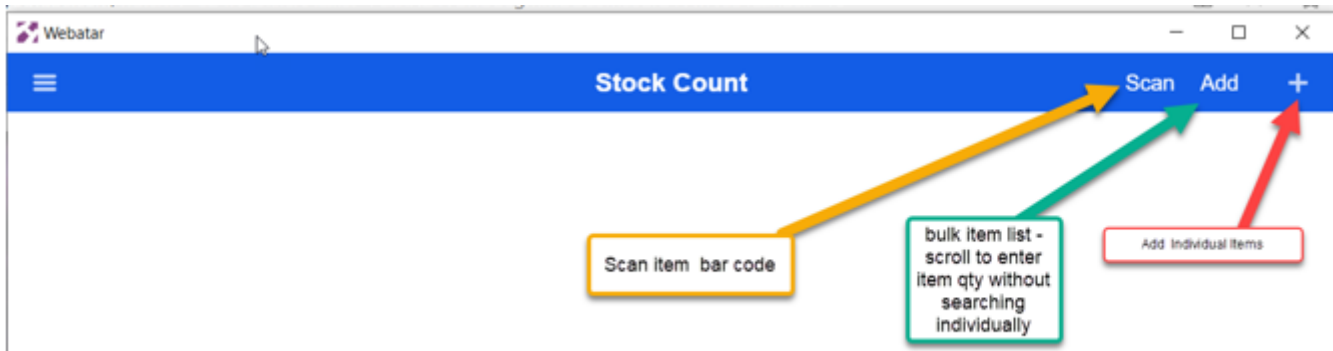
Add items to the count individually by filtering on Brand categorisation.

Quick Add: Call up multiple items and enter counts simply by scrolling to the required item

Search count item by bar code

Search items product code or description

Scan item bar code



Once the item is searched and returned on screen

Simply enter the actual count quantity

Warehouse is set to default to the user, thus saves time on having to select the warehouse on each count.

Click save

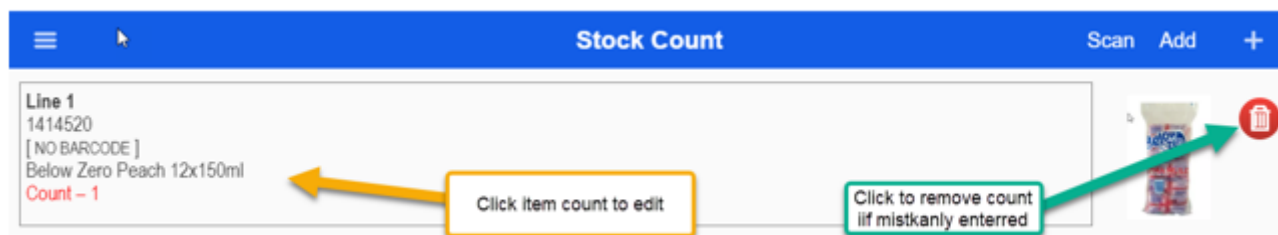
Search the next item and enter the count quantity.

Brand	⊗ ↓ ^A / _Z Results ↻ ✓
Hats	bend
Sunglasses	
Catalyst	02-01/3220931 Bend 80mm Grey Friars 90deg test 1234567 Total Qty - 16 Quote - 0 (Current) Bend 80mm Grey Friars 90deg
Ford Co.	
Honda	
Hyundai	- 0 + ✓
Inovyn	02-01/3220933 Bend 80mm Karaka 90deg 6009188002176 Total Qty - 14 Quote - 0 (Current) Bend 80mm Karaka 90deg
Kia	
light emitting diode	
Lenovo	- 2 + ✓

Enter any relevant notes related to queries/ discrepancies.

Brand	Results
Hats	bend
Sunglasses	
Catalyst	02-01/3220931 Bend 80mm Grey Friars 90deg test 1234567 Total Qty - 16 Quote - 0 (Current) Bend 80mm Grey Friars 90deg
Ford Co.	
Honda	
Hyundai	- 0 + ✓
Inovyn	02-01/3220933 Bend 80mm Karaka 90deg 6009188002176 Total Qty - 14 Quote - 0 (Current) Bend 80mm Karaka 90deg
Kia	
light emitting diode	
Lenovo	- 2 + ✓

Counts not sync'd to server can be deleted or edited in the event of errors



once items are counted and ready to sync, click the sync bar to push counts to the server

Stock Count		Scan	Add	+
Line 1 1414520 [NO BARCODE] Below Zero Peach 12x150ml Count - 1				
Line 2 GLA001 [NO BARCODE] Glass Tubes Count - 4				
Line 3 03-02/3107148 3107148 Clip Etray 32mm Sliding Dimond Count - 10				

Items successfully sync'd from Webatar will be displayed on the main system as follows

Go to Inventory Module > Activity > Stock Count

Enter the required date range and warehouse.

Click Search

Active Stock Take - MONT

Link

Unread Messages : 0

Reminders Due : 19 | 0

Calcula

Inventory Module

Configuration

Activity

Stock Forecast

Repackage

Barcode Count

Stock Count

Stock Requests

Stock Request - Stores

Stock Level Adjustment

Stock Count

SearchAddScan SKUVIEWInventory OverviewProcessPrint

Code:

Description:

Date From:

2023-09-13

Date To:

2023-09-13

Warehouse:

All

Approval Status:

Open

Document Type:

All

Document No:

Show Duplicates Only:

☐

Decimals:

User:

CountSerials

Page 0 of 0Remove Paging:Select AllUnselect All

#	Select	Status	Document Type	Customer	Supplier	Count No	Document No	User	Sync Date Time	Count Qty
---	--------	--------	---------------	----------	----------	----------	-------------	------	----------------	-----------

See variance as soon as counts are sync'd, resulting in fewer delays in resolving discrepancies.

Stock Count

SearchAddScan SKUVIEWInventory OverviewProcessPrint

Code:

Description:

Date From:

2023-09-03

Date To:

2023-09-13

Warehouse:

All

Approval Status:

Open

Document Type:

All

Document No:

Show Duplicates Only:

☐

Decimals:

User:

CountSerials

Page 1 of 1Remove Paging:Select AllUnselect All

#	Select	Status	Document Type	Count No	User	Count Date	Sync Date Time	Stock Code	Stock Description	Count Qty	On Hand Qty	Difference	Do
1	☐		Stock Take	SC1043	Imraan Saljee	2023-09-13	2023-09-13 15:...	02-01/3220933	Bend 80mm Karaka 90deg	2	14	-12	
2	☐		Stock Take	SC1044	Imraan Saljee	2023-09-13	2023-09-13 15:...	1414520	Below Zero Peach 12x150ml	1	0	1	
3	☐		Stock Take	SC1046	Imraan Saljee	2023-09-13	2023-09-13 15:...	03-02/3107148	Clip Etray 32mm Sliding D...	10	25	-15	

You will notice the synced items are listed in the grid with the system quantity, counted quantity and variance or difference.

The supervisor can then opt to do second counts on items where necessary.

Any duplicated counts can be deleted / marked compete from the grid.

Once the counts have been completed, these can be processed to the stock take

The process to stock take

When clicking on the process, bring up a window

This window will have the option for document type.

Currently only Stock Take

Select stock take and then there is another option which looks at open stock takes.

Select on the stock take.

This stock take defines the warehouse and items

When clicking on next the following will happen

Filter all stock counts by the warehouse, meaning that if the count is of another warehouse, ignore it

If an item was counted multiple times, take the last count for the stock take

On the status, only look at Open status, ignore other statuses

If Document Type was not specified as StockTake but user selected it, use it for the stock take.

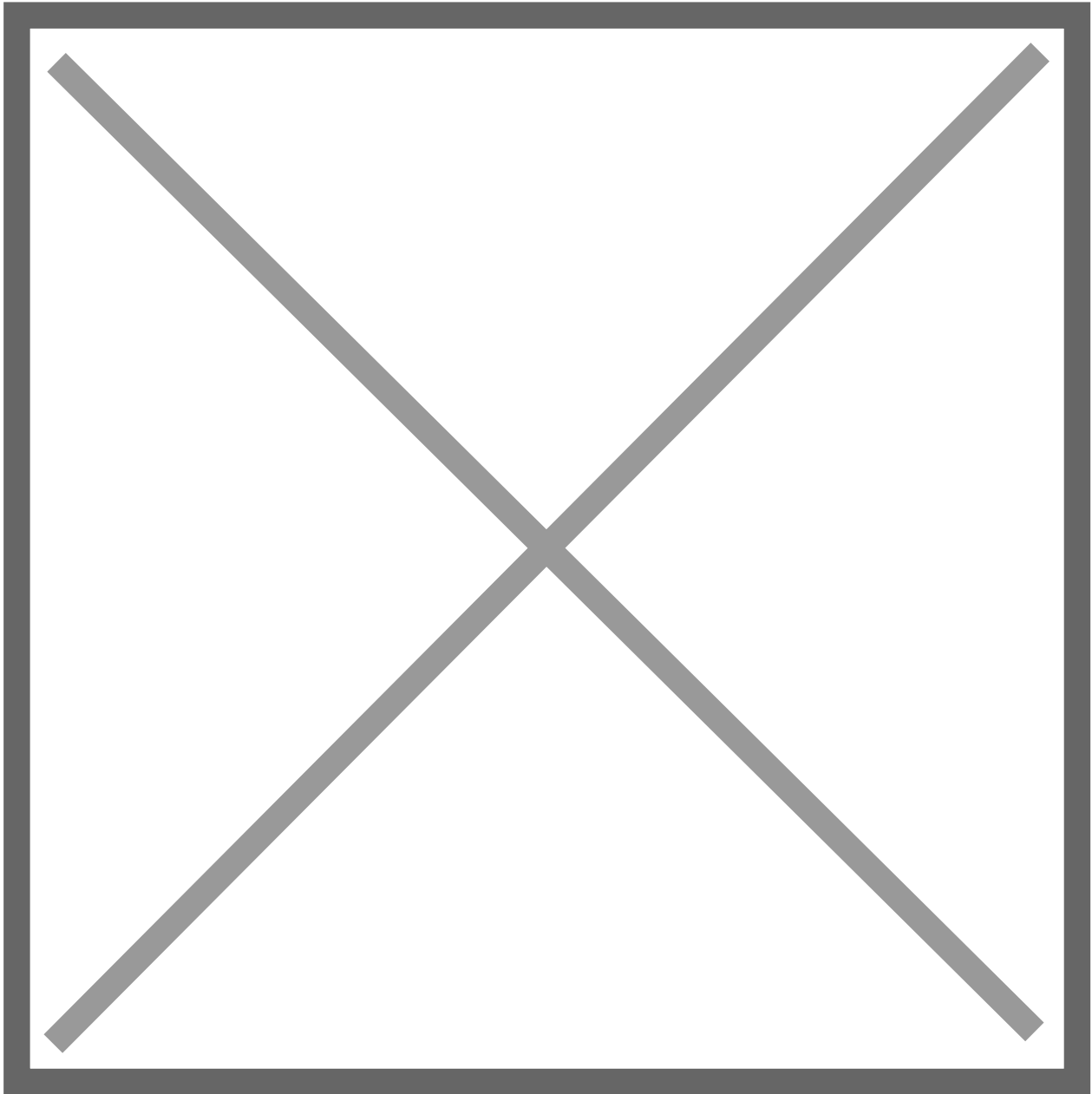
If a stock item was counted but the stock take does not have this item, ignore it.

When clicking on continue, produce an exception report with various headers

Successful	Showing Items successfully updated to the stock take file
Duplicate items	Show items that were duplicated but was not taken to stock take
Items not in stock take	Show items that were in stock count but not in stock take

After you have successfully updated the stock take file, do the following to the stock count items

1	Change the status to completed
2	Insert the stock take document number into the Document no column.
3	For those items that did not have a Document type StockTake marked which was blank, mark it as StockTake



Revision #4

Created 26 July 2023 21:25:28 by Paige

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