

Checklists

☐ **Time to Complete:** 15–90 minutes (varies by store condition)

☐ **Who this is for:**

- Store Managers
- Inventory Controllers
- Department Managers
- Team leader setting up stocktake
- All staff using PDE devices
- Casual/counting team

- Pre-Stocktake Checklist
- Setup Checklist
- Counting Checklist (PDE)
- Validation Checklist
- Finalisation Checklist

Pre-Stocktake Checklist

- Sections created and clearly named
- Store mapped logically
- Stock On Hand report reviewed
- Negative stock investigated
- Out-of-stocks verified
- Departments checked for accuracy

Setup Checklist

- Stocktake created
- Correct date set
- Only ONE stocktake exists
- Naming conventions agreed

Counting Checklist (PDE)

- Correct stocktake selected
- Input named clearly (Dept + Person)
- Section selected correctly
- Products scanned accurately
- "Add" pressed on final item
- No duplicate counting

Validation Checklist

- Input report reviewed
- Valuation summary checked
- High-value discrepancies flagged
- High/low quantity errors checked
- Reports filtered by department if needed

Finalisation Checklist

- All inputs completed
- Manual corrections applied
- Reports reviewed for errors
- Stocktake closed
- Stock count set