

Execution

☐ **Time to Complete:** 1-4 weeks (done progressively)

☐ **Who this is for:**

- Store Manager
- Inventory Controller
- Department Managers
- All counting staff
- Casual workers

☐ This is not a single task—it's ongoing preparation work.

- Prepare for Stocktake
- Create & Structure Stocktake
- Count Stock (PDE Guide)

Prepare for Stocktake

. Why Preparation Matters

Preparation ensures your system is already close to correct before counting begins.

1. Create Sections (Store Mapping)

- Go to: [Stocktakes → Sections](#)
- Create sections that reflect physical areas

Good Example:

- “Back Room - Drinks”
- “Front Aisle 1 - Grocery”

“ Clear section naming allows easy recounts and investigations.

2. Check Stock On Hand

- Reports → Stock → Stock On Hand
- Run report

Look for:

- Departments with unrealistic totals
 - Obvious errors
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3. Check Out-of-Stocks

- Filter for stock = 0

Fix:

- Items that are actually in stock
 - Remove or deactivate unused lines
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4. Check Negative Stock

- Filter for stock < 0

Fix:

- Missing invoices
 - Incorrect tracking settings
 - Products stuck “on order”
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Outcome of Preparation

You should now have:

- Clean data
- Clear store layout
- Confidence in starting stocktake

Create & Structure Stocktake

. Create Stocktake

- Go to: [Stocktakes → Create](#)
- Enter:
 - Name
 - Correct date

⚠ The date must match the actual stocktake date.

Structure Rules (Critical)

- Only ONE stocktake per store
- All inputs must exist inside it

Each input must:

- Represent one count
 - Have a section
 - Have a clear name
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Naming Inputs Properly

Use:

Department + Person

Examples:

- Grocery - John
- Dairy - Sarah

“ This makes investigations fast and accurate.

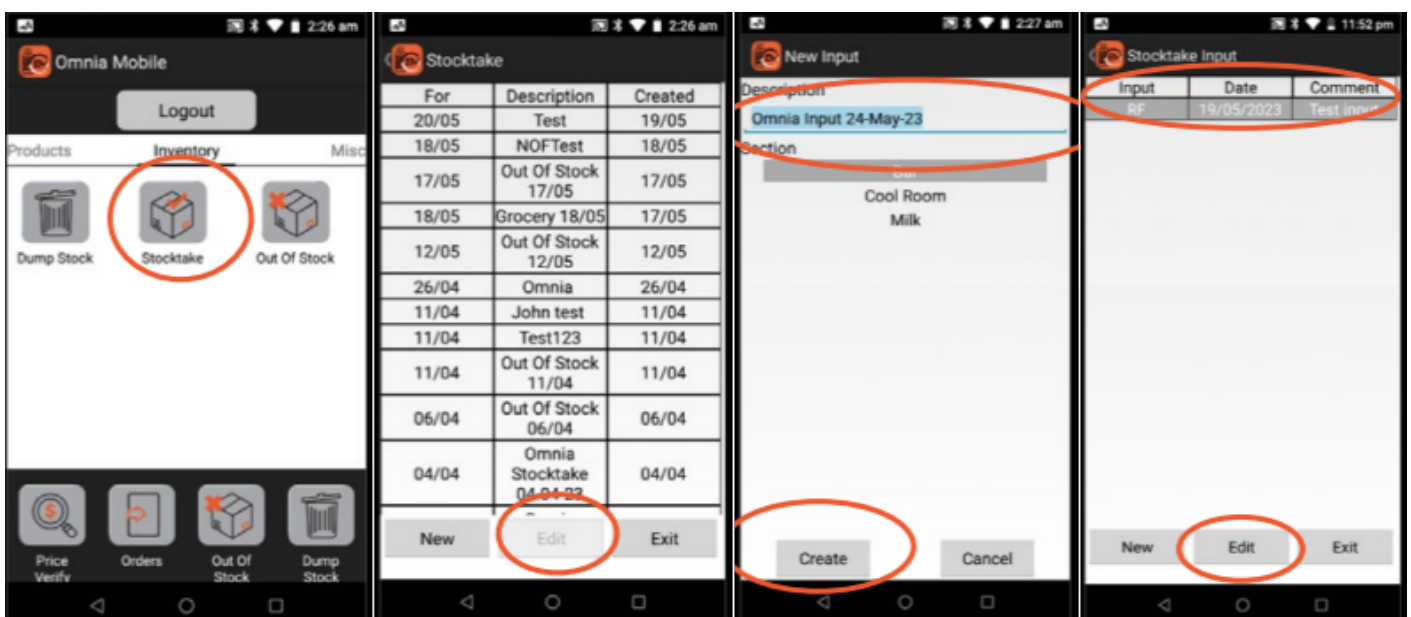
Common Mistakes to Avoid

- Creating multiple stocktakes
- Using vague input names
- Mixing sections incorrectly

Count Stock (PDE Guide)

Create an Input

- Login → Inventory → Stocktake
- Select stocktake → Edit
- Create input:
 - Name
 - Section



Counting Process

- Scan product
- Enter quantity
- Press **Add**

Optional:

- Scan location before product

Important Rules

- Always press **Add on final item**
 - Do not double count areas
 - Ensure correct section is selected
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Reviewing Counts

- Press back
 - Review scanned items
 - Edit if needed
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Common Issues

- Missing last item (forgot to press Add)
- Incorrect quantities entered
- Wrong section used