

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
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