

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
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Revision #3

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