

Quick Guide (End-to-End)

🕒 **Time:** 5-10 minutes

👤 **Who:** Experienced users / Team leaders running stocktake / Anyone needing a quick refresher

Step 1: Prepare

- Run Stock On Hand report
- Fix:
 - Negative stock
 - False out-of-stocks
- Create clear sections

Step 2: Create Stocktake

- Stocktakes → Create
- Enter name + correct date
- Save

Step 3: Count Stock

- Inventory → Stocktake (PDE)
- Select stocktake
- Create input:
 - Name (Dept + Person)
 - Assign section
- Scan items and enter quantities
- Press **Add on final item**

Step 4: Validate

- Input Report → check entries

- Valuation Summary → check totals
 - Valuation Detail → investigate issues
 - Variance Report → compare results
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Step 5: Fix Errors

- Use Manual Inputs
 - Adjust incorrect quantities
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Step 6: Finalise

- Close stocktake
 - Set stock count
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