

Counting Event Checklist

- Do a location audit of items to be counted
- Make any location and UOM changes found on location audit
- Run the clean-up queries and correct the items
 - INV_FIX_BIN_UOM_VS_QTY_UOM
 - INV_ITEM_LOC_VS_QTY_LOC
 - INV_COMPARE_PICK_PUTAWAY_LOC
 - INV_ITEMS_QTY_INACTV_PHYS_LOC
- Make sure all lines have processed
 - All Receipts Keyed
 - Manual Stagings Entered
 - RMA's completed
 - Receipt and Load Staged Process Ran
 - Correct Staged Errors
 - Stockroom Feedback
 - No Reservation
 - No Reservation Errors
 - No Backorders
 - No Picking Plans
 - No Material Picking Feedback
 - No Picking Confirmation
 - No Shipping/Issue
 - No Deplete On Hand
- Put any Recurring Processes on HOLD
- Start counting event
- Run Pre-Count Value Report and Query
- Setup Counting Event
- Run Counting Event Creation
- Print Count Sheets
- Count Items
- Update Counting Event
- Run Reconciliation Report and Query
- Double check any item variances as necessary
- Run Update Stock Quantity
- Check Counting Event is at status of Finished
- Run Post-Count Value Report and Query
- Post any write-ins with Manual Count or Manual Staging
- Re-run Post-Count Value Report and Query
- Complete Reporting Worksheet