

Stocktake

To start or resume a stock take, navigate to Items and select one of the stocktake navigation options

The screenshot displays the 'Stocktake' interface. On the left is a navigation sidebar with buttons for Home, Vendors, Items (highlighted with a green box), Purchase orders, Sales orders, System, and Exit. The main area features an 'Item Search' section with filters for Quick Filter (Active items), Description, Part number, Vendor (No selection), Type (No selection), Location (No selection), Item ID, Size, and Tender number. Below the filters are buttons for New, View, Delete, Refresh, and Stocktake (highlighted with a green box). A table with columns Vendor Name, Item Groups, Item Type, Description, Size, and Quanti... is visible. A context menu is open over the 'Item Groups' column, listing options: New, View, Delete, Refresh, Copy, Import, Stocktake (highlighted with a green box), Export, Resize, Sort, Clear Sort, Customise..., and Developer tools... A green text box on the right contains the instruction: 'Select stock take from one of the menu options or right click on the grid and select select stocktake.'

NOTE: Only stocktake can be active but you can close and resume the stocktake until it is closed or cancelled.

Add items to stocktake

Add items to the stocktake and update stock values

Stocktake details

Audit log

- Close stocktake
- Cancel stocktake
- Add items

Stocktake ID: 3 Stocktake date: 20/01/ Closed date: Cancelled date:

Item ID	Quantity reported	Quantity on hand
1005357H	1	

10.0Fx10CM
10.0Fx10CM
1001780-HC
1001782-HC
1005357H
1009664
1010480-H
1010481-H
1010482-H
1011834H
1011842
1011880J
1012067-03
1013319
1014652
110100483
12673

Save Cancel Delete

Save and Close Save Cancel

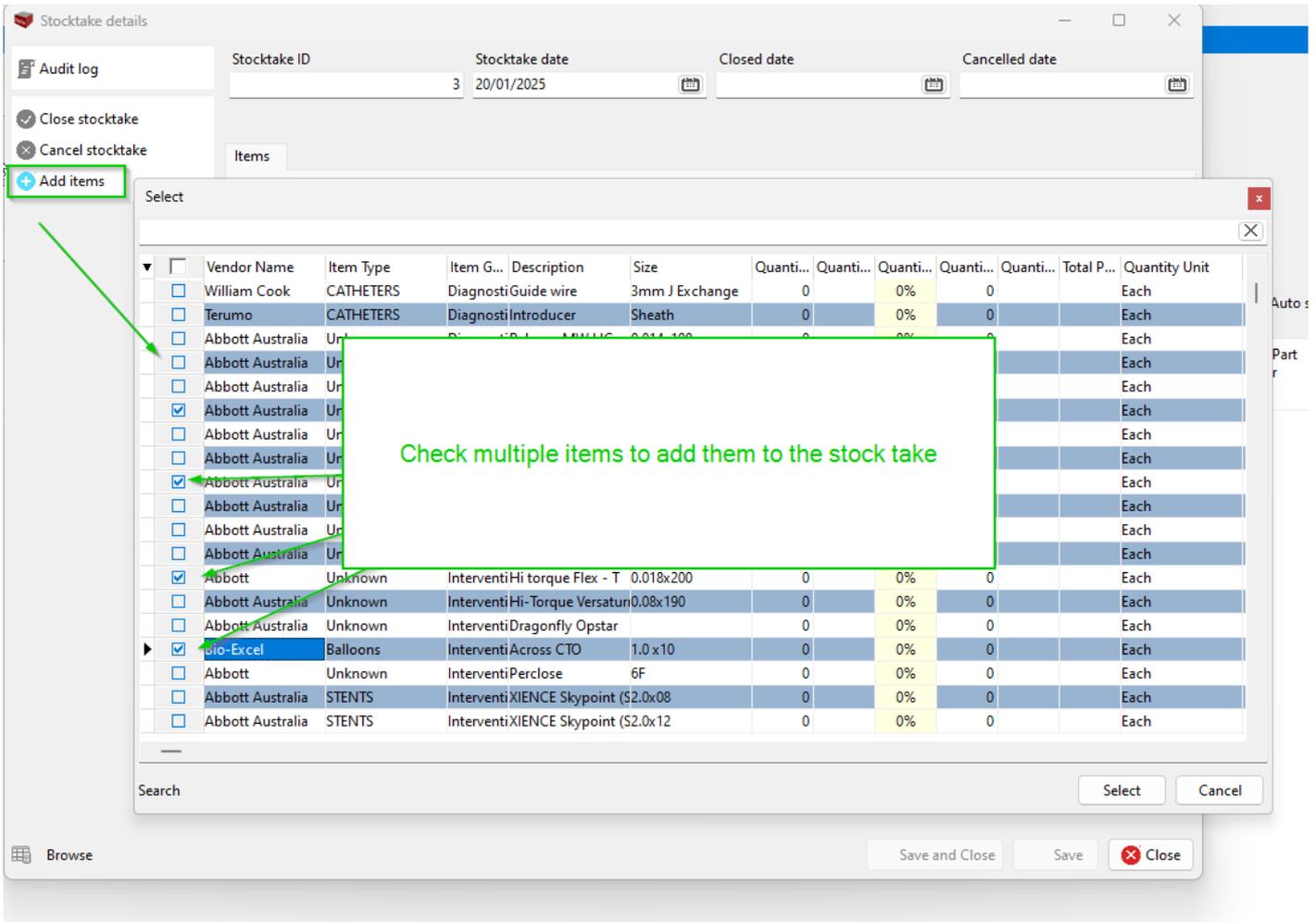
Insert

Copy the value from item quantity on hand to quantity reported

Current item quantity on hand

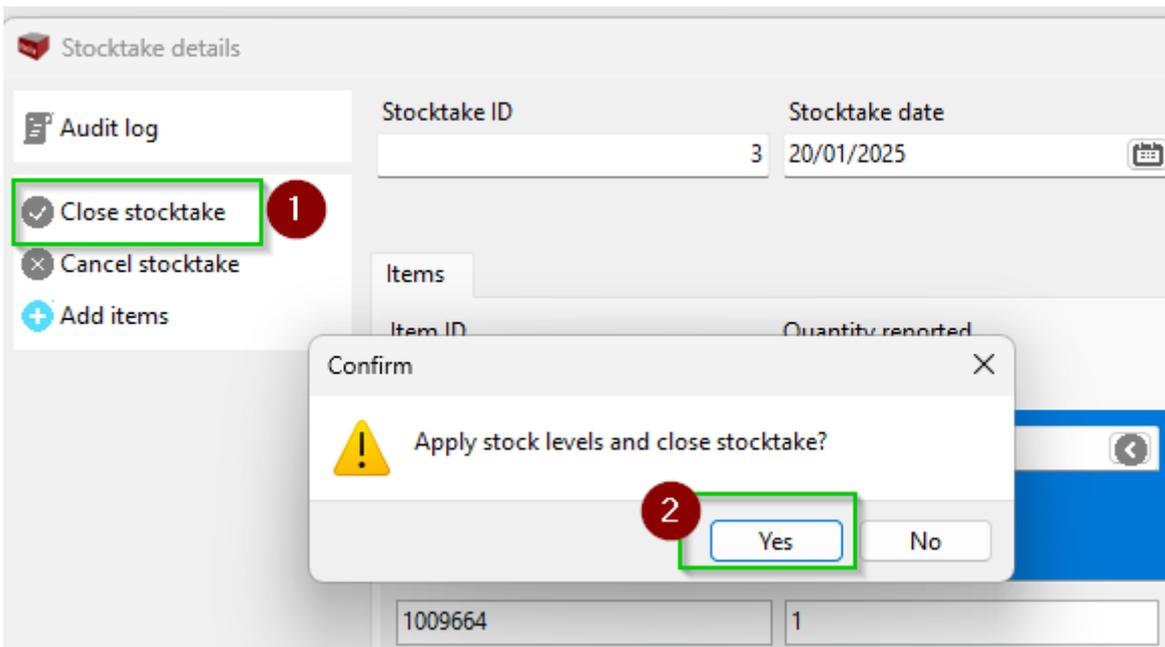
Add items to the stocktake, and update the quantity reported

Option to bulk add items



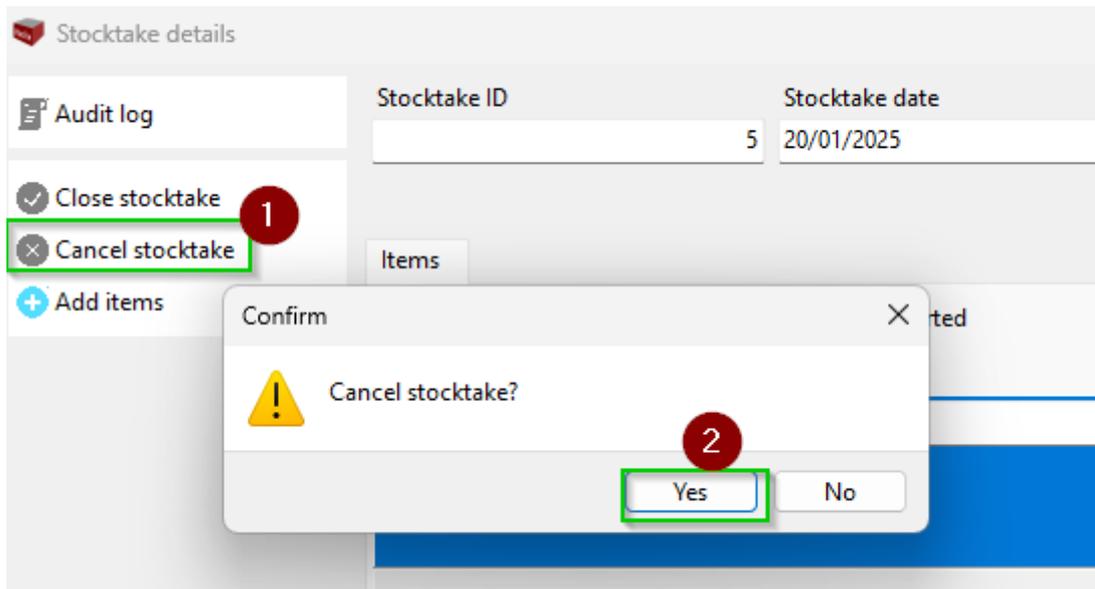
Close a stocktake

Closing a stocktake will apply the new stock levels and close the stocktake.



Cancel a stocktake

Cancelling a stock take will not apply any stock levels and close the stocktake so it is no longer available.



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