Recording Stock Takes: Step 1
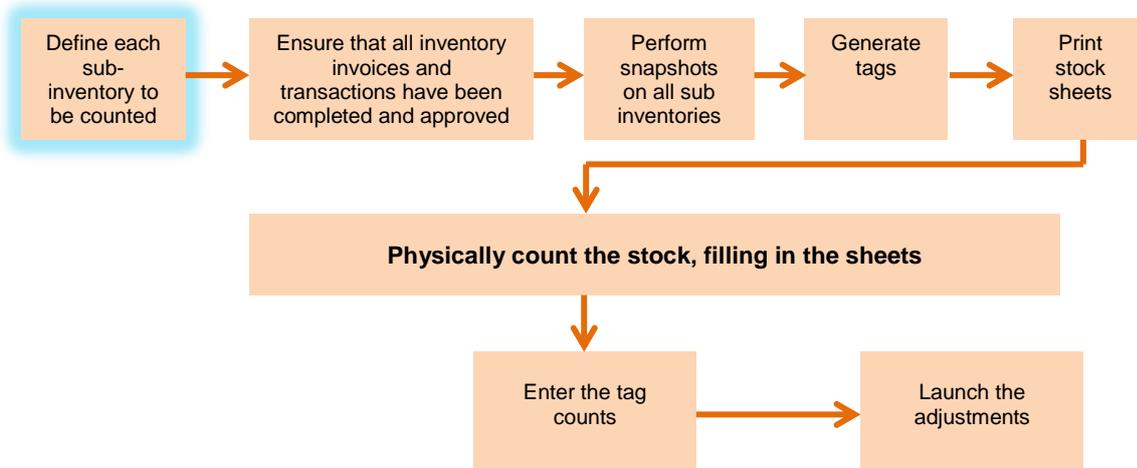
Define each sub-inventory to be counted

Responsibility:	CAPSA INV Senior Stores User Responsibility
Navigate:	Counting ➔ Physical Stock Take ➔ Physical Inventories

1. Click on **View** menu and select **Find**.

2. Click **New** and complete the Define Physical Inventory form (see overleaf).

3. Enter **Name** and **Description**, in the same format as last month.

4. Change the **Date** to the date to be counted (last day of month).

5. In the **Approvals** section, **Required** field, click on the drop down arrow and change to **Never**.

6. In Count Sub-inventories section click on **specific**.

7. Click on the **List of Values** in the first blank field and enter the Sub-inventory to be counted e.g. Asset and click **OK.**

8. **Save** your work.

9. Return to Physical Inventory Summary Form as above on and repeat step 1-8 for each sub-inventory to be counted.