Define each sub-inventory to be counted → Ensure that all inventory invoices and transactions have been completed and approved → Perform snapshots on all sub inventories → Generate tags → Print stock sheets → Physically count the stock, filling in the sheets → Enter the tag counts → Launch the adjustments

Printing Stock Sheets

Responsibility: CAPSA INV Senior Stores User Responsibility
Navigate: Reports ➔ Run

1. Click OK to Single Request.

2. In the Name field, click on the List of Values and select the request Physical Inventory tag listing and click OK.

3. In the Parameters screen click on the List of Values, choose the relevant Physical Inventory to be printed and click OK and click OK.

4. In the Upon Completion section click on Options and ensure the number of copies is set to 1 and that the relevant printer is in the Printer name field.

5. Click OK.

6. Click Submit.

7. The request screen will display, click on Refresh Data to update the phase of your request.

8. The stock sheet should have printed off.

If your department has more than one sub-inventory, click on the “Submit New Request” button and complete steps 1 – 8 until all sub-inventory details have been printed.

Exporting

If you wish you could export this report into excel and manipulate it to include item descriptions and re-order to make the actual counting easier.