

Quick guide Stocktaking 3.0

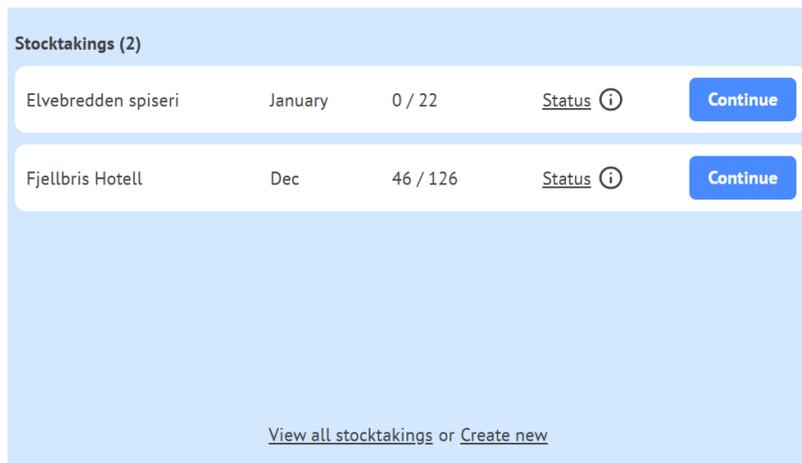
To register stocktaking, we recommend using the Stocktaking App, which makes it easy to register items in a busy workday. See separate quick guide. This guide shows how to perform stocktaking in the client version (desktop PC/Mac).

Start a stocktaking

Click on *Stocktaking* in the menu, then *Overview*.

Here you will see a list of current stocktakings and statistics for the location's inventory.

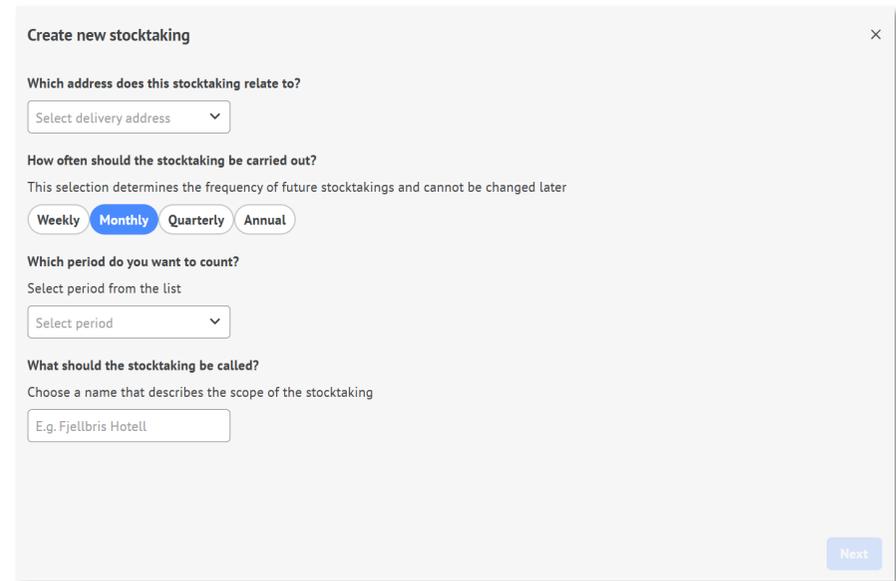
Below the list of stocktakings, you will find a button called *Create new*.



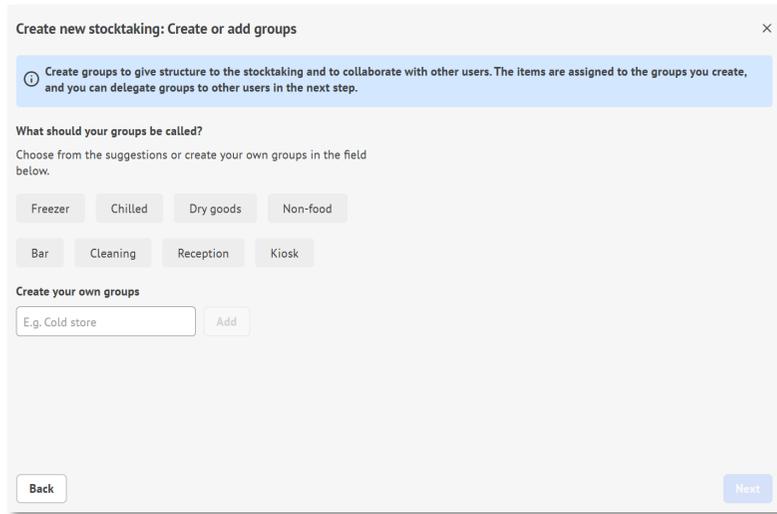
Start by selecting the address for the stocktaking, then choose period type, period, and the name of the stocktaking.

Choose a name that describes the area the stocktaking applies to.

Then click *Next step*.



In the next step, you can create or add groups. Groups are used to structure the stocktaking. They can also be used later to delegate stocktaking groups to other users.



Create new stocktaking: Create or add groups

① Create groups to give structure to the stocktaking and to collaborate with other users. The items are assigned to the groups you create, and you can delegate groups to other users in the next step.

What should your groups be called?
Choose from the suggestions or create your own groups in the field below.

Freezer Chilled Dry goods Non-food

Bar Cleaning Reception Kiosk

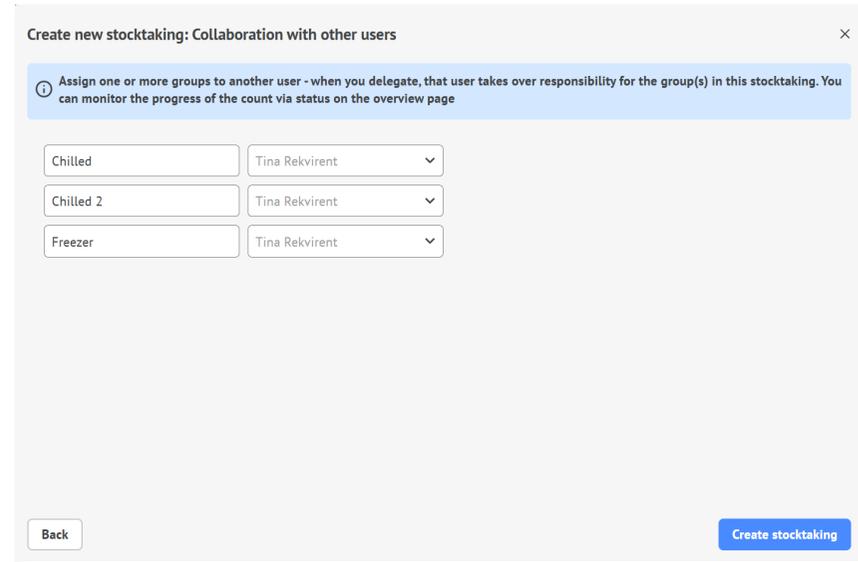
Create your own groups

E.g. Cold store Add

Back Next

You will first see suggested groups, and in the field below you can add your own group names. The names can also be changed in the next step.

Here you can delegate the groups by selecting users from the dropdown menus. The group will be locked, and the user will be responsible for it, but you can still follow the progress of the counting. Groups can also be delegated from the counting list. When you are ready, click *Create stocktaking*.



Create new stocktaking: Collaboration with other users

① Assign one or more groups to another user - when you delegate, that user takes over responsibility for the group(s) in this stocktaking. You can monitor the progress of the count via status on the overview page

Chilled Tina Rekvirent

Chilled 2 Tina Rekvirent

Freezer Tina Rekvirent

Back Create stocktaking

Add items

Choose which source you want to use for the stocktaking.

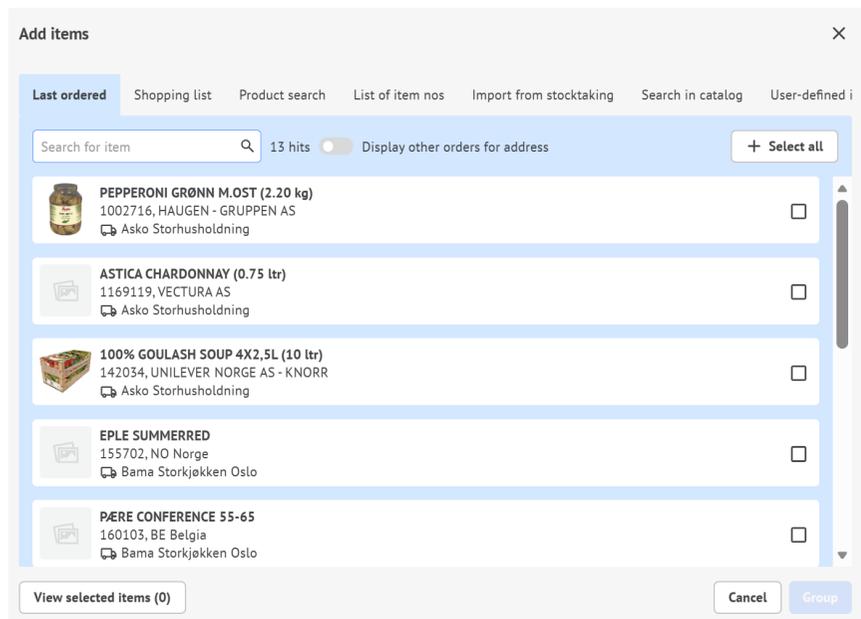
You can choose between six different sources:

1. **Last ordered** gives you an overview of the most recently ordered items
2. **Shopping lists** allows you to count based on a shopping list
3. **Product search** allows you to search for items

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4. **List with item numbers** allows you to retrieve items by entering item numbers
5. **Import from stocktaking** allows you to retrieve items from another stocktaking
6. Search in catalogue allows you to browse catalogues

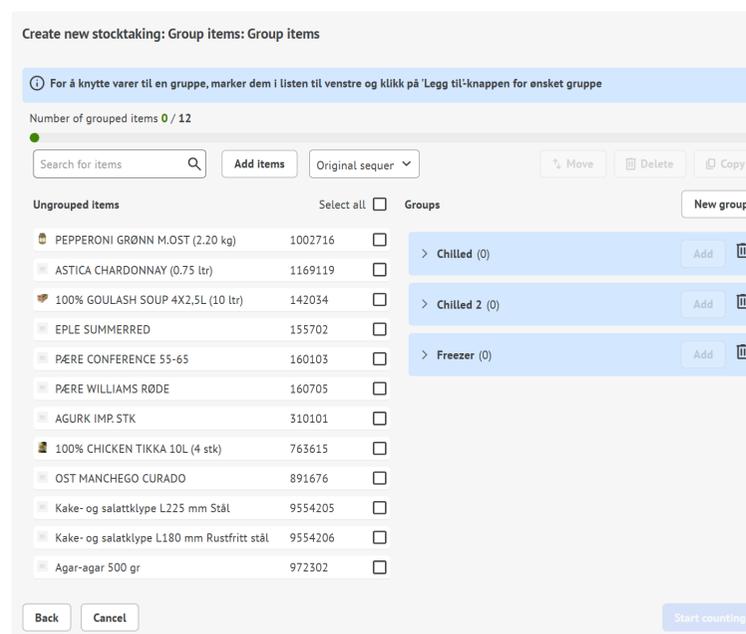
In addition, you can add **custom items**.



Check the items you want to include and continue with *Groups*. At any time, you can view the items you have selected under *View selected items*. You can also add more items later.

Groups

In the grouping step, you can add items to groups using *Move* and *Copy*, or by using *Add* at group level. You can also add more groups by clicking *New group*.



In the overview of ungrouped items, you can search, add more items, or change the order of items.

When you are ready, click *Start counting*, which becomes active once all items are grouped.

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Remember that using groups makes the stocktaking easier to structure. Build your stocktaking by grouping items so they reflect your storage layout, e.g. dry goods, fridge, and bar.

Before you begin counting, you will receive a summary showing the groups that have been delegated. You can then start the counting.

Create new stocktaking: receipt

Here is an overview of delegated groups and who they are assigned to. When a group is delegated, it is locked for you as the owner.

Delegated groups

Name	Assigned	Number of items
No groups delegated.		

With the stocktaking app, you save time, count by simply scanning, and have the values uploaded continuously. Scan the QR code or click on the buttons below to go to the download page.



Download on the App Store | GET IT ON Google Play

Start stocktaking

Delegation

If you did not delegate in the grouping step, you can delegate at group level when you reach the counting list. Once a group is delegated, it becomes locked for you as the owner, but you can still see the progress. When the group is fully counted, it will be marked as completed. If you want to make changes afterwards, you must remove the delegation.

Fruit and vegetables Number of items: 2 / 5 Total value: \$5.24 Anne Olsen + Add items

Item name	Counted break bulk	Counted sales unit	Counted weight/volume	Value	
Epler røde gata kg 109607		1 21,58/1 kg	0 21,58 kg	21,58	New + Waste
Sitron kg 129801		1 33,86/1 kg	0 33,86 kg	33,86	New + Waste
Løk banan sjalott 5kg sekk 350401	0 72,60 kg	0 363,00/5 kg	0 72,60 kg	0,00	New + Waste
Banan Fag enh KG.Helkart = 19 KG 126235		0 48,90/1 PCE	0 23,50 KGM	0,00	New + Waste
Melonn vann kg 121201		0 40,80/1 kg	0 40,80 kg	0,00	New + Waste

Count items

You can count in **broken units**, **sales units**, and **weight/volume**, depending on the item type. You can also register waste on each item line.

Chilled 2 Number of items: 0 / 3 Total value: 0.00 Not delegated + Add items

Item name	Counted break bulk	Counted sales unit	Counted weight/volume	Value	
PEPPERONI GRØNN M.OST (2.20 kg) 1002716	0 402,12 pk	0 1,608,48/4 pk	0 182,78 kg	0,00	+ Waste
100% GOULASH SOUP 4X2,5L (10... 142034		0 353,87/1 krt	0 35,38 ltr	0,00	+ Waste
100% CHICKEN TIKKA 10L (4 stk) 765615		0 345,37/1 krt	0 86,34 stk	0,00	+ Waste

At the top of each group, you have fields for delegating the group and adding more items.

By clicking *Change grouping*, you return to the grouping step, where you can also add more groups.

When you are finished counting, click *Complete stocktaking*.

If any groups have been delegated, you must wait until those counts are completed before you can submit the stocktaking.

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Summary and reporting

After completing the counting, you can review the stocktaking in the summary. If everything looks correct, you can start the reporting process.

Here you choose which email addresses should receive the report.

You can add additional recipients. Finish by submitting the stocktaking.

The screenshot shows the 'Stocktaking / New stocktaking' interface for 'Ann's bakery'. At the top, there are navigation buttons: '?', 'Back to stocktaking', and 'Save'. Below this is a progress bar with four steps: 'Summary' (checked), 'Pre-allocation' (checked), 'Reporting' (active, highlighted with a blue box and the number '3'), and 'Send' (disabled, highlighted with a grey box and the number '4'). The text 'All changes saved!' is visible to the right of the progress bar.

The main content area is divided into three sections:

- 1. Summary**: Labeled 'Reviewed' with a checkmark icon on the right.
- 2. Pre-allocation**: Labeled 'All items pre-allocated' with a checkmark icon on the right.
- 3. Reporting**: This section is highlighted in light blue. It contains an 'E-mail' input field with an 'Add' button next to it. A 'Download stocktaking' button is located at the top right of this section. At the bottom of this section are three buttons: 'Previous step', 'Skip step', and 'View summary'.

At the bottom of the interface, there are two more buttons: 'Back to stocktaking' and 'Send'.