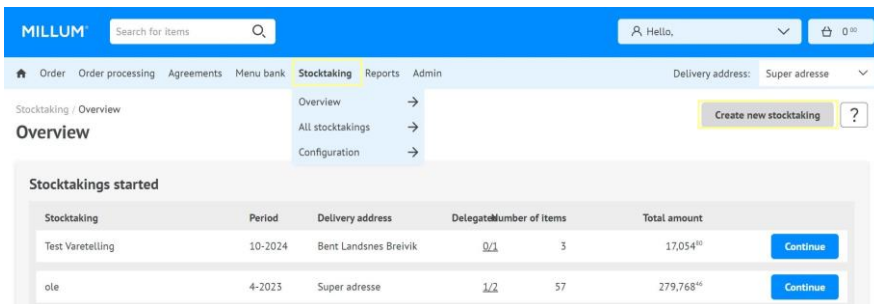


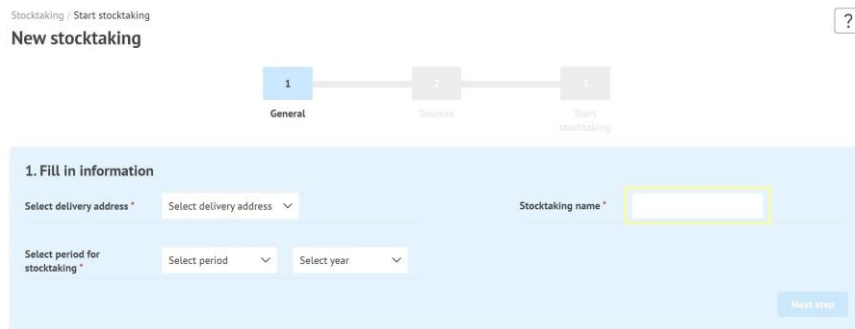
Quickguide new stocktaking

1. Start a new stocktaking

Click on **“Stocktaking”** in the menu, then **“Overview”**. On the right of the page, you have the option **“Create new stocktaking”**.



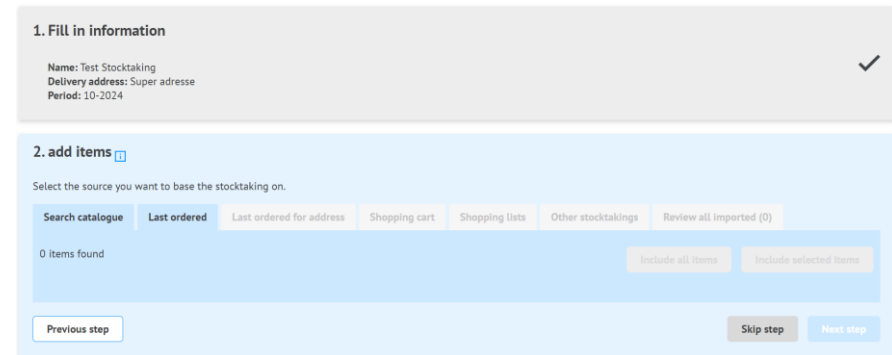
Start by naming your stocktaking and select the stocktaking period.



2. Choose which source to use for you stocktaking

You can choose from four different sources:

1. **“Last ordered”** provides you with a listing of your last ordered items
2. **“Shopping cart”** retrieves items from your shopping cart
3. **“Shopping lists”** enables you to count from a shopping list
4. **“Other stocktakings”** enables the use of a previous stocktaking



3. Select items from chosen source

If you choose to start a stocktaking based on a previous stocktaking, shopping list or shopping basket, you have to select which items you wish to count. You can select a single item or select all items from the chosen source.

In addition, you can at any time see the items you have selected under the tab **“review all imported”**.

2. add items

Select the source you want to base the stocktaking on.

Search catalogue | Last ordered | Last ordered for address | Shopping cart | Shopping lists | **Other stocktakings** | Review all imported (0)

07-2020 - Hasse test | 12 items found | Search list below | Include all items | Include selected items

Item number	Item name	Manufacturer	Catalogue	Number in unit	Price	
1043447	EARL GREY TE ØKOL. 24POS (24 stk)			20 pk	461.40	<input checked="" type="checkbox"/>
130132	BANAN BAJELLA			18.3 KG	274.50	<input checked="" type="checkbox"/>
1758200	SIKOLADE MELK 40% 9KG VALRHO...			9 kg	2,002.05	<input checked="" type="checkbox"/>
186882	VIKING MELK KONDENSERT USUKRET...			24 bx	673.44	<input checked="" type="checkbox"/>
190102	ANANAS GOLD			10 ST	200.00	<input type="checkbox"/>
2097129	MELK ØKOLOGISK 100% 500G GLORI...			10 pos	822.30	<input type="checkbox"/>
2201390	KNALL 109CM 100STK (100 stk)			1 esk	143.99	<input type="checkbox"/>
2216414	NORSKE FLAGG 1000STK (1000 stk)			1 krt	207.55	<input type="checkbox"/>

4. Add items manually

If you choose to start a stocktaking without retrieving items from any source, you have to search for the items manually. You can select between **“Search catalog”**, **“User-defined item”** or **“Add items from sources”**. The last selection will give you the same options as in point 2.

+ Details of stocktaking

Search

UNGROUPED (3 of 3 counted) Total value: 1,695⁹⁴

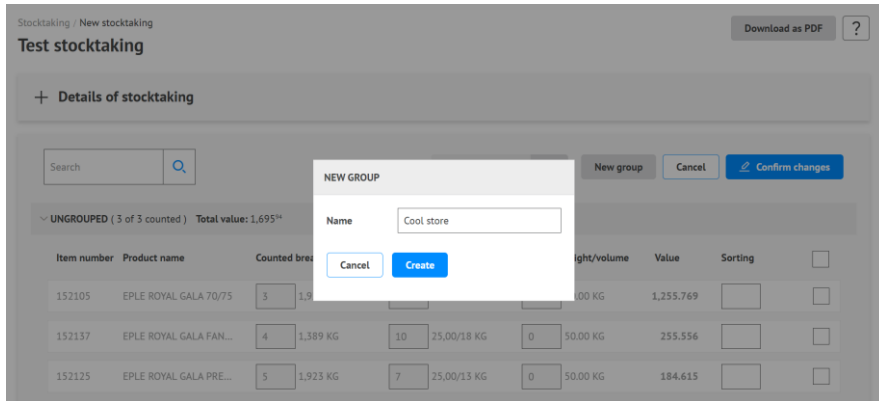
Item number	Product name	Counted break bulk	Counted sales unit	Counted weight/volume	Value	Waste	Sorting
152105	EPLÉ ROYAL GALA 70/...	<input type="text" value="3"/> 1,923 KG	<input type="text" value="50"/> 25,00/13 KG	<input type="text" value="0"/> 50.00 KG	1,255.769	<input type="text" value="0"/>	<input type="button" value="🔗"/>
152137	EPLÉ ROYAL GALA FA...	<input type="text" value="4"/> 1,389 KG	<input type="text" value="10"/> 25,00/18 KG	<input type="text" value="0"/> 50.00 KG	255.556	<input type="text" value="0"/>	<input type="button" value="🔗"/>
152125	EPLÉ ROYAL GALA PR...	<input type="text" value="5"/> 1,923 KG	<input type="text" value="7"/> 25,00/13 KG	<input type="text" value="0"/> 50.00 KG	184.615	<input type="text" value="0"/>	<input type="button" value="🔗"/>

3 of 3 items with total value:
1,695⁹⁴

5. Create your own item groups

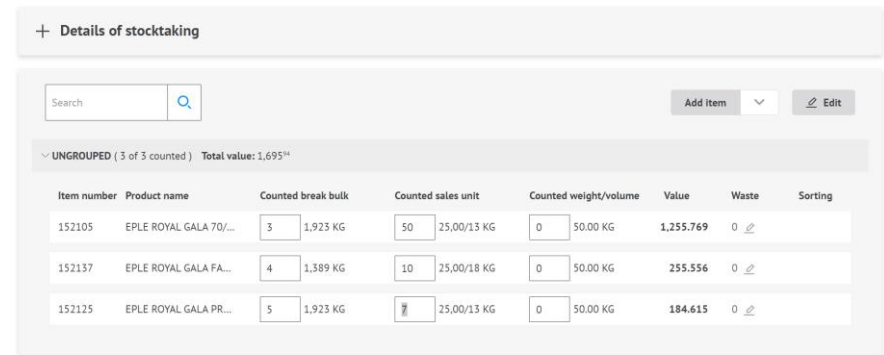
To start grouping your items in the stocktaking you click **“Edit”** to create new groups or sort your items in the desired group.

Build your stocktaking by grouping your items so they reflect your storage, ex: dry good storage, cool store, bar. You can sort items within each group based on where they are located in the storage.



6. Input stocktaking details

Having added all items to be counted from selected sources you can start counting. You can count in **break bulk**, **sales unit** and **weight/volum**.



3 of 3 items with total value:
1,695⁹⁴

[Start submission](#)

7. Summary and reporting

Having finished counting you can review your summary. If everything is in order you can start the reporting. You can select which e-mail should receive the report, and you can select several email recipients. Complete the stocktaking by clicking "Send".

The screenshot shows a progress bar at the top with four steps: 'Summary' (checked), 'Pre-allocation' (checked), 'Reporting' (active, with a '3' in a box), and 'Send' (disabled). Below the progress bar, there are two grey bars, each with a checkmark on the right. The main content area is titled '3. Reporting' and contains an 'E-mail' input field with an 'Add' button. Below the input field, two email addresses are listed: 'test@millum.no' and 'test2@millum.no', each with a trash icon to its right. To the right of the email list is a 'Download stocktaking' button. At the bottom of the form are three buttons: 'Previous step', 'Skip step', and 'View summary'. Below the form is a 'Back to stocktaking' button on the left and a 'Send' button on the right.