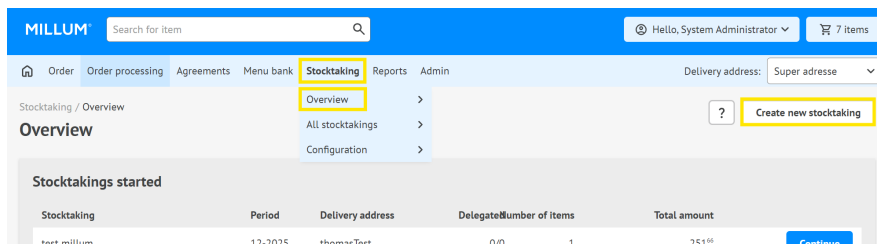


Quickguide new stocktaking

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.

The screenshot shows the 'New stocktaking' form. At the top, there is a progress bar with three steps: '1 General', '2 Sources', and '3 Start stocktaking'. The first step, '1. Fill in information', is active. It contains the following fields:

- Select delivery address:** A dropdown menu with 'Select delivery address' as the placeholder.
- Stocktaking name:** A text input field with a yellow border.
- Select period for stocktaking:** Two dropdown menus, one for 'Select period' and one for 'Select year'.

A 'Next step' button is located at the bottom right of the form.

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 stocktaking's** enable the use of a previous stocktaking

The screenshot shows the '1. Fill in information' and '2. add items' steps of the stocktaking process. The first step, '1. Fill in information', is completed and shows the following details:

- Name: Test Stocktaking
- Delivery address: Super adresse
- Period: 10-2024

The second step, '2. add items', is active. It shows a list of sources to choose from: 'Search catalogue', 'Last ordered' (selected), 'Last ordered for address', 'Shopping cart', 'Shopping lists', 'Other stocktakings', and 'Review all imported (0)'. Below the list, it says '0 items found' and has buttons for 'Include all items' and 'Include selected items'. At the bottom, there are 'Previous step', 'Skip step', and 'Next step' buttons.

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*.

ADD ITEMS FROM SOURCES

Search catalogue

Last ordered

Last ordered for address

Shopping cart

Shopping lists

Other stocktakings

Review all selected (0)

Select catalogue

Display only items from shopping lists

Include all items

Include selected items

brød

Showing 100 of 500 hits

Item number	Item name	Catalogue	
11025501	Brød/Kagetang 250 mm	Brønnum	<input type="checkbox"/>
11025701	Brød/Kagetang RF 250 mm	Brønnum	<input type="checkbox"/>
11026501	Brød/Kagetang RF 210 mm	Brønnum	<input type="checkbox"/>
2545606	BRØD EKSTRA GROVT 700G (0.70 kg)	Asko med vin & brennevinssavtale	<input checked="" type="checkbox"/>
4338323	BRØD EKSTRA GROVT SKÅRET 750G (9 stk)	Asko med vin & brennevinssavtale	<input checked="" type="checkbox"/>
5654679	BRØD RUSTIKKE EBRÅRT MIKROVE (0.0-14)	Asko med vin & brennevinssavtale	<input type="checkbox"/>

Cancel

Next

Add items manually

If you choose to start a stocktaking without retrieving items from any source, you must search for the items manually. You can select between ***Search catalog***, ***User-defined item*** or ***Add items from sources***.

+ Details of stocktaking

Search

Add item

Edit

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/...	3	1,923 KG	50	25,00/13 KG	0	50,00 KG	1,255.769	0	
152137	EPLÉ ROYAL GALA FA...	4	1,389 KG	10	25,00/18 KG	0	50,00 KG	255.556	0	
152125	EPLÉ ROYAL GALA PR...	5	1,923 KG	7	25,00/13 KG	0	50,00 KG	184.615	0	

3 of 3 items with total value:

1,695⁹⁴

Start submission

Millum Procurement

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 in the storage.

The screenshot shows the 'Details of stocktaking' page. A 'NEW GROUP' modal is open, allowing the user to create a new group named 'Frozen goods'. Below the modal, a table lists items under the 'UNGROUPED' category. The table has columns for Item number, Product name, Counted break bulk, Counted sales unit, Counted weight/volume, Value, and Sorting. The total value for the ungrouped items is 155,301.

Item number	Product name	Counted break bulk	Counted sales unit	Counted weight/volume	Value	Sorting			
1975945	ATNA RAKFISKÖL 0,33...	54	25,61 fl	9	307,52/12 fl	54	77,60 ltr	8,339.22	
4313227	ATNA RONDANEPILSE...	954	25,71 fl	9	308,52/12 fl	8	77,90 ltr	27,927.22	
2430528	ATNA RYPEÖL 0,33L F...	98	22,89 fl	0	274,68/12 fl	8	69,36 ltr	2,798.10	

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/volume**.



The screenshot shows the 'Details of stocktaking' page. A table lists items under the 'UNGROUPED' category. The table has columns for Item number, Product name, Counted break bulk, Counted sales unit, Counted weight/volume, Value, Waste, and Sorting. The total value for the ungrouped items is 1,695.

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

3 of 3 items with total value:
1,695⁹⁴

Start submission

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 e-mail recipients. Complete the stocktaking by clicking **Send**.

The screenshot shows the 'Summary and reporting' page. A progress bar at the top indicates the steps: Summary (checked), Pre-allocation (checked), Reporting (3), and Send (4). Below the progress bar, a table lists items under the 'UNGROUPED' category. The table has columns for Item number, Product name, Counted break bulk, Counted sales unit, Counted weight/volume, Value, and Sorting. The total value for the ungrouped items is 155,301.

Item number	Product name	Counted break bulk	Counted sales unit	Counted weight/volume	Value	Sorting			
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