

Initial Count Set Up

Run an inventory report in your WMS and export to Excel and then sort the inventory list by location. Modify the excel sheet to include the following columns, Start Date, End Date, and Counter Name

Print Count
Sheets

Count Sheet 6

Counter:

Auditor:

Start Date	End Date	Location	Item	Good	Qty Over	Qty Short
		01-A-01	ABC123456			
		01-A-02	ABC123455			
		01-A-03	ABC123444			
		01-A-04	ABC123111			
		01-A-05	ABC123000			
		01-A-06	ABC126000			
		01-A-07	ABC127111			
		01-A-08	ABC128698			
		01-A-09	ABC129235			
		01-A-10	ABC123697			
		01-A-11	ABC100000			

Create a Count Sheet Control Check in/out log to track all count sheets issued to the count teams

Print Control
Sheets

Count Sheet	Start-Date	End-Date	Location Range	Counter Name
1			06-A-01 Thru 06-A-65	J. Gonzales
2			05-A-01 Thru 05-A-65	T. Smith
3			04-A-01 Thru 04-A-65	R. Frank
4			03-A-01 Thru 03-A-65	M. Jones
5			02-A-01 Thru 02-A-65	S. Allison
6			01-A-01 Thru 01-A-65	A. Uribe

Count Sheet Check-out Process

Issue Count Sheets by location range. Do not issue more than 2 hours worth of count sheets

Log out Count Sheet in the control Log to each individual

Count Sheet	Start-Date	End-Date	Location Range	Counter Name
1	9/1/2024		06-A-01 Thru 06-A-65	<i>J. Gonzales</i>
2	9/1/2024		05-A-01 Thru 05-A-65	<i>T. Smith</i>
3	9/1/2024		04-A-01 Thru 04-A-65	<i>R. Frank</i>
4	9/1/2024		03-A-01 Thru 03-A-65	<i>M. Jones</i>
5	9/1/2024		02-A-01 Thru 02-A-65	<i>S. Allison</i>
6	9/1/2024		01-A-01 Thru 01-A-65	<i>A. Uribe</i>

Issue Count Sheets to each auditor

Issue Handheld Scanner to each Auditor

Provide WMS log in credentials

Counting Process

User Logs into the mobile device and chooses LOOKUP

Start with the first location on your count sheet

2

User scans Location Bar code

Count Sheet 6

Counter: A. Uribe

Auditor

Start Date	End Date	Location	Item	Good	Qty Over	Qty Short
9/1/2024		01-A-01	ABC123456			
9/1/2024		01-A-02	ABC123455			
9/1/2024		01-A-03	ABC123444			
9/1/2024		01-A-04	ABC123111			
9/1/2024		01-A-05	ABC123000			
9/1/2024		01-A-06	ABC126000			
9/1/2024		01-A-07	ABC127111			
9/1/2024		01-A-08	ABC128698			
9/1/2024		01-A-09	ABC129235			
9/1/2024		01-A-10	ABC123697			
9/1/2024		01-A-11	ABC100000			

What is the result of the count

Location is Good

Check the "Good" Box on the count sheet and move to the next item

Count Sheet 6

Counter: A. Uribe

Auditor

Start Date	End Date	Location	Item	Good	Qty Over	Qty Short
9/1/2024		01-A-01	ABC123456	<input checked="" type="checkbox"/>		
9/1/2024		01-A-02	ABC123455			
9/1/2024		01-A-03	ABC123444			
9/1/2024		01-A-04	ABC123111			
9/1/2024		01-A-05	ABC123000			
9/1/2024		01-A-06	ABC126000			
9/1/2024		01-A-07	ABC127111			
9/1/2024		01-A-08	ABC128698			
9/1/2024		01-A-09	ABC129235			
9/1/2024		01-A-10	ABC123697			
9/1/2024		01-A-11	ABC100000			

3

Overage

4

Shortage

5

Invalid LPN

2

3

Overage

Look at the inventory balance in the surrounding locations to determine if by chance the overage cartons were positioned in the wrong spot.

If you can't find a nearby location with that can use the overage Qty, move the overage to the end of the aisle and place a placard "Overage" on the freight

Check the GOOD column on your sheet and made a note that you moved the overage freight and Qty to the end cap

Count Sheet 6

Counter: A. Uribe

Auditor

Start Date	End Date	Location	Item	Good	Qty Over	Qty Short	Comments
9/1/2024		01-A-01	ABC123456	X			
9/1/2024		01-A-02	ABC123455	X			Moved 5 cases to end of aisle
9/1/2024		01-A-03	ABC123444				
9/1/2024		01-A-04	ABC123111				
9/1/2024		01-A-05	ABC123000				
9/1/2024		01-A-06	ABC126000				
9/1/2024		01-A-07	ABC127111				
9/1/2024		01-A-08	ABC128698				
9/1/2024		01-A-09	ABC129235				
9/1/2024		01-A-10	ABC123697				
9/1/2024		01-A-11	ABC100000				

2

4

Shortage

Look at the inventory balance in the surrounding locations to determine if by chance you can find the missing inventory

If you can't find the missing inventory, look at the endcap to see if freight exists with an "Overage Placard"

If you find the missing items at the end of the endcap marked overage, move the needed freight to the location and update the count sheet accordingly

Count Sheet 6

Counter: A. Uribe

Auditor

Start Date	End Date	Location	Item	Good	Qty Over	Qty Short	Comments
9/1/2024		01-A-01	ABC123456	X			
9/1/2024		01-A-02	ABC123455	X			Moved 5 cases to end of aisle
9/1/2024		01-A-03	ABC123444				
9/1/2024		01-A-04	ABC123111				
9/1/2024		01-A-05	ABC123000				
9/1/2024		01-A-06	ABC126000				
9/1/2024		01-A-07	ABC127111				
9/1/2024		01-A-08	ABC128698				
9/1/2024		01-A-09	ABC129235				
9/1/2024		01-A-10	ABC123697				
9/1/2024		01-A-11	ABC100000				

If you can't find the missing items update the count sheet accordingly and notify the Inventory Manager of the shortage

Count Sheet 6

Counter: A. Uribe

Auditor

Start Date	End Date	Location	Item	Good	Qty Over	Qty Short	Comments
9/1/2024		01-A-01	ABC123456	X			
9/1/2024		01-A-02	ABC123455	X			Moved 5 cases to end of aisle
9/1/2024		01-A-03	ABC123444	X			
9/1/2024		01-A-04	ABC123111	X			
9/1/2024		01-A-05	ABC123000			-3	Location Short 3
9/1/2024		01-A-06	ABC126000				
9/1/2024		01-A-07	ABC127111				
9/1/2024		01-A-08	ABC128698				
9/1/2024		01-A-09	ABC129235				
9/1/2024		01-A-10	ABC123697				
9/1/2024		01-A-11	ABC100000				

5

Invalid LPN

Look at the LPN's listed in the system for this location.

If the LPN is not listed in the system, scratch/void out the label

If the system shows another LPN in this location verify the count and SKU in the system to the physical count. If it balances, update the count sheet

If the LPN shows up in another location, go to that location and determine if inventory exists there with a copy of the MU in question.

If Make whatever corrections are needed to fix the count and MU. If needed, associate an Inventory MU to the count

Start	End	Location Name	Good	Overage	Shortage	Comments
7/9/2024	7/9/2024	01-A-01	X			Moved 2 cases SKU-123 that were over to the endcap
7/9/2024	7/9/2024	01-A-02	X			MU 12348976 was invalid. Change the MU in this location and moved over SKU abc-123 Qty 20 to MU INV000001
		01-A-03				