HOW TO PERFORM CYCLE COUNTS

Cycle counts are an important method for businesses to make sure inventory records are kept up to date and to compare expected inventory levels against actual inventory levels. This information is useful for identifying inventory control issues and enables businesses to take corrective action.

Before performing a cycle count, it is important to follow these steps:

- 1. Stop movement of all products to be counted
- 2. Finalize any sales and purchase orders that are in process
- 3. Create invoices and vendor bills for all shipped and received orders

To perform cycles count in AdvancePro:

1. Click on "Products > New Cycle Count"



Products

2. Enter the cycle count details and specify which products should be counted

Count Details		Filter Criteria	_
Date:	Friday , June 19, 2015 💌	Warehouse: Warehouse1	•
Name:	6/19/2015 - Camera Equipment		
Picker:	Josh, Bemstein	Vendor:Select Vendor	•
Created By:	Josh, Bernstein	Product Category: Cameras	•
C. C. Approved By:		Custom Field:Select Custom Field	•

3. Click "Start" at the bottom right hand side of the screen in order to begin the cycle count

				(New)				
Scan	Type					Count Details Date: Friday , June 19, 2015	ter Criteria	Warehouse1	•
SKU	#					Name: 6/19/2015 - Camera Equipment			
	1					Picker: Josh, Bernstein	Vendor:	Select Vendor	•
UOM	Details						roduct Category:	Cameras	•
Break	Down QTY					C. C. Approved By:	Custom Field:	-Select Custom Field-	
,	· · · · · · · · · · · · · · · · · · ·								
	SKU # CEDSRT3	Product	ß	ШŤ	<u>8</u>	QTY shortcode Comment			i
1		CANNON EOS Rebel T3 Nikon 17-55mm f/2.8G ED-IF AF-S DX Lens							
3		Nikon D3200				0			
4		Nikon D750 FX-format Digital SLR				0			
						Start	<u>C</u> omplete	Cancel	Close
_	A								

4. Click the print icon (ڬ) at the bottom left hand corner of the screen

5. Take the cycle count printout and fill in actual inventory quantities

		cycle count report			
name: 6	6/19/2015 - Camera Equipment wareh	tatus: (IN PROGRESS) ouse: Warehouse1 endor:Select Vendor	product ca	6/19/20	
# no	product	sku	qty	scanned date	comment
	product CANNON EOS Rebel T3	sku CEOSRT3	qty 0	scanned date	comment
1			qty 0 0	scanned date	comment
1 2	CANNON EOS Rebel T3	CEOSRT3	qty 0 0 0	scanned date	comment

6. Once the cycle count sheet has been filled out, click "Products > View All Cycle Counts" and select "In Progress", then select your cycle count

CycleCour	it Name Warehouse		🗌 All 📄 Open	In Progress ☐ Approved ☐ Completed ☐ C	Cancelled 6/19/2015 • 6/19/2015 • 🗠
No	Name	Date	Warehouse	Status	Approved
1	6/19/2015 - Camera Equipment	6/19/2015	Warehouse1	In Progress	

7. Fill in the actual quantities that have been counted and click "save" at the bottom right hand side of the screen, then click "Complete"

		()	N PRO	OGRE	SS)						
Scan Box					Cour	nt Details			Filter Criteria	hu i a	
SVI1#						Date:	Friday , June		Warehouse:	Warehouse1	~
uty						Name:	6/19/2015 - Camera I	Equipment			
1						Picker:	Josh, Bernstein	-	Vendor:		Ψ.
UOM Details						Created By:	Josh, Bernstein		Product Category:	Cameras	Ŧ
BreakDown QTY						Approved By:			Custom Field:		-
					C. C	. Approved By:			Custom Field.		<u> </u>
No SKU #	Product	S	Unit	PickL		QTY short	tcode	Comment			6
1 CEOSRT3	CANNON EOS Rebel T3					10					
2 N17-55mm	Nikon 17-55mm f/2.8G ED-IF AF-S DX Lens					0					
3 ND3200	Nikon D3200					0					
4 ND750	Nikon D750 FX-format Digital SLR					0					
								0	0.11	Canad	
								Save	Complete	Cancel	Close

Now you will be prompted to have the cycle count reviewed and approved

AdvancePro	×
Cycle Count is now completed. Please have it reviewed and approved.	
ОК	

8. To review and approve the cycle count, click "Products > View All Cycle Counts" and select "Completed" from the top of the screen, then select the cycle count to be reviewed.

0	Western Western		🗌 All 🔲 Open	In Progress Approved 🔽 Completed 🔲 (Cancelled 6/19/2015 6/19/2015 6/19/2015
CycleCou	nt Name Warehouse				
No	Name	Date	Warehouse	Status	Approved
1	6/19/2015 - Camera Equipment	6/19/2015	Warehouse1	Completed	

9. Review the cycle count, comparing "On Hand" quantities with "QTY" entered during the cycle count, then click "Approve" to update the quantity in AdvancePro

					(COM	PLETE)					
Scan Box							Cour	nt Details	Filter Criteria		
Scan Box Scan Type SKU #								Date: Friday , June 19, 2015 💌	Warehouse:	Warehouse1	~
								Name: 6/19/2015 - Camera Equipment			
1								Picker: Josh, Bemstein	Vendor:		v
UOM Details								Created By: Josh, Bernstein	Product Category:	1	
BreakDown QTY											v
							C. C	. Approved By:	Custom Field	1	~
No SKU#	Product	S	Unit F	iak 0	On Hand	Reserved	PL QTY	QTY shortcode	Comment		6
1 CEOSRT3	CANNON EOS Rebel T3				12	0	0				1
2 N17-55mm	Nikon 17-55mm f/2.8G ED-IF AF-S DX Lens				0	0	0	0			
3 ND3200	Nikon D3200				0	0	0	0			
4 ND750	Nikon D750 FX-format Digital SLR				0	0	0	0			
										1	
A								Save	Complete Ap	prove Ca <u>n</u> cel	Close
							8				

A printed report can be generated by clicking the print icon (¹⁾) at the bottom of the screen

		cycle count repo				
date: F	Friday, June 19, 2015	status: (APPROVED)				6/19/201
name: 6/19/2015 - Camera Equipment warehouse: Warehouse1			product ca	tegory: Cameras		
bicker: J	Josh Bernstein	vendor: N/A				
# no	product	sku		scanned date	comment	
# no				scanned date Jun 19 2015 11:46A		
# no 1	product	sku				
# no 1 2	product CANNON EOS Rebel T3	sku CEOSRT3				

10. You will be prompted to confirm the stock update, click "Yes" to continue

AdvancePro	<
Press YES to continue with new quantities	
Yes No]

11. You will now receive confirmation that the quantity update has been performed successfully

