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"

Product Info	Inventory Info	Other
Add Product	Manage Inventory	Manage Categories
		Global Pricing
Edit Product	New Cycle Count	Variant Manager
		New Raw Material
View All Products	View All Cycle Counts	View All Raw Materials
		Build Finished Product
Item Kit	Product Re-order Alert Report	View All Promotions

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

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

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

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

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

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"

(IN PROGRESS)

Scan Box
Scan Type
| SKU # | ▼ |
Qty
| | 1 |

UOM Details
BreakDown QTY

Count Details
Date: Friday , June 19, 2015 ▼
Name: 6/19/2015 - Camera Equipment
Picker: Josh, Bernstein ▼
Created By: Josh, Bernstein
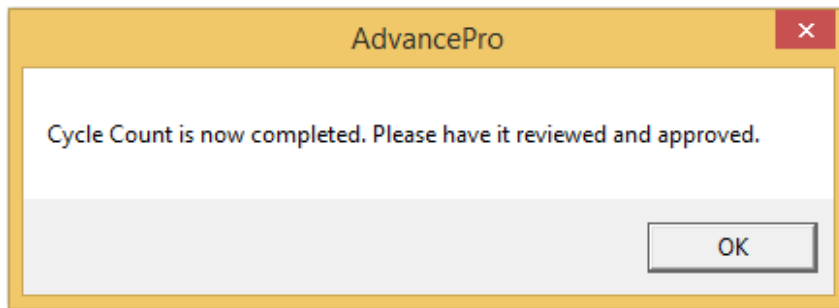C. C. Approved By:

Filter Criteria
Warehouse: Warehouse 1 ▼
Vendor: ▼
Product Category: Cameras ▼
Custom Field: ▼

No	SKU #	Product	IS	Unit	PickL..	QTY	shortcode	Comment	
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			

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.

OK

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.

☐ All   ☐ Open   ☐ In Progress   ☐ Approved   ☑ Completed   ☐ Cancelled
Between   and
6/19/2015 ▼   6/19/2015 ▼

CycleCount 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

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

cycle count report

date:	Friday, June 19, 2015	status:	(APPROVED)		6/19/2015
name:	6/19/2015 - Camera Equipment	warehouse:	Warehouse1	product category:	Cameras
picker:	Josh Bernstein	vendor:	N/A		

# no	product	sku	qty	scanned date	comment
1	CANNON EOS Rebel T3	CEOSRT3	10	Jun 19 2015 11:46A	
2	Nikon D3200	ND3200	0		
3	Nikon D750 FX-format Digital SLR	ND750	0		
4	Nikon 17-55mm f/2.8G ED-IF AF-S DX Lens	N17-55mm	0		

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

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