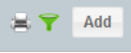


CRITICAL COUNT INVENTORIES

Setting up a critical count inventory for your store is a two-step process. Start by creating a template from which the inventories will be counted and then schedule the inventories.

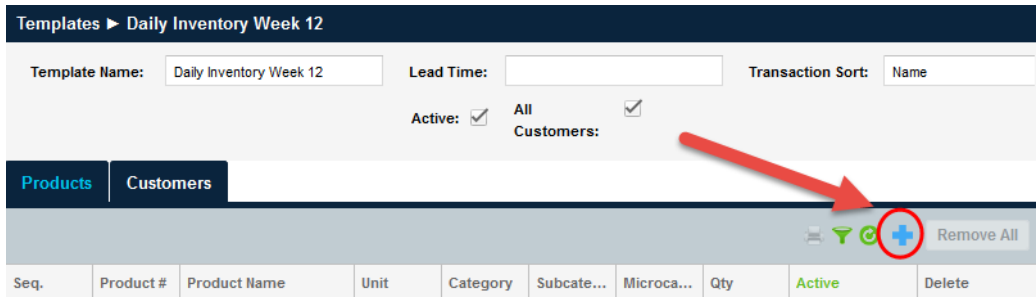
STEP 1: CREATING A TEMPLATE

1. Under the **Administration** tab, click on **Update Templates**

2. In the top right corner of the screen, click the **Add** button 

3. Fill in the **Template Name** and how you would like the items to be sorted (using the dropdown next to **Transaction Sort** and click continue. The **Lead Time** field can remain blank.

4. From here you will see the complete template, and to add items choose the blue plus sign in the top corner of the screen






Templates ► Daily Inventory Week 12

Template Name: Lead Time: Transaction Sort:

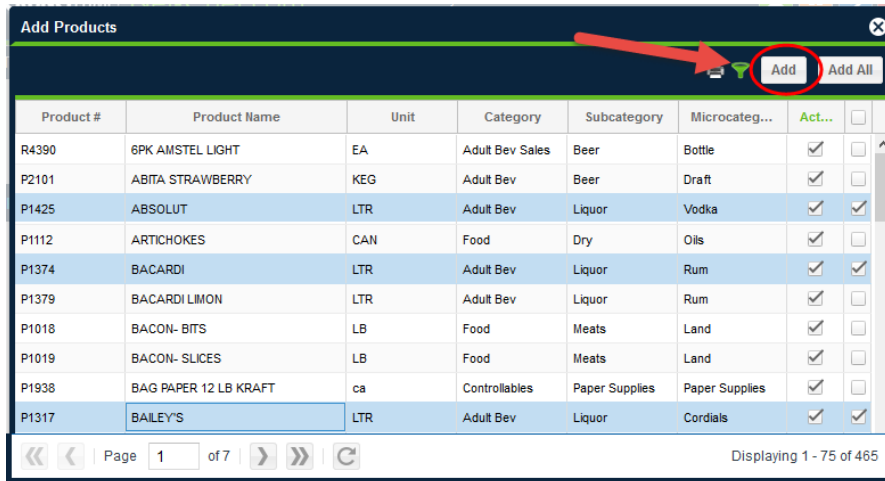
Active: All Customers:

Products Customers




   Remove All

Seq.	Product #	Product Name	Unit	Category	Subcate...	Microca...	Qty	Active	Delete

5. This will open up an **Add Products** window that will give you a full list of all products in the system. Using the filter function in the top right corner, you can search for specific items or categories of items to narrow down the items you are looking for. Once you have found what you need, highlight the items by clicking on them (you will notice the line will turn blue) and then click add.



Add Products

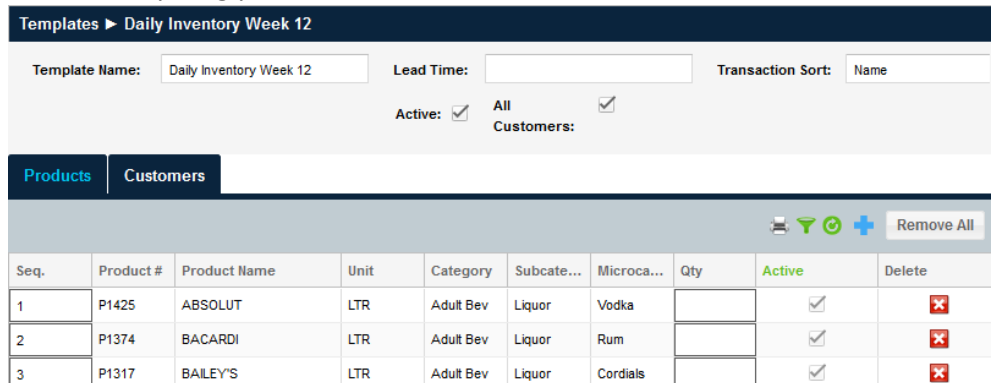
   Add All

Product #	Product Name	Unit	Category	Subcategory	Microcateg...	Act...	<input type="checkbox"/>
R4390	6PK AMSTEL LIGHT	EA	Adult Bev Sales	Beer	Bottle	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P2101	ABITA STRAWBERRY	KEG	Adult Bev	Beer	Draft	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P1425	ABSOLUT	LTR	Adult Bev	Liquor	Vodka	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
P1112	ARTICHOKES	CAN	Food	Dry	Oils	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P1374	BACARDI	LTR	Adult Bev	Liquor	Rum	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
P1379	BACARDI LIMON	LTR	Adult Bev	Liquor	Rum	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P1018	BACON- BITS	LB	Food	Meats	Land	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P1019	BACON- SLICES	LB	Food	Meats	Land	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P1938	BAG PAPER 12 LB KRAFT	ca	Controllables	Paper Supplies	Paper Supplies	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P1317	BAILEY'S	LTR	Adult Bev	Liquor	Cordials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 7

Displaying 1 - 75 of 465

6. Once you click the add button, they will populate into the template. You can continue to add items as you need until the template has everything you wanted on there.






Templates ► Daily Inventory Week 12

Template Name: Lead Time: Transaction Sort:

Active: All Customers:

Products Customers

   Remove All

Seq.	Product #	Product Name	Unit	Category	Subcate...	Microca...	Qty	Active	Delete
1	P1425	ABSOLUT	LTR	Adult Bev	Liquor	Vodka	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	P1374	BACARDI	LTR	Adult Bev	Liquor	Rum	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	P1317	BAILEY'S	LTR	Adult Bev	Liquor	Cordials	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

STEP 2: SCHEDULE THE INVENTORY

1. Under the **Inventory** tab, select **Create/Review Inventories**
2. Make sure the **Post Period** does not show an period that is already closed, and you should see a button for **New Scheduled Inventory**

The screenshot shows the 'Physical Inventory' window. At the top, there is a 'Post Period' dropdown set to '12/22/2020'. To its right is a button labeled 'New Scheduled Inventory', which is circled in red and has a red arrow pointing to it. Below this is a table with columns: Date, Type, Detail, Status, and Process. The first row shows '12/22/2020', 'Final for Post', an empty 'Detail' cell, 'Scheduled' status, and a 'Count Sheet' link.

3. Once you click on **New Scheduled Inventory**, you will have the option to inventory from a template (giving you the chance to use the template you just created):

The screenshot shows a dialog box titled 'Physical Inventory for Post Period 12/22/2020'. It has 'Save and Close' and 'Close' buttons. The 'Date' is set to '12/16/2020'. Under the 'Template' section, there are two options: 'Template' (unchecked) and 'Daily Inventory Week 12' (unchecked).

Or, you can choose an entire, Category, Sub-Category or Micro-Category of products.

The screenshot shows a vertical list of dropdown menus for selecting product categories. The options are: 'User Defined Category', 'Category', 'Subcategory', 'Microcategory', 'Storage Location', and 'All Products'. Each option has a small downward arrow icon to its right.

4. From here, you just need to select each date that you would like to schedule this inventory from the drop down menu, and select the template. If you want to do the inventory every day for that period, you will have to click on each day, and then select the template.

The screenshot shows the 'Physical Inventory for Post Period 12/22/2020' dialog box. The 'Date' dropdown is open, showing a list of dates from 12/16/2020 to 12/22/2020. The 'Template' dropdown is also open, showing 'Template' and 'Daily Inventory Week 12' as options. The 'Save and Close' and 'Close' buttons are visible at the bottom right.

5. When you are done, click on **Save and Close** in the top right corner
6. Once that is complete, all of your scheduled inventories will show up under the **Physical Inventory** window

The screenshot shows the 'Physical Inventory' window after scheduling. The 'Post Period' is '12/22/2020'. There are two buttons: 'New Scheduled Inventory' and 'Copy Scheduled Inventory'. The table below shows the following data:

Date	Type	Detail	Status	Process
12/16/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/17/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/18/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/19/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/20/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/21/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/22/2020	Template	Daily Inventory Week 12	Scheduled	Count Sheet Cancel
12/22/2020	Final for Post		Scheduled	Count Sheet