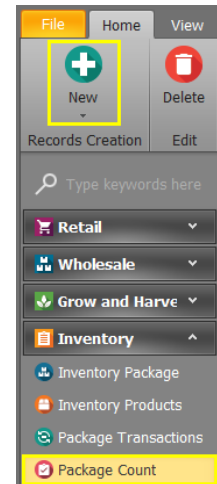


Conduct an Inventory Count Manually

Last Modified on 02/10/2020 2:34 pm MST

In order to make sure Inventory records are accurate, your team is likely performing periodic inventory counts. These counts are conducted on each Inventory Package. You can use KLÉR to manage and document Package counts. If your location has removable scanners available, the most efficient way to to conduct a count is allowing employees to scan items. Refer to the [Conduct an Inventory Count with Scanners](#) article.



To conduct a package count manually, without scanners, follow the steps below:

- Step 1 - From the **Inventory** module, select the **Package Count** section and click the **New** button. This will open a new Package Count detail window.
- Step 2 - The **Inventory Status** field is automatically set to "In Process." From the **Category** drop-down menu, choose the categories you would like to include in the inventory count. This will auto-populate all products in the selected categories to your **Inventory Count List** once you save the Package Count. The **Inventory Number** will also auto-populate the first time you save.

A screenshot of a form titled 'Inventory Count'. The form has four fields: 'Inventory Status' with the value 'In Process', 'Inventory Date' with the value '10/11/2018', 'Category' which is empty, and 'Inventory Number' with the value '1'. Each field has a small 'x' icon to its right, indicating it can be cleared.

- Step 3 - If a remote device is not available, you will need to print the

report for counting purposes. As you count or after the count is complete, enter your counted amounts in the **Inventory Count** field. If a product did not appear on your Inventory Count List, you can use the add new button to manually search the entire inventory for the product.

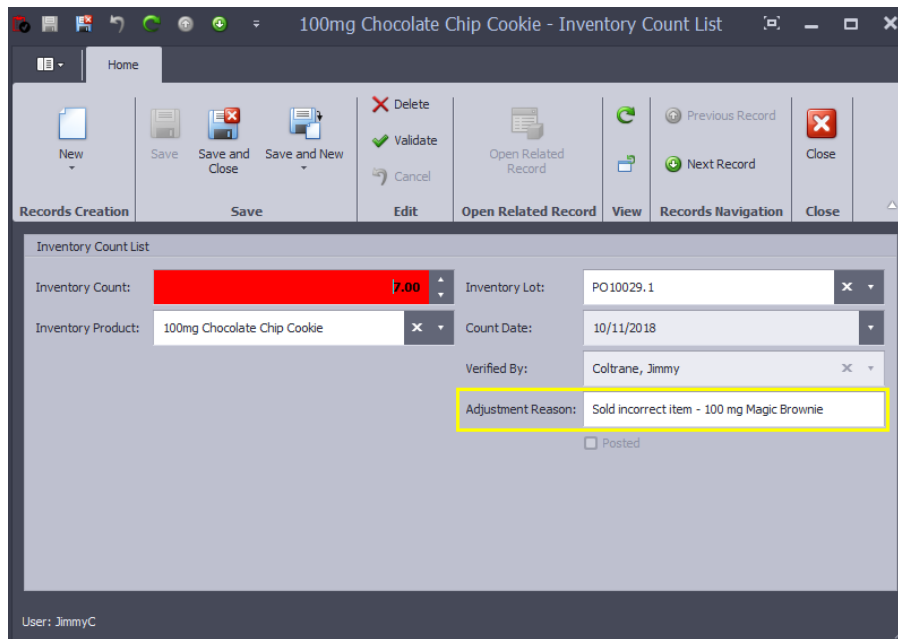
When a products **Inventory Count** does not match the expected **Current Qty**, the amount will be shown highlighted in red.

Inventory Product	Adjustment Qty	Current Qty	Inventory Count	Adjusted Qty	Inventory Lot	Count Date	Verified By	Adjustment Reason
Click here to add a new row								
100mg Magic Brownie	1.00	4.00	5.00	0.00	PO10029.3	10/11/2018	Coltrane, Jim...	
100mg Chocolate Chip Cookie	-1.00	8.00	7.00	0.00	PO10029.1	10/11/2018	Coltrane, Jim...	
250mg Gummy Package SAT	0.00	7.00	7.00	0.00	PO10029.4	10/11/2018	Coltrane, Jim...	

- Step 4 - Once all products are scanned or added to the **Inventory Count List**, the **Adjustment Qty** field will show the amount of missing or extra product. These products will need to adjustment and reason for adjustment.

Inventory Product	Adjustment Qty	Current Qty	Inventory Count	Adjusted Qty	Inventory Lot	Count Date	Verified By	Adjustment Reason
Click here to add a new row								
100mg Magic Brownie	1.00	4.00	5.00	0.00	PO10029.3	10/11/2018	Coltrane, Jim...	
100mg Chocolate Chip Cookie	-1.00	8.00	7.00	0.00	PO10029.1	10/11/2018	Coltrane, Jim...	
250mg Gummy Package SAT	0.00	7.00	7.00	0.00	PO10029.4	10/11/2018	Coltrane, Jim...	

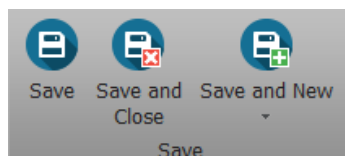
- Step 5 - Your **Inventory Count** can only be complete if all of your **Inventory Products** have been accounted for or an **Adjustment Reason** has been entered. To enter an adjustment reason, click the product needing to be adjusted and a pop-up will appear to enter the **Adjustment Reason**.



- Step 6 - Once you have verified all discrepancies, mark the **Inventory Status** as Complete. The Adjusted Qty field will populate with the amount of adjustment made in the inventory for each product.

Inventory Product	Adjustment Qty	Current Qty	Inventory Count	Adjusted Qty	Inventory Lot	Count Date	Verified By	Adjustment Reason
100mg Chocolate Chip Cookie	-1.00	8.00	7.00	-1.00	PO10029.1	10/11/2018	Coltrane, Jim...	Sold incorrect item - 100 ...
100mg Magic Brownie	1.00	4.00	5.00	1.00	PO10029.3	10/11/2018	Coltrane, Jim...	Sold incorrect item - 100 ...
250mg Gummy Package SAT	0.00	7.00	7.00	0.00	PO10029.4	10/11/2018	Coltrane, Jim...	

- Step 7 - Click one of the **Save** options.



You've now completed an inventory count of each package and reconciled the inventory!

