Updated as of December 21, 2021

Physical Inventory Quick Reference Guide

Before entering your Physical Inventory in CNCentral, print the Physical Inventory Report and conduct an actual Physical Inventory using the report. Follow this think for more information on accessing the report: https://inteamhelp.zendesk.com/hc/en-us/articles/1500008986302-Physical-Inventory-Report

Steps to Start a New Physical Inventory:

1. Select "Inventory" from the left-hand menu.

2. Select the "Physical Inventory" button in the top right.

3. Click the blue plus sign button on the bottom right-hand side of your screen, and select "Start Count"

5. Select your "Bin", if applicable. (This is essentially the storage location of the product.)

6. Select the "Date" (note that only the current date or past dates will be available for selection)
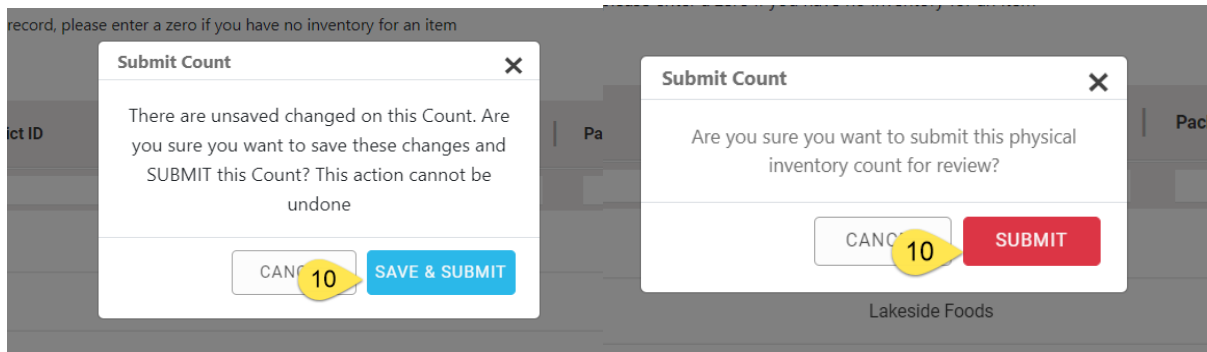
7. Click the "Save & Continue" button
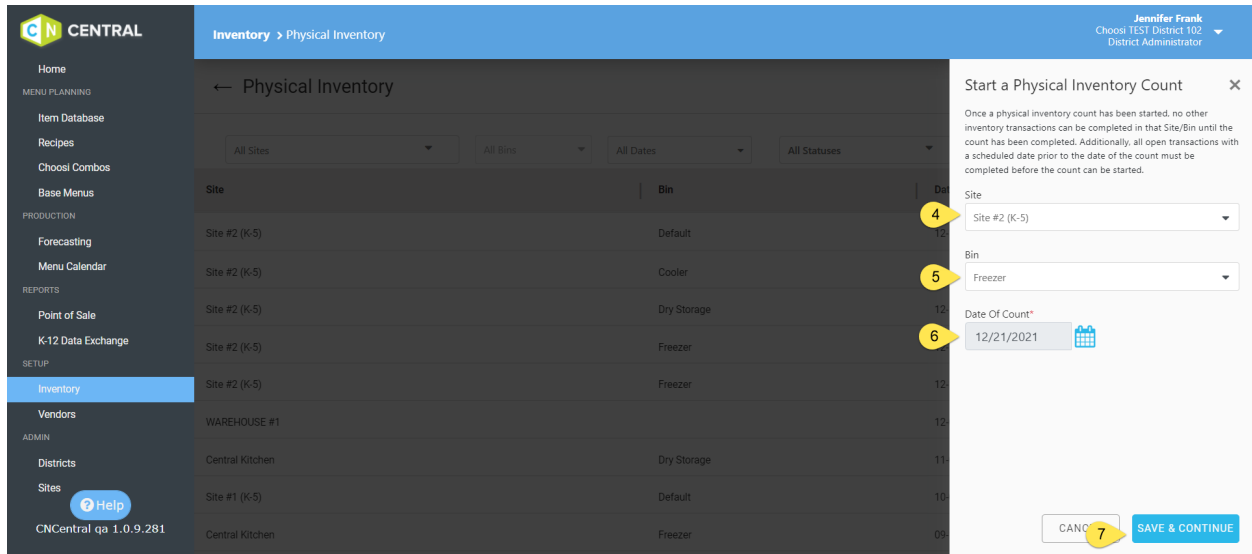
8. Add your numbers to the "Counted Balance" field.

9. When all entries for an entire "Bin" have been made, select "Submit".
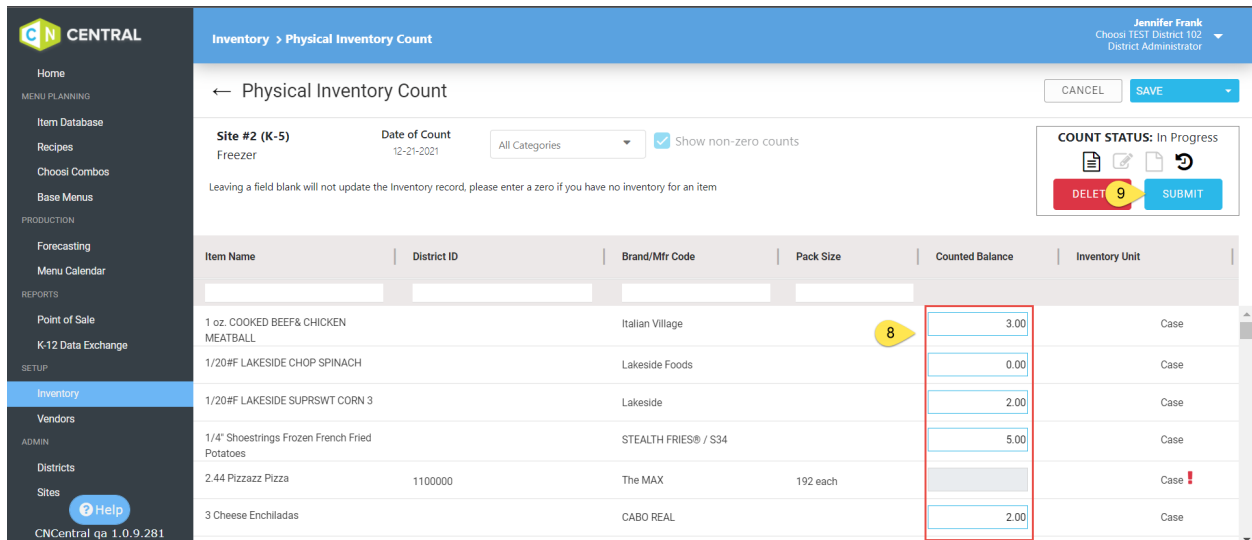
10. If you have not saved the count, you'll be asked if you want to "Save & Submit". Click the "Save & Submit" if you're ready to submit your count. If you have saved the count, you'll simply be asked if you want to "Submit". Click the "Submit" button if you're ready to submit your count.

record, please enter a zero if you have no inventory for an item

Submit Count ✕

There are unsaved changed on this Count. Are you sure you want to save these changes and SUBMIT this Count? This action cannot be undone

CAN⦿ 10 **SAVE & SUBMIT**

ict ID

Pa

Submit Count ✕

Are you sure you want to submit this physical inventory count for review?

CANⓒ 10 **SUBMIT**

Pack

Lakeside Foods

Steps to Edit/Complete an Existing Physical Inventory:

1. Select "Inventory" from the left-hand menu.

2. Select the "Physical Inventory" button in the top right.
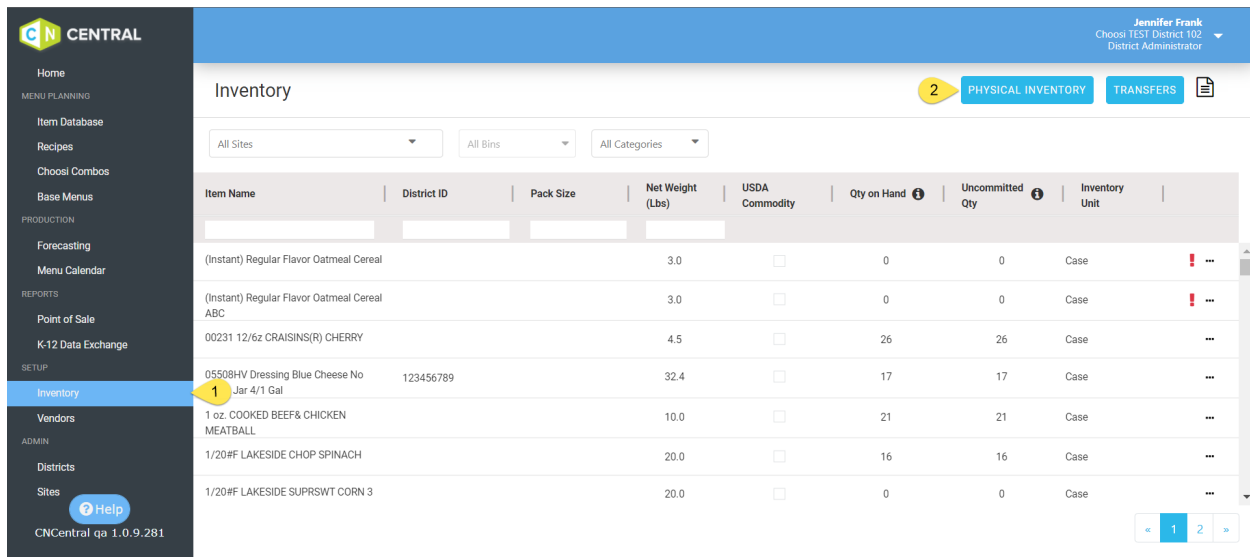
3. Locate from the list of Physical Inventories the count you'd like to edit or complete and click the three dots icon and select "Edit". Use the filters across the top if necessary to refine the results and make it easier to locate the desired count.

4. Make any changes necessary to the inventory numbers previously input or finish entering numbers for an inventory count. When ready to submit, follow steps 9 & 10 above to submit a complete physical inventory count.

Tips and Troubleshooting:

1. You can save your work as you are entering your Physical Inventory counts by clicking on the "Save" button at any time. Saving your work will allow you to retain any data entered and exit the Physical Inventory to return to it at any time while it is in the "Pending" status with all previously entered data.

2. If an Item has a red exclamation point next to the Inventory Unit on the right, it is either missing a price or the item has not been confirmed on the Inventory Setup screen. If the Inventory Setup has not been confirmed; you will need to confirm the Inventory Setup information before continuing the physical inventory for this item. If it's missing a price; you will only be able to complete a physical inventory count that subtracts from the Inventory balance, not adds. You can add a price in the Vendors section.

3. If you are looking for a specific Item, use the textbox under the "Description" field to quickly filter the list to find your Item or you can use the "Category" filter to find items.

4. Once a count has been submitted and has a status of "Complete" users will not be able to delete a physical inventory count. While it is still in the "In Progress" status, counts can be edited or deleted if necessary.

5. You will not be able to perform a Physical Inventory count if there are open Transfers and/or Orders made in the site you're trying to perform a Physical Inventory for prior to the date of the Physical Inventory count. The system will not allow this action. Those transactions must be closed before a count can be started.

For more help on conducting a Physical Inventory, check out this video:
https://inteamhelp.zendesk.com/hc/en-us/articles/1500007918142-Manager-Conducting-a-Physical-Inventory