

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

Inventory Counts will allow On-hand Inventory to be counted and easily entered into MotionMD resetting Stock Record On-hand levels to correctly match actuals. This will allow accounts to better manage and understand Inventory levels, address shrink and see positive or negative variances in On-hand levels.

To access the Counts functionality, a designated role is required that is assigned at the Administrator level. A Key Account Contact or manager should submit a Help Ticket within MotionMD requesting the role to be assigned to specific User(s) within their account.

Starting a New Inventory Count

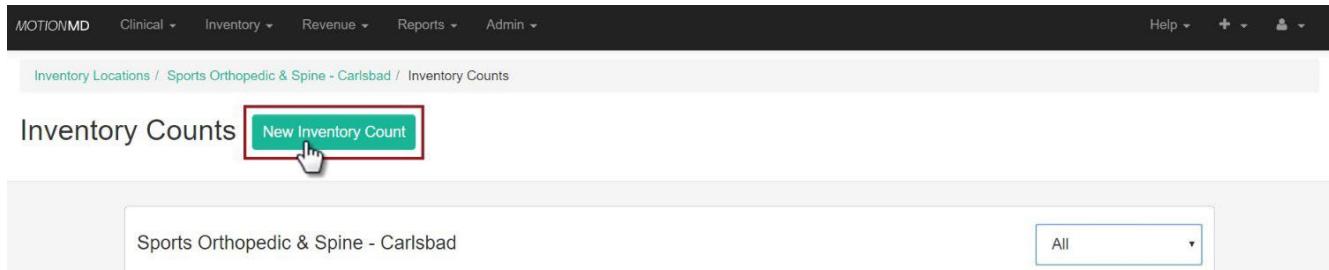
From the **Inventory Locations** list page, click the **Menu** button under the Inventory Location

or from the **Actions** section within a specific Inventory Location click the **Inventory Counts** link

UoM	PAR	On Hand	Outstanding	Qty Needed
EA	1	1 of 1	0	0

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

After clicking the **Inventory Counts** link an Inventory Counts list page will open, click the **New Inventory Count** button.



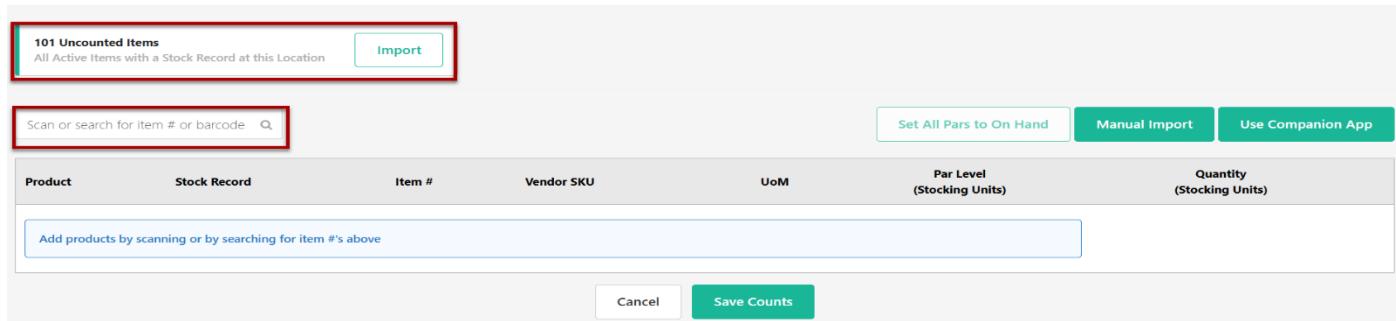
The screenshot shows the MotionMD software interface with a dark header bar. The header includes the MotionMD logo, navigation links for Clinical, Inventory, Revenue, Reports, and Admin, and a Help section. Below the header, a breadcrumb navigation path shows 'Inventory Locations / Sports Orthopedic & Spine - Carlsbad / Inventory Counts'. The main content area is titled 'Inventory Counts' and features a green 'New Inventory Count' button with a red border and a cursor pointing to it. Below the button, the text 'Sports Orthopedic & Spine - Carlsbad' is displayed, along with a dropdown menu set to 'All'.

On the **Add Inventory Count** page, SKUs and Barcodes can be manually typed into the search bar, a bar code scanner can be used to scan product SKU/Barcode labels, a Manual Import or via the Mobile Companion App. Please refer to the [Overview of Inventory Counts Utilizing the Mobile Companion App](#) document on utilizing the Mobile Companion App for counts.

A notification of all active items with a stock record associated to the inventory location will appear indicating stock which has not been counted. Users can import the uncounted stock to ensure that all items with a stock record in MotionMD are a part of the Inventory Count for update.

Add Inventory Count

CSA Orthopedics (South)



The screenshot shows the 'Add Inventory Count' page. At the top, a red box highlights the 'Import' button next to a '101 Uncounted Items' message. Below the message, a red box highlights the search bar with the placeholder 'Scan or search for item # or barcode'. To the right of the search bar are three buttons: 'Set All Pcs to On Hand', 'Manual Import', and 'Use Companion App'. The main area is a table with columns: Product, Stock Record, Item #, Vendor SKU, UoM, Par Level (Stocking Units), and Quantity (Stocking Units). A red box highlights the table header. Below the table is a search bar with the placeholder 'Add products by scanning or by searching for item #' above. At the bottom are 'Cancel' and 'Save Counts' buttons.

Manually Adding SKU's/Bar Code Scanning

Manually typing in SKUs/Barcodes has type-ahead functionality so the part number can be selected from the dropdown

Add Inventory Count

Sports Orthopedic & Spine - Carlsbad



The screenshot shows the 'Add Inventory Count' page for 'Sports Orthopedic & Spine - Carlsbad'. A red box highlights the dropdown menu for the part number '01ef', which lists '01EF-S', '01EF-M', and '01EF-L'. Below the dropdown is a table with columns: Item #, UoM, Par Level (UoM), and Quantity (Stocking Units). The table shows a row for 'Reaction Knee Brace DJO - DonJoy' with an item number '11-0215-2', a UoM of 'EA', a par level of '0', and a quantity of '1'. A note at the bottom states '1 EA = Stocking Units'.

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

After selecting the SKU/Barcode from dropdown or scanning the bar code, the most recent addition will show at the top of the list. The **Quantity** can be manually adjusted with up/down arrows within the box or updated by typing in quantity counted. If a scanner is being used, the **Quantity** field will automatically increment with each bar code scan and a beep can be heard alerting the user the code was scanned and accepted. If a SKU/Barcode is added or scanned inadvertently, clicking the **X** at the end of the row will remove it from the Count page.

Add Inventory Count

CSA Orthopedics (South)

99 Uncounted Items All Active Items with a Stock Record at this Location		Import				
Scan or search for item # or barcode		Set All Pairs to On Hand	Manual Import	Use Companion App		
Product	Stock Record	Item #	Vendor SKU	UoM	Par Level (Stocking Units)	Quantity (Stocking Units)
AirSelect Standard DJO - Aircast		01EF-S		EA 1 EA = 1 Stocking Units	0	<input type="text" value="1"/> X
Reaction Knee Brace DJO - DonJoy		11-0215-3		EA 1 EA = 1 Stocking Units	10	<input type="text" value="1"/> X

If a SKU/Barcode is added or scanned that does not have a corresponding Stock Record for that Inventory Location, a beep will be heard, and **New** Pill will display under the Stock Record. The **Par level** can be manually adjusted with up/down arrows within the box or typing in quantity counted.

Add Inventory Count

CSA Orthopedics (South)

100 Uncounted Items All Active Items with a Stock Record at this Location		Import				
Scan or search for item # or barcode		Set All Pairs to On Hand	Manual Import	Use Companion App		
Product	Stock Record	Item #	Vendor SKU	UoM	Par Level (Stocking Units)	Quantity (Stocking Units)
X-ROM Post-Op Knee Brace DJO - DonJoy		11-2181-9		EA	<input type="text" value="0"/> ▲ ▼	<input type="text" value="1"/> X
Reaction Knee Brace DJO - DonJoy		11-0215-3		EA 1 EA = 1 Stocking Units	10	<input type="text" value="1"/> X

If a SKU/Barcode is added or scanned and it is not found in MotionMD, a beep will be heard, and **Not Found** pill will display under the Stock Record. Any SKU with the **Not Found** pill will need to be manually removed by pressing the **X** next to the quantity.

Inventory Locations / Strongsville Family Health - Inventory Location / Inventory Counts / New												
Add Inventory Count												
Strongsville Family Health - Inventory Location												
565 Uncounted Items All Active Items with a Stock Record at this Location												
<table border="1"> <thead> <tr> <th>Product</th> <th>Stock Record</th> <th>Item #</th> <th>UoM</th> <th>Par Level (Stocking Units)</th> <th>Quantity (Stocking Units)</th> </tr> </thead> <tbody> <tr> <td>Product Not Found Manually remove the count line to apply counts</td> <td>Not Found</td> <td>11-0447-9</td> <td></td> <td></td> <td><input type="text" value="1"/> X</td> </tr> </tbody> </table>	Product	Stock Record	Item #	UoM	Par Level (Stocking Units)	Quantity (Stocking Units)	Product Not Found Manually remove the count line to apply counts	Not Found	11-0447-9			<input type="text" value="1"/> X
Product	Stock Record	Item #	UoM	Par Level (Stocking Units)	Quantity (Stocking Units)							
Product Not Found Manually remove the count line to apply counts	Not Found	11-0447-9			<input type="text" value="1"/> X							

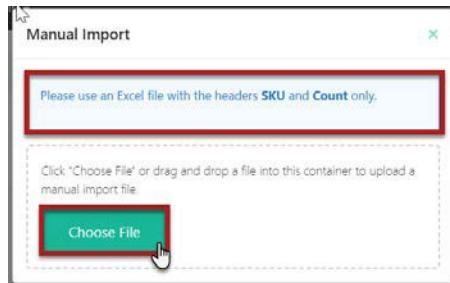
OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

Import a Manual Count

Users are able to import spreadsheets with manual inventory counts completed to an inventory location in MotionMD. In preparation, the Excel file must contain specific details to process the upload successfully. The file should contain only have two columns of data. The first column should include header **SKU (All Caps)** and the second column with the header **Count**.

A	B
1	SKU
2	01EF-L
3	01EF-M
4	01EF-S
5	01EF-XL
6	01EF-XS
7	01ES-L

Validate once again the headers on the excel file are typed exactly as **SKU (All Caps)** and **Count**. Then select **Choose File** to upload the file.



Import Uncounted Items

After all items are counted, any SKU that has an active stock record in MotionMD but was not counted can be viewed by selecting the **Import** button. A pop-up box will appear with a list of the SKU's. Select SKU's for count adjustments as needed and click **Import Selected**. To complete the count click the **Save Counts** button at the bottom of the page.

Product	Item #
Stirrup Ankle Brace	02AU
SP Walker Boot	01A-L
Leg Brace	03AU
Leg Brace	03AB

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

The Saved Count will show at the top of the Inventory Counts list page. This page shows the Count ID number, total number of Items Counted, Created on Date and User, Updated on Date and User, the Status and Age of the Count

Inventory Locations / Sports Orthopedic & Spine - Carlsbad / Inventory Counts

Inventory Counts [New Inventory Count](#)

Sports Orthopedic & Spine - Carlsbad Displaying all 10 inventory counts

ID	Item Count	Created	Updated	Status	Age	
258	14	6/5/2020 at 05:26 PM Cynthia Sever	6/5/2020 at 05:26 PM Cynthia Sever	Pending	0 hours	View
257	45	6/5/2020 at 10:50 AM Cynthia Sever	6/5/2020 at 11:08 AM Cynthia Sever	Applied	0 days	View

Additional SKUs/Barcodes may be added to a Count if it is in **Pending** status. Counts in Pending status will expire after 72 hours. The Count can be edited and updated by clicking the **View** button

Sports Orthopedic & Spine - Carlsbad Displaying all 10 inventory counts

ID	Item Count	Created	Updated	Status	Age	
258	14	6/5/2020 at 05:26 PM Cynthia Sever	6/5/2020 at 05:26 PM Cynthia Sever	Pending	0 hours	View
257	45	6/5/2020 at 10:50 AM Cynthia Sever	6/5/2020 at 11:08 AM Cynthia Sever	Applied	0 days	View

Click the **Edit** button

Inventory Count
Sports Orthopedic & Spine - Carlsbad 6/5/2020

[Cancel Inventory Count](#) [Edit](#) [Apply](#)

Product	Item #	UoM	Par Level (UoM)	Quantity (Stocking Units)
Reaction Knee Brace	11-0215-2	EA 1 EA = Stocking Units	0	1
AirSelect Standard	01EF-S	EA	9	10
Deluxe Shoulder Immobilizer	79-84105	EA 1 EA = 1 Stocking Units	5	3

Enter or scan additional items and click **Save** button

98 Uncounted Items
All Active Items with a Stock Record at this Location

[Import](#)

Scan or search for item # or barcode

[Set All Pairs to On Hand](#) [Manual Import](#) [Use Companion App](#)

Product	Stock Record	Item #	Vendor SKU	UoM	Par Level (Stocking Units)	Quantity (Stocking Units)
Crutches Medline	New	88-073000051514		CS 1 CS = 2 Stocking Units	1	1
AirSelect Standard DJO - Aircast		01EF-L		EA 1 EA = 1 Stocking Units	15	1
Quick-Fit Wrist II DJO - ProCare		79-87570		EA 1 EA = 1 Stocking Units	3	1
X-Act ROM Knee Brace DJO - DonJoy		11-2151-9		EA 1 EA = 1 Stocking Units	3	1

[Back](#) [Save Counts](#)

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

Applying the Count

When a Count is complete and ready to be submitted, click into the **Pending Count** and click the **Apply** button

Inventory Count
Sports Orthopedic & Spine - Carlsbad 6/5/2020

Product	Item #	UoM	Par Level (UoM)	Quantity (Stocking Units)
Reaction Knee Brace	11-0215-2	EA 1 EA = Stocking Units	0	1
AirSelect Standard	01EF-S	EA	9	10
Deluxe Shoulder Immobilizer	79-84105	EA 1 EA = 1 Stocking Units	5	3
AirSelect Standard	01EF-M	EA	40	37

[Back](#)

[Cancel Inventory Count](#) [Edit](#) [Apply](#) 

The User is taken back to the Count list page and a **Success** message will appear at the top of the page and the applied Count's status will update to **Applied**. At that time the On-hand levels for each SKU on the applied count will be updated

Inventory count applied successfully. 

Inventory Locations / Sports Orthopedic & Spine - Carlsbad / Inventory Counts

Inventory Counts [New Inventory Count](#)

Sports Orthopedic & Spine - Carlsbad Displaying all 10 inventory counts						All
ID	Item Count	Created	Updated	Status	Age	View
258	51	6/5/2020 at 05:26 PM Cynthia Sever	6/5/2020 at 05:41 PM Cynthia Sever	Applied	0 days	View

After the Count has been Applied, the list of items can still be seen by clicking the **View** button, but no actions can be taken within the Count page.

Inventory Locations / Sports Orthopedic & Spine - Carlsbad / Inventory Counts / Show

Inventory Count
Sports Orthopedic & Spine - Carlsbad 6/5/2020

Product	Item #	UoM	Par Level (UoM)	Quantity (Stocking Units)
Reaction Knee Brace	11-0215-2	EA 1 EA = Stocking Units	0	1
AirSelect Standard	01EF-S	EA	9	10
Deluxe Shoulder Immobilizer	79-84105	EA 1 EA = 1 Stocking Units	5	3
AirSelect Standard	01EF-M	EA	40	37

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

Cancelled & Expired Counts

At any time, a Count in Pending status can be cancelled by clicking into the Count and clicking the **Cancel Inventory Count** button

Inventory Locations / Sports Orthopedic & Spine - Carlsbad / Inventory Counts / Show

Inventory Count
Sports Orthopedic & Spine - Carlsbad 6/5/2020

Cancel Inventory Count Edit Apply

After 72 hours a Pending Count will automatically Expire if it has not been Cancelled or Applied. The reason being, in most scenarios, inventory has been received or dispensed and the Count is not up to date

Both the **Cancelled** and **Expired** Counts will show on the Counts list page

Sports Orthopedic & Spine - Carlsbad Displaying all 10 inventory counts

All

ID	Item Count	Created	Updated	Status	Age	View
256	83	6/5/2020 at 10:45 AM Cynthia Sever	6/5/2020 at 05:44 PM Cynthia Sever	Cancelled	0 days	View
258	51	6/5/2020 at 05:26 PM Cynthia Sever	6/5/2020 at 05:41 PM Cynthia Sever	Applied	0 days	View
257	45	6/5/2020 at 10:50 AM Cynthia Sever	6/5/2020 at 11:08 AM Cynthia Sever	Applied	0 days	View
255	14	5/19/2020 at 06:32 PM Cynthia Sever	5/19/2020 at 06:46 PM Cynthia Sever	Expired	16 days	View

The Count list page can be filtered to any **Status**

Inventory Locations / Sports Orthopedic & Spine - Carlsbad / Inventory Counts

Inventory Counts [New Inventory Count](#)

Sports Orthopedic & Spine - Carlsbad Displaying all 10 inventory counts

All

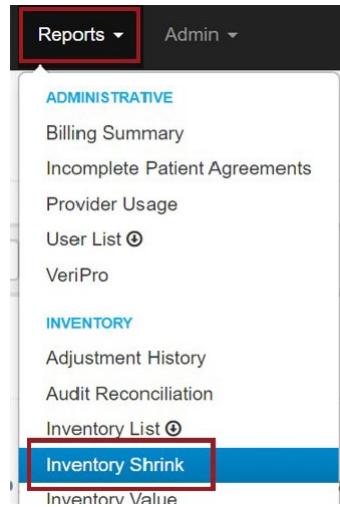
All

Pending
Cancelled
Applied
Expired

OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

Inventory Shrink Report

To view the report showing applied Counts and Inventory Variance, click on the **Reports** menu dropdown and select **Inventory Shrink Report**



On the Inventory Shrink report page, select **All** or **specific Inventory Locations** and **Date Range** then download the report



Inventory Shrink Report

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
Count ID	Account	Inventory Location	Product	SKU	Par Level	Previous On-Hand Qty	Count Qty	Variance	Unit Price	UOM	CF	Ext Price	Created At	Created By	Updated At	Updated By	Status
255	DJO	Sports Orthopedic & Spine - Carisba Reaction Knee Brace		11-0215-2	0	0	1	1	42	1	42	5/19/2020 18:32	Cynthia Sever	5/19/2020 18:35	Cynthia Sever	Expired	
255	DJO	Sports Orthopedic & Spine - Carisba AirSelect Standard		01EF-S	9	9	10	1	0	1	0	5/19/2020 18:34	Cynthia Sever	5/19/2020 18:38	Cynthia Sever	Expired	
255	DJO	Sports Orthopedic & Spine - Carisba Deluxe Shoulder Immobilizer		79-84105	5	5	3	3	0	10	1	0	5/19/2020 18:46	Cynthia Sever	5/19/2020 18:46	Cynthia Sever	
256	DJO	Sports Orthopedic & Spine - Carisba Reaction Knee Brace		11-0215-2	0	1	1	0	42	1	0	6/5/2020 10:45	Cynthia Sever	6/5/2020 17:44	Cynthia Sever	Cancelled	
256	DJO	Sports Orthopedic & Spine - Carisba Deluxe Shoulder Immobilizer		79-84105	5	3	4	1	10	1	10	6/5/2020 10:46	Cynthia Sever	6/5/2020 17:46	Cynthia Sever	Cancelled	
256	DJO	Sports Orthopedic & Spine - Carisba AirSelect Standard		01EF-M	40	37	38	1	50	1	50	6/5/2020 10:46	Cynthia Sever	6/5/2020 17:44	Cynthia Sever	Cancelled	
256	DJO	Sports Orthopedic & Spine - Carisba Reaction Knee Brace		01EF-M	40	37	25	-12	50	1	-600	6/5/2020 10:46	Cynthia Sever	6/5/2020 17:46	Cynthia Sever	Cancelled	
256	DJO	Sports Orthopedic & Spine - Carisba AirSelect Standard		01EF-S	9	10	15	5	0	1	0	6/5/2020 10:49	Cynthia Sever	6/5/2020 17:44	Cynthia Sever	Cancelled	
257	DJO	Sports Orthopedic & Spine - Carisba AirSelect Standard		01EF-L	12	12	25	13	50	1	650	6/5/2020 10:50	Cynthia Sever	6/5/2020 11:08	Cynthia Sever	Applied	
257	DJO	Sports Orthopedic & Spine - Carisba Squared Toe Post-Op Shoe		79-81232	20	18	18	0	8	1	0	6/5/2020 10:52	Cynthia Sever	6/5/2020 11:08	Cynthia Sever	Applied	
257	DJO	Sports Orthopedic & Spine - Carisba IceMan Classic with Universal Wrap-On Pt 11-1422		0	0	5	2	-3	25	1	-75	6/5/2020 10:56	Cynthia Sever	6/5/2020 11:08	Cynthia Sever	Applied	
258	DJO	Sports Orthopedic & Spine - Carisba Reaction Knee Brace		11-0215-2	0	0	1	1	42	1	42	6/5/2020 17:26	Cynthia Sever	6/5/2020 17:41	Cynthia Sever	Applied	
258	DJO	Sports Orthopedic & Spine - Carisba AirSelect Standard		01EF-S	5	9	10	1	0	1	0	6/5/2020 17:26	Cynthia Sever	6/5/2020 17:41	Cynthia Sever	Applied	
258	DJO	Sports Orthopedic & Spine - Carisba Deluxe Shoulder Immobilizer		79-84105	5	3	3	0	10	1	0	6/5/2020 17:26	Cynthia Sever	6/5/2020 17:41	Cynthia Sever	Applied	
258	DJO	Sports Orthopedic & Spine - Carisba AirSelect Standard		01EF-M	40	39	37	-2	50	1	-100	6/5/2020 17:32	Cynthia Sever	6/5/2020 17:41	Cynthia Sever	Applied	

The report provides details for each Count ID, listing out all Inventory items counted. In addition, it provides Previous On-hand quantities compared to the Count Quantity as well as the variance between before and after with a negative number indicating missing inventory. The Unit Price multiplied by the Variance will show Extended Price with a negative number indicating lost revenue. The last few columns show Dates, User and Status of the Count ID.