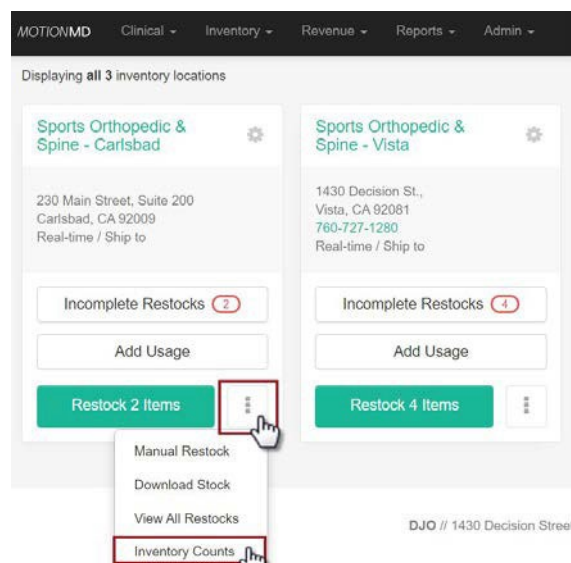# OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

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
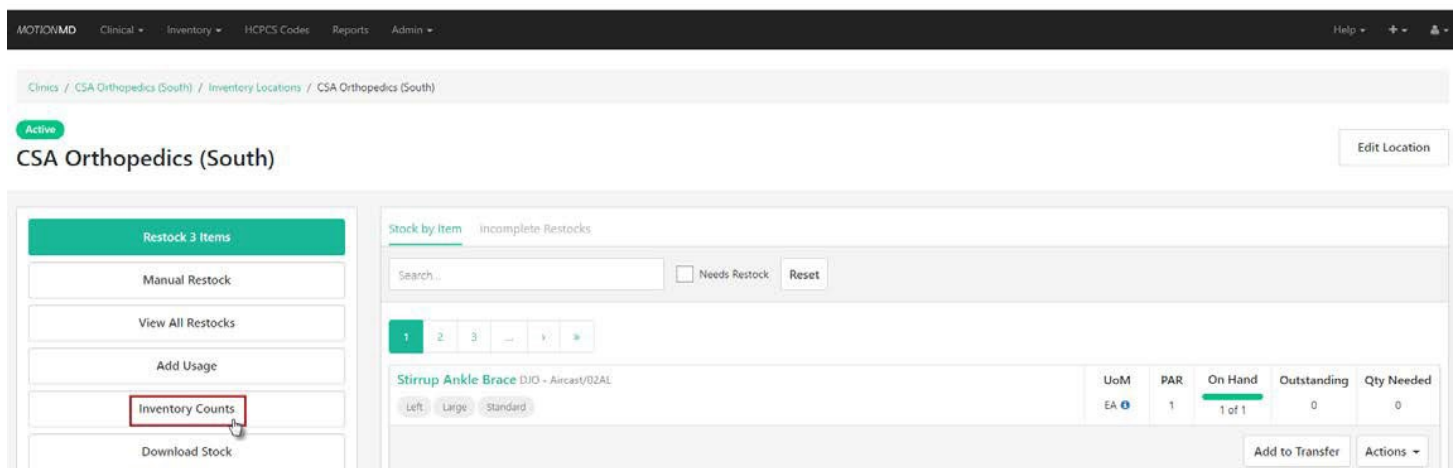
OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

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

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.

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

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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.

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.

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.


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

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.
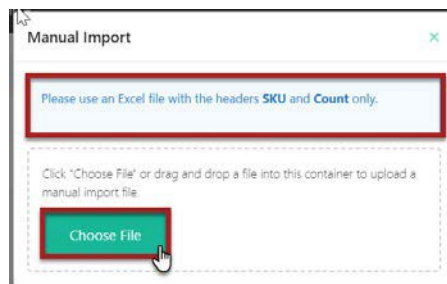
Import Uncounted Items

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.
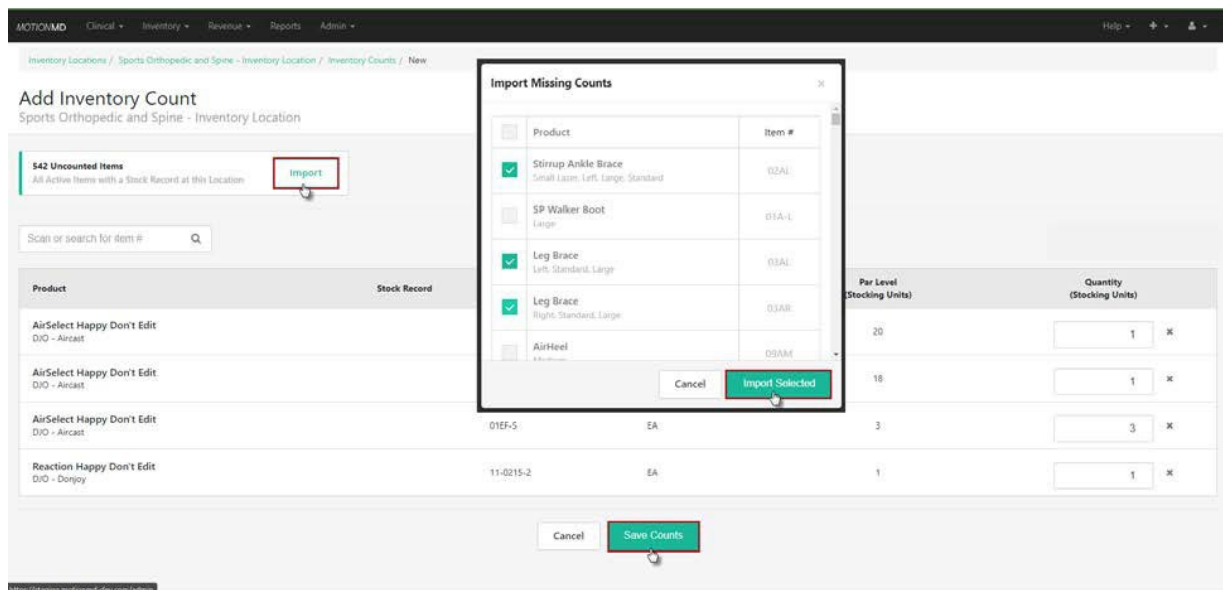
OVERVIEW OF INVENTORY COUNTS IN MOTIONMD®

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

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

Click the **Edit** button

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

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

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

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.

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

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

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

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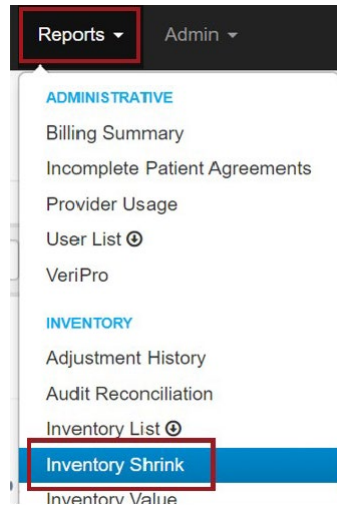
On the Inventory Shrink report page, select **All** or **specific Inventory Locations** and **Date Range** then download the report

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.