Stocktaking

Title	Widget	Widget Description
Stocktaking	+ INVENTUR	Creates a new stocktaking order Available: • Customer details

General

Kebab menu (⋮)

Type	Menu item	Explanation
	Complete stocktaking	The stocktaking order is completed
	Exit stocktaking	The stocktaking is discarded
	Customer notes	

Functions in the title bar

Icon	Explanation
	Allows export of the currently documented stocktaking as Excel
	- If no items are present or - if the setting "Use consignment stocks" is activated and all items have "Documented Quantity" == 0 the stocktaking is automatically deleted.

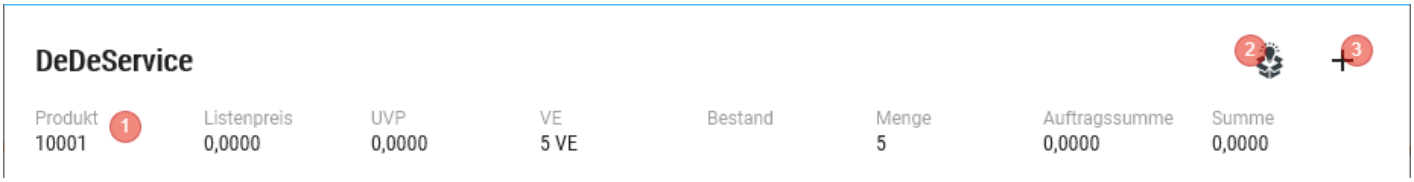
Column definition

Name	Visible	Sort	Full Text	Explanation
Product	Visible			
Name	Visible			
Batch	Visible			
Quantity	Visible			documented quantity, default= 0
Unit	Visible			
Type	If the setting "Use consignment stocks" is activated in the backend			Possible values for Type: Understock: If documented quantity < quantity in consignment stock Overstock: If documented quantity > quantity in consignment stock Matching: If documented quantity == quantity in consignment stock
Inventory	If the setting "Use consignment stocks" is activated in the backend			This is the inventory from the consignment stock

Header

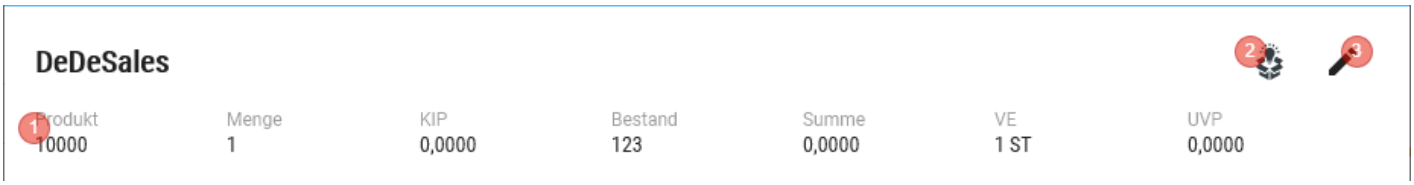
The headers differ depending on whether the product is already in the cart or not.

Product is not yet in the cart



1. Product
2. Inventory (only visible if "Use consignment stocks" is activated. The inventory from the consignment stock is displayed)
3. Switches to the entry mask to add the product to the cart. The icon is only visible if "Direct selection" is **inactive**.

Product is already in the cart



1. Product
2. Quantity
3. Consignment inventory (only visible if "Use consignment stocks" is activated. The inventory from the consignment stock is displayed)
4. Batch
5. Expiry date (only visible if an expiry date was scanned via HIBC barcode)
6. Switches to the entry mask to edit the selected item. The icon is only visible if "Direct selection" is **inactive**.

* these fields correspond to the default setting.

Scan function

A successful scan opens the product in the entry area.

- for creating a new entry if the product is not yet in the cart.
- for editing if the product is already in the cart.

Widgets

1x1 Widgets

Completion	If the setting "Use consignment stocks" is not activated in the backend: Close stocktaking -> jump to Customer details If the setting "Use consignment stocks" is activated in the backend, and at least one item with understock is present: Message "Should an order for consignment withdrawal be created?" YES> An order is created with the items of understock and the corresponding difference quantities. Then the message appears: "Should the consignment withdrawal order be edited now?" NO> Close stocktaking -> jump to Customer details YES> Load withdrawal order NO> Close stocktaking -> jump to Customer details
Scan	The item entry mask opens and can be filled via the scanner

Import	Allows the import of an Excel list. Structure: • no column header • first column: product number • second column: stocktaking quantity • optional third column: batch Re-importing the Excel overwrites the quantity if previously documented

FAQ

Release

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