Summary

This screen is used to complete a Stock Take within your system.

> If incorrectly handled, a Stock Take may have major impact on stock availability and the value of your Stock Holding.

There are three ways to complete a Stock Take:

1. Stock Take via a CSV
2. Stock Take via a Barcode Scanner
3. Stock Take via a Browser

Best Practice

Ideally, all stock movement should be paused while the physical count is in progress. This action requires you to stop all inbound deliveries, outbound shipments, and internal stock transfers.

If continuous operation is unavoidable, please ensure that you implement exceptionally rigorous control measures for every single transaction (receipt or issue) that takes place during the count period.

Hide Recently Committed

If checked, Stock Records have have been committed to a Stock Take within the last 30 days will be hidden from the list.

This will allow you to view only those lines which have not had a recent Stock Take.

> Use this feature to quickly hide lines for which you have recently completed a Stock Take

Changed Since

Your system will track changes in stock figures since the start of a Stock Take. This is taken from when a stock figure is entered for a specific SKU in a specific location. If there are adjustments

made after that to that location (e.g. despatch, transfers, goods in, etc.), the count will be automatically updated to take those into account.

FAQs

Can I create new stock via a Stock Take?

Yes. If your count is larger than expected, Orphan Stock will be created. If you add a new SKU to a location within the Stock Take, Orphan Stock will be created.

Orphan Stock is stock that is not linked to a Purchase Order and is added based on the current Cost Price. More information on this is available here.

Can I correct my Orphan Stock once I understand where it came from?

Yes - see the Orphan Stock page for more information.

When I commit a Stock Take, what exactly am I committing?

When you click commit, you are committing a stock take for any items in your currently selected location. This may include items that are not within your currently filtered view.

What happens to items that are written off in a Stock Take? Is there a record of them?

Full details on changes within a Stock Take are found within the Stock History report.

A complete log (including values) of write-offs and overages may be found in the Stock Discrepancy report.

How do I know which items were checked recently?

If you use the 'hide recently committed' checkbox on the Stock Take screen, all Stock Records for which a stock take has been committed in the previous 30 days will be hidden.

Revision #4
Created 27 October 2025 13:38:32 by Mike
Updated 25 September 2026 10:40:51 by Mike