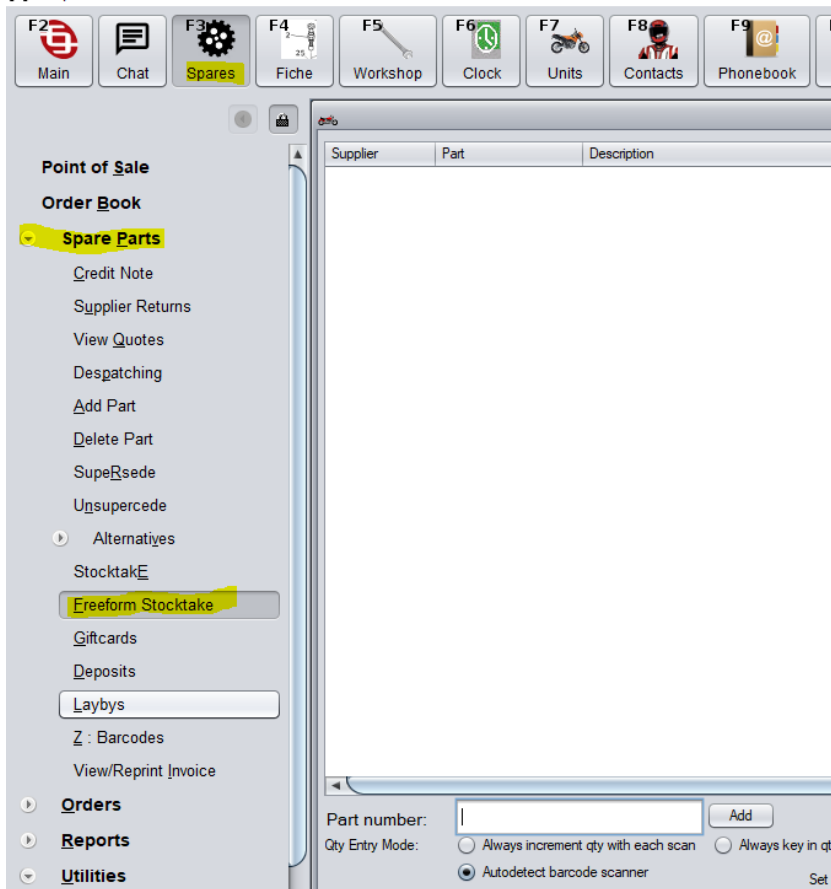


# FREEFORM STOCKTAKE

For stocktaking in c9 there is a couple of different ways it can be done. This will outline the Freeform method. This is a great way to run rolling stocktake and also to be able to stocktake in sections.

Spares->Spare Parts->Freeform Stocktake



AN IMPORTANT CONSIDERATION WHEN USING FREEFORM STOCKTAKE IS THAT C9 ASSUMES THE PARTS BEING COUNTED ARE FROZEN. THIS MEANS THEY CANNOT BE SOLD OR RECEIVED WHILE THE STOCKTAKE IS BEING DONE AS THIS PROCESS **REPLACES** THE EXISTING STOCK LEVEL AND DOES NOT OPERATE ON THE VARIATION METHODOLOGY.

In the part number box you can type the part number or scan the barcode and click Add. c9 will then pop a box on the screen where you can enter the quantity you have counted on hand, edit the min and max quantity and edit the location.

The 'Enter Part Qty' dialog box is shown with the following fields:

- Qty: 1
- Min: 0
- Max: 0
- Location: (empty)

Buttons: OK, Cancel

Background window details:

- Part number: 01-371-5510-0
- Add button
- Qty Entry Mode:
  - ☐ Always increment qty with each scan
  - ☐ Always key in qty manually
  - ☒ Autodetect barcode scanner
- Set all parts initially added here to this new location: (empty)

Enter the required information/corrections and click OK. This will then add the part number to the list to be corrected when we finalise the stocktake. **Until the stocktake is finalised c9 still assumes the stock is frozen.** Continue entering the part numbers and when you have done 15-20 items, click the Apply Stock Adjustment button. This then processes the adjustments and lets the stock go live again. Once this button is pressed, click the clear cancel button to begin the next location or section that you wish to count.

The 'Freeform Stocktake' window displays the following table:

Supplier	Part	Description	Curr Qty	Loc	Max Qty	Min Qty	Last Stock Take	Stock Take...	New Max	New Mi
Accessories	01-371-5510-0	1050-1290 ADV,17-20,FRAME GUARDS	1				...	1	0	0
Accessories	0827500022	BATTERY POWERED HAND HELD LAMP	1				...	1	0	0
FICEDA	JTF1581.13	SPROCKET 13 520 #YC3	2				...	2	0	0

Buttons at the bottom:

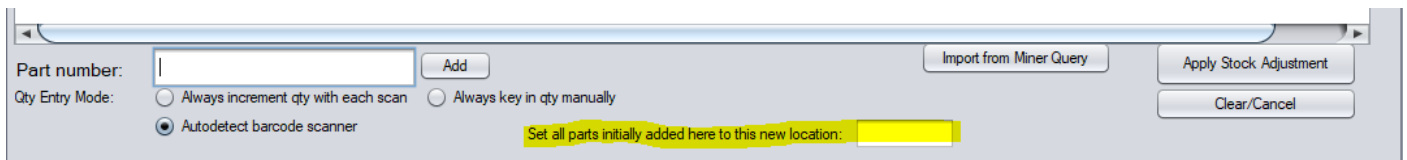
- Add
- Import from Miner Query
- Apply Stock Adjustment
- Clear/Cancel

Background window details:

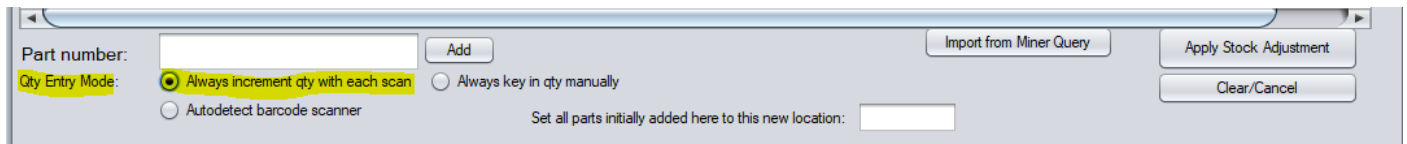
- Part number: (empty)
- Qty Entry Mode:
  - ☐ Always increment qty with each scan
  - ☐ Always key in qty manually
  - ☒ Autodetect barcode scanner
- Set all parts initially added here to this new location: (empty)

Some of the clever things c9 can do with this Freeform stocktake. Utilising this for a rolling stocktake in c9 makes keeping stock levels accurate very easy. At the bottom of the screen you can see a box that says Set all parts initially added to this new location. If you enter a location in here, then this can act as a location based rolling stocktake screen. As you enter parts onto the screen the location will update to the location

you entered in this box. This is also useful for moving stock from one location to another.



You can also utilise your scanner to incrementally add a counted quantity. Choose the Qty Entry Mode: Always Increment qty with each scan. This means as you scan each item in the location and c9 will automatically add the part to the list and increase the quantity in hand as you scan them.



## A SETTING TO CONSIDER REGARDING ALL STOCKTAKING

Setup > Main Setup Screen. Spares 2 Tab

There is this setting. If this setting is enabled it means when stock is received in it is flagged as being Stocktaked. If you do not want this to happen. i.e. only counted as stock taked if you have actually done a Stock Take you will need to untick this setting.

