## **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

F2 Main Chat Spares F4 Spares Ficher	F5 Workshop	F6 F7 Clock Uni	ts F8 Phonebook
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Point of <u>S</u> ale	Supplier	Part	Description
Order <u>B</u> ook			
Spare <u>P</u> arts			
<u>C</u> redit Note			
Supplier Returns			
View <u>Q</u> uotes			
Despatching			
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<ul> <li>Alternatives</li> </ul>			
Stocktak <u>E</u>			
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Laybys			
<u>Z</u> : Barcodes			
View/Reprint Invoice			
• <u>O</u> rders	Part number:		Add
• <u>R</u> eports	Qty Entry Mode:	<ul> <li>Always increme</li> </ul>	ent qty with each scan O Always key in qty
• <u>U</u> tilities		<ul> <li>Autodetect bar</li> </ul>	code scanner Set a

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.

	Enter Part Qty       Qty:       Image: One of the second sec	
Part number:	I-37175510-0 Add Adways increment qty with each scan Adv Autodetect barcode scanner	ways key in qty manually Set all parts initially added here to this new location:

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.

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Supplier	Part	Description			Curr Qty	Loc	Max Qty	Min Qty	Last Stock Take	Stock Ta	ake New M	lax New N	<b>A</b> i
Supplier Accessories Accessories FICEDA	Part 01-371-5510-0 0827500022 JTF1581.13	Description 1050-1290 ADV,17-2 BATTERY POWERE SPROCKET 13 520	20,FRAME GUA ED HAND HELD #YC3	RDS LAMP	Curr Gty 1 1 2	Loc	Max Qty	Min Qty	Last Stock Take	Stock Ta 1 2	ske   New M	lax New N 0 0 0	
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Part number:		t atu with each soon	Add	(in at manually					. nom minel Query		opply Stock Ad	ljustment	
Giy Entry Mode.	<ul> <li>Autodetect barco</li> </ul>	ode scanner	- Aways Ke	Set all parts initi	ially added here to	this new loc	ation:				Clear/Car	icel	

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.

Part number:	Add		Import from Miner Query	Apply Stock Adjustment
Qty Entry Mode:	Always increment qty with each scan     Always key in qty manually			Clear/Cancel
	<ul> <li>Autodetect barcode scanner</li> </ul>	Set all parts initially added here to this new location:		

## 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.

Application Setup		
Printers General Spares Spares 2 Workshop Workshop 2 Timesheet Cust 1 C Payments Deposits EFTPOS / Paypal Ordering Freight Networking Networking 2 No Daily Workshop Daily Followup / Other Email Body Templates System	tifications N	liers Units otifications 2
Adding New Parts to Inventory:       Default Qty On Hand:       0       Default Max Qty:       0         ✓       Print Zero take reserve/pickups as pro forma invoice.       F2 Lookup part : by default only show stocked items (F6 Filter)         ✓       Show Profit Margin on Point of Sale (does not factor invoice discount)		
Import Price File : Prefix Description with discount code (where relevant. e.g. OPEA price file:	5)	
Treat pricefiles entries with this in their supercession field as NLA: (NLA NA NLS)		
<ul> <li>Magicial query show pricing on screen by default</li> <li>Alert when selected is a part already on order</li> <li>Alert when stocked parts are below RRP at key points (import price file, etc)</li> <li>Print barcodes for received customer parts (as well as stocked parts)</li> <li>Do Not Print Customer ABN/Phone/Email on Invoice</li> <li>Open order option details whenever adding a part to order onto Point of Sale</li> <li>Point of Sale ordering : force operator to select a customer</li> <li>Share/Use Crowd sourced Diagram/Category Map for importing catalogs</li> </ul>		
Print Notes on Invoices: No	ter etc)	
On merge orders for customer: merge everything, including unreceived parts Print Part Numbers on Quote O Never O Always O Usually (Ask) Rarely (Ask) Print Line Discount Details: O Never O Only for line/cost discount O Always		
Whenever inventory is received via receive order, assume operator has verified qtyonhand a stocked item's last stocktake date to be today	nd flag	
Delete Old Unstocked items:  Ignore Header Held  Ignore Retail Held Fuzzy Matching: Trim following # of leading characters if initial part does not match  2		
Browse Setup Tables Change Password	ОК	Cancel