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8. Inventory Counting

Produmex Scan offers the following processes to perform an inventory counting:

- Counting: No inventory information is displayed during the counting.
- Quick Counting: During the counting, the inventory of the bin location/warehouse is displayed.
- Guided Counting: During the counting, the bin locations and the items from the inventory counting document are listed on the screen as a task list. Only the items that are listed on the document can be counted.

The counting is performed based on an SBO Inventory Counting document.

Inv	entory Cou	nting											_	
Co Co Inv	unt Date unting Type entory Counter	11/22/17 Single Cou Employee	unter ▼ Do	e, John	Time (11:45AM				No. Status Ref. 2	Primar	y 16 Ope	n	
Ĺ	Ge <u>n</u> eral													
Fi	nd Item No	o			Warehouses	•		<< >	>					
#	Item No.	Item Description	Freeze	Whse	Bin Location	1	In-Whse Qty	Count	ed UoM Counted Qty	Counted Qty	Variance	UoM Code	Items per Unit	7
1	📫 A1000	Normal Paper A1 00		📫 01	⇒ 01-ST-P0	0011	75.000			⇒ 0.000	0.000			
2	⇒ A1000	Normal Paper A1 00		⇒ 01	01-ST-P0	012	30.000			⇒ 0.000	0.000			
3	➡ B2000	B2 batch paper - int		⇒ 01	01-ST-P0	012	15.000			0.000	0.000	Manual		_
4	⇒ 51000	S1 serialized paper		⇒ 01	⇒ 01-ST-P0	012	10.000			0.000	0.000	Manual		_
5	8						0.000			0.000	0.000			- 11
														- 11
_														- 11
														- 11
_														- 11
														- 11
														-
							130.000							
Rei	narks	Comment												
	ОК	Cancel							Add Items	Adjust Count	ed Quantities	Copy	to Inventory Postir	g

8.1. Multiple Counters

Produmex Scan supports multiple counters' inventory counting scenarios as well. Depending on SAP BO document settings, you are able to do:

- Individual counting where individual counters conduct independent counting of an item at a storage location. You can select a maximum of 5 individual counters.
- Team counting where a group of counters' counting results of an item at a storage location add up to its total quantity. You can select a maximum of 10 team counters.

Before you start with the counting, in the inventory counting document you have to select the counting type and you have to add the users names to this document.

Last update: 2022/05/18 18:59 implementation:scan:stock_counting https://wiki.produmex.name/doku.php?id=implementation:scan:stock_counting

Inve	entory Co	unting							
Cou	nt Date	05/05/	17		Time	Sel	ect Individu	al Counters	
Cou	nting Type	Multipl	e Counters		-	501	cermannaa	di counters	
No.	of Individual	Counters		1		#	Counter Type	User Name/Employee Name	7
No.	of Team Cour	iters		0		1	User 🔻	manager	-
	General					2	User 💌		
Fin	d Item I	No.		W	arehou:	Sel	ect Team Co	ounters	
#	Item No.	Item Description	Freeze	Whse	Bin Lo				
1						#	Counter Type	User Name/Employee Name	<u>_</u>
						1	User 💌		-

8.2. Save counted items to SAP document

8.2.1. Real-time

Real-time is the default configuration of Produmex Scan. After tapping the Finish button, the counted items are immediately added to the Inventory Counting document.

It is not recommended to use this configuration if there is no Bin Location in the warehouse and/or, depending on the performance of your environment, there are too many different items on the same location.

8.2.2. Non real-time

If the *Real-time Stock Counting* setting is disabled on Produmex Scan General tab, the counting result will be stored in a user table. Synchronize the Inventory counting document in order to update it with the counting results. Synchronization can be initiated from right click menu on the SBO Inventory Counting document.

The synchronization works if the following conditions are met:

- the counter employee is linked to the SAP user account and
- the Finish button is pressed to finish the counting.

Inventory Countin	ng			
Count Date	11/22/17	Time	11:45AM	Close
Counting Type Inventory Counter	Employee V Doe, John	-		Synchronize mobile Inventory Counting data
				Export mobile Inventory Counting data to Excel

8.2.3. Exporting / Importing counted items

Open the Inventory Counting document, right click on an empty area and select '*Export mobile inventory counting data to Excel*'. It will create two separate files: one for normal and batch items and one for serial numbered items (it means you have to specify two files).

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Reset the content of the warehouse to zero. Use Add Items>Select Items to add the Items to the document. The qounted quantities will be zero. Set the items to counted and use the Copy to Inventory Posting to post the zero quantities.

Then you have to start Add Items>Import Items:

nventory Cou	unting													_	
Count Date	12/14/17			Time	2:00F	РМ				No.	P	rimary	31		
Counting Type	Single Co	unter		*						Status			Open		
inventory Counter	r User	▼ ma	nager							Ref. 2					
Ge <u>n</u> eral															
Find Item N	lo.			Warehouse	s 🔻			<< >>							
# Item No.	Item Description	Freeze	Whse	Bin Loc	ation		In-Whse Qty	Counted	Uo	M Counted Qty	Counted Q	ty	Variance	UoM Code	7
1 📫 A1000	Normal Paper A1 00		📫 01	📫 01-9	YSTEM-B	IN-LOCA	200.000				⇒	0.000	0.000		-
2 🔿 B2000	B2 batch paper - int		📫 01	📫 01-9	YSTEM-B	IN-LOCA	10.000					0.000	0.000	Manual	
3 🔿 B3000	Batch Paper B3		📫 01	📫 01-9	YSTEM-B	IN-LOCA	45.000					0.000	0.000	Manual	
4 🔿 S1000	S1 serialized paper		📫 01	📫 01-9	YSTEM-B	IN-LOCA	60.000					0.000	0.000	Manual	
5							0.000					0.000	0.000		_
															_
									_						_
															_
									-						-
				_					-						-
_									-						-
_							215.000		-						
							315.000					_			
•						333									
Remarks															
ОК	Cancel						Add	d Items	-	Adjust Cour	nted Quantitie	25 🖌	Copy to In	ventory Postir	g
							Select It	ems							
							Import I	tems							

After that you have to define the structure of the file from which you import. It should be like this for the batch and normal file:

mport from	Excel	
Data Type to Imp	ort Inventory Counting	
File to Import	ents\Produmex Scan\batch.txt	
Map the File Colu	imns to the Object Fields	
Column in File	Field in Object	7
A	Item Code	× .
в	Item Description	▼
с	Warehouse Code	•
D	Counted Quantity	•
E	Bin Location Code	•
F	UoM Code	•
G	Batch Number	*
н		*
I		•
J		•
к		•
L		•
м		▼ ▼
Import Method Add <u>N</u> ew Re <u>A</u> dd New Re	cords and Update Existing Records cords Without Updating Existing Records	Mapping Use Data Template
Check Impo	t File for Errors Cancel	Clear Mapping

and for the serial numbers file:

Import from	Excel			_ 🗆	×
Data Type to Imp	ort	Inventory Counting			
File to Import		nents\Produmex Scan\serial.txt 🛄			
Map the File Colu	umns to the Obje	ct Fields			
Column in File	Field in Object	t			7
A	Item Code			•	
В	Item Descriptio	n		-	
С	Warehouse Co	ode		•	
D	Counted Quar	ntity		•	
E	Bin Location C	ode		-	
F	UoM Code			-	
G	Serial Number			-	
н				•	
I				-	
J				-	
К				•	
L				•	
М				•	-
Import Method			Mapping		
Add New Red	cords and Updat	e Existing Records	Use Data Template		
	en ede Müherut II	adation Eviction Records			
	cords without u	poating Existing Records	Save as Template		
			Clear Mapping		
Check Impor	rt File for Errors				
Import	Cancel				

We recommend that you save the template with *Save As* for later use. You have to specify the file that was created by the add-on for SAP BO, and then it will be imported.

Note:

You have to update the inventory counting document. You cannot have the same item on the same bin location twice in the inventory posting document. So if you reimport your inventory counting, it is advisable to delete the existing lines. You have to import both files generated by the add-on.

8.3. Inventory Counting functions

8.3.1. Stock Counting

Tap the Reload button to load the Inventory Counting documents. Every open Inventory counting document is listed. It is possible to filter the documents with the following fields:

- Inventory counting document number
- Count Date
- Counter user/employee

Tap the Reload button to apply the filter(s).

Displayed information:

- 1. Document Number
- 2. Counter
- 3. Count Date
- 4. Remarks from the Inventory Counting document
- 5. Counting type

Select the inventory counting document and tap the Count Items button to start the counting.

🐮 Stock Counting	╷ ╬╲┽═╳
Doc. No.	
Count Date 11/22	/17
Inv. Counter	
#16(1) Cntr: Jo Date: 11/22/17 (3) Remarks: Comment	ohn Doe (2)
#17 Cntr: Jo Date: 11/22/17 Remarks:	ohn Doe Single
	•
Reload	
Count Items	Back

On the next screen scan/enter the bin location code you would like to count.

If the warehouse to count does not have bin locations, add the warehouse to the field. The warehouse can also be selected from a list. Press the ... button. Note: Only non bin managed warehouses can be selected from the list.

Press the Count button to proceed.



On the next screen scan the item then specify the UoM and the batch number. Enter the quantity to the Quantity field. To increase the current value with the entered value, press the Add button. To replace the current value with the entered value, press the Upd. button. To remove the added quantity, press the Delete button.

Items managed by 'On every transaction' serial numbers must be counted by scanning the serial numbers.

Items managed by 'On release only' serial numbers can be counted by adding the counted quantity.

When a positive difference is counted for on release only items, the serial numbers have to be created manually in SAP Business One after the counting process on the mobile devices is completed. Open the 'Serial Number Counting' form from the Inventory Counting document: go to the 'Counted Qty' field on the line of the serial numbers and press CRTL + TAB.

×

On the 'Serial Number Counting' form click on the 'Create...' button.

×

Enter the serial numbers to the 'Serial number' field or create them automatically after pressing the 'Automatic Creation...' button. *Please note: It is not possible to create empty serial numbers.*

When a negative difference is counted, select the serial numbers to issue manually in SAP Business One after the counting process on the mobile devices is completed. On the 'Serial Number Posting' posting screen every serial number on the counted location is selected. Move the serial numbers you would like to keep to the 'Available Serial Numbers' grid. Create the serial numbers you would like to issue as described above or issue the empty serial numbers. If there are already registered serial numbers on the counted location, you can allocate those serial numbers as well.

	Ne 1	these Descriptions	When Carls	Quantity		Total Column	Orace Oh :	Disartian	
# Ite	n NO. 1	Item Description	whise Code	Quantity	-	Total Selected	Open Qty	Direction	
1 🔿	52000	Serial paper on rel	≥⊏> 01		-5	-10		Out	
•			1						
# Seri	al Number	Bin Location	Alloc	cated 🔼		# Seria	l Number	SCANTEST	
						1 🔿			
					>	2 ->			
					<	4			
						-			
				-		6			
•		***		•		6			
Available	Quantity			•		6 Total Sele	cted	-10	

Already counted goods are listed on the screen.

If the 'Show all Stock Counting data on scanners' option is disabled on Produmex Scan General tab, only the number of the counting records is displayed on the screen.

📲 Stock Co	ounting 🔰 🐺 🏷	.€ @	≡×	📲 Stock (Counting	- 🗱 🏹 🐗	(@ X
Bin Loc.	01-ST-P0012			Bin Loc.	01-ST-P0	0012	
Item	B2000 * Batch pape	er		Item	S1000 * S	Serial paper	
Batch No.	B1171122			Serial No.	SN2212		
UoM				UoM			
Quantity	10	Add	Upd	Quantity		Add	L Upd
A1000 * Norm	al paper		-	Counted	3		
		30 pc	s				
B2000 * Batch	paper						
BN/SN: B11/0)803		5				
S1000 * Serial	l paper						
BN/SN: SN22	11		1				
		Delete	e				
Finish	1	Back		Fini	sh	Bac	k

Press the Back button to go back to the previous screen. The system will keep the counting results, but the results will not be synchronized with SBO.

Press the Finish button to finish the counting of the given bin location. The Inventory Counting

document will be updated with the counting result.

- Items that are stored on the given location but are not listed on the Inventory Counting document will be automatically added to the document.
- If there is an item on stock on the location that was not counted, the quantity of the item will be set to zero on the location.
- If there is an item that is not on stock on the location, but was counted during the counting, the quantity of the item will be set to the counted quantity on the location.
- In case of offline counting, after pressing the Finish button the system informs the add-on that the results of the count can be synchronized.

Example:

Bin Location content:

- A1000 75pcs
- A3000 200pcs
- B1000 20pcs
- B2000 25pcs

Inventory Counting document: Count A1000 and A3000 on the location.

×

The user counts 75pcs for A1000 and presses the Finish button.

In SAP Business One, the counted quantity is set to zero for A3000. B1000 and B2000 are added to the Inventory Couning document with zero counted quantity.

×

×

8.3.2. Quick Counting

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If the Guided Quick Counting option is disabled on the Produmex Scan General tab of Produmex Scan Settings, the Quick Counting option is available in the Inventory section of the Main Menu.

Press the Reload button to load the Inventory Counting documents. Every open Inventory Counting document is listed. It is possible to filter the documents with the following fields:

- Inventory counting document number
- Count Date
- Counter user/employee

Displayed information:

- 1. Document Number
- 2. Counter
- 3. Count Date
- 4. Remarks from the Inventory Counting document
- 5. Counting type

Select the Inventory counting document and press the Count Items button.

×

On the next screen scan or enter the bin location.

If the warehouse to count does not have bin locations, enter the warehouse code into the WH/Bin field. The warehouse can also be selected from a list. Press the ... button. Please note: Only non bin managed warehouses can be selected from the list.

Already counted bin locations and warehouses are listed on the grid and are marked with a green check mark.

If the 'Display all sheet bin locations for Quick Counting' option is enabled on the Produmex Scan General tab, every bin location from the Inventory counting document is listed on this screen. The already counted locations are marked with a green check mark.

👪 Quick Counting	₩₩₩	۵×	👪 Quick	Counting	# ‰ €	۵×
Doc. No. 16			Doc. No.	16		
Remarks Commen	t		Remarks	Commen	t	
WH / Bin			WH / Bin			
01-ST-P0012		-	01-ST-P001	11		-
01-ST-P0011		•				•
Count	Back		Сои	int	Back	

On the next screen every item from the location/warehouse is listed with the on stock quantity. Items with different batch or serial number are listed on separate lines. Displayed information:

- 1. Item Code * Item Description
- 2. BN: Batch number
- 3. Status:
 - Green check mark: completely packed
 - Orange check mark: not packed/partially packed
- 4. Counted quantity/Quantity on stock UoM
- 5. SN: Serial number

Scan the item, then specify the UoM and the batch number. Enter the quantity to the Quantity field. To increase the current value with the entered value, press the 'Add' button. To replace the current value with the entered value, press the Upd. button. To remove the added quantity, press the Delete button.

Items managed by 'On every transaction' serial numbers can be counted by scanning the serial numbers.

Items managed by 'On release only' serial numbers can be counted by adding the counted quantity.

When a positive difference is counted for on release only items, the serial numbers have to be created manually in SAP Business One after the counting process on the mobile devices is completed. Open the 'Serial Number Counting' form from the Inventory Counting document: go to the 'Counted Qty' field on the line of the serial numbers and press CRTL + TAB.

×

On the 'Serial Number Counting' form click on the Create... button.

×

Enter the serial numbers to the 'Serial number' field or create them automatically after

pressing the 'Automatic Creation...' button. *Please note: It is not possible to create empty serial numbers.*

When a negative difference is counted, select the serial numbers to issue manually in SAP Business One after the counting process on the mobile devices is completed. On the 'Serial Number Posting' posting screen every serial number on the counted location is selected. Move the serial numbers you would like to keep to the 'Available Serial Numbers' grid. Create the serial numbers you would like to issue as described above or issue the empty serial numbers. If there are already registered serial numbers on the counted location, you can allocate those serial numbers as well.

	Item No.	Item [Description	Whse Code	Quantity		Total Selected	Open Qty	Direction	
1	⇒ 52000	⇒ Se	rial paper on re	ele 📫 01		-5	-10	5	Out	
	4				444					
<u>Av</u> Filt Filt	ailable Serial Nu er by er	mbers Seri	al Number				<u>Serial Nur</u>	nbers Difference	1	
#	Serial Number		Bin Location	Alloc		>	# Seria 1 → 2 → 3 → 4 → 5 → 6 →	l Number	SCANTEST	

Add the next item or press the Finish button to finish the counting and send the result of the counting to SBO.

Press the Back button to go back.

For more information please see: Stock Counting

💐 Quick Count	ng 🐺 🏹	€ @	×	📲 Quick (Counting	# K	€ œ×
Bin Loc. 01-5	01-ST-P0012		Bin Loc. 01-ST-P0012		012		
Item B20	B2000 * TESTB2			Item	S1000 *		
Batch No. B11	B1172211			Serial No.	SN2214		
UoM				S1000 Seri SN: SN2212	ai paper		1/1
Quantity 10		Add Up	d	S1000 * Seri	al paper		-
B2000 * Batch paper				SN: SN2213			1/1
BN: B1170803 B2000 * Batch paper (1)		5/5	(3)	S1000 * Serial paper SN: SN2214 (5)			0/1
BN: B1172211 (2)		0/10	(4)	S1000 * Seri	al paper		 Image: A second s
S1000 * Serial paper SN: SN2211		1/1	•	SN: SN2215			0/1
		Delete				[Delete
Finish	E	Back		Fini	sh	Ba	ack

8.3.3. Guided Counting

If the Guided Quick Counting option is enabled on the Produmex Scan General tab of Produmex Scan Settings, the Guided Counting option is available on the Inventory section of the Main Menu.

Make sure that the 'Display all sheet bin locations for Quick Counting' option on the Produmex Scan General tab of Produmex Scan settings is enabled.

Press the Reload button to load the Inventory Counting documents. Every open Inventory Counting document is listed. It is possible to filter the documents with the following:

- Inventory counting document number
- Count Date
- Counter user/employee

Press the Reload button to apply the filter(s).

Select the inventory counting document then press the Count Items button to start the counting.

Displayed information:

- 1. Document Number
- 2. Counter
- 3. Count Date
- 4. Remarks from the Inventory Counting document
- 5. Counting type

Select the inventory counting document then press the Count Items button to start the counting.

×

On the next screen every bin location from the Inventory Counting document is listed in alphabetical order.

Already counted locations are marked with a green checkmark.

Scan the bin location/warehouse and press the Count button.

If the 'Restricted zone handling in Quick Counting' option is enabled on the Produmex Scan General tab of Produmex Scan settings, only bin locations that are listed on the screen can be scanned or selected, otherwise the following error message is displayed:



💐 Guided	Counting	•••	∖₹	Ξ×
Doc. No.	16			
Remarks	Comment			
WH / Bin				
01-ST-P0012	2			<u> </u>
01-ST-P0011				1
				•
Cour	ıt		Back	

On the next screen every item that was selected on the inventory counting document are listed with the current quantity on stock in alphabetical order. Even items from the list that are not available on stock can be scanned for counting, but only strictly the items from the inventory counting document.

Items with different batch or serial number are listed on separate lines.

Displayed information:

- 1. Item Code * Item Description
- 2. BN: Batch number
- 3. Status:
 - Green check mark: completely packed

- Orange check mark: not packed/partially packed
- 4. Counted quantity/Quantity on stock UoM
- 5. SN: Serial number

Scan the item then specify the UoM and batch number if needed.

Items managed by 'On every transaction' serial numbers can be counted by scanning the serial numbers.

Only items listed on the screen can be scanned otherwise the following error message is displayed:



📲 Quick Co	ounting 👘	‰ € @	×	💐 Quick (Counting	#‰≮ ∞×
Bin Loc. 01-ST-P0012		Bin Loc.	01-ST-P0	012		
Item	B2000 * TESTB2		Item	S1000 *		
Batch No.	No. B1172211		Serial No. SN2214			
UoM [S1000 Sen SN: SN2212	ai paper	1/1
Quantity 10 Add Upd		bd	S1000 * Serial paper 🗸			
B2000 * Batch paper		F 15	H	SN: SN2213 S1000 * Serial paper SN: SN2214 (5) (1/1
B2000 * Batch paper (1)		575	(3)			0/1
BN: B1172211 (2) 0/1		0 / 10	(4)	S1000 * Seri	al paper	×
S1000 * Serial paper SN: SN2211 1/1		-	SN: SN2215		0/1	
		Delete				Delete
Finish	ı	Back		Finis	sh	Back

Add the next item or press the Finish button to finish the counting and send the counting results to SBO. Only the stock of the items that are listed on the Inventory Counting document is updated.

If there is an item on stock on the given location that is not listed on the Inventory Counting document, the user cannot register counting data for that item. When the Inventory Counting document is updated with the counting data, the item will not be added to it with zero quantity.

Example: Bin Location content:

• A1000 - 75pcs

- A3000 200pcs
- B1000 20pcs
- B2000 25pcs

Inventory Counting document: Count A1000 and A3000 on the location.

×

The user counts 75pcs for A1000 and presses the Finish button.

In SAP Business One, the counted quantity is set to zero for A3000. Because B1000 and B2000 are not included in the Inventory Counting document, the system does not take them into account when it updates the Inventory Counting document.



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