Cycle Count: Overview and Configuration

Overview

To check the correctness of the stock that is kept at the administrative level against the stock that is actually present in the warehouse, Produmex offers a cycle counting function. Produmex provides three types of cycle count:

- **Direct Cycle Count:** This type of count automatically books stock differences as “Goods Issues” (in case of negative differences) or “Goods Receipts” (in case of positive differences) in SAP.
- **Cycle Count:** This type of count will not directly book the differences into SAP. First it registers the differences in Produmex according to the type of cycle count (Lost and Found, Registration). Then the booking in SAP can be done in the “Processing” step.
- **Recount:** The Recount Flow is utilized when users want to verify the accuracy of their initial count or when they identify a discrepancy in the counting process. This allows users to modify the results of counting tasks to ensure precision.

Cycle count types

- **Lost and Found:** The differences will be booked during the count therefore the new stock will be displayed in the inventory without processing. To balance the inventory, the system will add the inverse of the stock difference to the ‘Lost and Found’ location.
- **Registration:** The differences will be stored in a table and the stock on the counted location will remain the same until the count is processed.

Note: Differences for serial numbers will always use type *Registration* regardless of the selected type in the controller.

Configuration

1. Quality status

Different Quality Statuses during “Cycle Count” and “Direct Cycle Count”. You can use both Cycle Count and Direct Cycle Count as needed to ensure the best Quality Status behavior for your workflow.

- **Direct Cycle Count:** During this type of counting, if location has a quality status set, then location quality status is applied to surplus stock.
  - If location has no quality status set, then Cycle Count quality status is applied to surplus stock. The surplus stock will inherit the Quality Status of the stock already on location.
  - If there is no stock of the item at the location, the surplus stock will receive the Quality Status set up in the **Organization Structure**.
- **Standard Cycle Count:** Define the default quality status for the surplus quantity. Open the

Organizational Structure and on the Defaults tab define the quality status. Using the Cycle Count method the surplus quantity will inherit the Quality Status of the **Organization Structure**'s default tab (e.g.**Quality Status Cycle Counting: RELEASED)**.

The described behavior is related to blind counting. Non-blind count does not work if stocks at the same location differ in their Quality Status **only**. The Quality Status of the items cannot be changed during Cycle Count.

Examples:

Cycle Count - Count Location - Count Everything
Default quality status:** RELEASED**

	Stock NOT on Logistic Unit	**Stock on Logistic Unit**
Scenario 1	**Location default quality status:** - **On location:** 1 piece with quality status RELEASED **Counting:** 2 pieces **Result:** 1 piece will get quality status RELEASED and 1 will get Cycle Count Quality Status	**Location default quality status:** - **On location:** 1 piece with quality status RELEASED **Counting:** 2 pieces **Result:** All pieces will get quality status RELEASED
Scenario 2	** Location default quality status:** - **On location:** 1 piece with quality status RELEASED and 1 with RETURNED **Counting:** 3 pieces **Result:** 1 piece will get quality status RELEASED and 1 will get RETURNED 1 will get Cycle Count Quality Status	** Location default quality status:** - **On location:** 1 piece with quality status RELEASED and 1 with RETURNED **Counting:** 3 pieces **Result:** 2 pieces will get quality status RELEASED and 1 will get RETURNED
Scenario 3	**Location default quality status:** - ** On location:** The 2 piece with quality status RELEASED and 2 with RETURNED **Counting:** 3 pieces **Result:** The 2 pieces will get quality status RELEASED and 1 will get RETURNED	**Location default quality status:** - ** On location:** 2 pieces with quality status RELEASED and 2 with RETURNED **Counting:** 3 pieces **Result:** The 2 pieces will get quality status RELEASED and 1 will get RETURNED
Scenario 4	**Location default quality status:** - ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Cycle Count Quality Status	**Location default quality status:** - ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Cycle Count Quality Status
Scenario 5	**Location default quality status:** SUQ ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Shipping Under Quarantine (SUQ)	**Location default quality status:** SUQ ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Shipping Under Quarantine (SUQ)

Direct Cycle Count - Count Location
Default quality status:** RELEASED**

	Stock NOT on Logistic Unit	Stock on Logistic Unit
Scenario 1	**Location default quality status:** - **On location:** 1 piece with quality status RELEASED **Counting:** 2 pieces **Result:** The 2 pieces will get quality status RELEASED	**Location default quality status:** - **On location:** 1 piece with quality status RELEASED **Counting:** 2 pieces **Result:** The 2 pieces will get quality status RELEASED
Scenario 2	**Location default quality status:** - ** On location:** The 1 piece with quality status RELEASED and 1 with RETURNED **Counting:** 3 pieces **Result:** All pieces will get quality status Cycle Count Quality Status	**Location default quality status:** - ** On location:** The 1 piece with quality status RELEASED and 1 with RETURNED **Counting:** 3 pieces **Result:** All pieces will get quality status Cycle Count Quality Status
Scenario 3	**Location default quality status:** - ** On location:** The 2 piece with quality status RELEASED and 2 with RETURNED **Counting:** 3 pieces **Result:** All pieces will get quality status Cycle Count Quality Status	**Location default quality status:** - ** On location:** The 2 piece with quality status RELEASED and 2 with RETURNED **Counting:** 3 pieces **Result:** All pieces will get quality status Cycle Count Quality Status
Scenario 4	**Location default quality status:** - ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Cycle Count Quality Status	**Location default quality status:** - ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Cycle Count Quality Status
Scenario 5	**Location default quality status:** SUQ ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Shipping Under Quarantine (SUQ)	**Location default quality status:** SUQ ** On location:** 0 piece **Counting:** 2 pieces **Result:** The 2 pieces will get Shipping Under Quarantine (SUQ)

2. Cycle Count Controller

Adjust cycle count settings for the company. For further information about the cycle count controller see:
5.1.3.9. Cycle count controller

3. Location

Adjust cycle count settings for a location. For further information about the cycle count settings see:
5.2.6.2 Cycle count

4. Lost and Found

When using the cycle count type ‘LostAndFound’, extra configuration needs to be done:
Create a non pick BIN location where the stock differences will be booked. On the warehouse definition select this location as Location ‘Lost and Found’ from a dropdown menu.

5. Cycle count during other operations

Set the configurations for the cycle count during other operations. For further information see: 3.2.3.17. Produmex cycle count – Other operations filter (PMX_COOF)

6. Pick List Controller

Set if the system allows cycle count on alternate picking. For further information see: 5.1.3.44. Picklist controller

7. Force serial numbers during cycle count

When the ‘Force serial numbers during cycle count’ option is enabled for items with PMX serial numbers and enabled track location, then during the ‘Cycle count’ process, the quantity must be entered by scanning the serial numbers. This option can be enabled at the item’s Produmex Inventory tab.

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