

# Cycle Count Flow

## Overview

The Cycle Count flow is used when the counted differences need to be reviewed and approved before booking. It offers the following options:

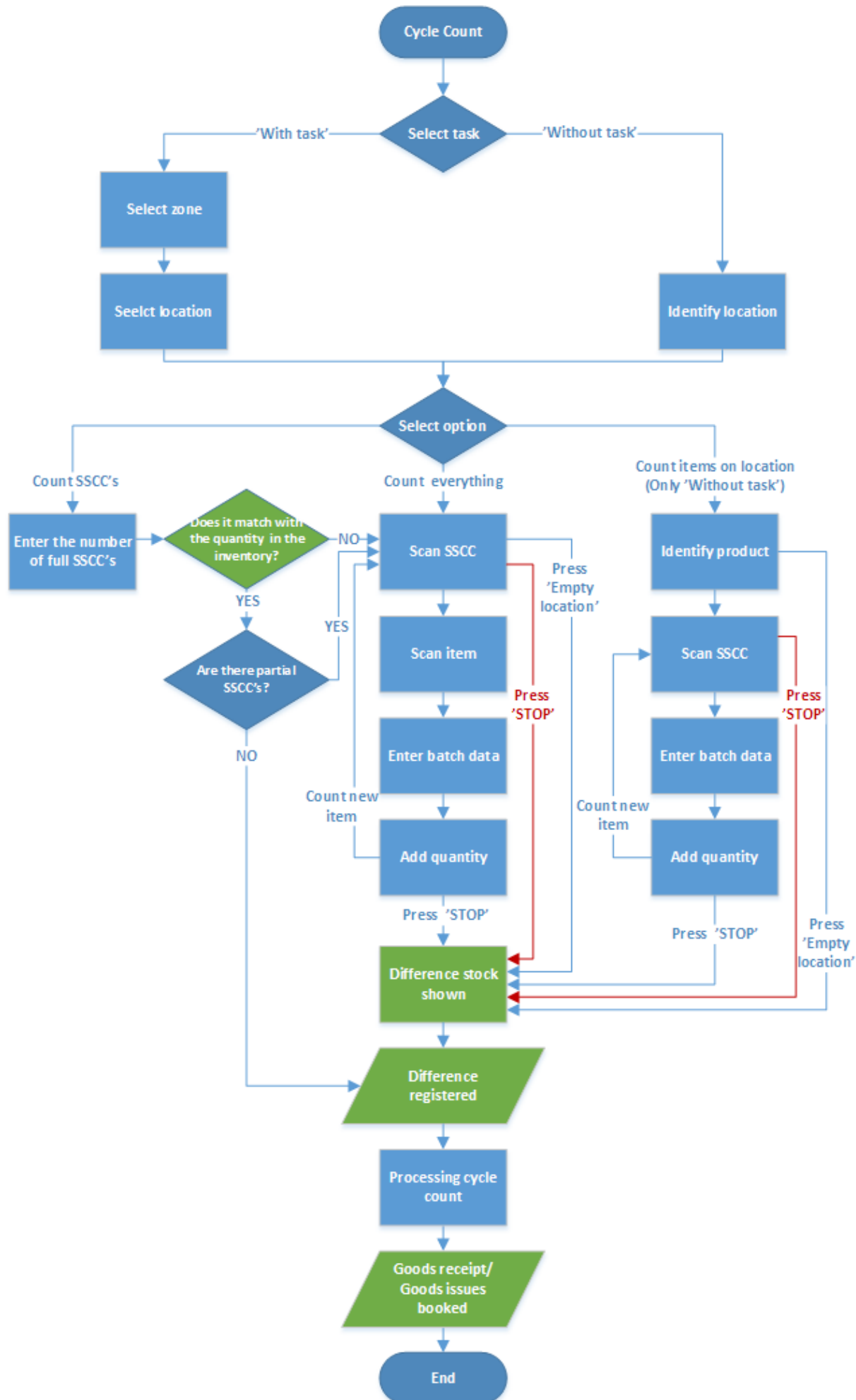
- With task: When selecting this task, only locations with the option 'Location needs to be counted now' set to true are allowed.
- Without task: When selecting this task, all locations with the option 'Allow to be counted during cycle count' set to true are allowed.

Note: This document only describes the steps of blind counting. During a blind count, the current inventory is not displayed on the mobile client. Users should count the physical inventory without any information about the inventory in the system. Blind counting is set if the following settings are disabled on the [Cycle Count Controller](#):

- Allow to adjust quantity of current stock items?
- Show current stock items

## Workflow





- Without task
- With task
- Count everything
- Count SSCC
- Count items on location
- Scan SSCC
- Scan item
- Enter batch data
- Add quantity
- Identify item
- Scan item
- Enter batch data
- Add quantity
- Process cycle count

## 1. Cycle count with task

### 1.1 Office

Tasks can be made for the cycle counting process. Tasks allow users to plan the cycle counting.

The screenshot shows the 'Select locations to count' dialog box in the Produmex application. The left sidebar contains a tree view with the following items: Organizational structure, Inventory Report, Sales, Purchasing, Routes, Inventory, Production, 3PL, Cycle count, **Select locations** (highlighted), Process, Pmx serial numbers, Reports, and Interfacing. The main area of the dialog box contains the following fields and options:

- ☒ Pick locations
- ☒ Non pick locations
- ☐ Production lines
- ☐ Reception dock
- ☐ Shipping dock
- ☐ Only when cycle count requirements are met (#days, #operations, ...)
- Warehouse: Warehouse 02 (02)
- Zone: Z1 (Z1)
- Location from: [empty] To: [empty]
- Lock location for user: manager (1)
- Item group: [empty]
- Item from: normal test(ITEM01) ... To: catch weight item ...
- ☐ Remove count task from selected locations
- ☐ Remove lock from selected locations
- Buttons: Update, Close

The settings on this screen can be used to limit the locations that will need to be counted. After pressing the 'Update' button, it will set the property 'Needs to be counted now' on the selected location(s) to true.

Organizational structure - Produmex Logex AddOn v5.6.1.32

Search

Code: AA1  
Name: AA1

General Cycle count Put away

Cycle counting **Location not counted yet**

☒ Allow location to be counted during cycle count  
☐ Allow location to be counted during other operations  
☒ Location needs to be counted now

Count after number of days: 0  
Count after number of operations: 0  
Locked by: 1

Unlock

Ok Cancel Inventory

Close

### ***Pick locations, non-pick locations, reception dock, shipping dock, production lines***

Select the type of locations to perform the actions on.

### ***Only when cycle count requirements are met***

When this setting is set to true, the cycle count settings (like number of days, number of operations, ...) on location and cycle count controller are checked. Only locations where these requirements are met will be used to perform the actions.

### ***Warehouse***

Select the warehouse. If no warehouse is selected all warehouses are used.

### ***Zone***

After selecting a warehouse, all zones in this warehouse will be listed here. Select a zone to only use the locations in this zone. If no zone is selected, all zones are used.

### ***Location from... to***

Select location(s) which needs to be counted.

### ***Lock location for user***

Select a user to lock the locations for. If no user is selected, the location(s) will not be locked. When a user is selected, the locations that are found using the entered selection criteria will be locked for this user. This means stock on these locations cannot be used. Only the selected user can perform the cycle counting task on the handheld device. This option can be used to divide the cycle counting task for users.

### ***Item group***

Select an item group. The property 'Needs to be counted' will be set to true on locations where the

items from the group are stored.

### **Item from... to**

Select item(s). The property 'Needs to be counted' will be set to true on locations where the selected item(s) are stored.

### **Remove count task from selected locations**

If this is set to true, the property 'Needs to be counted' on location will be set to false.

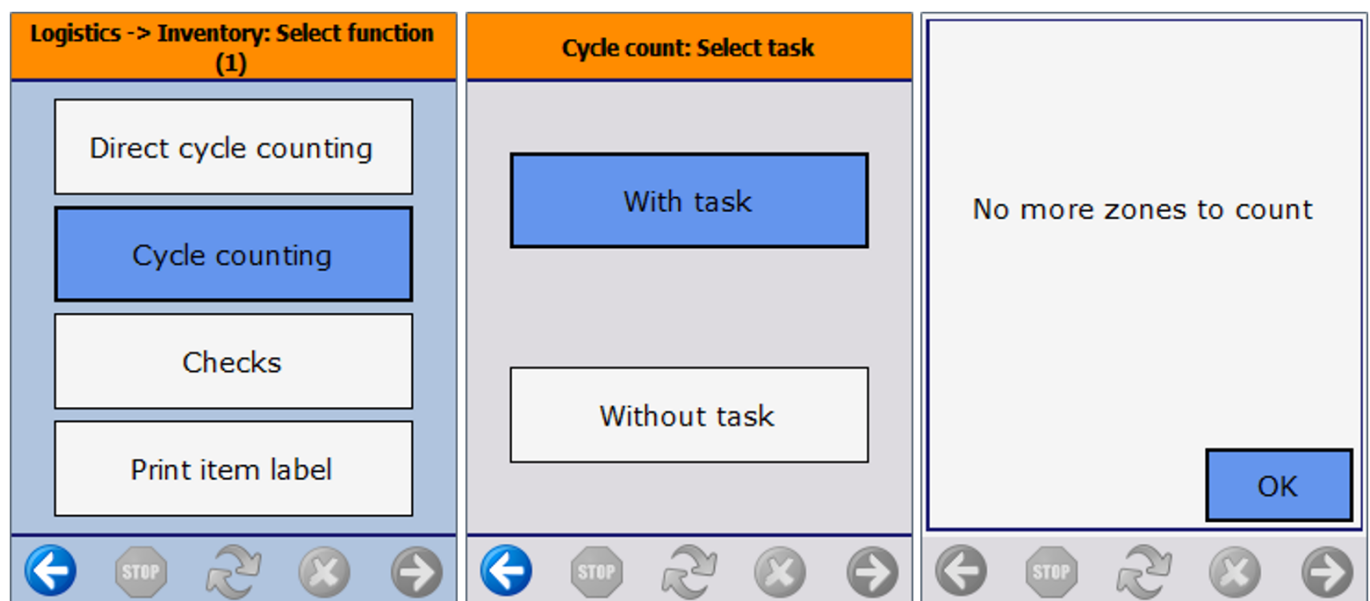
### **Remove lock from selected locations**

Remove the lock on the selected locations.

## **Shopfloor**

All screens regarding the cycle count will have the prefix 'Cycle count:' on the screen title. This is done because when the user needs to perform cycle count during other operations, it is visually clear that he is performing a cycle count.

Select the "Cycle counting" function on the handheld terminal. Select the option 'With task'.



If there are no locations which needs to be counted, the system will display the message 'No more zones to count'.

If there are locations which needs to be counted, the system will display the list of zones where those location(s) are located. Select a zone.

Cycle count: Select a zone	Cycle count: Select a location	Cycle count: Select task
<div> <div></div> <div> Z1 Warehouse 02(02) </div> <div> Z4.1 Warehouse 02(02) </div> <div> Z4 Warehouse 02(02) </div> </div>	<div> <div></div> <div> AA1 Warehouse 02(02) </div> </div>	<div>Count everything</div> <div>Count SSCC's</div>

After selecting a zone, select a location from the list. Only locations that need to be counted and have no locking, or are locked for the current user, are displayed in the list.

After the user has selected the location, this location will be locked for this user. No other user will see this location in the list of locations to be counted.

When the cycle count type is 'Registration', the system will check if there are open registrations. When there are open registrations, the system asks whether to remove those registrations. Press 'Yes' for clearing the previous registrations. In this case only new registrations will be used. Press 'No' for keeping the previous registrations. In this case, new registrations will be added to the already existing registrations.

Cycle count: Registrations found

This location has some open registrations.  
Do you want to clear the previous cycle count?

Yes

No

Select a task:

- Count everything: count all the items on this location.
- Count SSCC's: count all full logistic units on the location.

*Note: Full logistic units in the system are SSCC's where no stock has been removed yet.*

## 1.2 Count everything

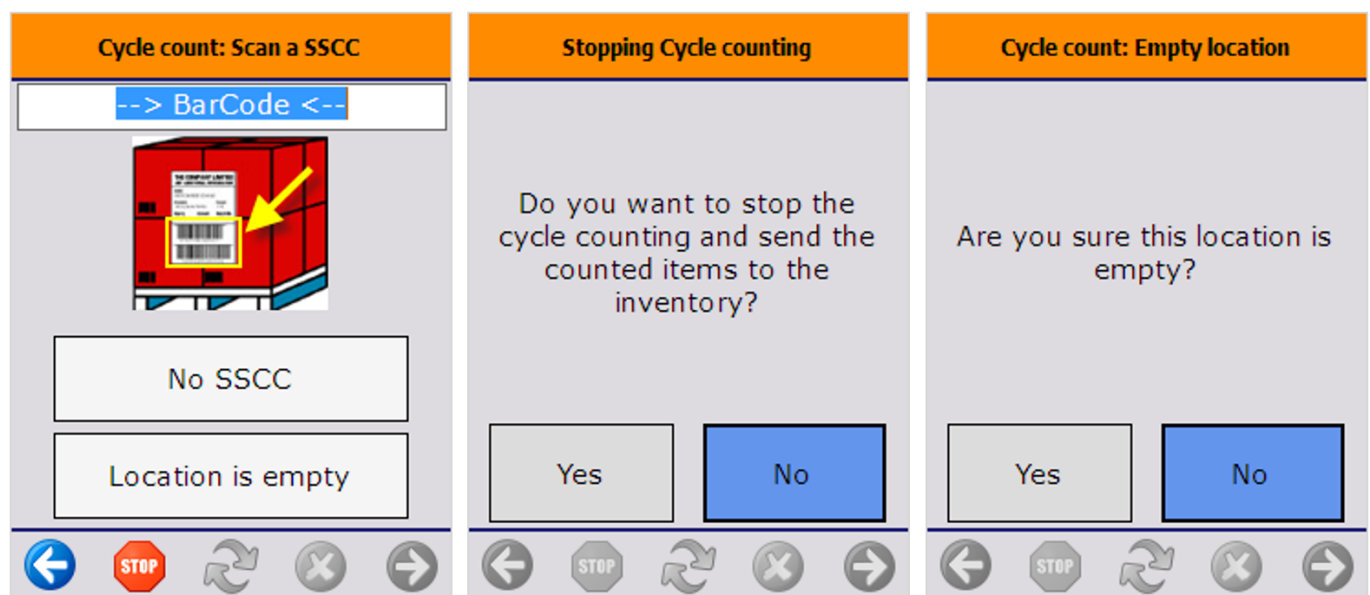
### Scan SSCC

Scan the SSCC or press the 'No SSCC' button if there is no SSCC present.

To stop the process, press the 'Stop' button.

### Empty location

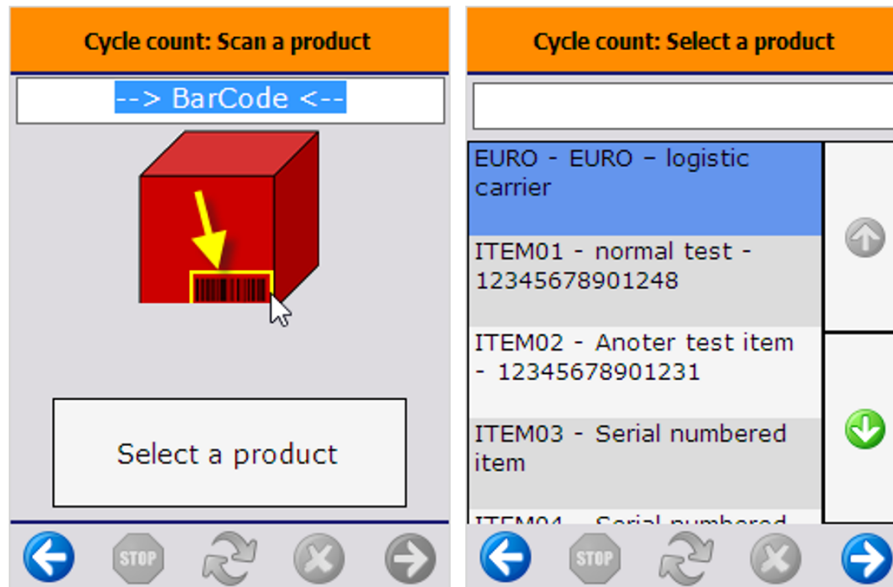
If the location is empty press the 'Location is empty' button. After pressing the button, the system will ask whether the location is empty. Press the 'Yes' button to confirm. Then the system will display the list of differences in stock if configured. When proceeding, the differences will be registered according to the type of cycle count (Lost and Found, Registration).



### Scan item

Scan the product barcode. When no barcode is present, press the 'Select product' button and select it from a list. This list contains all the products.





## Enter batch data

If there is no GS1/EAN128 product barcode on the logistic unit, the system will ask to enter additional information about the product manually, e.g. the batch number, second batch number, and/or the best before date (if applicable). If there is a GS1/EAN128 barcode on the logistic unit, the system would have recorded this information directly. After the batch information has been entered, the system will check if the combination of batch/BBD is known in the system. If this is not the case, confirm that the batch/BBD is not known.

## Add quantity

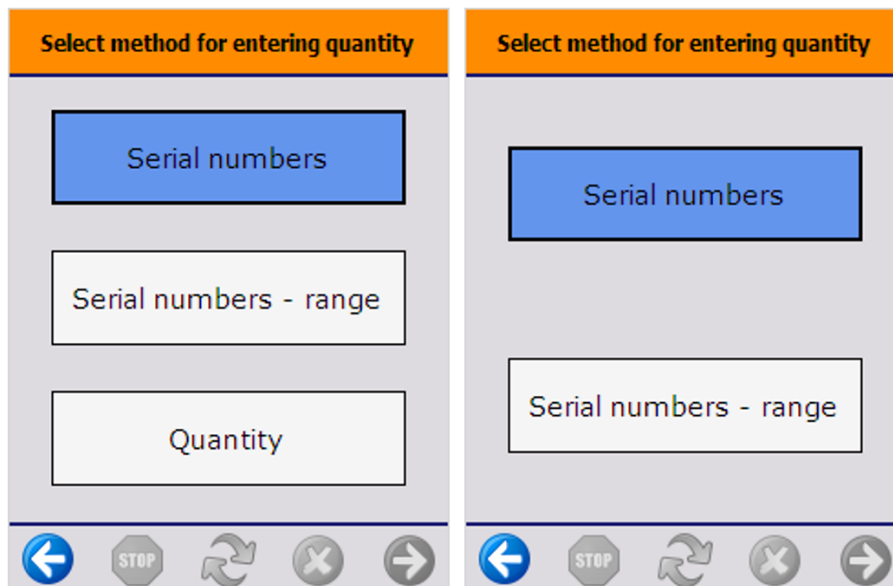
Enter the quantity. For more information about how to enter the quantity please see: [Screens for entering additional information](#).

When the item is managed by 'On every transaction' SAP serial numbers and the track location option is enabled, the quantity must be defined by scanning the serial numbers.

When the item is managed by 'On release only' SAP serial numbers and the track location option is enabled, the quantity must be entered manually. When there is a negative difference and there are existing serial numbers on the location, the missing serial numbers can be selected during [processing](#) the count.

When the item has PMX serial numbers and track location enabled, the quantity can be defined by scanning the serial numbers or entering the quantity. If the '*Force serial numbers during cycle count*' option is enabled for the [item](#), then the quantity can only be added by scanning the serial numbers.

When the item has serial numbers but the track location option is not enabled, the quantity can only be defined by entering it manually. However Produmex does not support these items in the '[Process](#)' step of the cycle count.



### Add new item or finish the process

After entering the quantity, proceed with the next item on the location. The system will display the 'Cycle count: Scan an SSCC' screen, however the 'Location is empty' button will not be displayed.



After counting all the items on the location, press the 'Stop' button. When pressing the 'Stop' button, a confirmation to stop the cycle count is asked.

- Press 'No' to proceed with other items on the location.
- Press 'Yes' to finish the cycle count. After pressing the button, the differences will be shown if configured. When proceeding, the differences will be registered according to the type of cycle count (Lost and Found, Registration).

### Cancel cycle count

To cancel the process, press the left arrow button. The system will check whether there are already

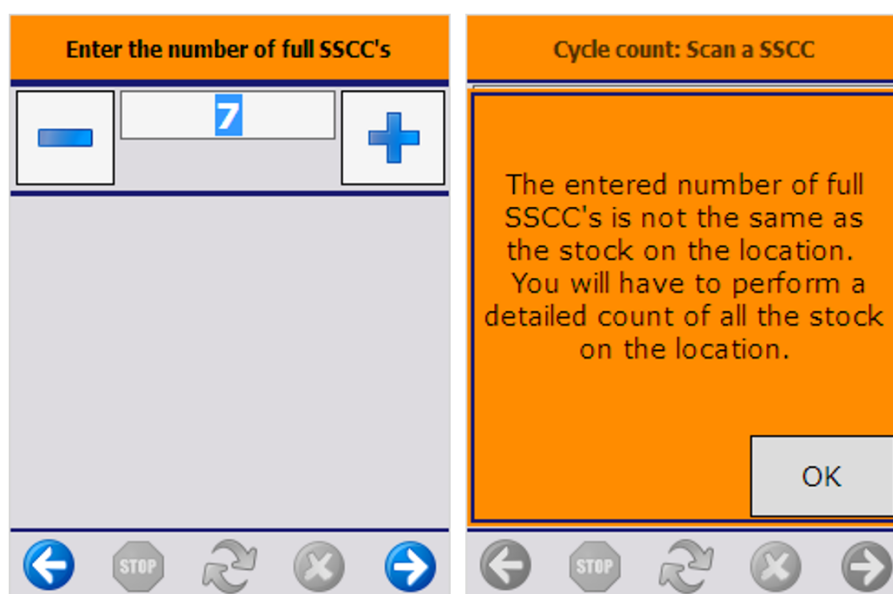
entered stock. If there are, the system will ask for confirmation.

- When clicking 'Yes', the list of counted stock will be cleared, and no bookings will be done. This can be considered a 'cancellation' of the counted stock.
- When clicking 'No' the cycle count process can be continued.

## 2.3 Count SSCC's

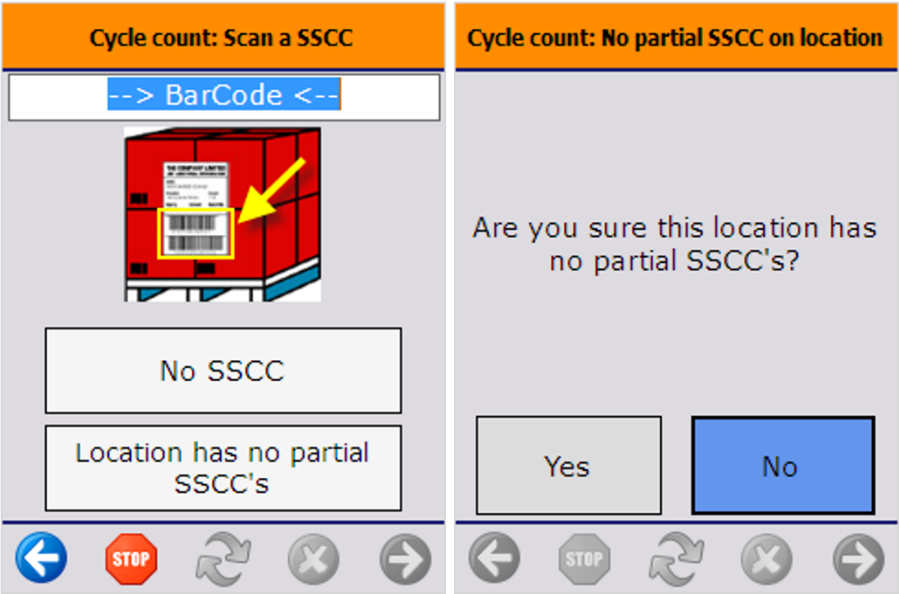
Enter the number of full SSCC's.

If the number of the entered SSCC's does not correspond to the number of full SSCC's in the system, the system requires to perform the 'Count everything' cycle count task.



If the number of entered SSCC's corresponds to the number of full SSCC's in the system, the system will ask to enter the data for the partial SSCC's.

When there are partial SSCC's on the location, proceed by scanning the SSCC on the partial logistic unit or press the 'No SSCC' button. Then the 'Count everything' cycle count task will be performed for those logistic units.

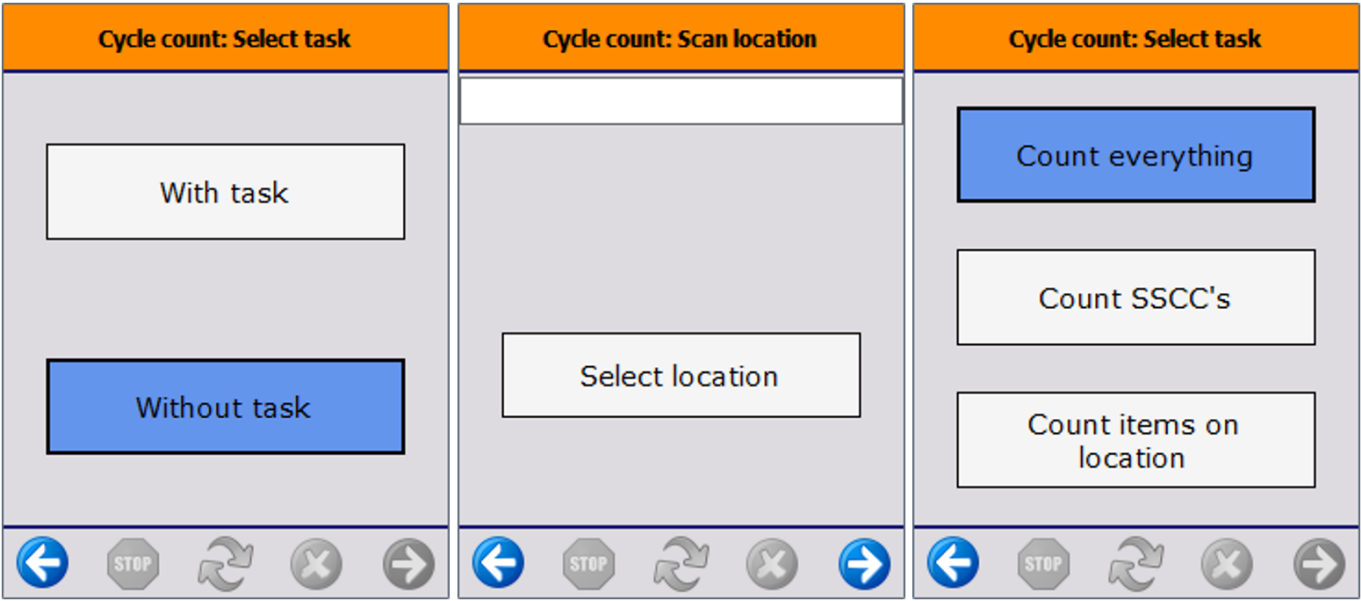


When there are no partial SSCC’s, press the ‘Location has no partial SSCC’s’ button. Then the system will ask whether there are partial SSCC’s on the location. Confirm this action.

## 2. Cycle count without task

Scan or select a location.  
After identifying the location, select a task:

- Count everything: count all the items on this location.
- Count SSCC’s: count all full logistic units on the location.
- Count items on location: count only a certain product on the location.



### 2.1. Count everything


## Scan SSCC

Scan the SSCC or press the 'No SSCC' button if there is no SSCC present.

To stop the process, press the 'Stop' button.


### Empty location

If the location is empty press the 'Location is empty' button. After pressing the button, the system will ask whether the location is empty. Press the 'Yes' button to confirm. Then the system will display the list of differences in stock if configured. When proceeding, the differences will be registered according to the type of cycle count (Lost and Found, Registration).

Cycle count: Scan a SSCC	Stopping Cycle counting	Cycle count: Empty location
<div>--&gt; BarCode &lt;--</div> <div></div> <div>No SSCC</div> <div>Location is empty</div>	<div>Do you want to stop the cycle counting and send the counted items to the inventory?</div> <div>Yes</div> <div>No</div>	<div>Are you sure this location is empty?</div> <div>Yes</div> <div>No</div>

## Scan item

Scan the product barcode. When no barcode is present, press the 'Select product' button and select it from a list. This list contains all the products.

Cycle count: Scan a product	Cycle count: Select a product
<div>--&gt; BarCode &lt;--</div> <div></div> <div>Select a product</div>	<div></div> <div><div>EURO - EURO - logistic carrier</div><div>ITEM01 - normal test - 12345678901248</div><div>ITEM02 - Anoter test item - 12345678901231</div><div>ITEM03 - Serial numbered item</div><div>ITEM04 - Serial numbered</div></div> <div><div>↑</div><div>↓</div></div>

## Enter batch data

If there is no GS1/EAN128 product barcode on the logistic unit, the system will ask to enter additional information about the product manually, e.g. the batch number, second batch number, and/or the best before date (if applicable). If there is a GS1/EAN128 barcode on the logistic unit, the system would have recorded this information directly. After the batch information has been entered, the system will check if the combination of batch/BBD is known in the system. If this is not the case, confirm that the batch/BBD is not known.

## Add quantity

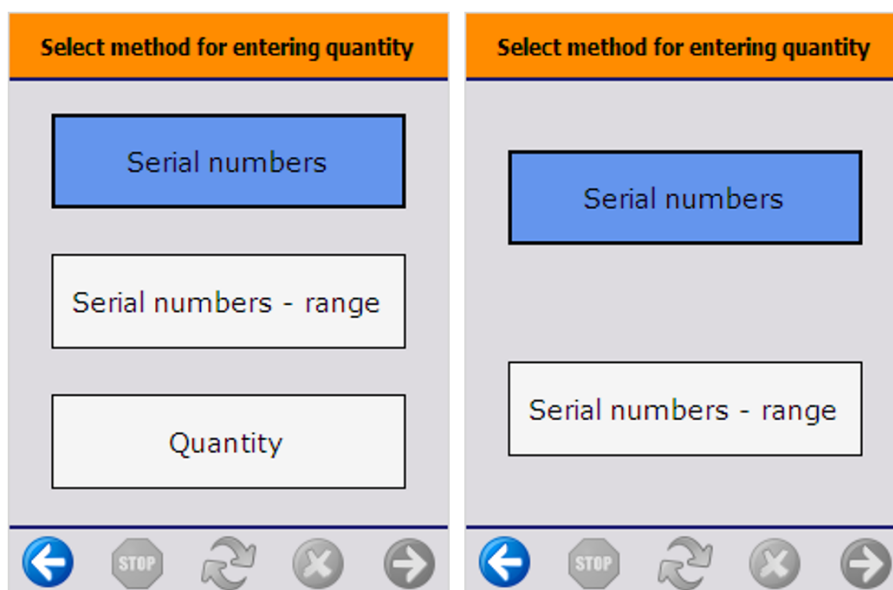
Enter the quantity. For more information about how to enter the quantity please see: [Screens for entering additional information](#).

When the item is managed by 'On every transaction' SAP serial numbers and the track location option is enabled, the quantity must be defined by scanning the serial numbers.

When the item is managed by 'On release only' SAP serial numbers and the track location option is enabled, the quantity must be entered manually. When there is a negative difference and there are existing serial numbers on the location, the missing serial numbers can be selected during [processing](#) the count.

When the item has PMX serial numbers and track location enabled, the quantity can be defined by scanning the serial numbers or entering the quantity. If the '*Force serial numbers during cycle count*' option is enabled for the [item](#), then the quantity can only be added by scanning the serial numbers.

When the item has serial numbers but the track location option is not enabled, the quantity can only be defined by entering it manually. However Produmex does not support these items in the '[Process](#)' step of the cycle count.



## Add new item or finish the process

After entering the quantity, proceed with the next item on the location. The system will display the 'Cycle count: Scan an SSCC' screen, however the 'Location is empty' button will not be displayed.



After counting all the items on the location, press the 'Stop' button. When pressing the 'Stop' button, a confirmation to stop the cycle count is asked.

- Press 'No' to proceed with other items on the location.
- Press 'Yes' to finish the cycle count. After pressing the button, the differences will be shown if configured. When proceeding, the differences will be registered according to the type of cycle count (Lost and Found, Registration).

## Cancel cycle count

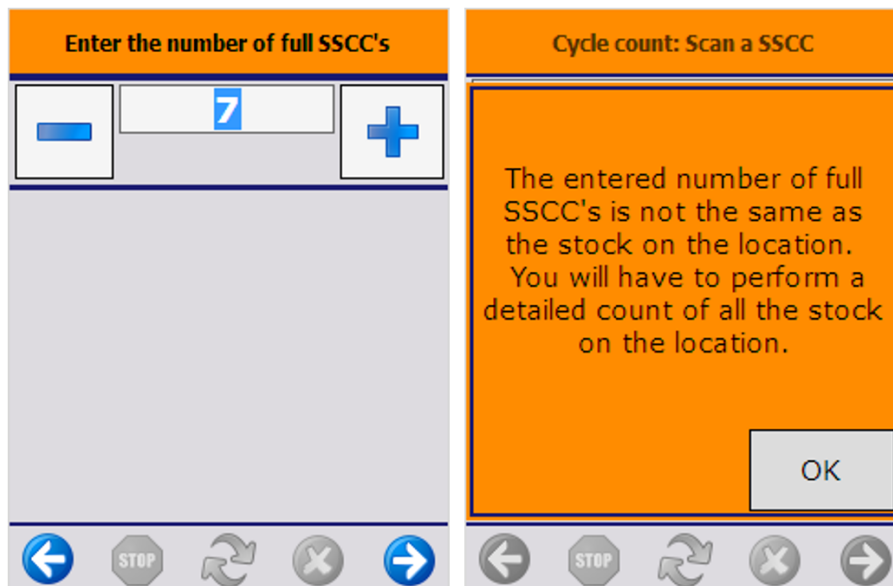
To cancel the process, press the left arrow button. The system will check whether there are already entered stock. If there are, the system will ask for confirmation.

- When clicking 'Yes', the list of counted stock will be cleared, and no bookings will be done. This can be considered a 'cancellation' of the counted stock.
- When clicking 'No' the cycle count process can be continued.

## 2.2. Count SSCC

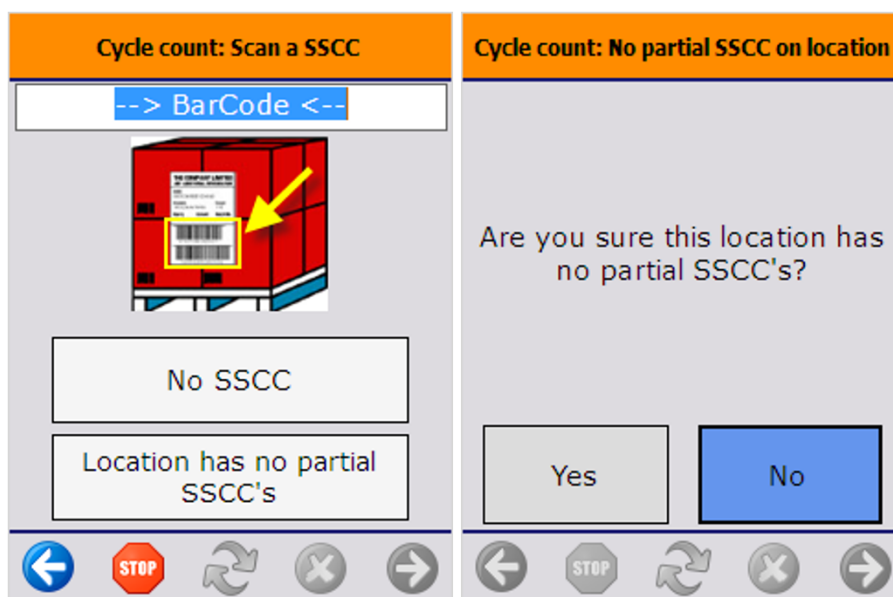
Enter the number of full SSCC's.

If the number of the entered SSCC's does not correspond to the number of full SSCC's in the system, the system requires to perform the 'Count everything' cycle count task.



If the number of entered SSCC's corresponds to the number of full SSCC's in the system, the system will ask to enter the data for the partial SSCC's.

When there are partial SSCC's on the location, proceed by scanning the SSCC on the partial logistic unit or press the 'No SSCC' button. Then the 'Count everything' cycle count task will be performed for those logistic units.



When there are no partial SSCC's, press the 'Location has no partial SSCC's' button. Then the system will ask whether there are partial SSCC's on the location. Confirm this action.

## 2.3. Count items on location

### Identify the product

Scan the product. When no barcode is present, press the 'Select product' button and select it from a



list. This list contains all the products.

### Empty location

If the location is empty press the 'Location is empty' button. After pressing the button, the system will ask whether the location is empty. Press the 'Yes' button to confirm. Then the system will display the list of differences in stock if configured. When proceeding, the differences will be registered according to the type of cycle count (Lost and Found, Registration).

### Scan SSCC

Scan the SSCC the item is on. If there is no SSCC present press the 'No SSCC' button.

### Enter batch data

If there is no GS1/EAN128 product barcode on the logistic unit, the system will ask to enter additional information about the product manually, e.g. the batch number, second batch number, and/or the best before date (if applicable). If there is a GS1/EAN128 barcode on the logistic unit, the system would have recorded this information directly. After the batch information has been entered, the system will check if the combination of batch/BBD is known in the system. If this is not the case, confirm that the batch/BBD is not known.

### Add quantity

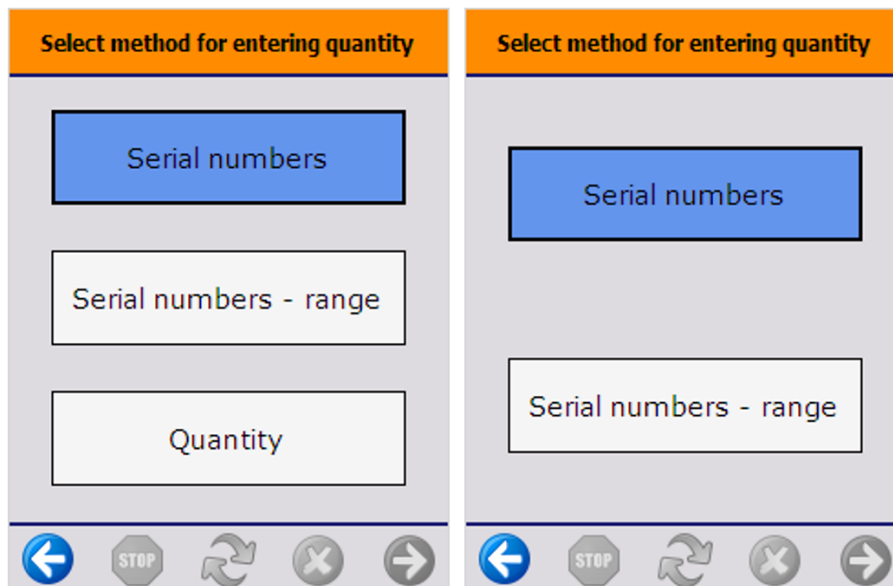
Enter the quantity. For more information about how to enter the quantity please see: [Screens for entering additional information](#).

When the item is managed by 'On every transaction' SAP serial numbers and the track location option is enabled, the quantity must be defined by scanning the serial numbers.

When the item is managed by 'On release only' SAP serial numbers and the track location option is enabled, the quantity must be entered manually. When there is a negative difference and there are existing serial numbers on the location, the missing serial numbers can be selected during [processing](#) the count.

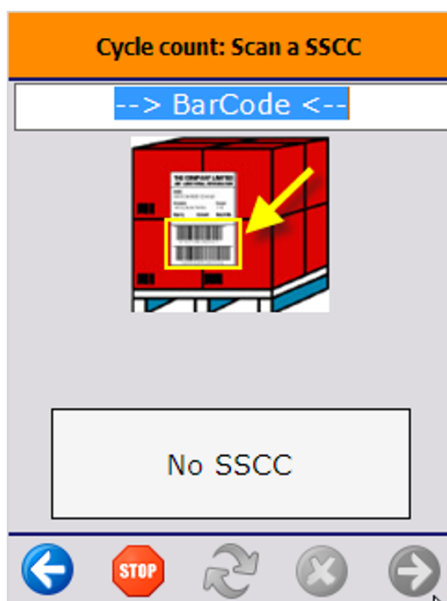
When the item has PMX serial numbers and track location enabled, the quantity can be defined by scanning the serial numbers or entering the quantity. If the '*Force serial numbers during cycle count*' option is enabled for the [item](#), then the quantity can only be added by scanning the serial numbers.

When the item has serial numbers but the track location option is not enabled, the quantity can only be defined by entering it manually. However Produmex does not support these items in the '[Process](#)' step of the cycle count.



## Finish process

After entering the quantity, proceed with the next logistic unit on the location. The system will display the 'Cycle count: Scan an SSCC' screen, however the 'Location is empty' button will not be displayed.



After counting the total stock for the item on the location, press the 'Stop' button. When pressing the 'Stop' button, a confirmation to stop the cycle count is asked.

- Press 'No' to proceed with other logistic units on the location.
- Press 'Yes' to finish the cycle count. After pressing the button, the differences will be shown if configured. When proceeding, the differences will be registered according to the type of cycle count (Lost and Found, Registration).

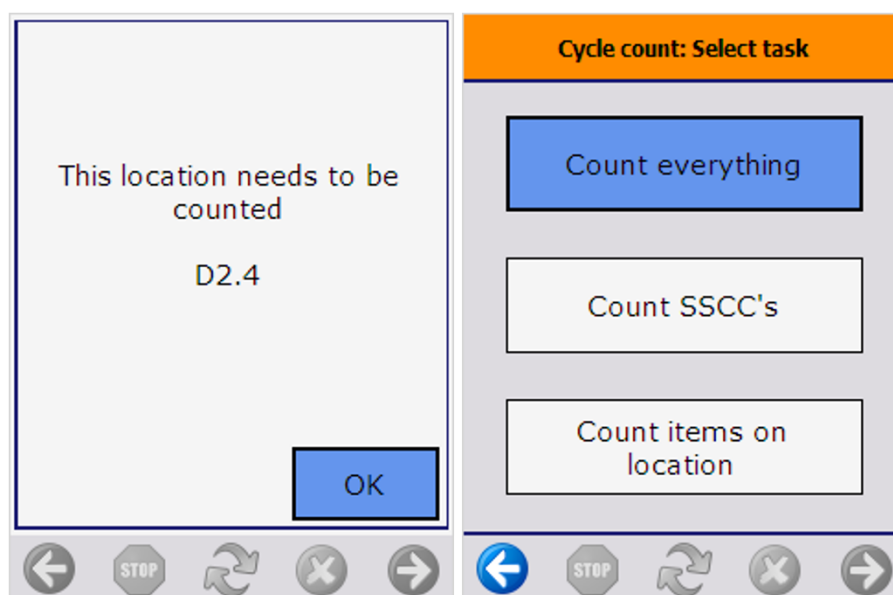
## Cancel cycle count

To cancel the process, press the left arrow button. The system will check whether there are already entered stock. If there are, the system will ask for confirmation.

- When clicking 'Yes', the list of counted stock will be cleared, and no bookings will be done. This can be considered a 'cancellation' of the counted stock.
- When clicking 'No' the cycle count process can be continued.

### 3. Cycle count during other operations

When the cycle counting needs to be done during other operations, the system will display the message 'This location needs to be counted'. After pressing the 'Ok' button, a 'Cycle count' type process can be started.



Based on the cycle count controller configurations, the system might allow to skip the count. When the skipping is allowed, an extra 'Skip count' button will appear. For skipping the count, select the 'Skip count' button or press the left arrow button.

If configured, the system displays a list of reasons for the skipping. Select a reason.

<div>Cycle count: Skip count</div> <div>You are about to skip the counting of the location. Are you sure you want to skip?</div> <div><div>Yes</div><div>No</div></div>	<div>Please provide a reason why you are skipping the count.</div> <div>Please provide a reason why you are skipping the count.</div> <div><div></div><div></div></div>	<div>You cannot skip the count.</div> <div><div>OK</div></div>
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When the skipping is not allowed, the normal 'Cycle count' process will be performed. When pressing the left arrow button, the system will display a warning message that the count cannot be skipped.

#### 4. Additional information

The PMX\_CYCO table is populated when the differences are shown on the Mobile Client and the user clicks the Update button in the Select Locations to Count window to confirm that the process is completed.

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