Inventory Control

Inventory Control is a powerful tool that allows you to keep track of your physical inventory and identify any missing pieces or other mistakes in the inventory. Performing a yearly inventory is critical to keeping your store running smoothly and keeping your inventory current and up-to-date. You can use DiamondCounter to quickly and easily perform a year-end inventory.

To do your year-end inventory in DiamondCounter, you must first log-on to the software with your username and password. Once that has been completed, you can click on Tools, and then Inventory Control (Physical). Now the Inventory Control screen will open.

You will be presented with a screen similar to the above. There are several options that will make your scanning task more streamlined, and they are as follows:

The Print Tools menu allows you to print both a discrepancy report, and a discrepancy report for all missing pieces. Perform this after you've completed scanning all of the inventory in your store.
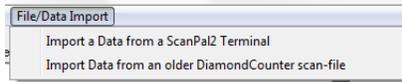
The File / Data Import menu allows you to both receive data from a Metrologic ScanPal2 Scanner, as well as from an old DiamondCounter Inventory control file, if you started your inventory control before noticing our newer Inventory Control procedure.
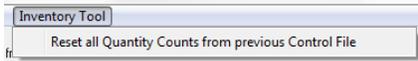
The Inventory Tool menu simply resets the counts from the last time you took inventory. Use this with caution! Using this option before you are done your initial scan of your inventory will result in **unrecoverable** loss of all of your scanned data to that point and you will have to start over! **Do not** use this option until you are done your Inventory Control for the year, or starting a new Inventory Control cycle!
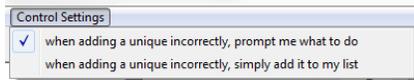
The Control Settings option simply turns prompts on and off when you're entering items into your control file. When the first option is checked off, if you're adding a duplicate unique item, a prompt will pop up asking you what do to. If the second option is checked (only one or the other can be checked) the delinquent item will be added regardless.
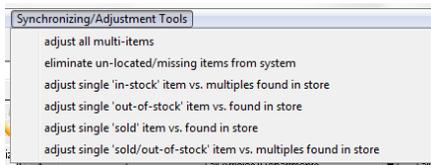
The Synchronizing / Adjustment tools are your last step in getting your inventory right. Once you have everything scanned into your inventory and have printed out your discrepancy reports, each of the options available in this menu should be run **once.**

Once they have all be run, your inventory control is complete and your store is balanced.

There are several other options that will make the actual scanning process much easier and allow you to see exactly what is being done and where it is being done from. They are as such:
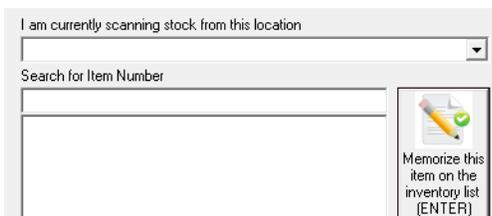
These options are available to you, so you know which area you are scanning, and so you can type in a SKU number manually if you do not have a scanner, or the barcode on the ticket is damaged. The first box, labeled 'I Am Currently Scanning Stock from This Location' can be filled in with the current section of the store you're scanning the items from, the specific showcase the pieces came from, or even the name of the clerk who is scanning the items. Whatever is in this box will appear on the main list, in the 'Scan Loc' column (second column from the right). This can help you pinpoint errors in the scan. The 'Search for Item Number' box does just that: Searches for an item number. Partial item numbers will populate the box below the search box, at which point you will have to select the item that you want by clicking on it, and the clicking the 'Memorize this item on the Inventory list (ENTER)' button. If you type in a complete item number, selecting it from the list is unnecessary, and you can simply click the 'Memorize' button.
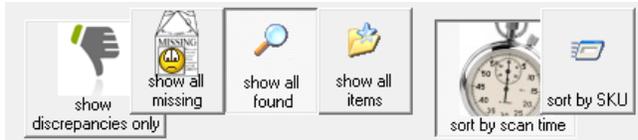
The buttons shown here change the way the table below them is displayed. The settings shown to the left are the default settings that the software chooses when it is first opened, but you can change them. 'Show Discrepancies Only' displays just errors, either items that were not scanned, scanned multiple times etc. 'Show All Missing' shows items that are in the database but were not scanned, or have just not been scanned yet. 'Show all Found' shows all the items that have been scanned into the system and match an in-stock item already in the system. 'Show all Items' shows all items scanned, regardless of whether or not they are in inventory or out-stock. 'Sort by Scan Time' sorts the list by the time the item was scanned, with the newest scanned items first, whereas 'Sort by SKU' sorts the items by SKU number.
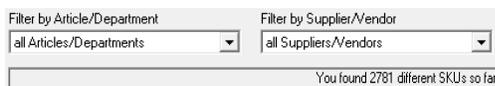
Below the buttons, there are options to filter what you're Looking for, so you can find something specific. You can filter by specific article category by clicking the arrow on the drop-down box and selecting your specific article that you'd like to see. You can also do the same with the supplier or vendor, by clicking the arrow on the drop-down box and selecting a specific supplier. You can also mix and match these, so you can see everything in the list from a specific article category, by a specific supplier. This can help you find items that you may have missed or items you're wondering if you've scanned or not. You can also see exactly how many pieces are resident in the current list by checking out the box underneath the drop-down boxes

The Refresh button refreshes the current table to show you the latest results. This can be useful if you have multiple stations taking inventory, and you need to see what other people have added to the list before your own list refreshes automatically.

The Close button simply closes the screen and drops you back to the Item QuickPick Screen.

Procedure

To begin taking your inventory, if you are the first person to start, you must first click the 'Inventory Tool' menu, and then click 'Reset All Quantity Counts from Previous Control File'. **Please use caution when performing this step**! This step must only be performed **once** per inventory control session, and only at the beginning! If this step is performed while inventory is being taken, then all inventory scanned into the system **WILL BE LOST,** and must then be **re-scanned**! Please use **extreme caution** performing this first step! Also please note that this **will NOT affect** your current inventory, only the Inventory Control List that you will be scanning pieces into for your Inventory Control.

Once this first crucial step has been performed (only once, remember), you can begin scanning your inventory into the system. You can do this from multiple terminals. There is no sharing of individual files required, as this is all performed at the database level. Also note that while inventory is being performed, **you can continue to sell items from your store**, as the list will keep updating dynamically

and will not cause counting errors! Before you start to scan, you may want to fill in the 'I am scanning from this location' field with something that you'll remember, or something related to where you're scanning. For example, if you're scanning all the items from the front of the store, you may type in 'Store Front' or something similar. If you're scanning an individual case, or tray, you could fill the case or try number in that field, so you can better identify where the piece came from. As you scan, you may come across various error messages with prompts that ask you what to do. These are pretty self-explanatory, and typically come up when a duplicated piece has been scanned. The options that are displayed state that you can either add this piece to the inventory as a new item, or set the piece aside and enter it manually later. Choose the option which works best for you, and continue on your way.

Also, rather than simply scanning the pieces, you can type the SKU of the piece into the Search box and find the piece that way. If you only type a partial SKU number, the box below the search field will propagate with partial matches, at which point you'll have to select the appropriate piece and click the 'Memorize' button. If you type in a whole SKU number, you'll just have to click the 'Memorize' button, as the piece is automatically selected in that instance.

If you're using a handheld wireless ScanPal2 Scanner, transferring those data off of it is relatively simple. Simply plug the device into the computer with the provided cable. Turn it on, select '2. Upload Data'. Once you've done this, simply select the 'File / Data Import' menu, and then select 'Import Data from a ScanPal2 Terminal'. A new screen opens. Simply follow the instructions on the screen, and then click the 'Download Scanner Data' button. Those data will then download from the scanner and into the software.

Also, if you started scanning with our legacy Inventory Control system (which is being phased out) you can import the control file you created in that system by clicking on the 'File / Data Import' menu, and selecting 'Import Data from an older DiamondCounter Scan File'. This will open a dialogue box where you can select the control file you began. Once you find it and select it, click 'Open', and all of the pieces that have been scanned into that file will automatically be added to the new Inventory Control system list. Remember to perform this action only once, as duplicating it will duplicate the number of pieces on the list.

Once the entire store has been scanned, and you've nothing left to add to the list, you should print both discrepancy reports that are available by clicking on the 'Print Tools' menu, and then clicking on 'Print Current Discrepancy Report' and also 'Print Current Discrepancy Report of Missing Pieces', so you have a paper record of things that are missing or went un-scanned. After you have completed this step it is time to synchronize.

To synchronize your inventory and make it match what you have scanned in, simply click the 'Synchronizing / Adjustment Tools' menu, and run each option in that menu in order:

- ❖ 'Adjust all multi-items' resets the quantities of your multi-items to what you scanned into the control list
- ❖ 'Eliminate un-located / Missing Items from System' sets all items that went un-scanned to 'sold' to nobody status, which means that they will not affect you final inventory count, or your sold item count.
- ❖ 'Adjust single 'in-stock' item vs. Multiples Found in Store' takes all unique items that were found with the same SKU number, and sets them to multi-item status.
- ❖ 'Adjust single 'out-of-stock' item vs. Found in Store' sets pieces that were set to out-of-stock, but were scanned into the Inventory Control List, back to in-stock status.
- ❖ 'Adjust single 'Sold' item vs. Found in Store' will take an item that's been listed as sold to somebody, but scanned into the Inventory Control List, and re-add it to the inventory as a new inventory piece.
- ❖ Finally, there is 'Adjust Single 'sold/out-of-stock' item vs. Multiples Found In Store', which takes multiple unique pieces that were listed as out stock, but have the same SKU, and re-inserts them into the software as a copy of the original SKU, with the exception of a '#' at the end of the SKU.

Once all those options have been selected and run, your inventory is complete.