



## Create Inventory Tally

Background: An inventory tally is an item worksheet on which you can take inventory by recording the item quantities.

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### To Do and Notice:

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1. Navigate to **Inventory** and select **New Tally**.
2. In the **New Tally** window, select the desired criteria for the Tally:
  - 1) **Inventory Unit** – unit within your facility
  - 2) **Use Existing Bins** – bin assignments  
**Notice:** When checked, the system will generate a tally of items based on the storage area and bin as assigned in your database; uncheck the box if you want to create a new Tally from “scratch.”
  - 3) **Description** – name or Title for the Tally – e.g., Oct 2014 Inventory Tally.
  - 4) **Inventory Dates** – Inventory Close date  
**Notice:** Dates are required.  
The system counts inventory as the last transaction of the day.
  - 5) **Cycle(s)** - type an entry if you take inventory using count cycles
3. Click **Create** in the upper right-hand corner.

**So What?** See the **Print Inventory Tally Reports** Quick Guide for instructions on running and printing Inventory Tallies. Take this Report to your stockroom, check it against your physical inventory and note necessary changes. Next, make the changes to your Tally in the system. See the **Enter/Finalize Inventory** Quick Guide for details on how to edit your Tally.

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