



## Enter Inventory Count

Background: Use the Inventory Tally Report when counting inventory, then make the appropriate edits to your counts via Edit Tally.

**Notice:** Any addition, change, or deletion of the Storage Location or Bin for an item on this screen will change the information listed in Item Maintenance on the Inventory Tab for that item. Use 'Create Inventory Tally' to generate a new tally based on the new information.

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### To Do and Notice:

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1. Navigate to **Inventory** and select [Edit Tally](#).
2. In the **Open Tally** window, select the desired criteria for the Tally you wish to open:
  - 1) Unit
  - 2) Description
  - 3) Dates
  - 4) Click **Go**
3. Select the desired Tally from the list.

**Notice:** The system remembers the last tally you are on within a session.
4. Use the Edit Tally features to add items to the tally and make any other changes you want.

### Edit Item Details

1. To change the Bin assignment for the item, click in the **Bin** box and make the necessary corrections.
2. If you assign or change a bin location and it applies only to the displayed tally, put a check mark in the **Write In** checkbox.
3. To change the counting unit for the item, click on the **Stock Unit** drop-down list and select the appropriate unit.
4. To change the item count, click in the **Qty** and enter the desired number.
5. To add or edit the Storage location or Bin, click on the Edit Details button found to the left of the item.
  - a. Select a **Storage Area** from the drop-down list.
  - b. Enter an alphanumeric ID in the Bin ID field.
  - c. Click **Done**.
6. Click **Save**.

### Add Items

1. Click on the **Add Items** button.
2. Search for the desired item.
3. Click the checkbox in front of the item(s) you wish to add.
4. Click Add Selected item(s).
5. Repeat steps 2-4 until all items have been added, then click **Done**.
6. To add or edit the Storage location or Bin, click on the Edit Details button found to the left of the item.
  - a. Select a **Storage Area** from the drop-down list.
  - b. Enter an alphanumeric ID in the Bin ID field.
  - c. Click **Done**.
7. Repeat step 6 until all Storage Locations and/or Bins have been updated, then click **Done**.
8. If you assigned or changed a bin location and it applies only to the displayed tally, put a check mark in the **Write In** checkbox.
9. Click **Save**.

### Delete Items

1. Click the box in front of the Item you wish to delete.
2. Click on the **Delete Checked** button.
3. Click **Save**.

### Move Items - to a different storage location

1. Click the box in front of the Item you wish to move.
2. Click on the **Move Item** button.
3. Select the new Storage Location from the drop-down list.
4. Click **Move**.
5. Click **Save**.

**So What?** See the **Finalize Inventory Count** Quick Guide to finalize your Inventory Tally.

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