



## Finalize Inventory Count

Background: Once you complete any necessary changes to your Tally, you may run the reports one more time, make any last changes, then Finalize your Tally.

**Notice:** Any addition, change or deletion of the Storage Location or Bin for an item will change the information listed in Item Maintenance on the Inventory Tab for that item.

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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 will open the last Tally you were working on.

### Set Inventory Status to Trial and Run Final Checks

1. To set your Inventory Tally in Trial Status, click on the **Status** drop-down list in the upper left-hand corner and select **Trial**.

**Notice:** Once the Inventory is set to 'Trial,' the system allows you print Inventory Reports. See the **Print Inventory Tally Reports** Quick Guide to run your report again and check it one more time before finalizing your tally.

2. Perform a final check of your Inventory counts.
3. Make any necessary changes to your Inventory Tally.

**Notice:** See the **Enter Inventory Count** Quick Guide for details on how to edit your Inventory Tally.

### Set Inventory Status to Trial and Run Final Checks

To finalize the Tally, click on the **Status** drop-down list in the upper left-hand corner and select **Finalize**.

**Notice:** Once you select **Finalize**, you will no longer be able to make changes to this Tally, as the system sets the inventory on hand.

**So What?** See the **Inventory Analysis Reports** Quick Guide to analyze your inventory.