How to conduct inventory in cairo.WMS?

> This article explains how to perform inventory in **cairo.WMS**.
>
> For inventory procedures in **cairo.ERP**, see this article.

This article explains how to conduct inventory in the cairo.WMS system, both for the entire warehouse and for individual shelves. You'll learn how to open and close inventory, what shelf statuses mean, and what the Inventory Assistant is used for.

Opening Inventory

To start inventory:

1. Log in to the specific sector on the scanner.
2. Select **1 - WORK IN SECTORS**.
3. Select **3 – INVENTORY**.

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[=0][LG][1  ][DEMO DEMO     ]
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        MAIN MENU
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 1  - ISSUING PRODUCTS
 2  - GOODS RECEIPT
 3  - INVENTORY
_______________________________
 4  - CHANGE OF SECTOR
_______________________________
 5  - WAREHOUSE STRUCTURE
 6  - GOODS DATA
 7  - POSITION OF GOODS
 8  - VERIFICATION OF SHORTAG
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 0  - CHANGE OF WORK MODE
```

To inventory a shelf, items cannot currently be issued from it.

The inventory process on the warehouse terminal is as follows:

Depending on the **INVENTORY - FORCE VERIFICATION OF DISCREPANCIES** parameter setting, the system will behave differently:

- **If the parameter is set to "NO"** or you select **1 - FIRST COUNT**:
  - Scan the shelf.
  - Scan the item.
  - Enter the quantity.
  - After checking all items on the shelf, to change its status, scan the shelf again and select **5** on the terminal. The shelf must have the status **FOR INVENTORY**.
- **If the parameter is set to "YES"**:
  - If discrepancies appear after the first count, you must verify them. Only the quantities of items where discrepancies were found are verified.
  - Quantities entered by the verifying person are final.

If the inventoried shelf is empty, scan its code to start the inventory process, then scan it again to mark the end of counting items.

Closing Inventory

You can close inventory in three ways:

- **Closing selected shelves:**
  1. Go to **WMS > INVENTORY**.
  2. Select **S T A T U S**.
  3. Press **Enter** on the sector.
  4. Use **[<-]** to select the shelf/shelves to close.
  5. Press **[Ctrl + F4]**.
- **Closing an entire sector:**
  1. Go to **WMS > INVENTORY**.
  2. Select **S T A T U S**.
  3. Press **[Ctrl + F4]** on the sector.
- **Closing the warehouse including items without an assigned location:**
  1. Go to **WMS > INVENTORY**.
  2. Select **S T A T U S**.
  3. Press **[F4]**.

> To inventory the entire warehouse, you must check all shelves assigned to the sectors ofthat warehouse.

After selecting the close option, a message will appear, and four stages will follow:

MESSAGE

TO CLOSE INVENTORY, ALL ITEM CARDS IN INVENTORY SURPLUSES MUST HAVE A NON-ZERO INVENTORY PRICE.

IT IS ALSO RECOMMENDED THAT RETURNS, UNCONFIRMED SHORTAGES, ETC., BE MOVED TO INVENTORY SHORTAGES, THUS THEY WILL BE AUTOMATICALLY OFFSET WITH INVENTORY SURPLUSES

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1. **Checking inventory prices of item cards in inventory surpluses:** Verification of prices for surplus items.
2. **Verification of shortages and surpluses:** Two types of K+ documents are generated (inventory surpluses and shortages). Shortages are removed from the warehouse, and surpluses are added to the warehouse.
3. **Confirmation before closing:** A message reminds you to ensure that all returns, unconfirmed shortages, and any supplier shortages have been moved to **INVENTORY SHORTAGES**.
4. **Irreversible operation:** You will be informed that the operation is irreversible. After confirmation, if there were surpluses/shortages, a K+ document will be created to add or remove the item from stock. Shelves will return to the **FOR INVENTORY** status.

Shelf Statuses and Inventory Assistant

In the WMS system, we distinguish three shelf statuses during inventory:

- **FOR INVENTORY:** The shelf is ready for checking.
- **FOR VERIFICATION:** The shelf has undergone the first count, and discrepancies have appeared between the entered quantity and the available stock in the system. This status appears only if the warehouse parameter **INVENTORY - FORCE DISCREPANCY VERIFICATION** is set to **YES**.
- **VERIFIED:** The shelf has been checked or checked and verified. A shelf with this status can be confirmed by closing the inventory on it.

> For an operator to verify an inventoried shelf, the following permission must be enabled: **WMS > ADMINISTRATION > OPERATORS > [Enter] on operator > TERMINAL > inventory - verification**

Inventory Assistant is a module where two operations can be performed:

- **WAREHOUSE COMPARISON:** Compares surpluses and shortages between warehouses for compensation, e.g., when an item has a different location than in the system.
- **SYMBOL ERRORS:** Generates a report that finds probable differences between the symbols of checked items. For example, if you have two items with similar symbols, where one item card is marked as 3 in shortages, and the other as 3 in surpluses, the program will suggest that it might be the same item, allowing for the compensation of the surplus and shortage.

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