Stock take count sheet

Channel Bay

Count what is on the shelf. Do not look up the expected quantity. Write 0 when you find none, and leave a line blank only if you did not count it. Use one row per SKU per zone, and write recounts in their own column.

STOCK TAKE NAME

LOCATION

DATE

CUT-OFF (DATE AND TIME)

COUNTED BY

CHECKED BY

Zone	SKU	Product and variant	Counted quantity	Counted by	Recount quantity	Notes

Columns match columns A to G of the Count tab in the free stock take template, so you can type each row straight in. Free to print and copy.

Stock take checklist

Tick each item as you finish it. The method behind each step is in the stocktake guide.

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Before the count

- [ ] Decide the scope: all stock, one location or some categories
- [ ] Set the cut-off time and tell staff and suppliers
- [ ] Receive deliveries that arrived before the cut-off
- [ ] Set aside damaged stock, returns and packed orders in labeled areas
- [ ] Export SKUs, expected quantities and unit costs at the cut-off, and save the file untouched
- [ ] Split the site into zones and give each zone one counter
- [ ] Agree the recount tolerance and what happens to uncounted items
- [ ] Print the sheets. Never show counters the expected quantities

On count day

- [ ] Pause picking and receiving, or log every movement after the cut-off
- [ ] Count blind, in the same unit as the SKU
- [ ] Open boxes, back rooms, returns shelves and stock behind counters
- [ ] Write 0 when you find none. Leave a line blank only if you did not count it
- [ ] Note damage, open cases and stock found in the wrong place
- [ ] Initial each line, and sign each zone off when it is done
- [ ] A second person checks every zone sheet and the page numbers
- [ ] Collect every sheet before anyone leaves

After the count

- [ ] Type the counts into the Count tab, and have a second person read them back
- [ ] Clear every "Not in export" row
- [ ] Recount every row of each flagged SKU, and keep the first count
- [ ] Apply your rule to items nobody counted
- [ ] Write the cause of each confirmed variance
- [ ] Post approved adjustments, and fix documents instead of adjusting when a receipt or transfer is wrong
- [ ] Report gains and losses separately
- [ ] File the sheets, the export and the summary

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