Stock Count Creation

Cavallo Support - 2024-12-03 - Setup

Overview

The Stock Count Creation screen, accessible from the **Administrative** dropdown located in the top left corner of the Stock Counts screen, allows users to create stock counts with potential filters by warehouse, bin (if the user is using a multibin database) and item.



Settings & Security

Stock Count Creation Settings

Adjust the following DataCollection Console settings as necessary. Save any changes you make in DC Console and log back into both the DC Console and DC Mobile for changes to take effect.

Stock Count Scanner Settings

Stock Count Default Format - Determines the format of automatically created Stock Counts via the Stock Count Creation screen. Entering Username will use the currently logged in user's username.

Screen Setup Settings

Stock Count Creation Field Sequence – See Changing the Field Sequences under Additional Settings

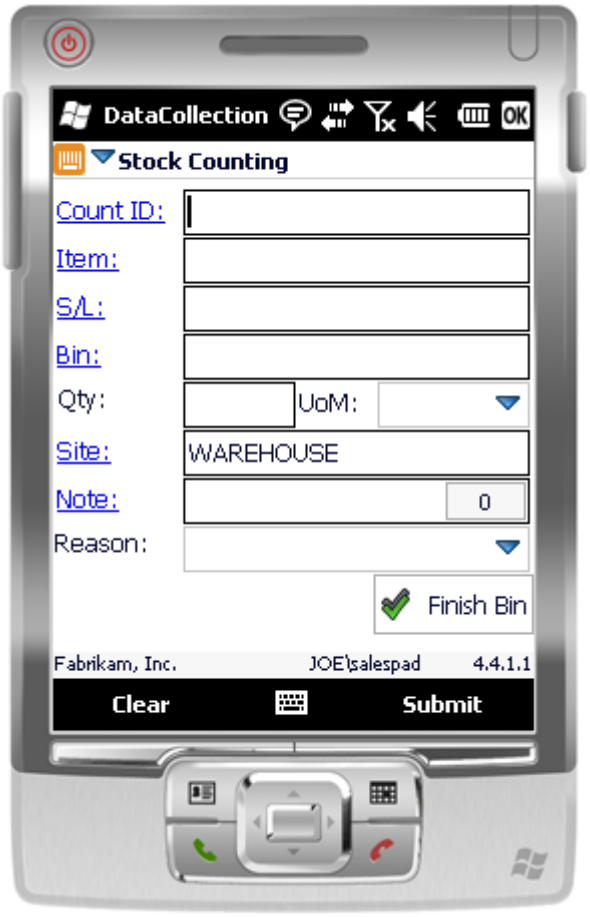
Stock Count Creation Fields To Clear – See Modifying the Fields to Clear under Additional Settings

Security

Enable the Sub-security *Create Stock Count Button*: Allows access to the Stock Count Creation screen by enabling/disabling the button for a set user or group.

Usage

1. Once you have accessed the screen, fill out the information as desired to create an active stock count with the filters you have supplied.
   Example: Entering a bin will allow you to create a stock count for all items in that bin, while entering an item will allow you to create a stock count for that item in all bins.
2. Filling out both fields creates a stock count for that particular item in that particular bin
   Note: Site is a required field.
3. Finally, you can choose to enter a stock count ID – this is not required, and not entering an ID will result in one being generated for you.



4. Clicking **Submit** when finished filling in the fields will create the stock count and all corresponding stock count lines. You will be notified of the successful creation of the stock count – clicking **OK** will return you to the Stock Counts screen to begin using your new stock count.