

# Add a Physical Inventory

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To begin a new Physical Inventory, navigate to Inventory > Warehouses.

The Warehouses list will be displayed. Click on the hyperlink in the Warehouse Code column of the warehouse for which you are conducting a physical inventory.

The screenshot shows the 'Warehouses' page interface. At the top, there is a '+ Add Warehouse' button, a 'Custom Grid Layout' option, and a 'Show Inactive Warehouses' toggle set to 'NO'. A 'Total' value of '\$112,491.50' is displayed in the top right. Below this is a grid with columns for Warehouse Code, Warehouse Name, Warehouse Total, and actions (Edit, Delete). A green box highlights the Warehouse Code column, which contains hyperlinks for each warehouse. The table data is as follows:

Warehouse Code	Warehouse Name	Warehouse Total	
<a href="#">*MI-Main</a>	Michigan Main Warehouse	\$0.00	Edit Delete
<a href="#">*Ohio-Main</a>	Ohio Main Warehouse	\$10.00	Edit Delete
<a href="#">MI-1001</a>	Michigan Tech 1001	\$0.00	Edit Delete
<a href="#">MI-1002</a>	Michigan Tech 1002	\$0.00	Edit Delete
<a href="#">Ohio-Cincinnati</a>	Cincinnati Warehouse	\$0.00	Edit Delete
<a href="#">Ohio-CLE-Tech1</a>	Cleveland Warehouse- Technician 1	\$0.00	Edit Delete
<a href="#">Ohio-Cleveland</a>	Cleveland East	\$377.50	Edit Delete
<a href="#">Ohio-COL-Tech1</a>	Service Truck One	\$0.00	Edit Delete
<a href="#">Ohio-COL-Tech2</a>	Service Warehouse Two	\$5.00	Edit Delete
<a href="#">Ohio-Columbus</a>	Columbus Warehouse	\$515.00	Edit Delete
<a href="#">Ohio-Obsolete</a>	Ohio Obsolete Inventory	\$370.00	Edit Delete
<a href="#">Ohio-Subcontractor</a>	Subcontractor Parts	\$30.00	Edit Delete

At the bottom of the grid, there is a pagination control showing '1' of 15 items and a 'Refresh' button.

The Warehouse page will be displayed. Click on the Physical Inventory tab, and then click on the Create Physical Inventory button.

**Warehouse - \*MI-Main** Edit History Part Transfer Delete

Warehouse Total: **\$1,055.83**

Code: \*MI-Main  
 Name: Michigan Main Warehouse  
 Description:

Address: 415 N Main Plymouth, MI 48170  
 GL Account: 12800-Inventory-Michigan

Inventory: 13 | Purchase Orders: 1 | **Physical Inventory: 0** | Technicians: 0 | Part Ledger: 5

**+ Create Physical Inventory** Custom Grid Layout

Drag a column header and drop it here to group by that column

Phys. Inv. Date	Note
Tuesday, June 8, 2021	

0 - 0 of 0 items Refresh

The Physical Inventory Count page will be displayed. At the upper left of the page, the Physical Inventory Date will auto-fill with today's date. If the actual count will not begin today, select the correct date.

The grid area will fill with the list of parts and current in-stock quantities. Click on the Export to Excel button, and then print the list, which will be used to record the count quantities found in the warehouse.

**Physical Inventory Count** Cancel Abandon Later Complete

Physical Inventory Date: 4/9/2022

Note: Quarterly physical.

**Physical Inventory Parts**

Export to Excel Show All Parts

Code	Description	In Stock	On Hand	Variance	Row	Shelf	Bin	Detail Note
5804	4 Button Remote	5 \$56.01						
AC-RP44	Alarm Control Remote Plate	1 \$5.00						
AC-RP26	Alarm Control Remote Plate	1 \$5.00						
WAVE2	Honeywell 2 Tone Siren	5 \$26.95						
HW-GSMV	Honeywell Cell	1 \$90.00						
HW-GSMX	Honeywell GSMX Cell	1 \$0.00						

1 - 59 of 59 items Refresh

Below is a sample of the exported warehouse parts list.

