INV-20 Define Counts

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Create Counts in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the creation of counts in NCFS which will enable you to define the Cycle count and initiate the Cycle count process by generating the Cycle Count listing report.

Note: This is an optional step in Cycle Counting.

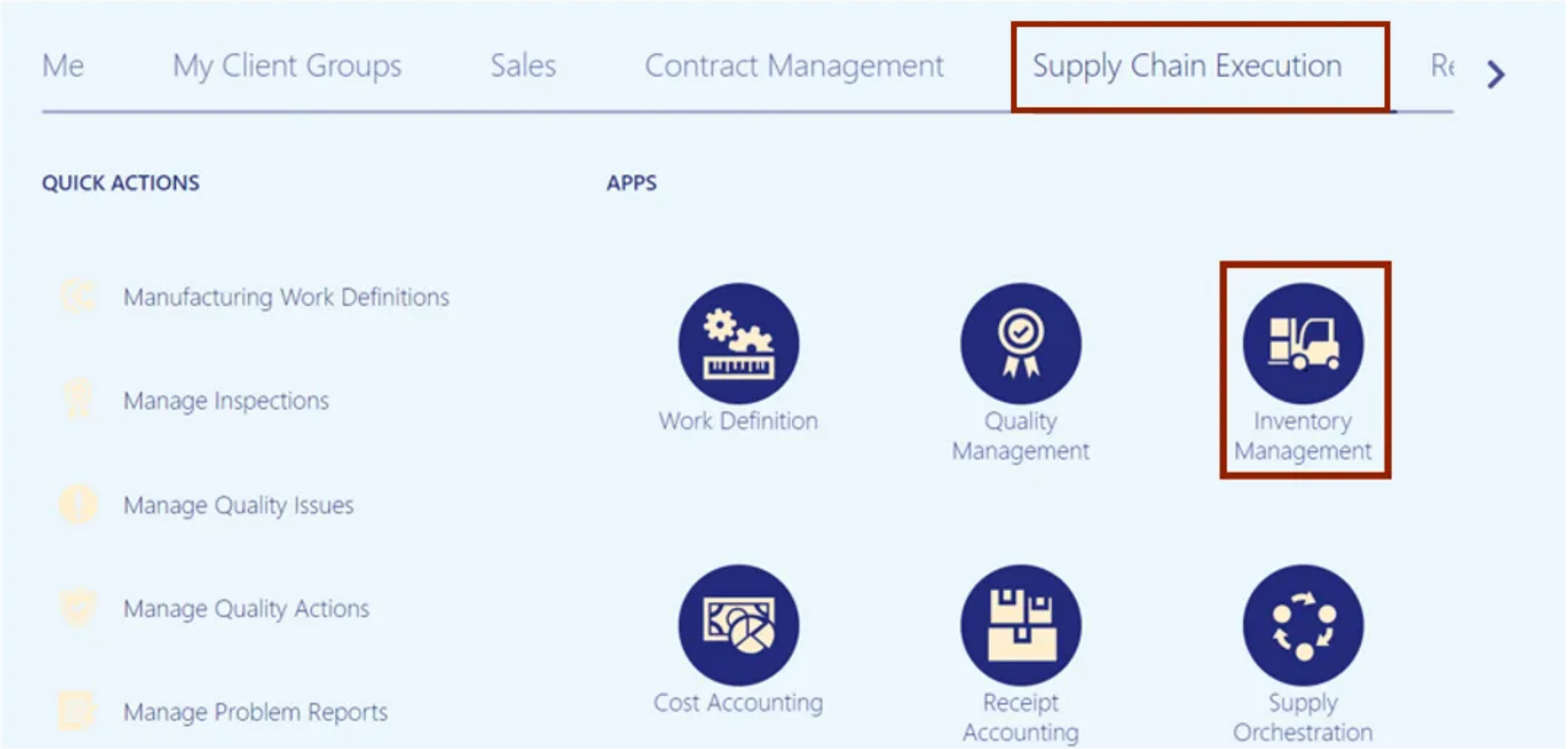
Define Cycle Count

To define cycle count in NCFS, please follow the steps below. There are 15 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Supply Chain Management** tab and click the **Inventory Management** app.

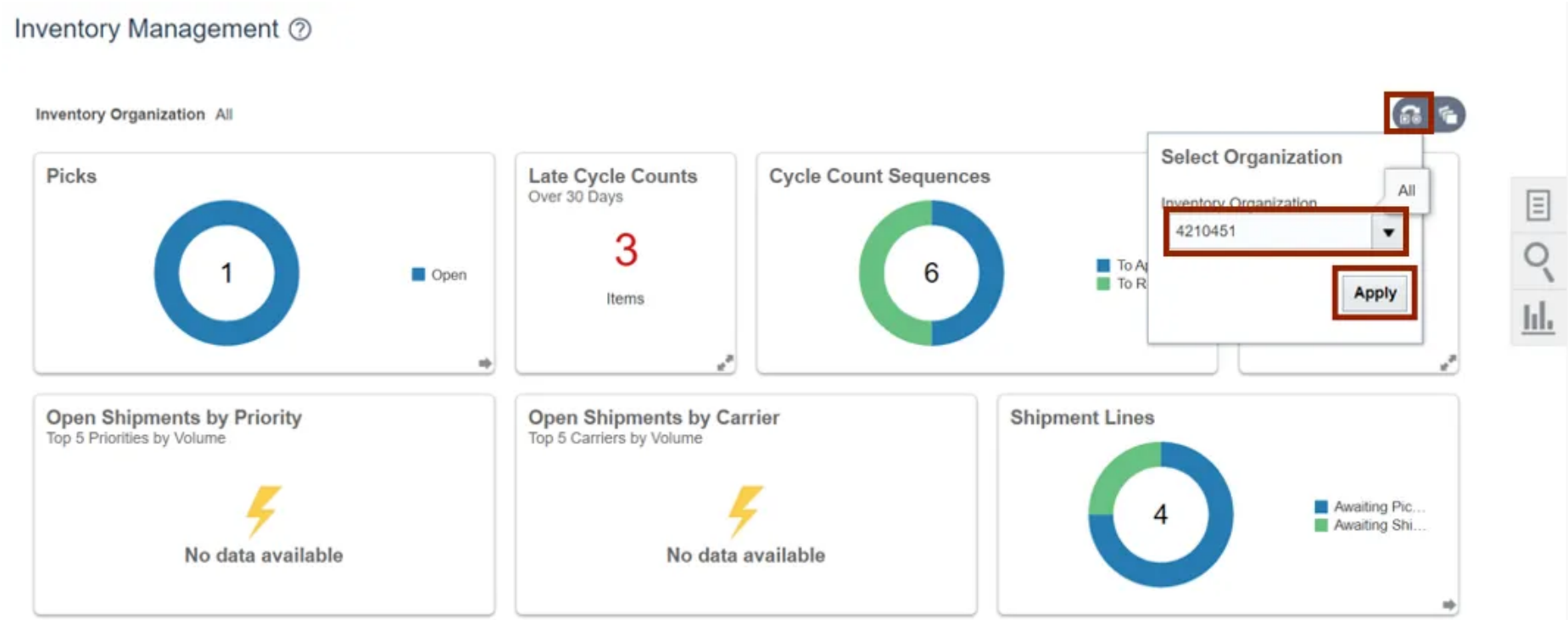
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Step 3. On the **Inventory Management** dashboard, click the **View By** icon. Click the *Inventory Organization* drop-down choice list, select the Inventory Organization.

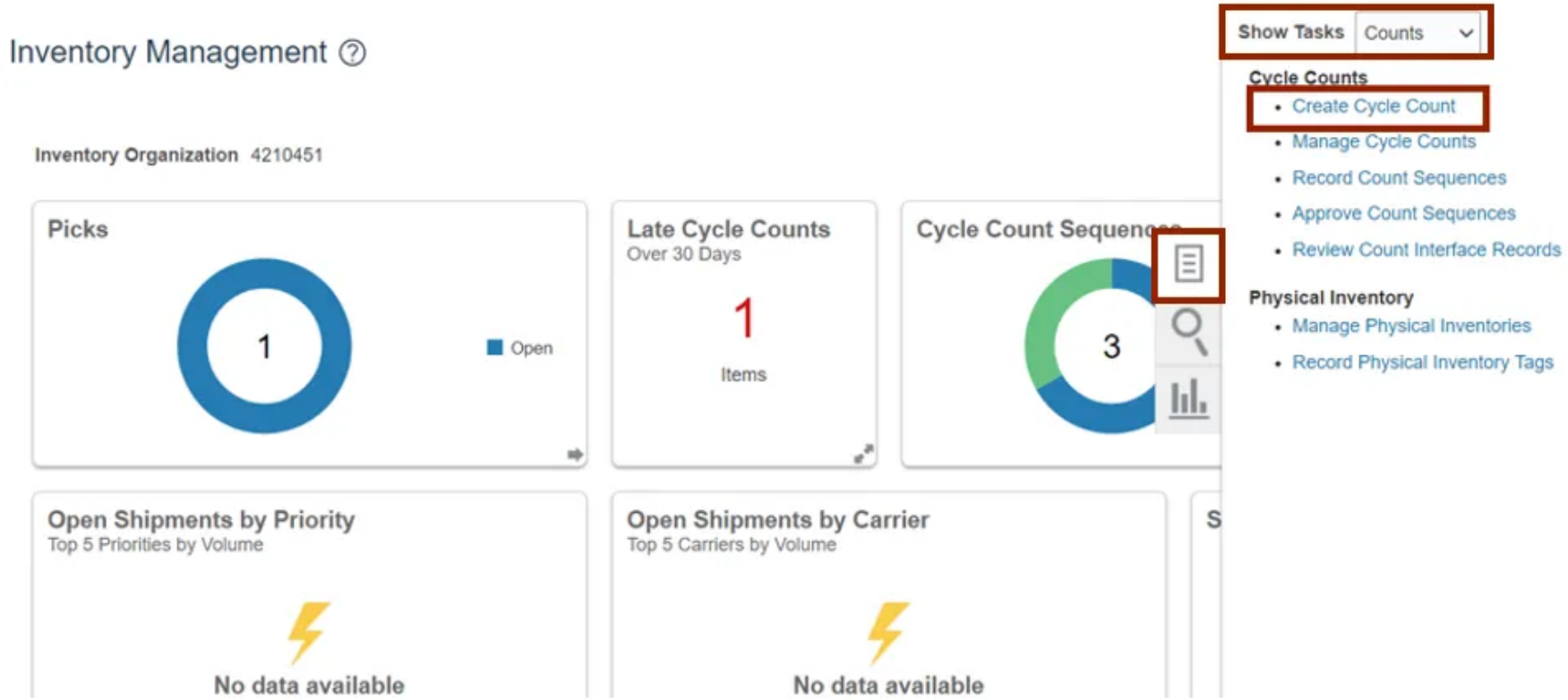
In this example, we choose **4210451**. Click the **Apply** button.

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Step 4. Click the **Tasks** icon. Click the *Show Tasks* drop-down choice list, then select **Counts** and click **Create Cycle Count**.

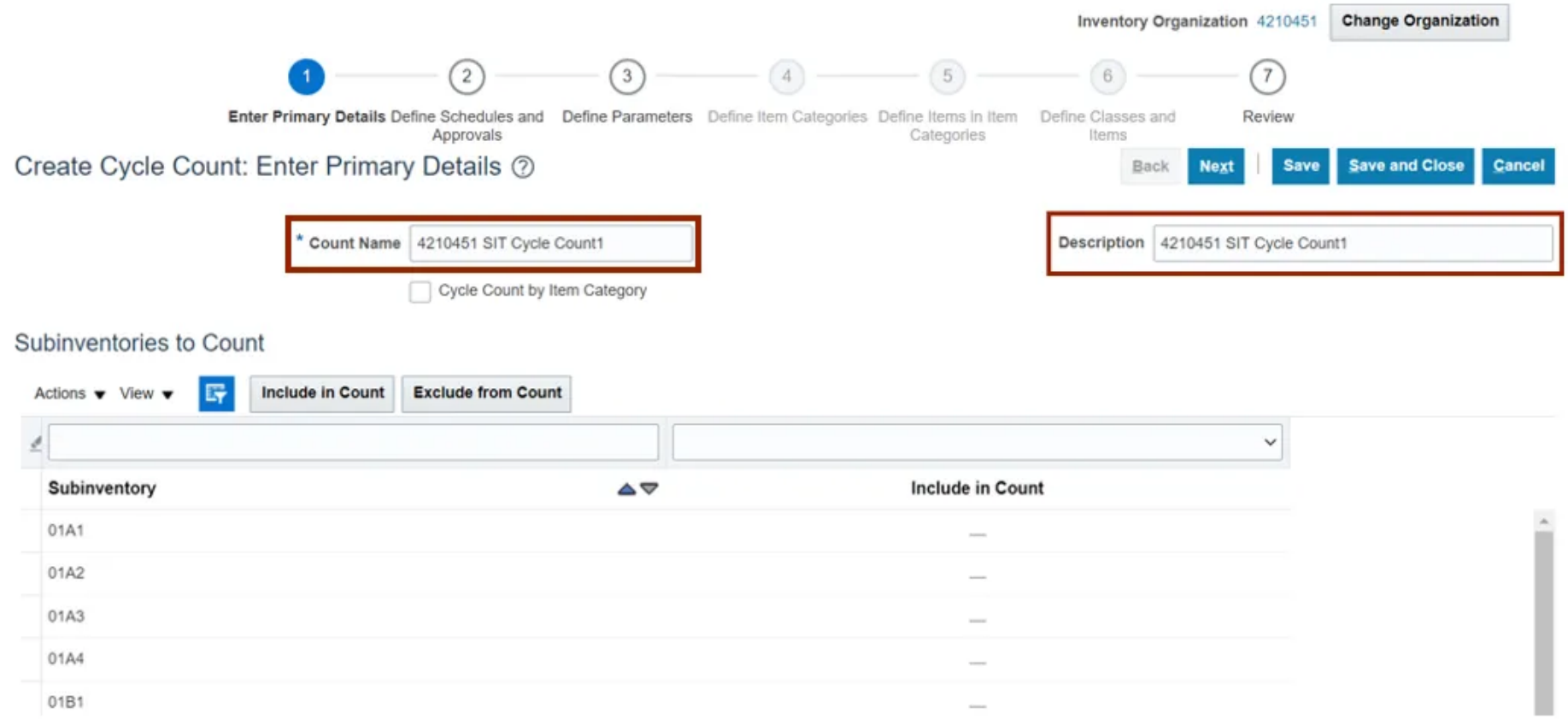
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Step 5. Enter the **Count Name** in the **Count Name field**.

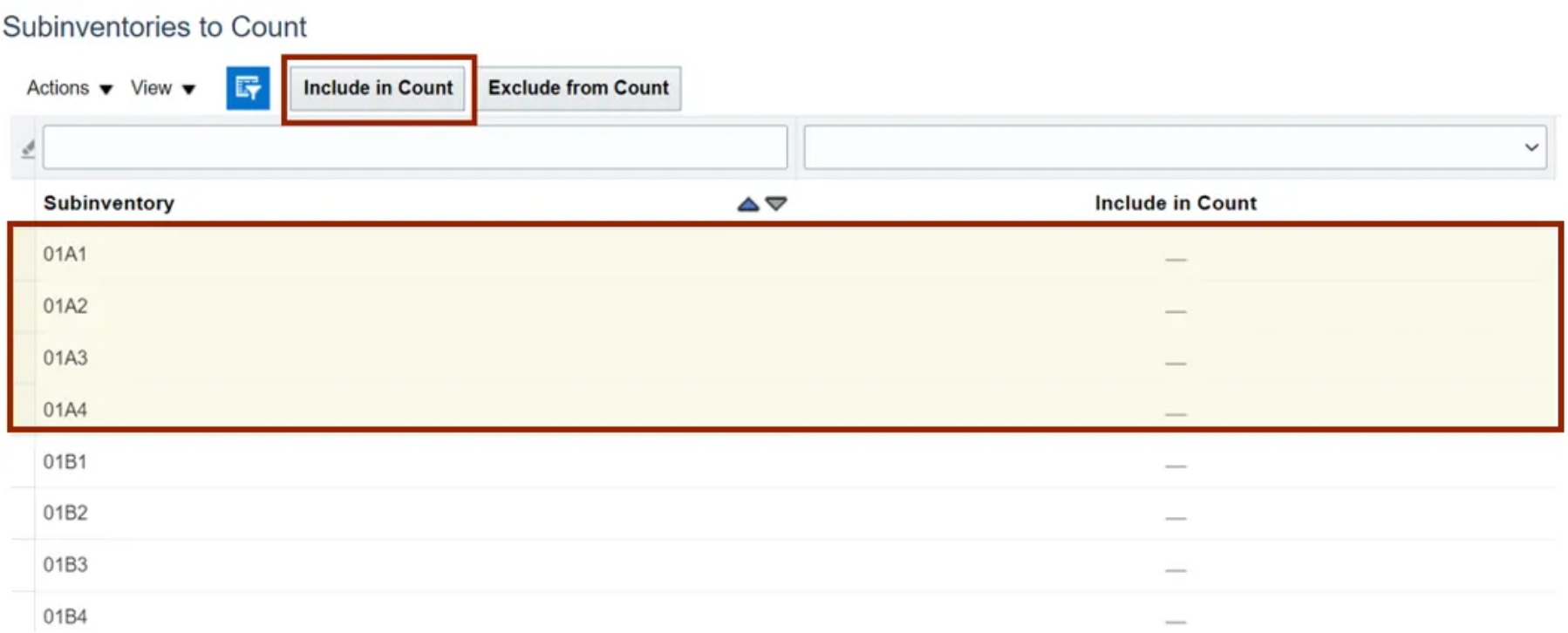
In this example, we choose **4210451 SIT Cycle Count1**. Enter the **Description** as required. In this example, we entered **4210451 SIT Cycle Count1**.

Image



Step 6. You can select a **Subinventory**. Either you can add them one by one, or you can hold the CTRL key and select **multiple Subinventories**, and then click the **Include in Count** button.

Image

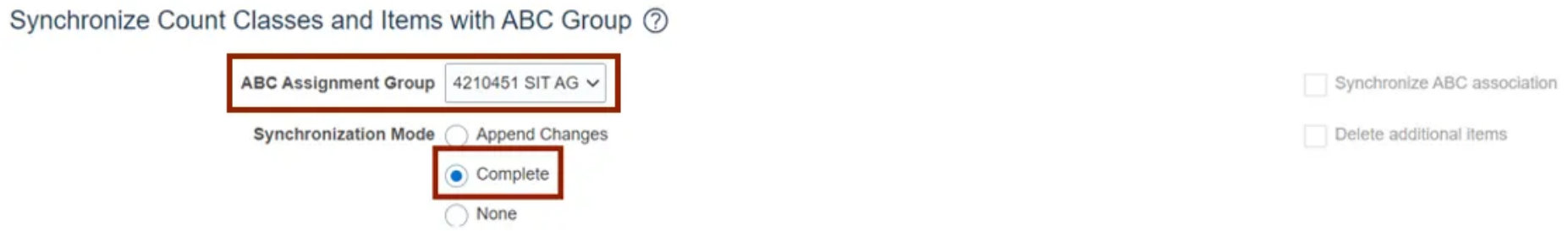


Step 7. Scroll down to the **Synchronize Count Classes and Items with ABC Group** section, then select the **ABC Assignment Group**.

In this example, we choose **4210451 SIT AG**. From the **Synchronization Mode**, select the **Complete** radio button.

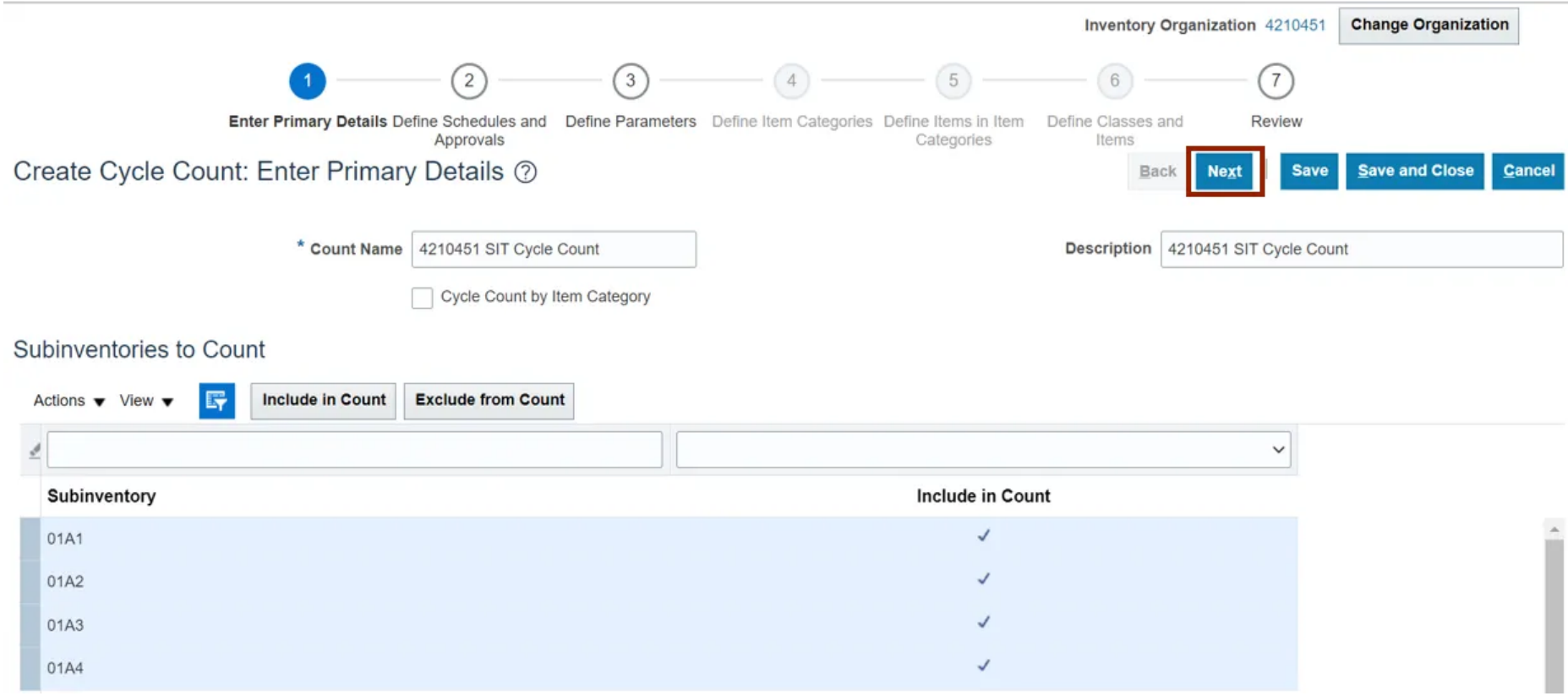
Note: ABC Assignment Groups are an optional step. Cycle counts can be scheduled directly instead.

Image



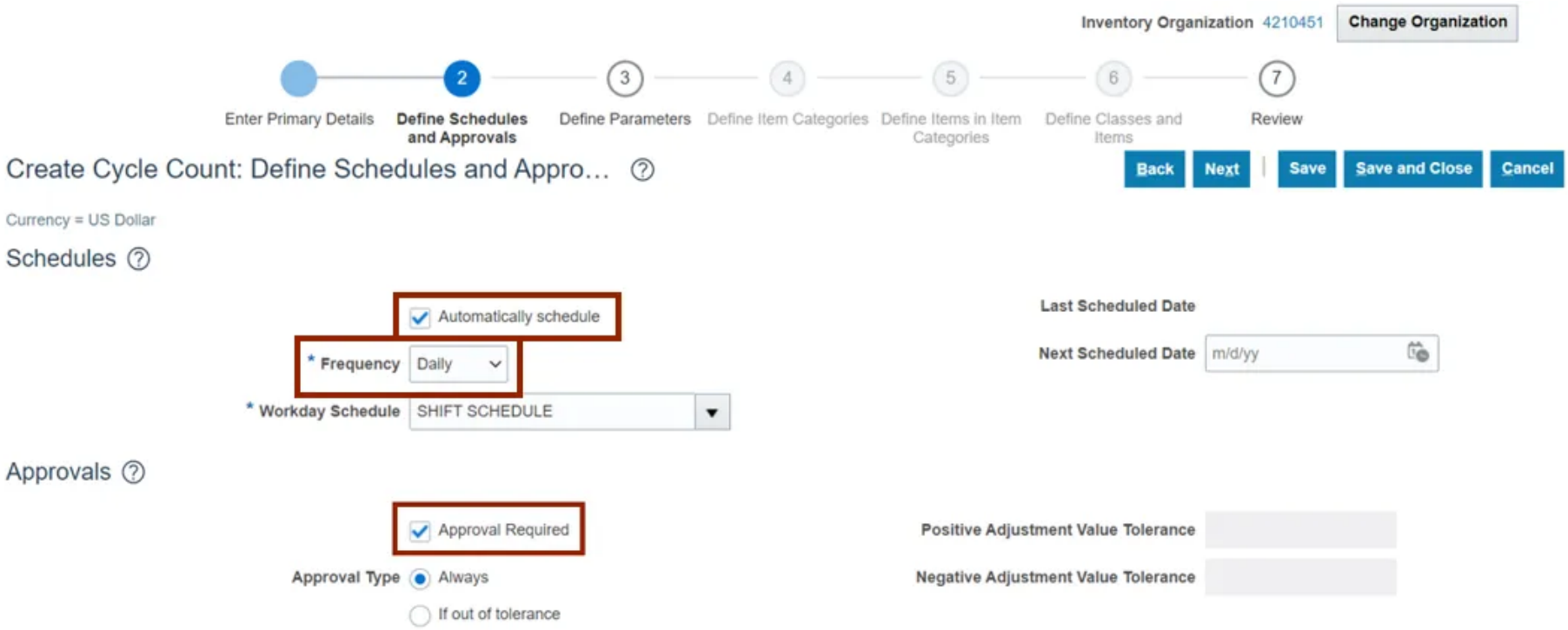
Step 8. Scroll up to the top of the page, click the **Next** button.

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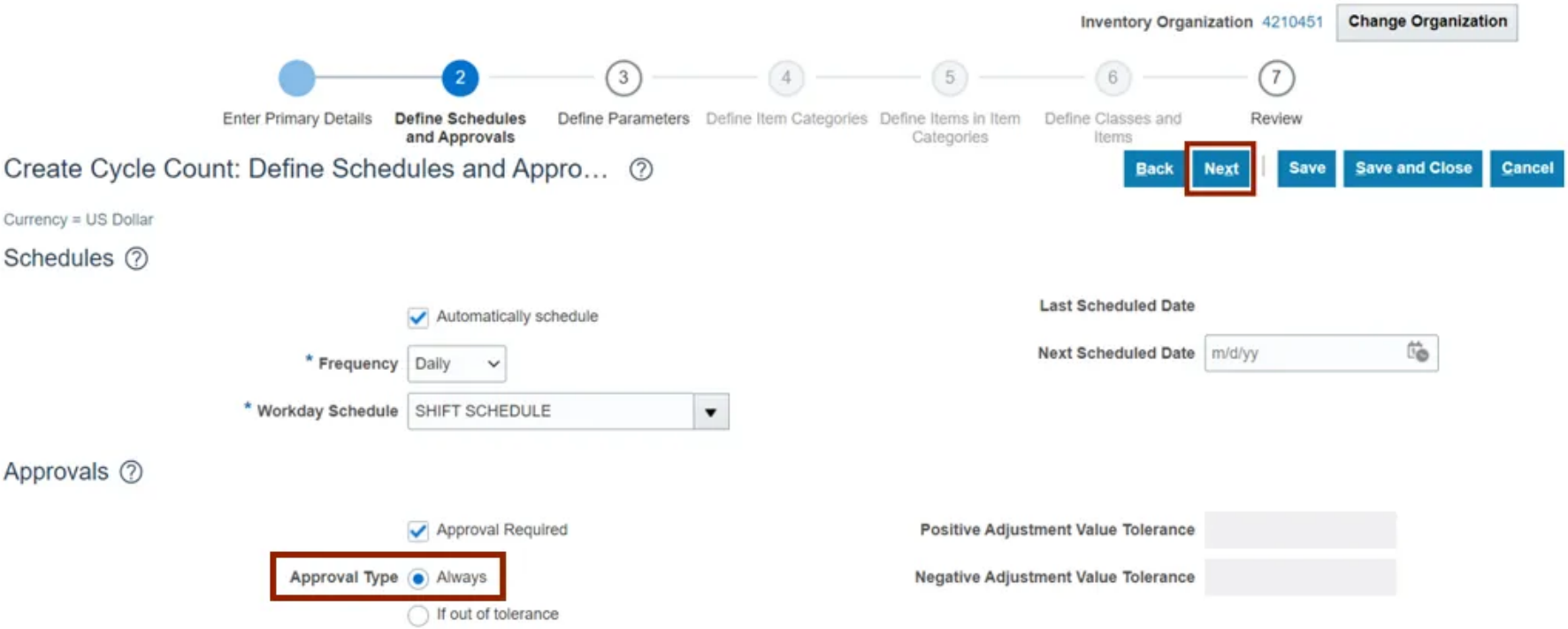
Step 9. In the **Schedules** section, select the **Automatically schedule** check box. Click the *Frequency* drop-down choice list, then select **Daily**. In the **Approvals** section, select the **Approval Required** check box.

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Step 10. Select the **Always** radio button for **Approval Type** if not already selected. Click the **Next** button.

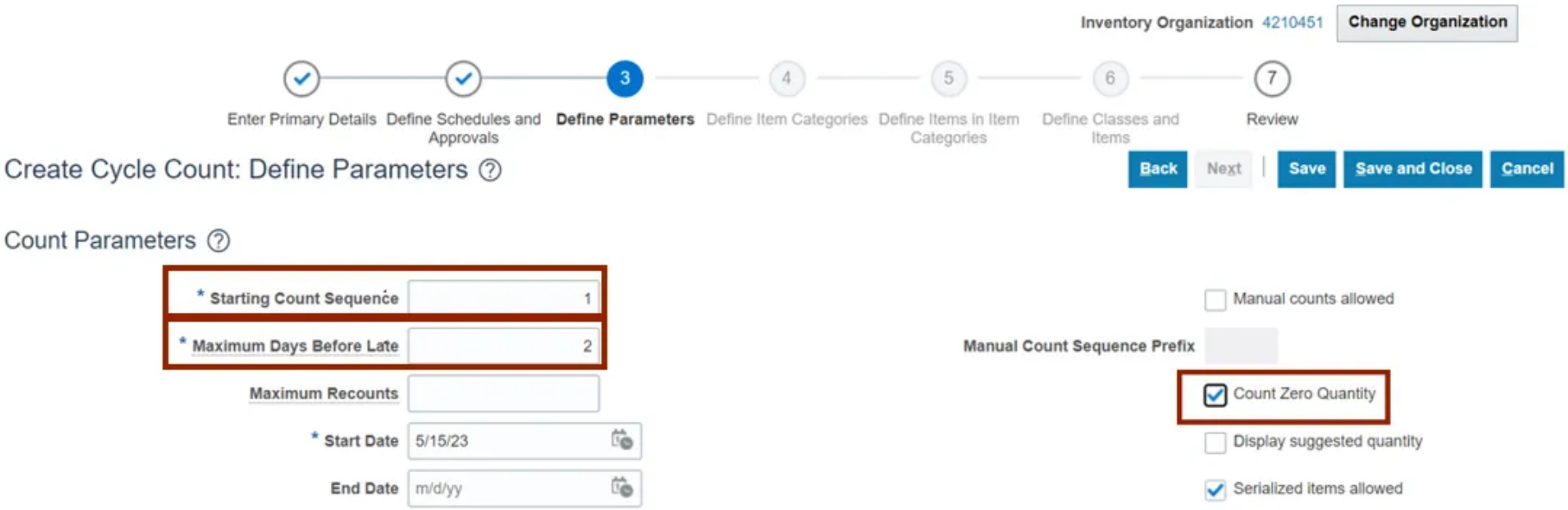
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Step 11. In the **Count Parameters** section, enter the **Starting Count Sequence** in the **Starting Count Sequence** field.

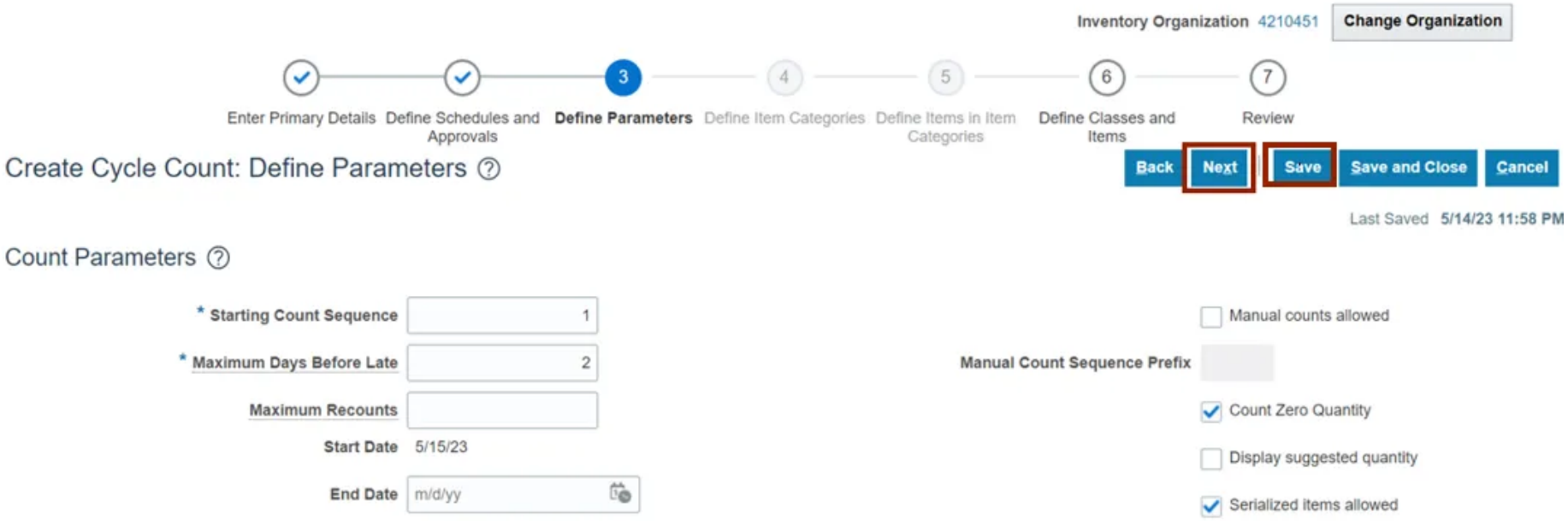
In this example, we choose **1**. Enter the **Maximum Days Before Late** in the **Maximum Days Before Late field** . In this example, we choose 2 (Note: Leave the **Maximum Recounts field** blank.) Select the **Count Zero Quantity** check box.

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Step 12. Click the **Save** button and click the **Next** button.

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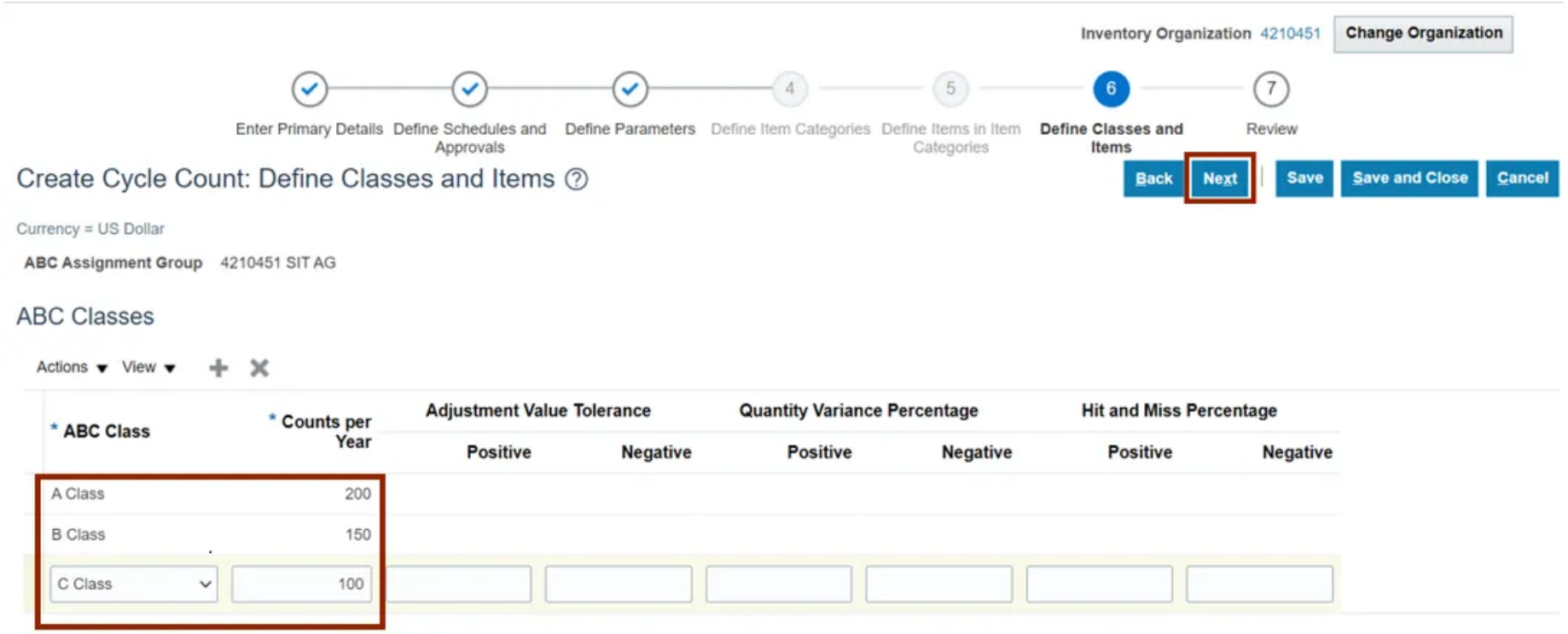
Step 13. In the **ABC Classes** section, provide the **Counts per year** for the ABC Classes in the **Counts per year field**.

In this example, we choose **A Class-200, B Class-150, C Class-100**.

Note: Provide the **Adjustment Value Tolerance, Quantity Variance Percentage** and **Hit and Miss Percentage** fields if required. Click the **Next** button.

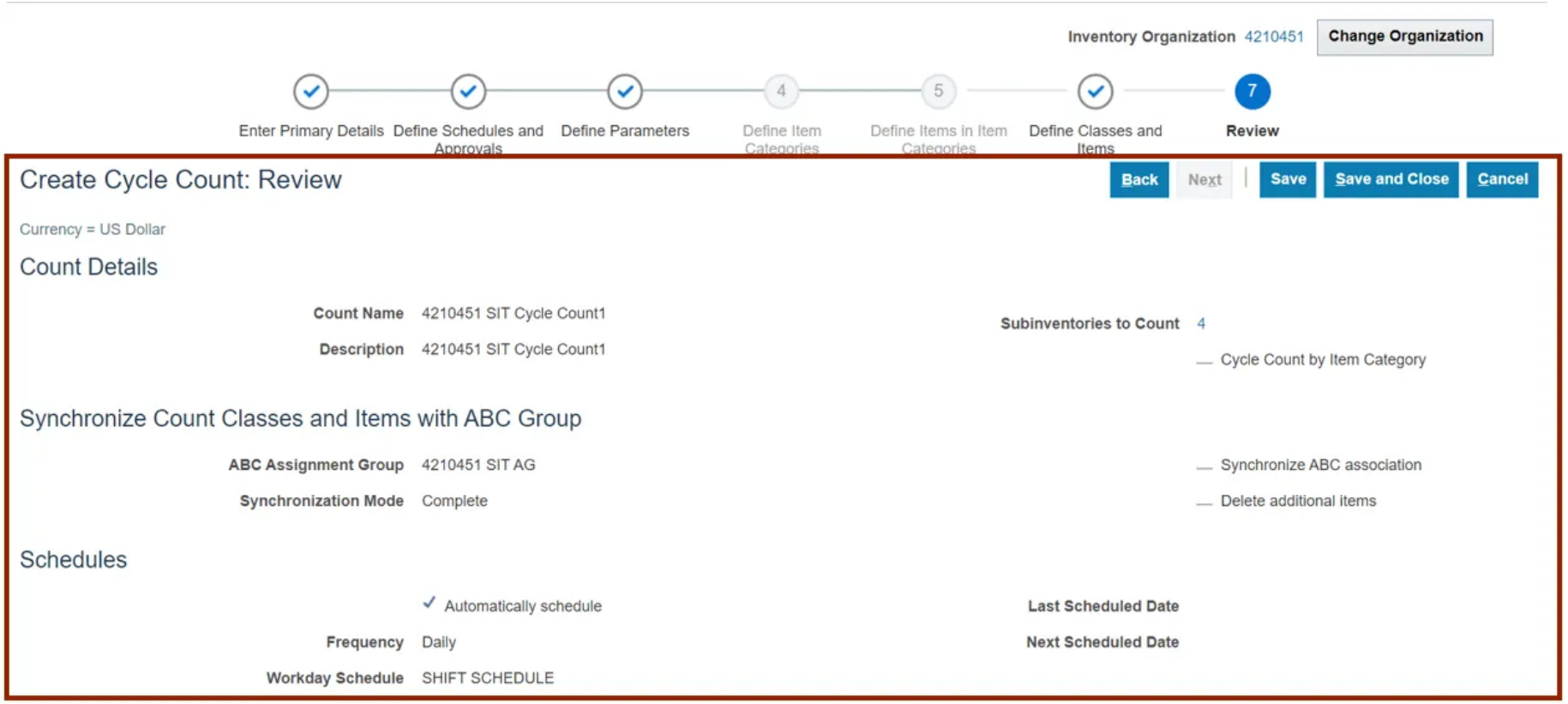
Note: ABC Assignment Groups are an optional step. Cycle counts can be scheduled directly instead

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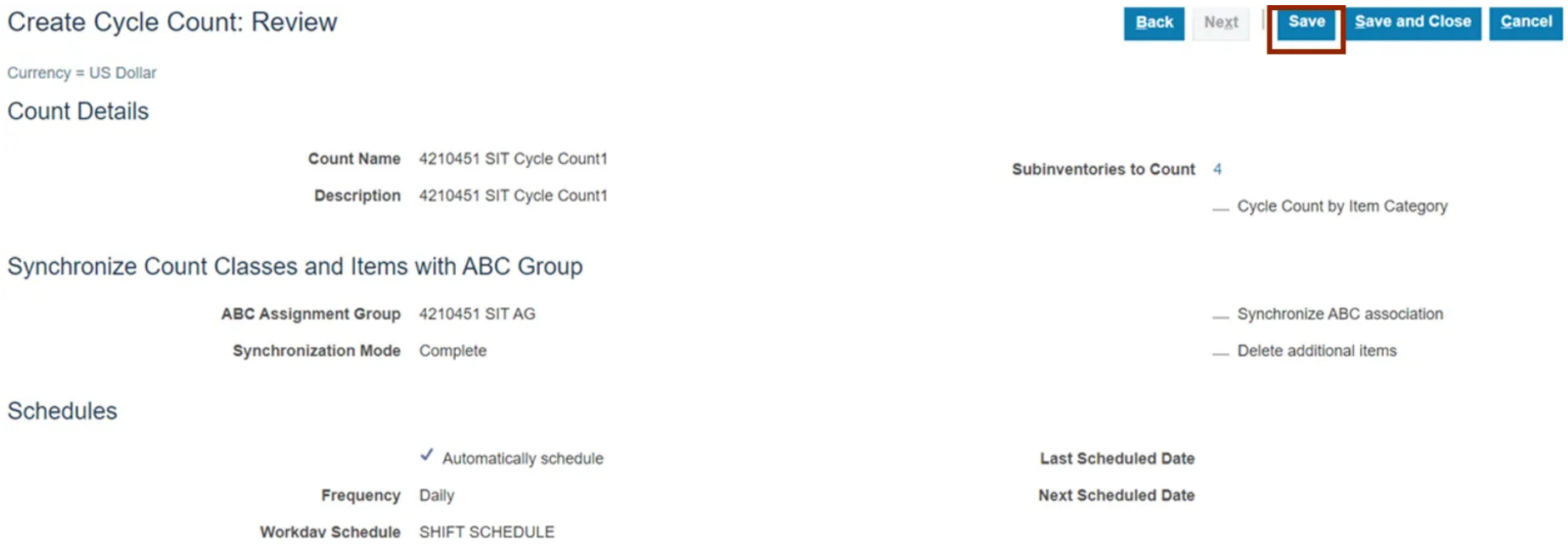
Step 14. Review the details of the cycle count created. Additional details can be viewed by scrolling down.

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Step 15. Click the **Save** button to save your cycle count.

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Wrap-Up

Create Counts using the steps above, to define cycle count and generate count sequences.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - AR101: Collections Management

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