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User Guide - mSupply Mobile

7. Stocktakes

mSupply Mobile will automatically keep track of your stock levels for you, as you receive stock and give it out. But sometimes data gets entered incorrectly or stock goes out without anyone making an entry in the system. Of course, we try not to let that happen - BUT if it does happen, we can make corrections. The easiest way to correct mistakes is to do a stocktake.

With mSupply Mobile, you can easily do the data entry for a full stocktake, OR you can choose to do a stocktake on a limited range of items (such as all your anti-malarials). You can even do a stocktake on a single item, if you notice that the quantity on your shelves is wrong.

Stocktakes

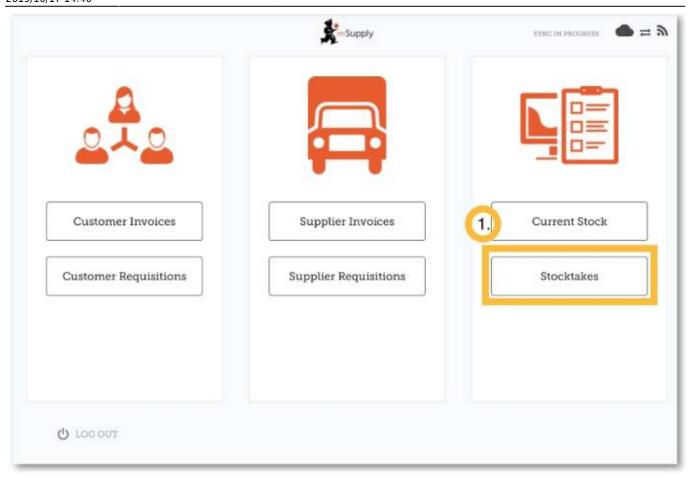
You should already be doing stock takes with your current ordering systems.



Stocktakes are a very important way to ensure that the orders we are placing are accurate and that the stock will be correct if anyone checks!

Ideally, you should be doing a physical stocktake of each item **EVERY** time you place a main order- but this depends on your local policies and procedures (and it may not be possible in larger facilities).

Let's learn how to do a stocktake... using mSupply Mobile makes doing stocktake a LOT easier than before.

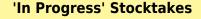


1. In the main screen, click on 'Stocktakes'

This brings up a list of all your previous stocktakes. The description of each Stocktake will be shown, with its date and 'Status'.

There are two stocktake statuses: In Progress (Current) and Finalised (Past).

An 'In Progress' stocktake is one you are still working on. If you want to keep working on an 'In Progress' stocktake, double click on it.



'In Progress' Stocktakes are the stocktake you are still working on, and haven't finalised.



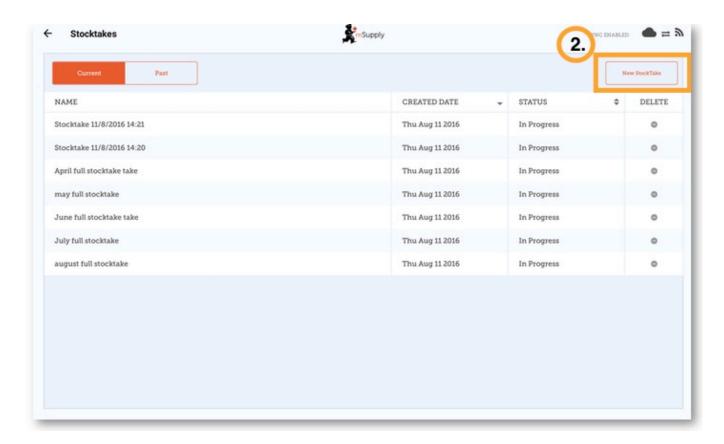
We **strongly** recommend only having one In Progress Stocktake at any time. This will prevent mistakes when moving between them.

Finalise or delete old stocktake before starting new ones!

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Let's start a new stocktake now...

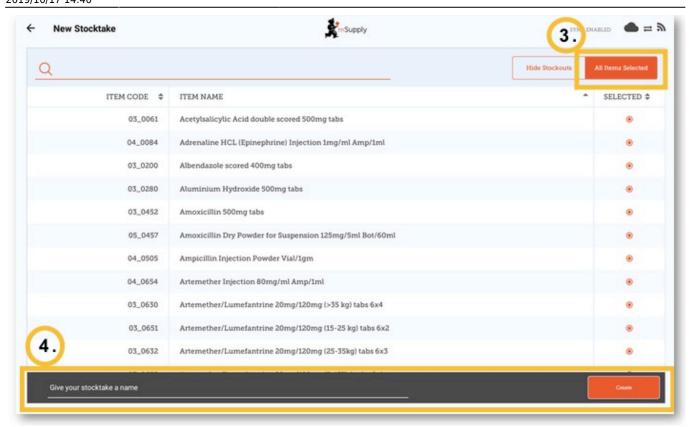
2. Click on 'New Stocktake'



3. Select the items that you wish to count by highlighting them in the far right column.

If you want to include EVERY item or most items, click 'All Items Selected'.

4. Give your stocktake a logical name, such as "April Full Stocktake'., and click CREATE.



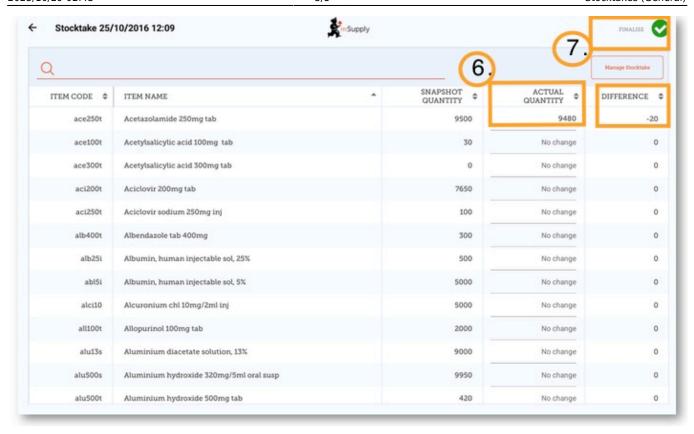
5.This will bring up the stocktake editor. This lists each item, its 'Snapshot Quantity' and its 'Actual Quantity' (from the physical count). The Snapshot Quantity is what the system THINKS you have. If it is correct (when compared with your physical count), you don't need to do anything!

The Actual Quantity is what you have actually counted. You can change this by clicking in that column and typing in the correct quantity.

6. Go through each item and compare your physical count with the Snapshot Quantity. Change each one you have to by clicking in the 'Actual Quantity' column. If you change the amount of stock you have in the **Actual Quantity** column, this variation will now show in the **Difference** column.

This can take some time but remember - if the Snapshot Quantity is correct, you don't need to do anything!

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7. When you are finished, click 'Finalise'.

This will update all your stock levels to match the quantities you have entered in the 'Actual Quantity' column.

Like always with mSupply Mobile, you don't need to be connected to the internet to do this - the information will sync in the background when internet becomes available.

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