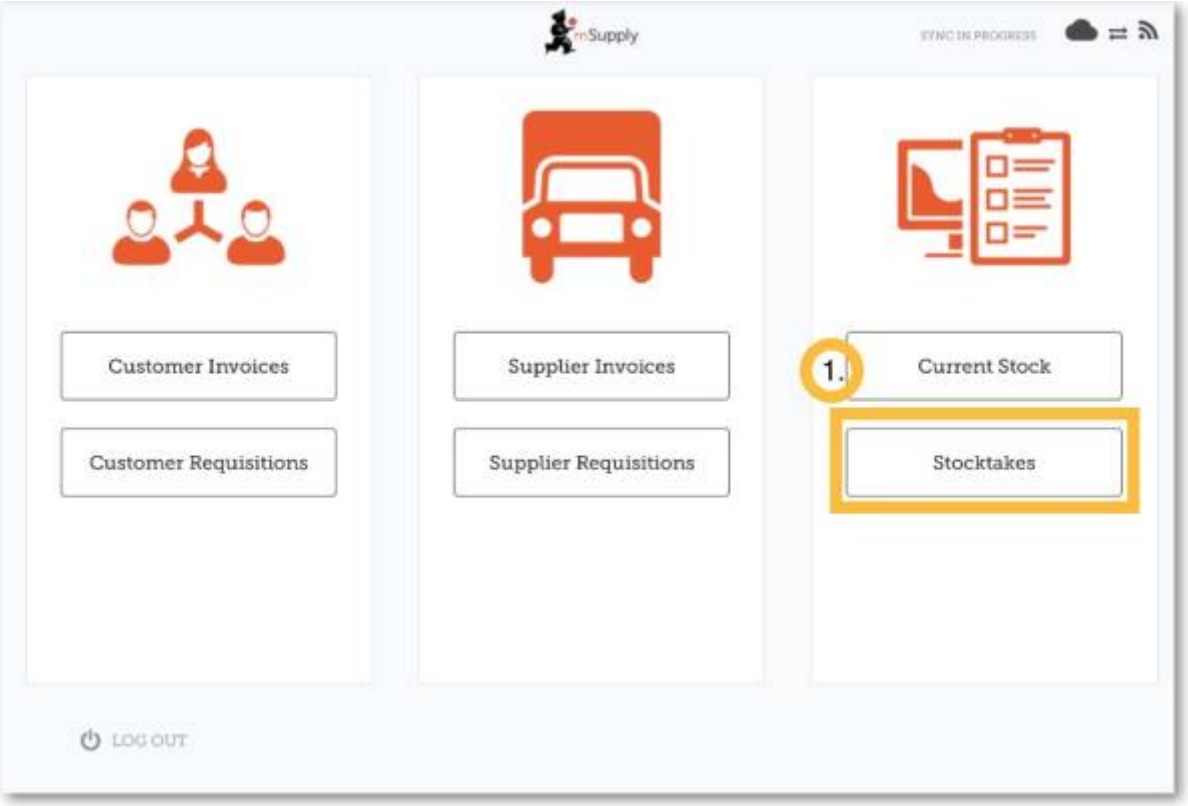
User Guide - mSupply Mobile

Stocktakes (Program)

You would like to perform a stocktake for all the items in a program.

You need to create a **Program Stocktake**, which will automatically populate your stocktake with items in the program.

Click on Stocktakes



When your store has access to at least one program, creating a Stocktake will prompt you to choose from either a **Program Stocktake** or a **General Stocktake.**
Note: In the **Program Settings** section of the master list - one of the **Tag**s must be assigned to the store you are working in.

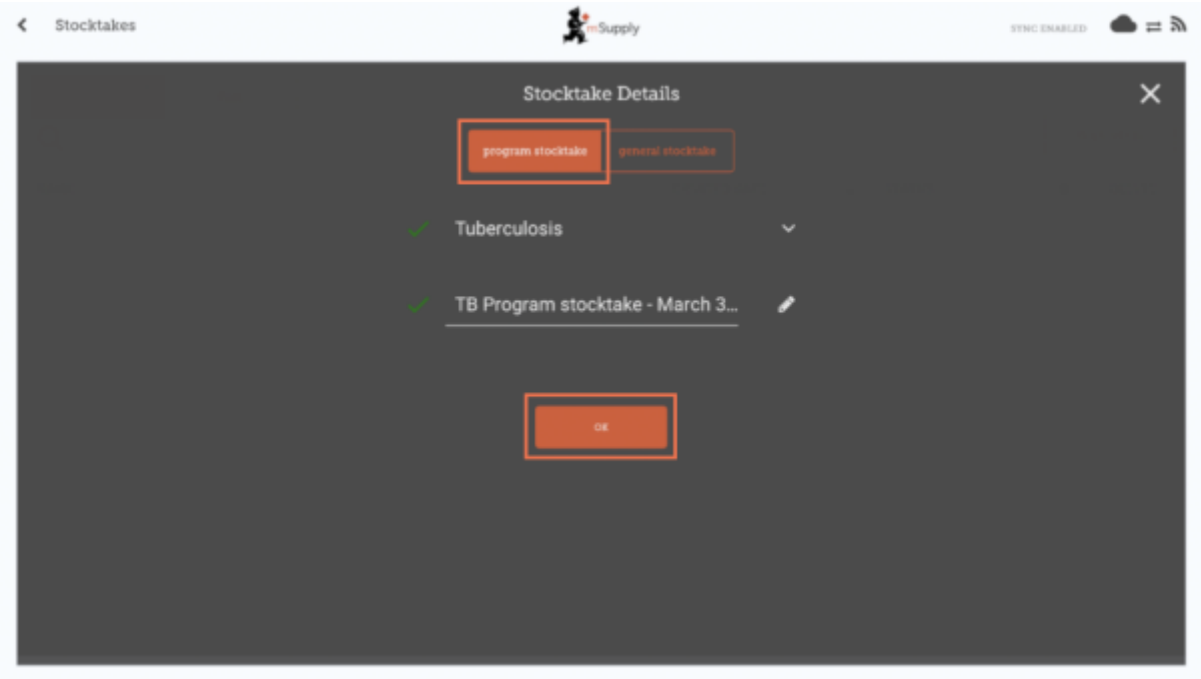
(To create a regular stocktake, click the **General Stocktake** button and continue as usual.)

Let's create a program stocktake...

Click on Program Stocktake

Select the **Program** from the dropdown list and give the stocktake a logical name.

Click **OK**.



This will bring up the Stocktake Editor

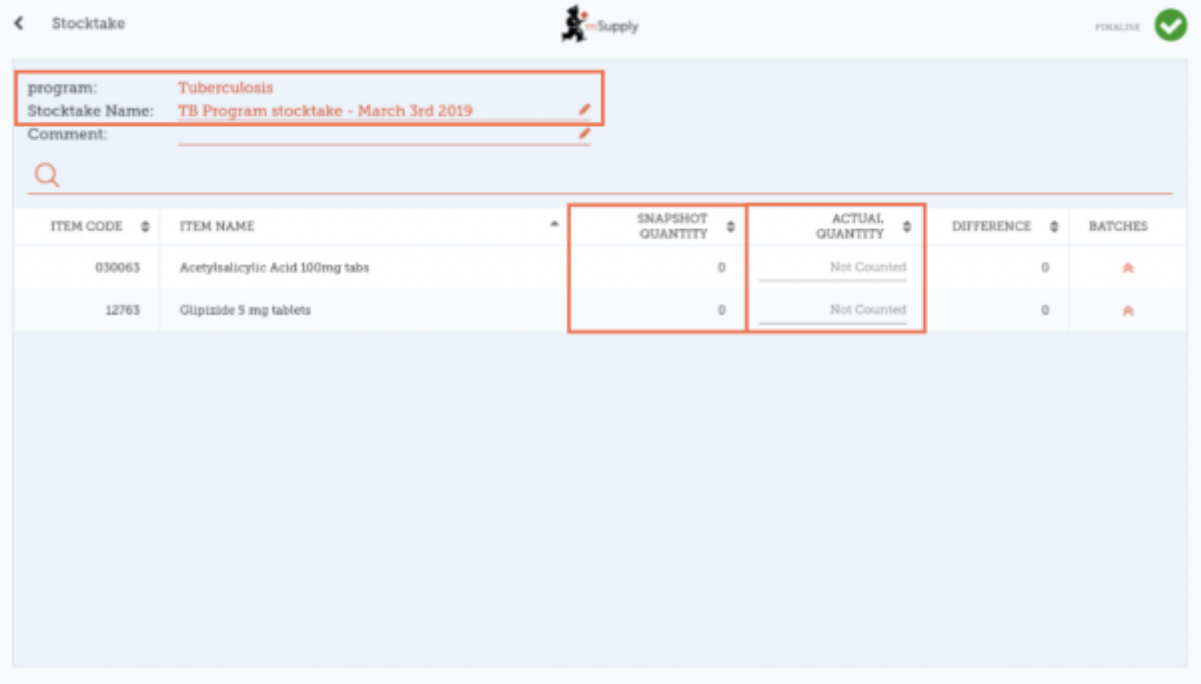
The stocktake is pre-populated with items from the program.

> You **cannot** add additional items to a Program Stocktake.

The Stocktake Editor 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.



For each item, compare your physical count with the Snapshot Quantity

Update incorrect item quantities 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.

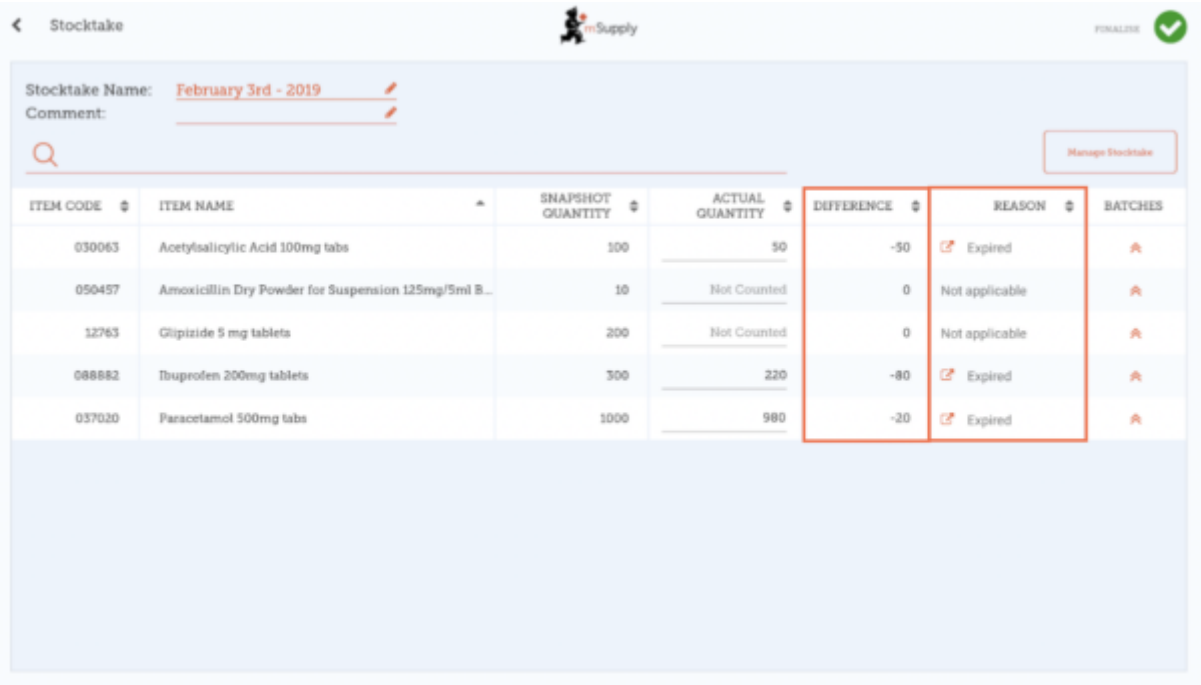
This can take some time but remember - if the **Snapshot Quantity** is correct, you don't need to do anything!

If prompted, enter a reason for inventory adjustments

If your stocktake screen shows a **Reason** column, you must enter a reason for any positive or negative inventory adjustments.

> **Options** must be enabled for **Stocktake Line Adjustments** on the mSupply desktop server and synced to mSupply Mobile to enable this feature.

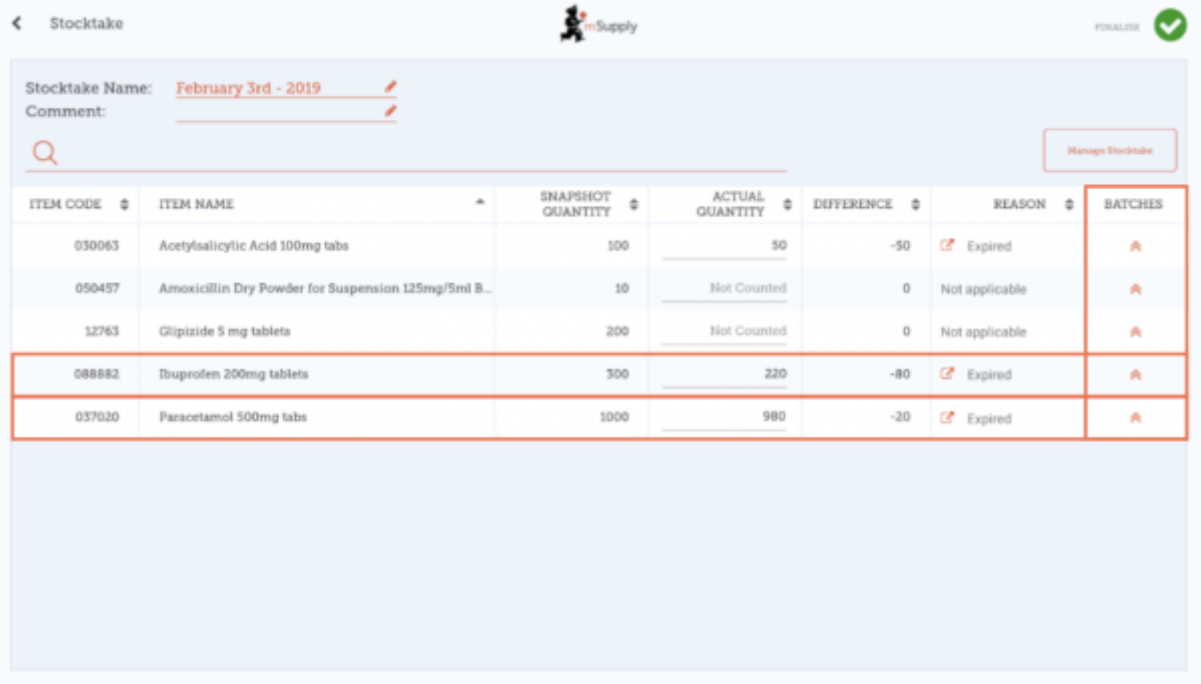
If the **Actual Quantity** entered is different from the **Snapshot Quantity**, you will be prompted to select a **Reason** for the **Difference** from a standard list. You will not be able to continue until a reason is selected.



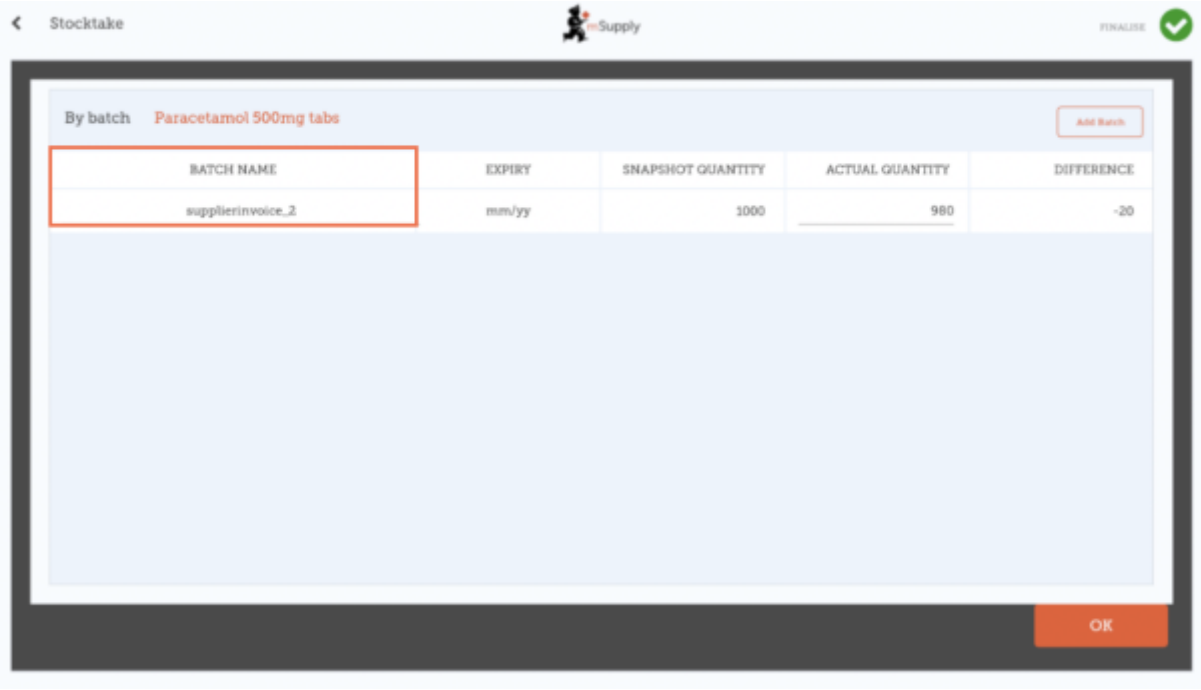
To change the reason, click on the cell again.

Edit batch-specific information

You can adjust batch-specific information or add new batches by clicking the item's **Batches** icon.

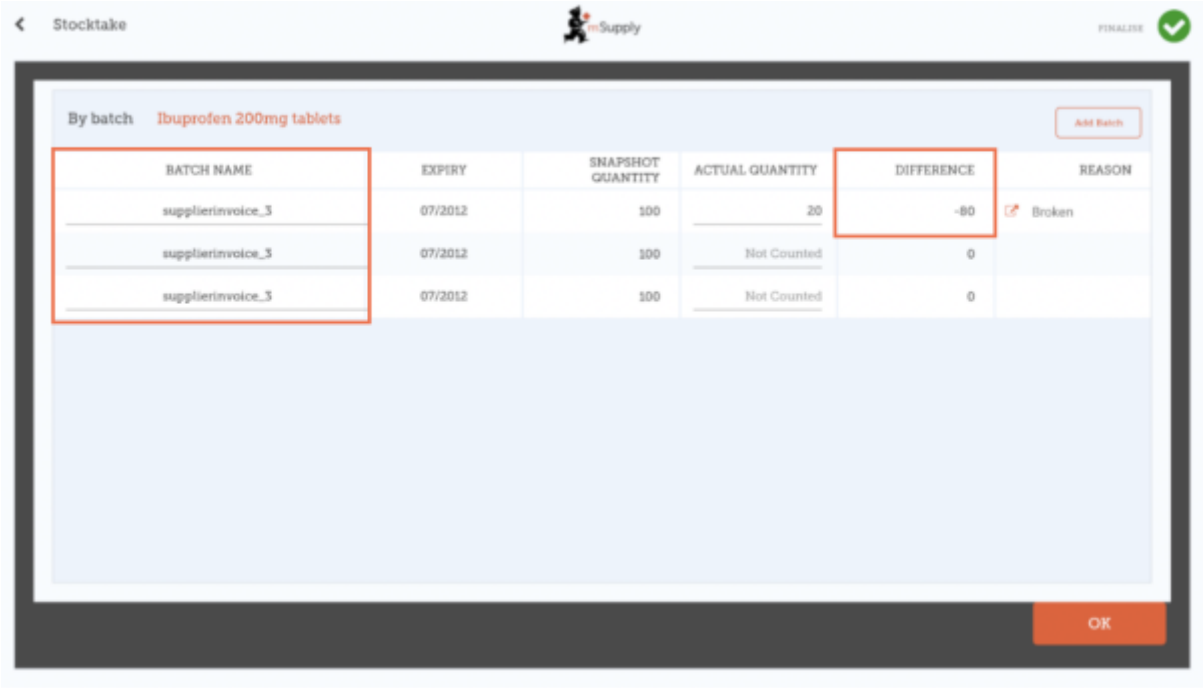


In this example there is only one batch of paracetamol.

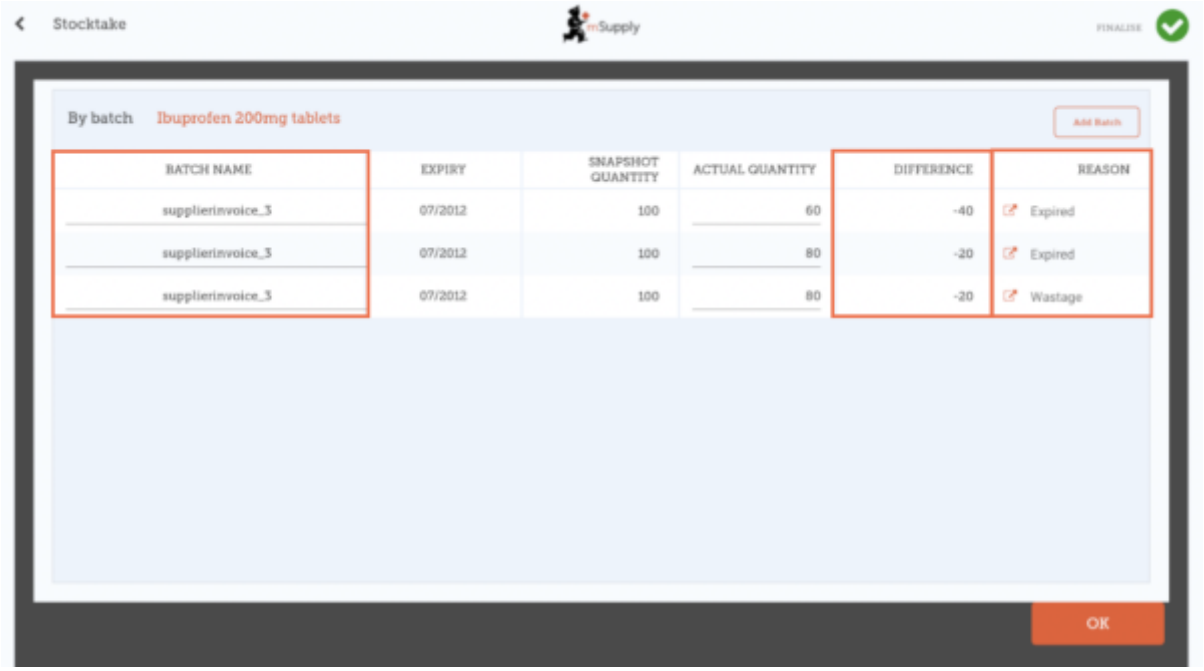


If there are multiple batches:

- **Inventory adjustments will be automatically made to the batch that arrived first (i.e. first in - first out).**
  - In this example there are three batches of ibuprofen. The **Snapshot Quantity** was 300 and the **Actual Quantity** was 220. The **Difference** of 80 was automatically taken away from the batch that arrived first. However, this can be manually changed in this screen.



- **The inventory adjustment reason selected will automatically apply to all batches.**
  - However, separate reasons for different batches can be manually changed in this screen. In this example we have updated the inventory adjustment of 80 among the batches of ibuprofen, with separate reasons for each batch.



When you are finished making changes in the **Batches** screen, click **OK**.

Note: The main stocktake screen will only show the most common reason among the batches for an item's inventory adjustment.

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.

Previous: ***Stocktakes (General)***	*Next:* ***The Mobile Dashboard***

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