PBE Exchange

Inventory Cycle Count

How it Works

Inventory Cycle Count is an optional feature that maintains accurate and up-to-date inventory levels by recording a product's open and closed containers. This can be quickly completed by scanning a product's bar code using the PBE Exchange mobile app. Once completed, the Inventory Cycle Count report can be emailed or viewed on the PBE Exchange desktop version.

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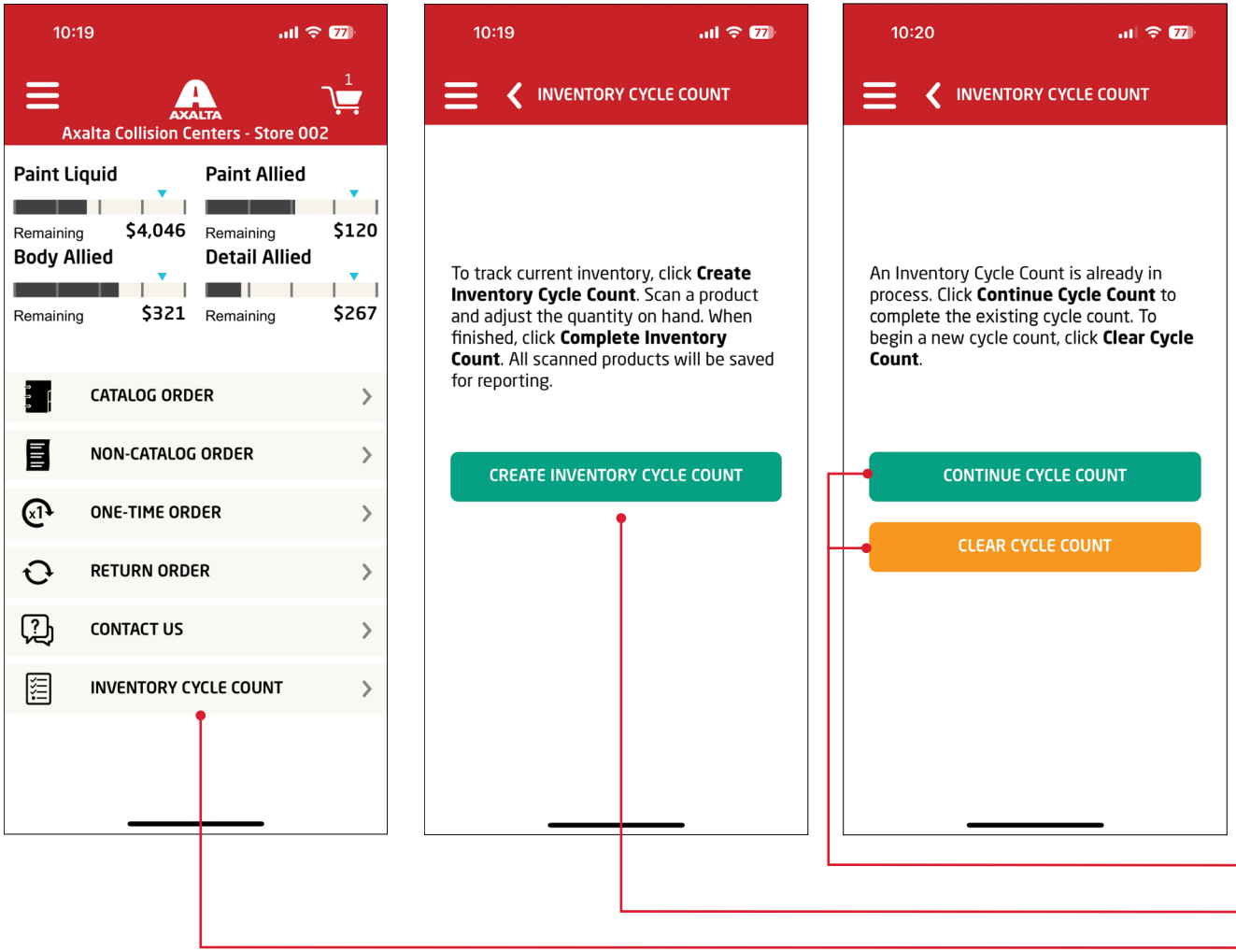
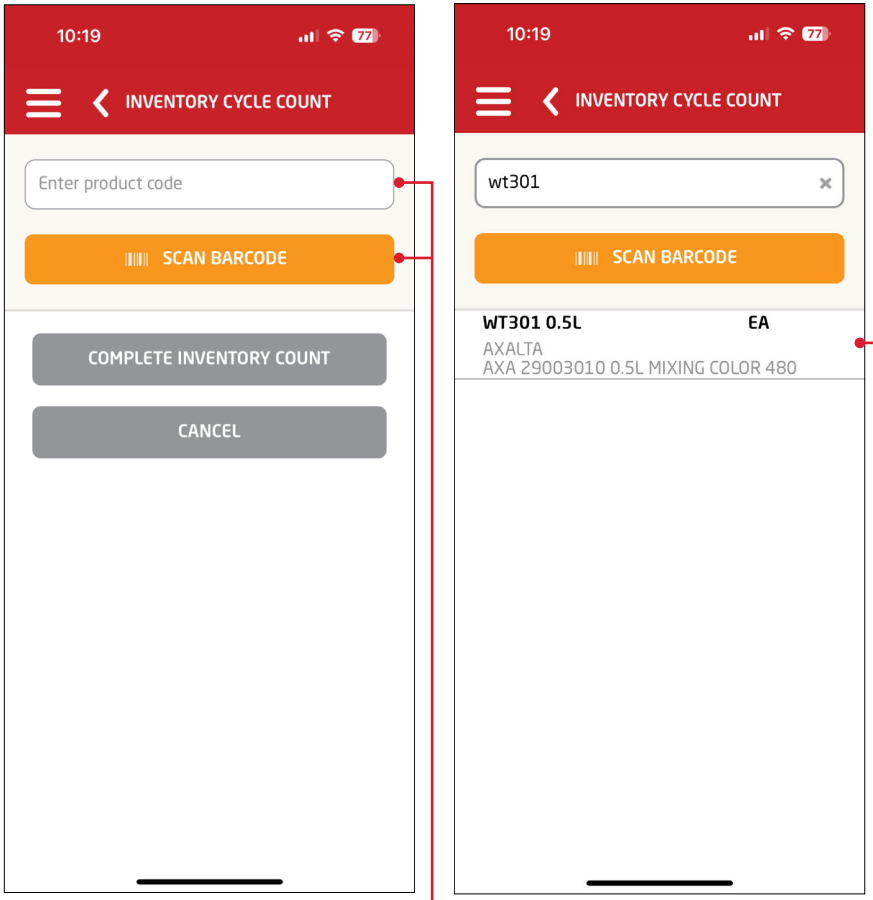


Getting Started with Inventory Cycle Counts

From the PBE Exchange Mobile App's home page, tap **Inventory Cycle Count**.

To begin a new cycle count, tap **Create Inventory Cycle Count**.

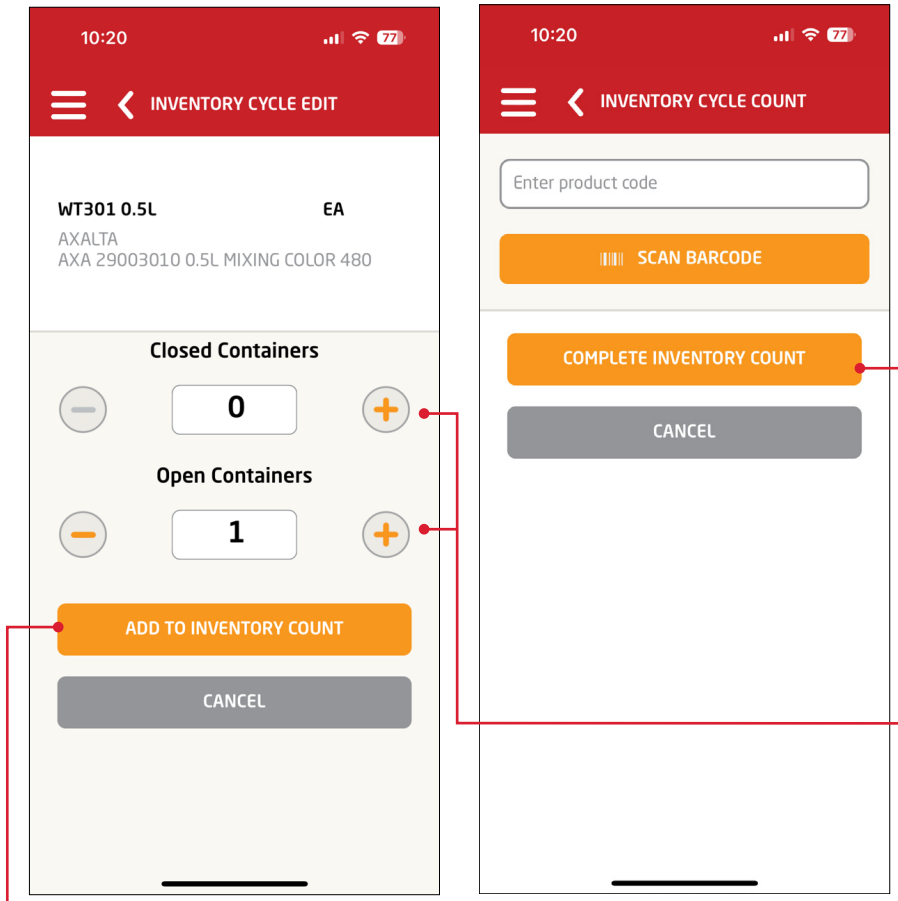
If a cycle count is currently in progress, a message appears to either click **Continue Cycle Count** or **Clear Cycle Count** to clear the current count and start a new one.



Adding Products

Enter a product code or tap **Scan Barcode** to find a product.

Tap on the product to add to the cycle count.



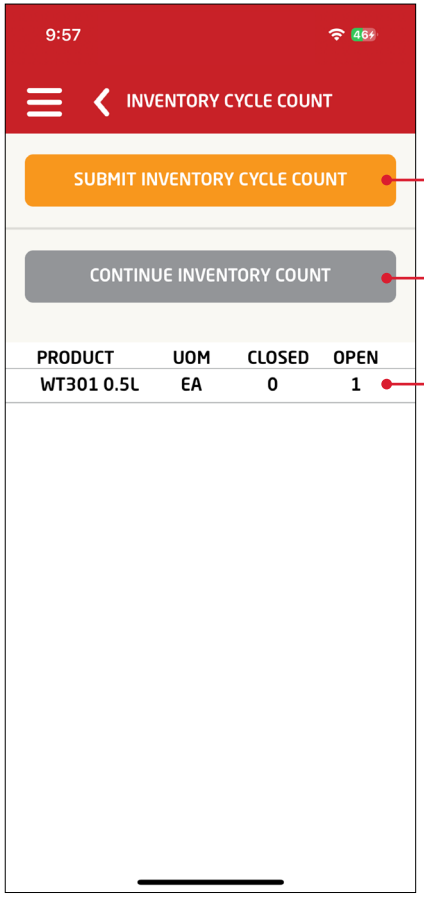
Adding Products

Using the -/+ buttons, select the number of **Closed Containers** and **Open Containers** for this product.

When finished, tap **Add to Inventory Count**.

Continue adding all products included in the inventory cycle count.

Once all products are added, click **Complete Inventory Count**.



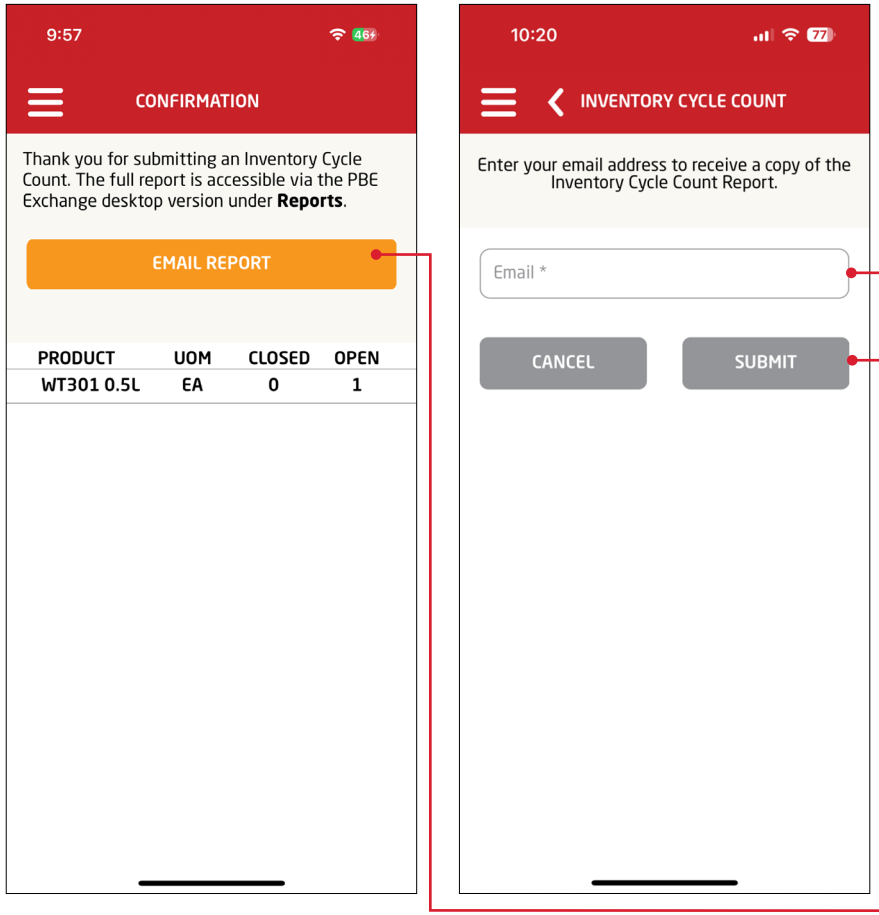
Submitting Cycle Count Data

Before submitting, review the Cycle Count data.

To edit a quantity, tap the product and edit the **Closed** and/or **Open** fields.

To add additional products, click **Continue Inventory Count**.

Once the product data is correct, tap **Submit Inventory Cycle Count**.

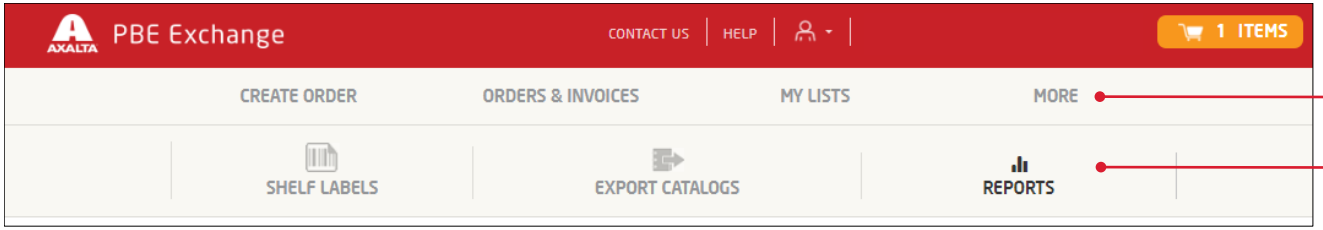


Emailing Report

A **Confirmation** page will appear. If you would like a copy of the report emailed to you, tap **Email Report**.

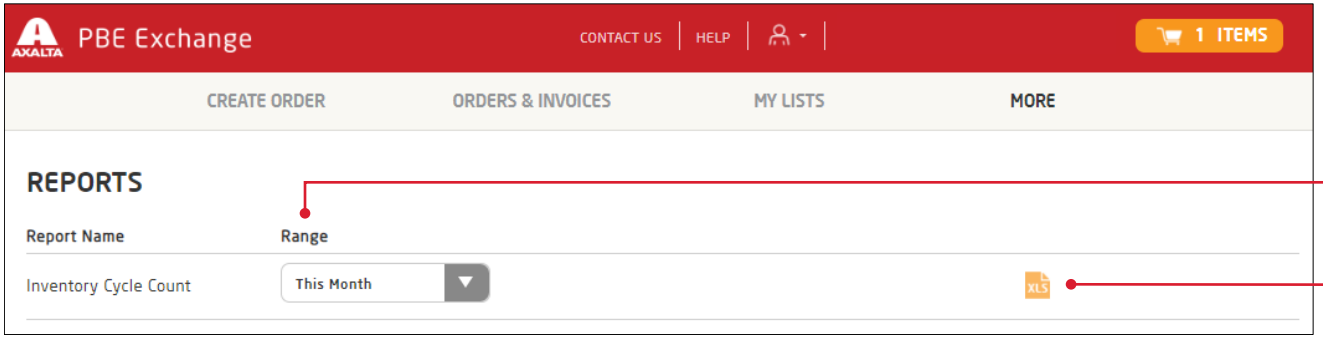
Type an email address in the **Email** field.

When finished, tap **Submit**.



Accessing the Report

From the PBE Exchange desktop version, click **More** in the header, then click **Reports** from the fly out menu.



Go to the **Range** field and make a time frame selection from the drop-down list.

Click the **XLS** icon to download the report.

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