



## Physical Count by Item User Manual

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Scanco Support Email - [support@scanco.com](mailto:support@scanco.com)  
Scanco Support Phone number - 330-645-9959 Opt. 3



## **Scanco Portal setting**

Scanco Portal will be referenced many times in this guide. The portal is where you make changes to the settings regarding how the programming functions.

The web address for the portal is: [Sales.Scanco.com](https://Sales.Scanco.com)

Your portal settings were setup during the installation and would have been \ will be refined during training.

Additional adjustments to the portal can be made by your System Administrator.

## **Scanco screens**

The screens included in this document are Scanco's Cloud version of Warehouse.

If you have Scanco Native version, the prompts are the same.

The icons or Buttons: in Scanco Native version are similar but different.



## Main Applications – Physical Count Icon

For Companies that do not have Multibin, the Physical count icon will take you into the Physical count program.

For Companies that have Multibin, the Physical count icon will take you to the screen on the next page.

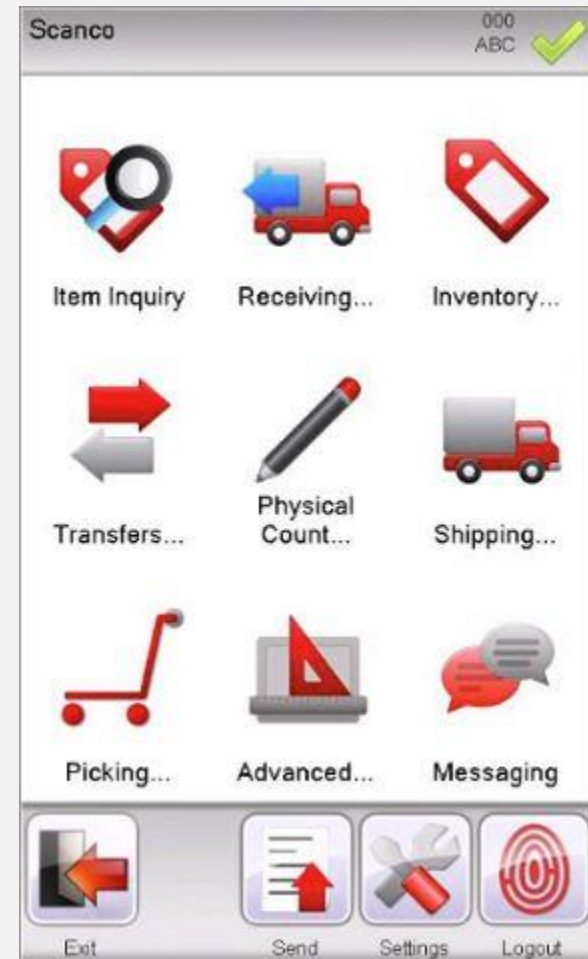
### Buttons

**Exit:** to exit Scanco Warehouse.

**Send:** to send all data collected in all applications.

**Setting:** to adjust settings.

**Logout:** to change users or companies.





## Count by Item

This document will explain Scanco Count by Item.

Choosing the Count by Item icon will move into the screen on the next page.

Count by Item is enable when the setting shown below is checked on the Physical Count tab in the Scanco Portal.

Allow Physical Count Activities

## Button

**Back:** to move back to Scanco Warehouse slash screen.





## Warehouse Prompt

Scan or Key in any valid warehouse code, or use lookup button to select one from a list.

This prompt will pre-fill with your default warehouse that is setup in the Scanco portal.

**Default Warehouse**

000 - ABC CENTRAL WAREHOUSE ▼

## Buttons

**Back:** to move back to Main Applications screen.

**Keys:** for on-screen keyboard.

**Lookup:** for seeing all available Warehouses accessible for use.

**Enter:** press after keying in data at Warehouse prompt.

The screenshot shows a mobile application interface for 'Count by Item'. At the top right, there is a status bar with '000' and 'ABC' next to a green checkmark. Below this, the 'Warehouse' prompt is displayed with the code '000' in a blue box and a red bar to its right. The main area of the screen is empty. At the bottom, there is a navigation bar with four icons: a house for 'Back', a keyboard for 'Keys', a magnifying glass for 'Lookup', and a red arrow for 'Enter'.



## Warehouse Lookup

This screen will display all warehouse that are enabled in the Scanco portal.

Warehouses

22 selected

Check all  Uncheck all

- 000 ABC CENTRAL WAREHOUSE(ABC)
- 001 001(ABC)
- 002 002(ABC)

## Buttons

**OK:** to move forward with the highlighted warehouse code.

**Cancel:** to move back to the warehouse code prompt.

Warehouse	Details
000	CENTRAL WAREHOUSE
001	EAST WAREHOUSE
002	WEST WAREHOUSE
002	WEST WAREHOUSE
003	003
003	003
004	004
005	005
006	006
007	007
008	008
009	009
010	010
011	011
012	012
097	RETURNS WAREHOUSE
098	SCRAP WAREHOUSE
099	REPAIR WAREHOUSE
RTL	RTL MP2

OK Cancel

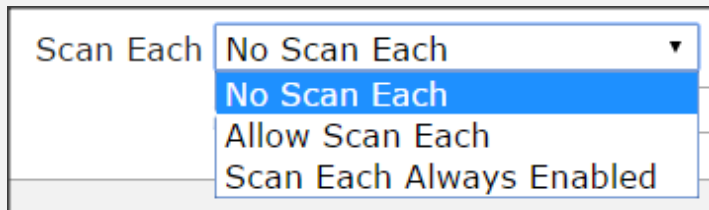


## Item Entry Prompt

Scan or key in any valid item at this prompt. Depending on setting in the Scanco portal you may or may not receive a message regarding items that are not frozen.

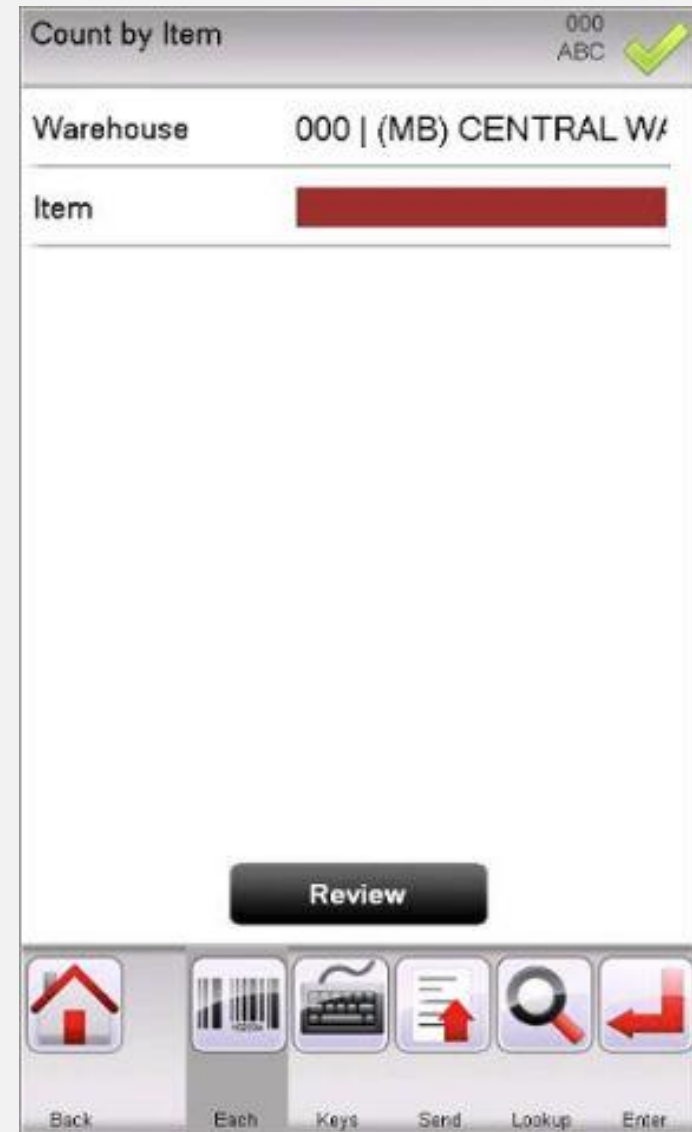
The Scan Each button is controlled by the option in the Scanco portal shown below.

- “No scan each” will remove the ‘Each’ button shown at the item prompt.
- “Allow Scan Each” will display the button and the user can turn it on\off.
- “Scan Each Always Enabled” will enable the button and the user cannot turn it off.



## Buttons

Explained on next page





## Freeze File Not Required

Checking freeze file not required will allow the entry of any item even if items are not frozen in Sage. This is a nice option for cycle counts when you want to let the user decide what will be counted. Items will be frozen when they are imported into Sage through the barcode import program.

- Freeze File not Required
- Allow Add Item to Freeze

## Buttons

**Review:** to enter review mode.

**Back:** to move back to Main Applications screen.

**Each:** available if 'Scan Each' is enabled in the Scanco Portal.

**Keys:** for on-screen keyboard.

**Send:** to send all data collected in Count by Item.

**Lookup:** for seeing all available Item for use.

**Enter:** press after keying in data at Item prompt.

The screenshot shows the 'Count by Item' screen. At the top right, there is a status bar with '000 ABC' and a green checkmark. Below this, the 'Warehouse' is set to '000 | (MB) CENTRAL W/'. The 'Item' field is currently blank and highlighted in red. At the bottom of the screen, there is a 'Review' button and a navigation bar with icons for 'Back', 'Each', 'Keys', 'Send', 'Lookup', and 'Enter'.



## Freeze File Required

Unchecking both option below will display the message shown on the right. To resolve, Items must be frozen in Sage before you can start scanning.

- Freeze File not Required
- Allow Add Item to Freeze





### Allow Add Item to Freeze File

Checking Allow Add to freeze file will display the message shown on the right. This is a nice option for cycle counts when you want to let the user decide what will be counted. Items will be frozen when they are imported into Sage through the barcode import program.

- Freeze File not Required
- Allow Add Item to Freeze





### Item Lookup without freezing first

The item lookup will show all items in the freeze file. If you do not freeze items in Sage, the list will grow as you collect and send items into Sage.

NOTE: The Item prompt + Item Lookup will filter possible items to be display if you enter a few characters of the item you wish to lookup, Example: entering 665 and pressing the Lookup button would display only 6655 on the list shown on the right.

### Buttons

**OK:** to move forward with the highlighted Item code.

**Cancel:** to move back to the Item code prompt.

Item	Details
2481-5-50	DESK FILE 5 1/4" CAP 50
6655	PRINTER STAND W/ BASKET
D1000	DESK 72" X 30"



The screenshot shows a mobile application interface for item lookup. It features a table with two columns: 'Item' and 'Details'. The first row is highlighted in red and contains '2481-5-50' and 'DESK FILE 5 1/4" CAP 50'. The second row is white and contains '6655' and 'PRINTER STAND W/ BASKET'. The third row is white and contains 'D1000' and 'DESK 72" X 30"'. Below the table, there are two buttons: a green 'OK' button and a red 'Cancel' button.



### Item Lookup when freezing first

The item lookup will show all items in the freeze file. If you freeze items in Sage, the list will most likely be large.

NOTE: The Item prompt + Item Lookup will filter possible items to be display if you enter a few characters of the item you wish to lookup, Example: entering 665 and pressing the Lookup button would display all items that contain '665' as shown on the list below.



Will display:

6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM
6652-28-24-15	SOUND CVR 28"W 24"D 15"H LQ
6655	PRINTER STAND W/ BASKET
6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H LQ

Item	Details
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK
1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/ LCK
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK
1001-HON-H254LK	HON 4 DRAWER LETTER FLE W/ LCK
2480-8-50	DESK FILE 8" CAP 50
2481-5-50	DESK FILE 5 1/4" CAP 50
2551-3-50	DESK FILE 3 1/2" CAP 50
2568-3-25	DESK FILE 3 1/2" CAP 25
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H
6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM
6652-28-24-15	SOUND CVR 28"W 24"D 15"H LQ
6655	PRINTER STAND W/ BASKET
6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H LQ
8953	UNIVERSAL 3 1/2" SSDD FLEX DSK
8971	UNIVERSAL 5 1/4" SSDD FLEX DSK
8972	UNIVERSAL 5 1/4" DSDD FLEX DSK
8973	UNIVERSAL 5 1/4" DSHD FLEX

At the bottom of the list are three buttons: a green 'OK' button, a red 'Cancel' button, and a white button with a red downward-pointing arrow.

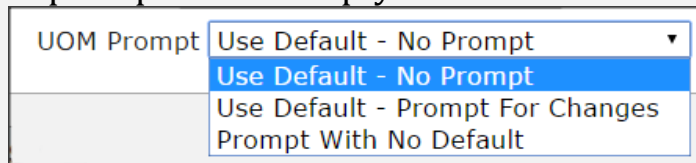


### Unit of Measure Prompt – optional

Scan or Key in any valid UOM, or use lookup button to select one from a list.

### Scanco portal options:

- No prompt: program will use Standard UOM, field will be display only.
- Use Default: This prompt will pre-fill with the item’s Standard UOM.
- Prompt with no default: the program will stop at the UOM prompt and be empty.



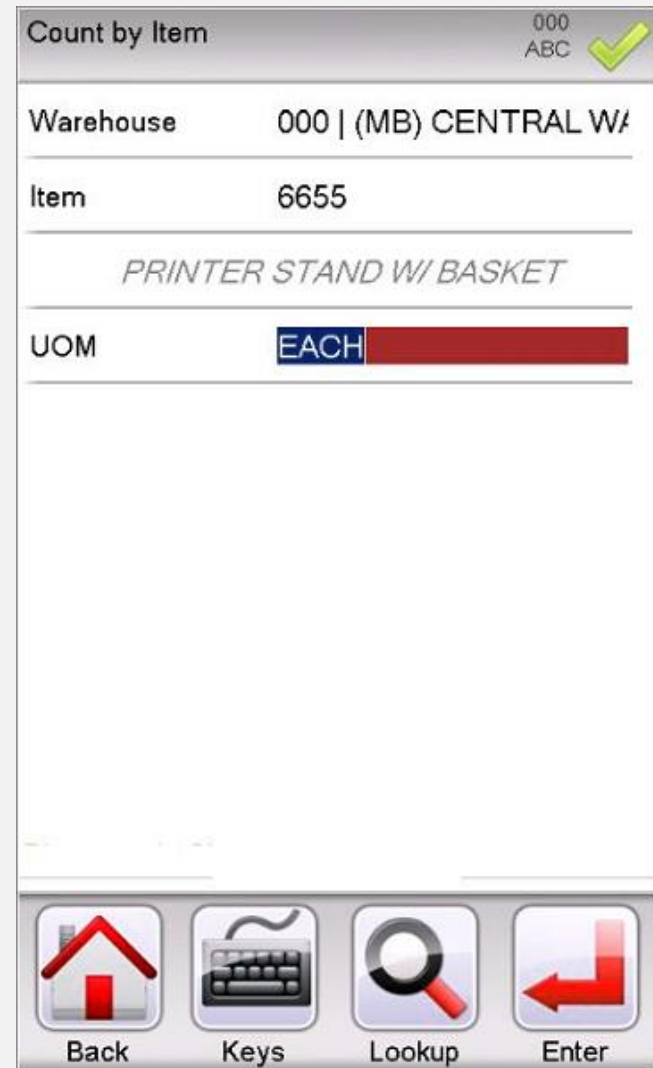
### Buttons

**Back:** to move back to Main Applications screen.

**Keys:** for on-screen keyboard.

**Lookup:** for seeing all available UOM.

**Enter:** press after keying in data at Bin prompt.





### Unit of Measure Lookup

The UOM lookup will show the items Standard, Purchase Order and Sales Order Units of Measure that are listed in Sage.

### Buttons

**OK:** to move forward with the highlighted Item code.

**Cancel:** to move back to the Item code prompt.

UOM
EACH
BOX
CASE

OK Cancel





## Bin Lookup

If your company has Multi-bin, then the bin lookup is available.

For Standard Sage non-multi-bin companies, the bin field will be a display only field. No lookup included.

Bin	Details
A10L	Empty
A10M	Empty
A20L	Empty
A20M	Empty
A20U	Empty
A30L	Empty
A30M	Empty
A30U	Empty
A40L	Empty
A40M	Empty
A40U	Empty
A50L	Empty
B10L	Empty
B10M	Empty
B10U	Empty
B20L	Empty
B20M	Empty
B20U	Empty
B30L	Empty
B30M	Empty

OK Cancel [Down Arrow]



## Quantity Prompt

Scan or key in positive numeric quantity are accepted at the quantity prompt.

## Buttons

**Back:** to move back to Main Applications screen.

**Keys:** for on-screen keyboard.

**Enter:** press after keying in data at Quantity prompt.

Count by Item		000 ABC
Warehouse	000   (MB) CENTRAL W/	
Item	6655	
<i>PRINTER STAND W/ BASKET</i>		
UOM	EACH	
Bin	A10L	
Quantity	<input type="text"/>	

Back Keys Enter



## Lot Prompt

Scan or key in lot numbers for lot controlled valuation product.  
NOTE: This prompt is not validated against Lot number in Inventory, discrepancy scans would be discovered in Sage's Physical Count Variance Register.

## Buttons

**Back:** to move back to Main Applications screen.

**Keys:** for on-screen keyboard.

**Enter:** press after keying in data at Lot prompt.

Count by Item		000 ABC
Warehouse	000   (MB) CENTRAL W/	
Item	2481-5-50	
	<i>DESK FILE 5 1/4" CAP 50</i>	
UOM	EACH	
Bin	A10L	
Lot	<div style="background-color: red; width: 100px; height: 15px;"></div>	

Back

Keys

Enter



## Lot Quantity Prompt

Scan or key in positive numeric quantity are accepted at the quantity prompt.


## Buttons


**Back:** to move back to Main Applications screen.


**Keys:** for on-screen keyboard.

**Enter:** press after keying in data at Quantity prompt.

Count by Item		000 ABC
Warehouse	000   (MB) CENTRAL W/	
Item	2481-5-50	
	<i>DESK FILE 5 1/4" CAP 50</i>	
UOM	EACH	
Bin	A10L	
Lot	78894	
Quantity	<input type="text"/>	

  
Back

  
Keys

  
Enter





### Serial Prompt “Qty Scanned” Display

As shown on the right after the first serial number is collected, the “Qty Scanned” field has accumulated +1.

NOTE: This prompt is not validated against Serial number in Inventory, discrepancy scans would be discovered in Sage’s Physical Count Variance Register.

Count by Item		111 ABC
Warehouse	000   (MB) CENTRAL W/	
Item	GB-MD750	
	<i>MODEM 9600 (SYNCHRONOUS)</i>	
UOM	EACH	
Bin	A10L	
Qty Scanned	1	
Serial		

Back

Keys

Send

Enter



## Send data collected

The 'Send' button at the item prompt should be pressed periodically to add items into Sage Physical Count Entry.

Suggested send times:

- After counting 20 items.

- After counting a row of bins.

- Before going on break.

- When completely finished counting.

## Buttons

**Yes:** will send data collected to Sage to be imported.

**No:** to cancel send.

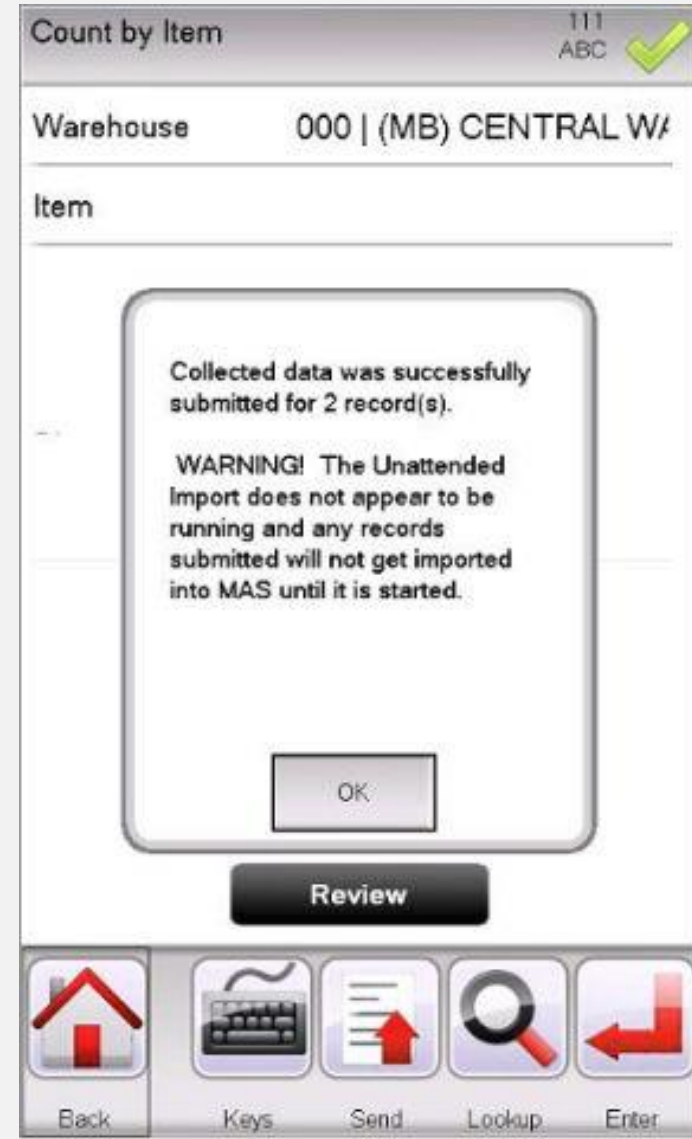




### Send Completed –warning about Barcode Import

After confirming “Yes” to sending collected data you may receive a warning message that the Sage Unattended Barcode Transaction Import is not running. Check with your warehouse manager to see if this has accidentally been stopped or not started on purpose. Data collected will not be in Sage’s Physical Count Entry screen and not included in the Sage Physical Count Variance Register until it is imported.

Press ‘Ok’ to continue.





**Send Completed** Press 'Ok' on this confirmation message to continue.

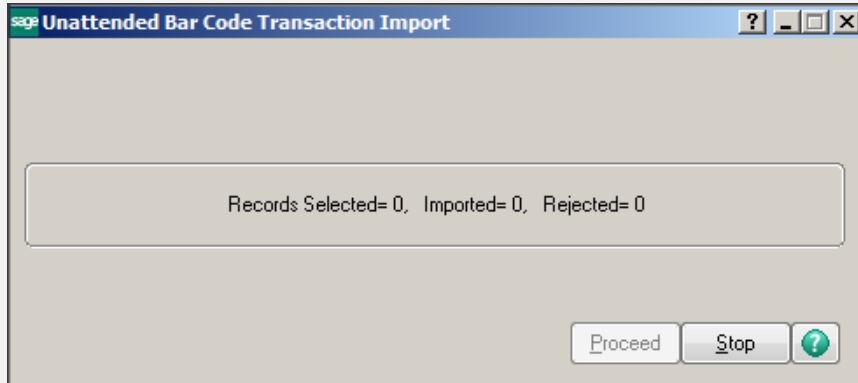
The Sage Physical Count Variance Register will show inventory count discrepancies which can be addressed in several ways.

1. If the item count is low, you can recount the item and add any missing quantity which will accumulate into the existing count.
2. If the item count is low, you can reset the quantity counted in Sage's Physical Count Entry screen and recount the item.
3. If the item count is high, you can reset the quantity counted in Sage's Physical Count Entry screen and recount the item.
4. If the item count is low, you can adjust the quantity counted in Sage's Physical Count Entry screen.





**Sage Unattended Barcode Transaction Import:** must be running for real time entries to be created in Sage Inventory Management module > Physical Count Entry > Physical Count Entry



**Where the goes in Sage**

