

# How To Create Inventory Count Sheets

If you are looking to create your own count sheets to be used for inventory, just follow these easy steps!

1. Go to Inventory < Manage Inventory.
2. Choose Export Grid from the far right-hand corner of your Manage Inventory screen.

The screenshot shows the 'Manage Inventory' screen. On the left, there's a sidebar with navigation links: Home, Order Guides, Order History, Shopping Lists, Receiving, Inventory (which is selected and highlighted with a red circle containing '1'), and Classifications. The main area has a header 'Manage Inventory' and a sub-header 'Last closed Aug 14, 2024 at 4:29 AM by Amie Shuford'. It features a 'Locations' dropdown with options like 'All Locations', 'BOH', 'JANITORIAL ORDER GUIDE', 'FOH ORDER GUIDE', and 'PORTER STOCKING PAR LIST'. Below this is a table with columns: SEQ, DIST#, ITEM DESCRIPTION, PRICE TYPE, UOM, PRICE, and INV COUNT. A search bar 'Search By Location' is also present. In the top right, there are buttons for 'Actions' and 'Valuate & Close Inventory'. A red arrow points to a 'More Options' button (three dots) which has a red circle with '2' over it, and a red box highlights the 'Export Grid' option in the dropdown menu.

Next, you'll customize exactly what you want to export and how you want it laid out on the export.

**Export Grid**

X

LOAD SAVED TEMPLATE

Select Saved Template

1 CREATE NEW GRID TEMPLATE

**SELECT PARAMETERS FOR EXPORTING**

**Export Grid**

X

LOAD SAVED TEMPLATE

Select Saved Template

DELETE NEW GRID TEMPLATE

New Grid Template Name\*  
Inventory Count Sheets

Weekly count sheets to be used for inventory

2  
3

1. Choose Create New Grid Template (This will save it for the next time you go to export your inventory.)
2. Give it a name. (i.e. Inventory Count Sheets)
3. Give it a description. (This is optional.)

Next, choose your file format.

SELECT PARAMETERS FOR EXPORTING

File Format\*

Excel

PDF

Comma-Separated



Now, you'll start choosing what you'd like to include on your export.

1. Click on Column Headers
2. Choose the headers you'd like.  
\*Make sure you hit Apply once you are done selecting headers.
3. Key in the number of blank columns you'd like, if any.
4. Choose what you'd like it sorted by.
5. Choose the sort order.

The screenshot shows two overlapping windows: 'Column Headers' on top and 'Export Grid' below it.

**Column Headers Window:**

- Search bar: Search for column name
- Buttons: CLEAR ALL and SELECTED(7)
- List of columns:
  - Seq (checked)
  - Dist # (checked)
  - Item Description (checked)
  - Price Type (unchecked)
  - UOM (checked)
  - Price (checked)
  - Inv Count (checked)
  - Last Inventory QTY (checked)
  - Distribution Center (unchecked)
  - Total Price (unchecked)
  - Pack Type (unchecked)
  - Attributes (unchecked)
  - Status (unchecked)
  - Brand (unchecked)
  - MFG (unchecked)
  - MFG # (unchecked)

A red circle with the number 2 is positioned over the checked items in the list.

**Export Grid Window:**

- Select Saved Template dropdown
- Delete New Grid Template button
- New Grid Template Name: Inventory Count Sheets
- Weekly count sheets to be used for inventory
- Select Parameters for Exporting:
  - File Format: Excel
  - Column Headers: Seq + 6 (highlighted with a red circle containing 1)
  - Separate Combined Data Elements From Grid checkbox
  - Number of Blank Columns: 4 (highlighted with a red circle containing 3)
  - Sort By: Seq (highlighted with a red circle containing 4)
  - Sort Order: Ascending (highlighted with a red circle containing 5)





Lastly, choose your grouping ("None" will export your inventory in sequential order by Location) and hit Create New Template.

Once that's done, you'll then have the option to Export.

The screenshot illustrates the process of creating an inventory export template. It shows three main components:

- Grouping Panel:** On the left, under the heading "GROUPING", it says "You can select up to 3 different groupings". It lists four categories: Group 1 (Group By: None), Group 2 (Group By: Classification), Group 3 (Group By: Distribution Center), and Group 4 (Group By: Brand). A red box highlights the "Group By: None" dropdown in Group 1. At the bottom are "Cancel" and "Create New Template" buttons, with a red arrow pointing to "Create New Template".
- Export Context Menu:** In the center, a context menu is open over a "Sort Order" section. The menu includes "Export" (highlighted with a red box), "Save Changes", "Edit Name", and "Delete". A red arrow points to the "Actions" button at the bottom of the menu.
- Sample Export File:** On the right, a grid table titled "Grouped by: Classification" shows sample inventory data. The columns are: Grouped by: Classification, Seq, Dist #, Item Description, UOM, Price, Inv Count, Last Inventory Qt, Blank 1, Blank 2, and Blank 3. The data includes items like DINNER ASST KOSHER MEAL, Apple, KNIFE PLAS COMSP 6 IN IND WRPD, WIPER TOWEL 13.5X21 CLTH LKWH, FORK PLAS COMSP 7 IN IND WRPD, SPOON PLAS SOUP COMSP IND WRPD, and TOWEL WIPE SANI 95CT.