CHAPTER 24 - CYCLE COUNTING.....2

CHAPTER 24 - CYCLE COUNTING

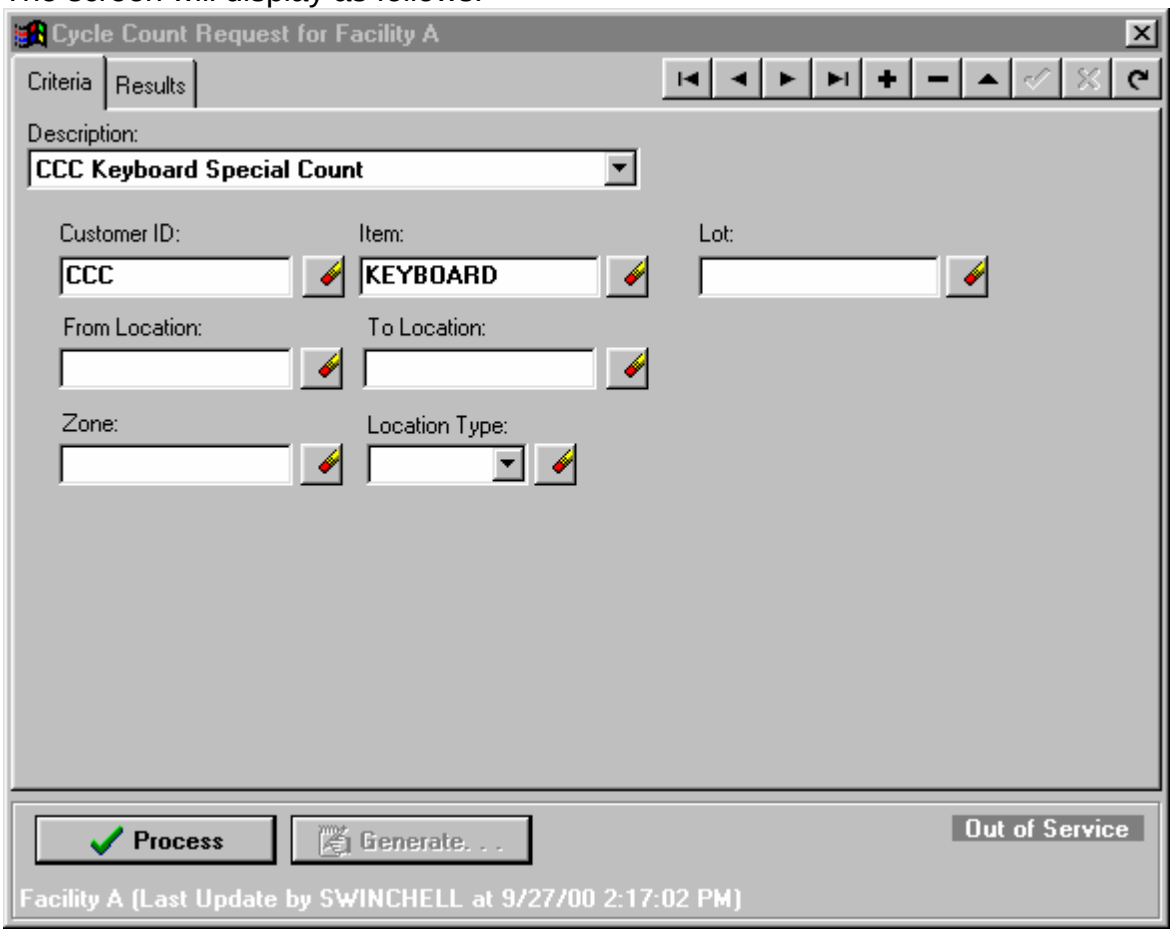
Cycle counts are logical counts of selected items or locations that allow the user to verify those logical counts against warehouse physical counts.

Cycle Count Request

These screens will allow the user to define parameters for a cycle count at a template. The user also has the option to create cycle counts tasks immediately.

From the Requests Menu, select Update Requests, and then click on Cycle Count.

The screen will display as follows:



Cycle Count Request/Criteria

Decide on whether to use an existing template or if a new one needs to be created.

HINT: **To help make the decision, view existing templates by positioning the cursor in the description field and double clicking to view the drop down box.**

Select an existing template by double clicking on the specific template or create a new one by clicking on the  .

If creating a new template, enter a description of the cycle count to be performed. This is a free text field. The description should be of some meaning of identification to the user. Skip this step if an existing template, is being used.

Tab to the customer field. In the customer field, type in the customer ID. If the customer ID is unknown, double click and a drop down box will appear.

To request counts for a range of locations, enter location ID's in the From and To Location Boxes. Leaving the To Location field blank will only create tasks to count at that location.

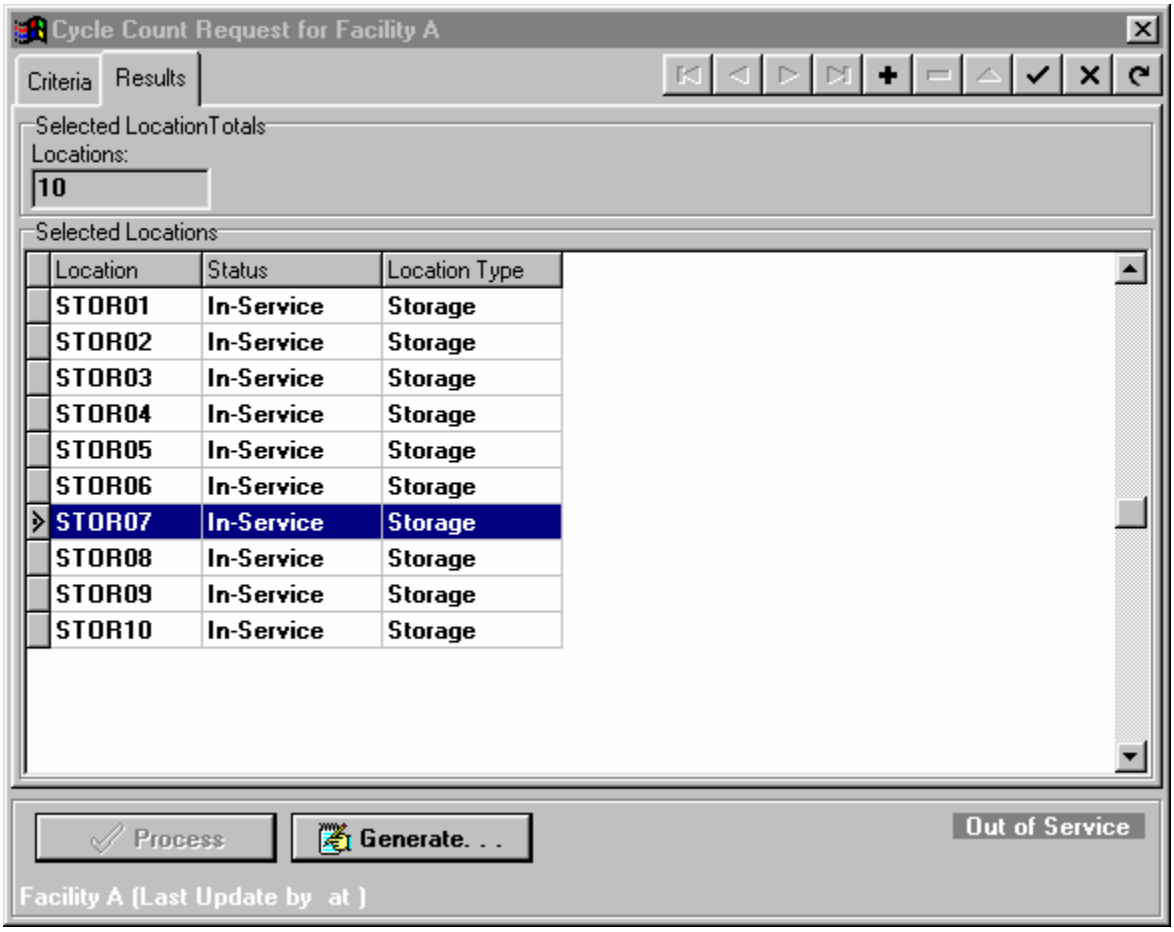
To generate a request on a specific customer, item, zone, location type, or lot, enter that information in the specific field. Leave all the other fields blank. These are considered "more specific parameters". They have an "and" relationship. Only if all non-blank parameters are fulfilled, the results will include the location(s) entered in Step 6.

HINT: **When using an existing template and changes are needed to any of the criteria (item etc.), after changing the information, click on the  to update the information.**

Click on the 

button to have SYNAPSE handle the request.

The screen will display as follows:

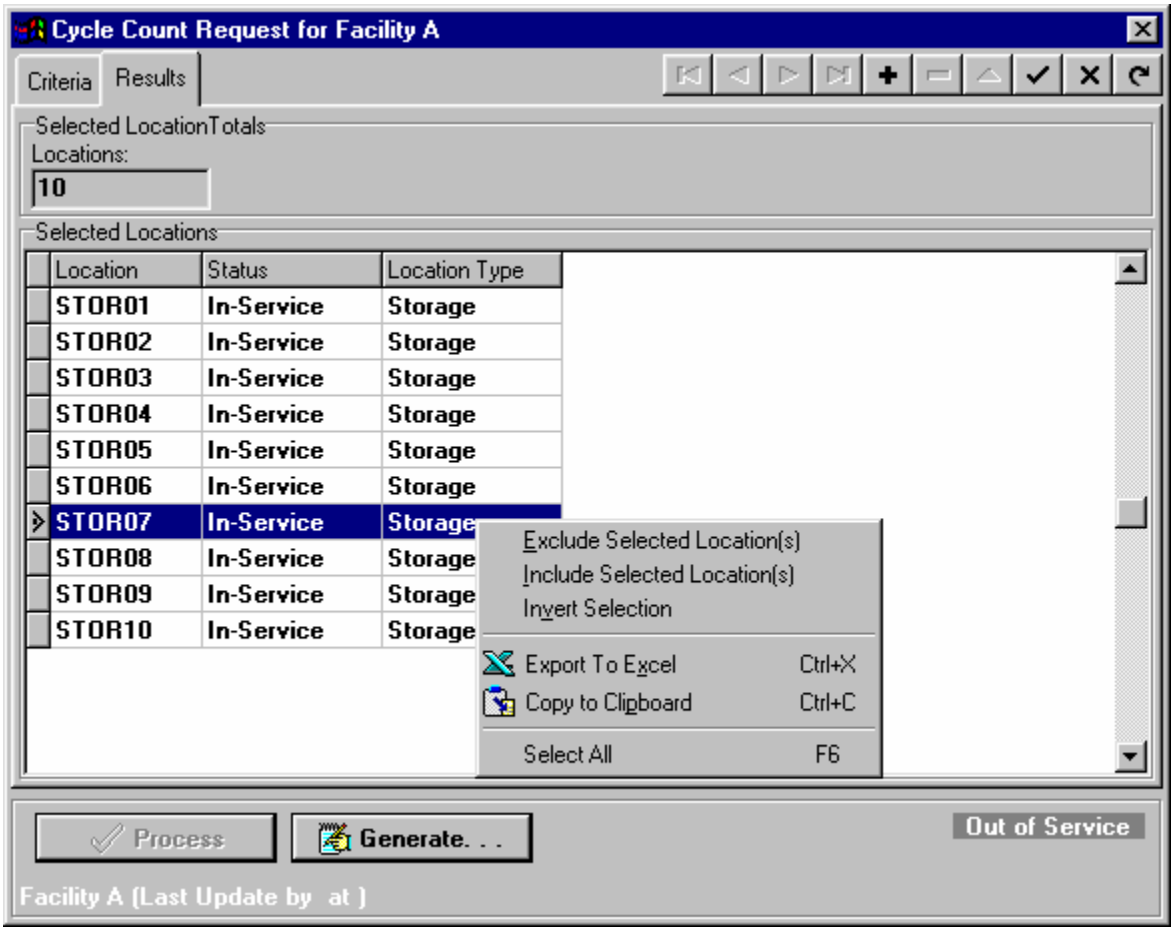


Cycle Count Request/Results

On the Results Tab, SYNAPSE will display the outcome of the request.

Review the results. Note that the shaded Locations box in the upper right will display the total number of locations returned by SYNAPSE processing.

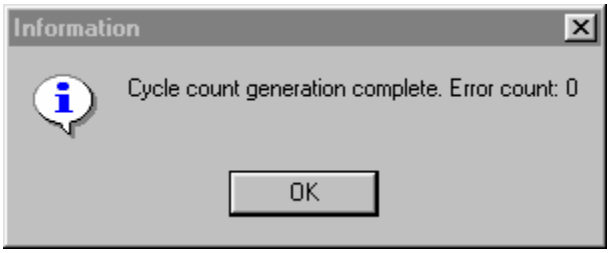
The Results screen will display as follows:



To include or exclude locations to be counted, right click the mouse. Highlight the row on the grid to be processed and select the Exclude Selected Locations(s) options. Continue until desired rows are processed. To do the reverse, select the Invert Selection option and then highlight a row on the grid, and select the Include Selected Location(s) option. Continue until desired rows are processed.

Review the results of the request. If acceptable, click on the  button to build the cycle count tasks.

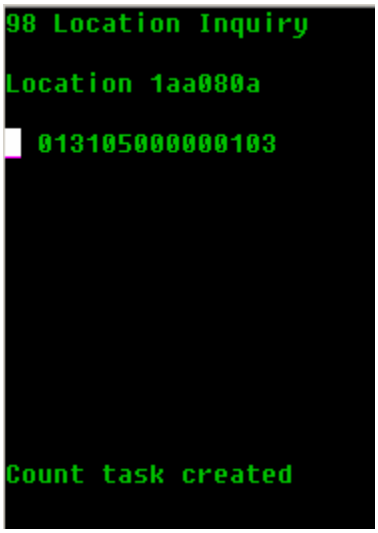
A message window will display stating the generation of cycle counts is complete:



Click on the “OK” button when the cycle count generation is complete.

Generating Cycle Counts from RF

The RF also has the ability to request a cycle count. To perform this option, the RF operator accesses the Location Inquiry screen (RF Option 98). Once in the screen, the RF operator presses F6.



Performing the Cycle Counts via the RF system

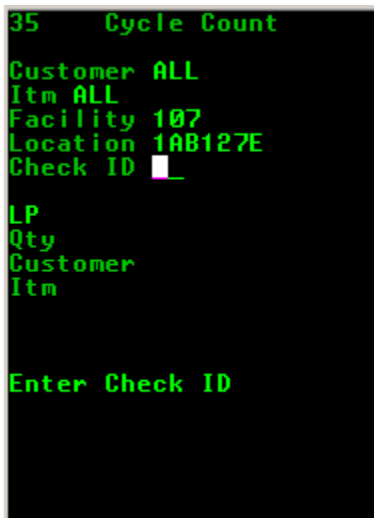
Select Work (option 30) from the SYNAPSE RF Main Menu.

The Work Menu will display as follows:

Select Cycle Count (option 35) from the RF Work Menu.

- SYNAPSE will assign a cycle count task based on the order that was entered into the system, the location of the user and the priority of the cycle count tasks.

The Cycle Count screen will display as follows:



Proceed to the location indicated. Enter or scan the location Check ID.

Scan in the LP. If the location is empty, press the F4 key.

Count the item and enter the quantity in the QTY field.

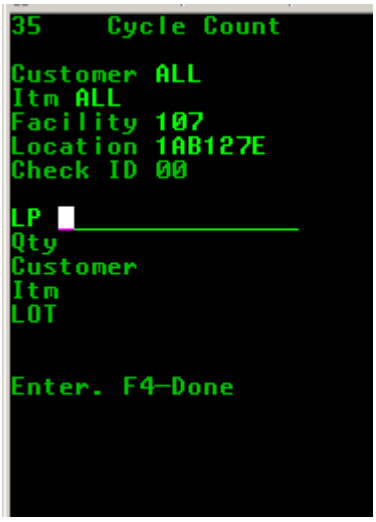
Scan or type the Customer ID in the Customer field.

Scan or enter the Item ID in the Itm field.

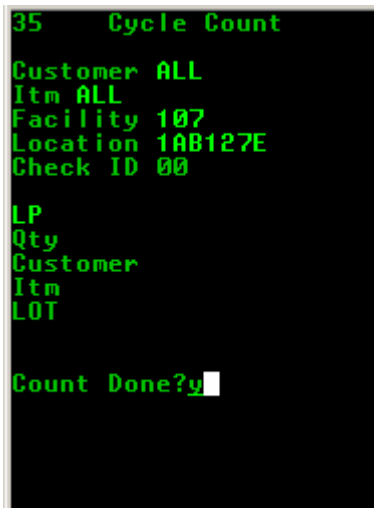
Hit the Enter key. If any other attribute is required, such as Lot number, the user will be prompted to enter this information also.

Continue counting the location until all the items have been counted and entered.

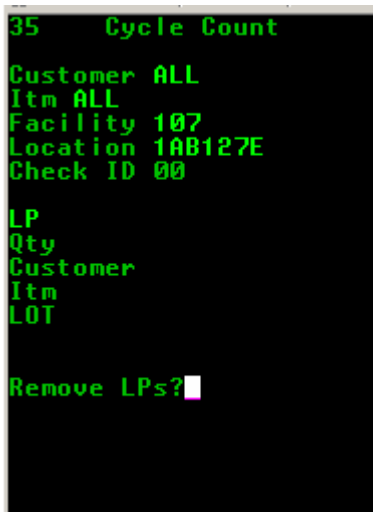
When the count task for the location is complete, hit the F4 key.



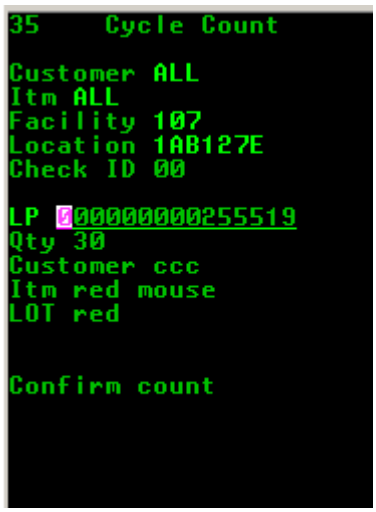
The system will ask the user to confirm that the counting is done, enter Y at the “Count Done ?” prompt.



If the user did not count an LP that Synapse expected, the user will receive a message, 'Remove LPs?'. This message lets the user know that there is an LP that is unaccounted from the count in the location. If the user realizes that they missed a pallet, then the user can answer 'N' and continue to enter the LP and information. If the user has entered all of the LP's, then the user can answer 'Y'. The system will remove the missing LP from the location and put it into a location called SUSPENSE. It does not remove the LP from inventory. See section on Suspense for further details.

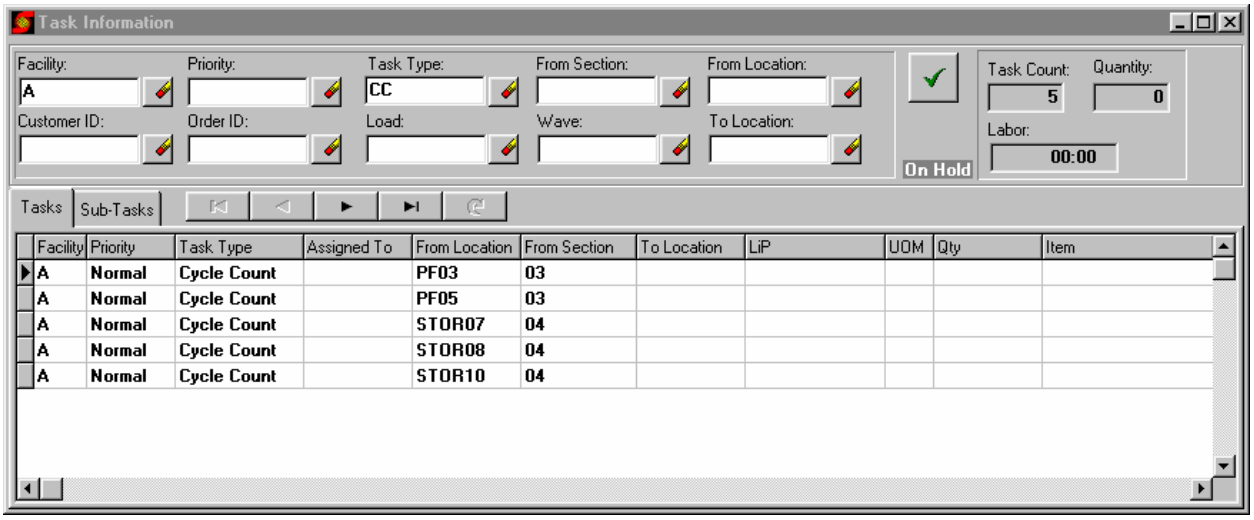


If the quantity entered on the count is different than what Synapse expected, the user will receive a message 'Confirm Count'. This lets the user know that there is a discrepancy. If the count is correct, the user presses enter to continue. If the count is not correct, the user can make the necessary changes and then press enter.

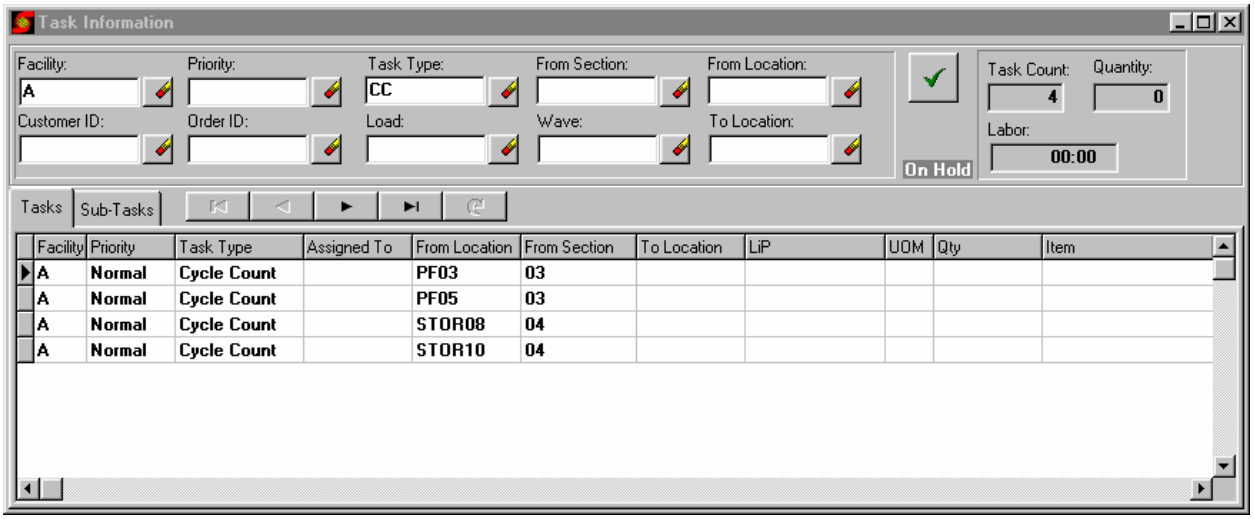


HINT: **To view the cycle count tasks, select Lookup from the main menu and click on Tasks.**

Task for location “STOR07” exists.



Task Information Screen before the example.



Task Information Screen <u>after</u> the example:

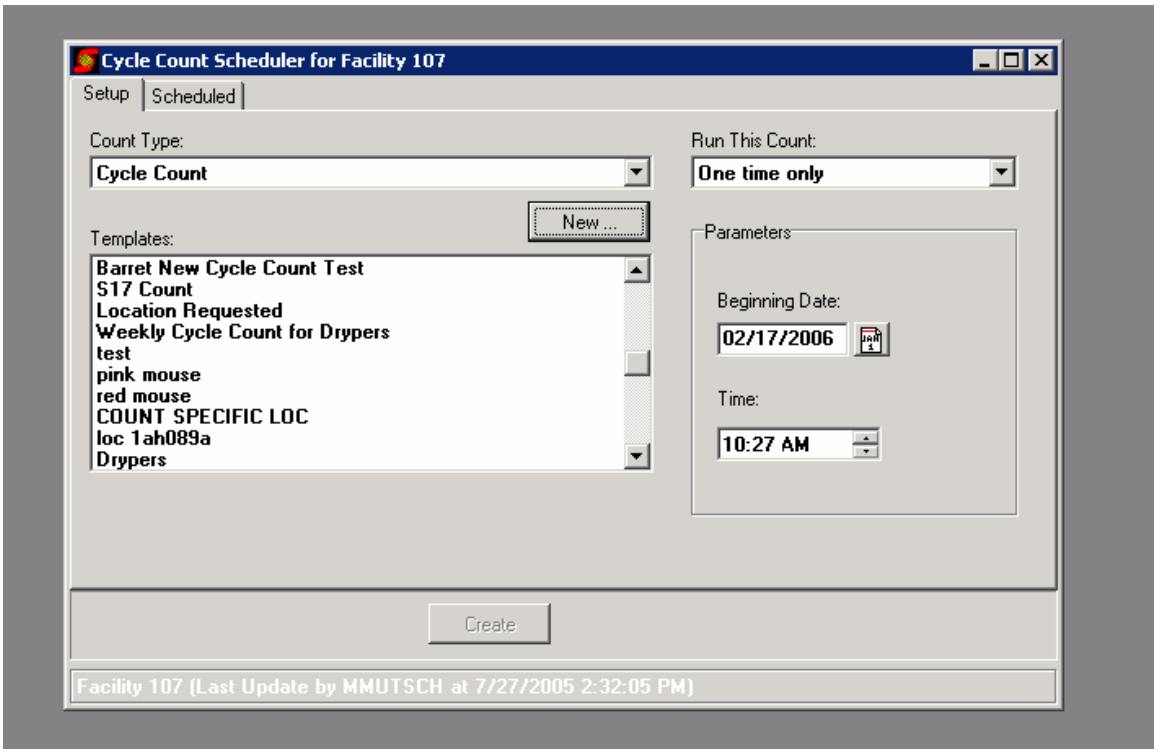
Notice that the task for location “STOR07” is no longer displayed.

Using the Count Scheduler

Cycle counts can be scheduled in advance for a one-time request or on a regularly scheduled basis such as monthly, annually, etc. The user can select the criteria for the count, and set a starting date and time for the tasks to be generated.

From the Requests Menu, select Update Requests, and then click on Count Scheduler.

The screen will display as follows:



Cycle Count Scheduler/Setup

Select the count template desired. These same templates were viewed in the Request Screen. To create a new template, click on the 

button and Synapse will switch to the Cycle Count Request Screen discussed earlier in this section.

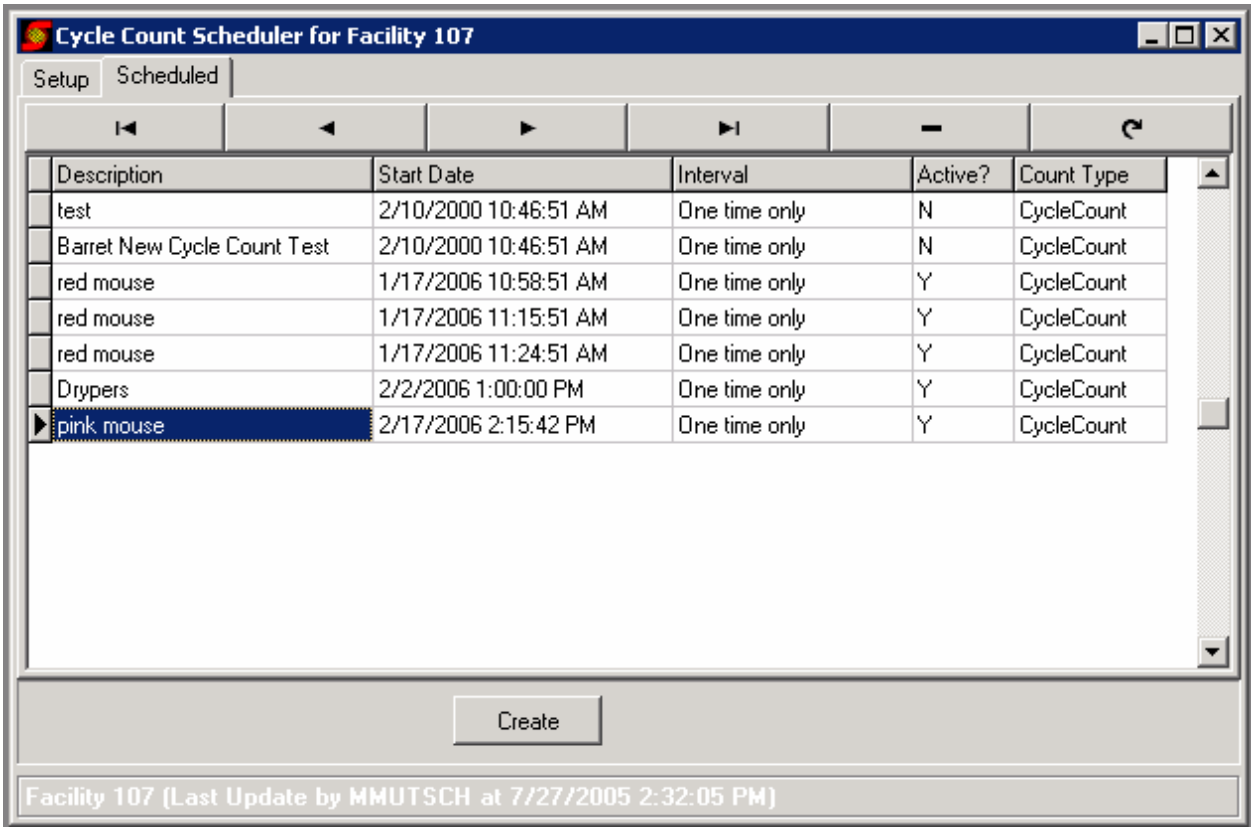
Select an interval for the count execution as shown above under the “Run This Count” heading. If an interval other than “One Time Only” is selected, the count will execute at the specific interval indefinitely, or until deleted.

Set the beginning date and time.

Click on the Create button. This will generate a schedule with the specified parameters. If this is a recurring request, the next request will be scheduled automatically after this request is executed.

- To view scheduled requests, select the Scheduled tab.

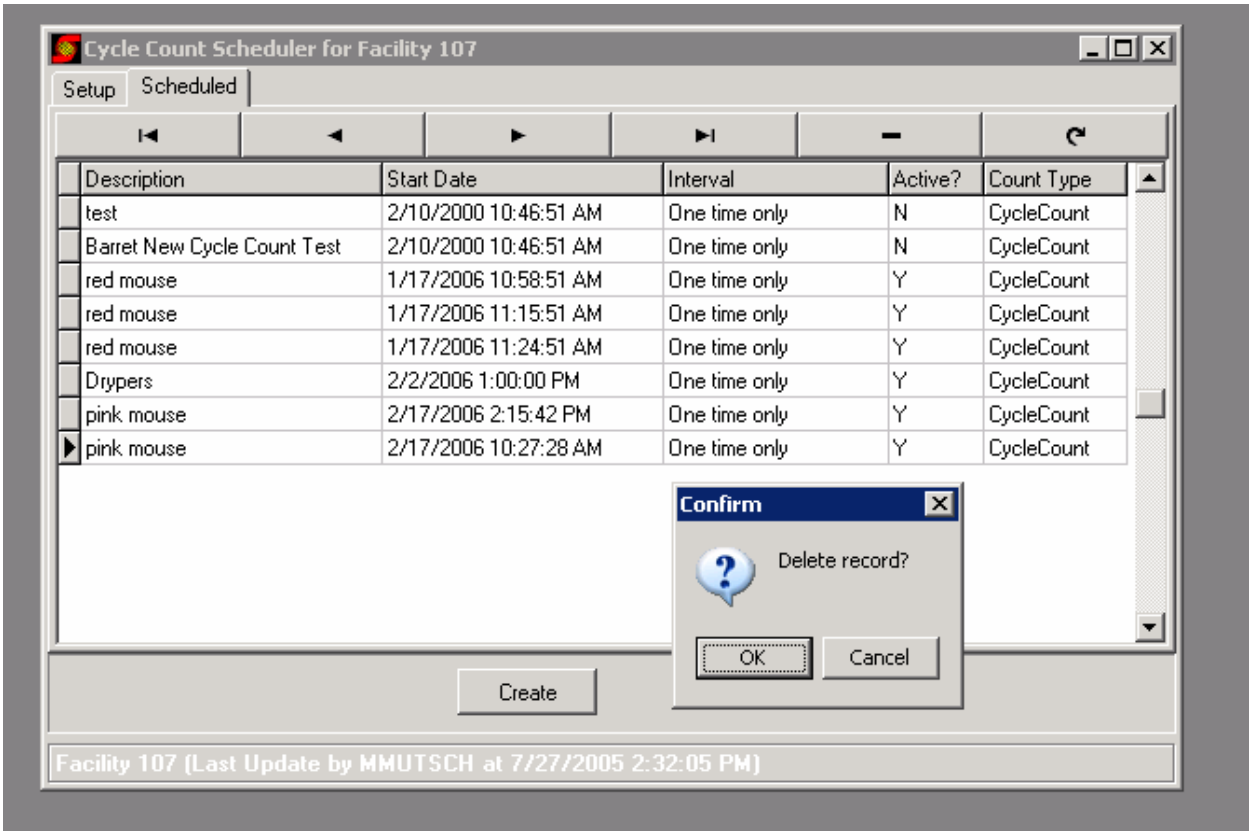
The screen will display as follows:



Cycle Count Scheduler/Scheduled

This screen displays a list of current scheduled counts, including the template description, start date, interval and count type.

Selecting one of these rows and using the "-" symbol on the task bar the user can to delete the schedule. Navigate through the rows or delete a row via the toolbar at the top of the panel.



Suspense

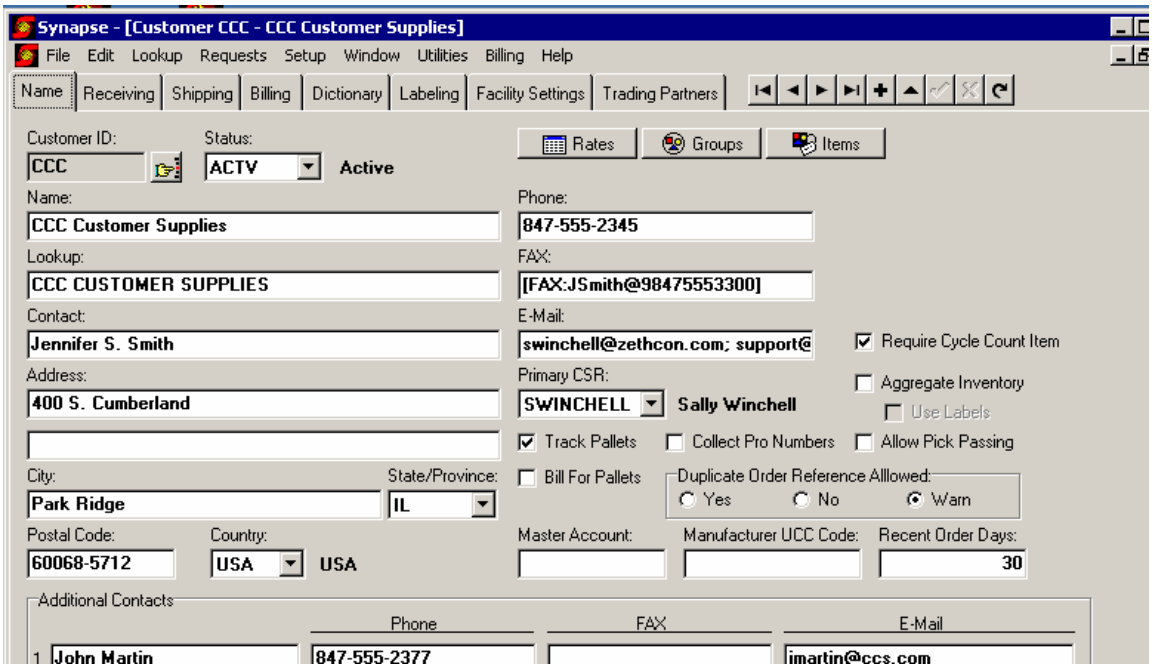
The Suspense location is used by the system to offset discrepancy values from a cycle count. This allows inventory control to have visibility and correct discrepancies from one LP or location to another. As an example, the system expected the user to count 30 cs from LP 255519, but the user only counted 25. The existing LP is reduced to the quantity of 25 and a system generated LP is entered into Suspense for a positive value of 5 (the system did a negative(-) on the LP and a positive(+) to Suspense). The overall total of the item is still 30 cs. These entries remain in Suspense until they are either cleared by another cycle count or removed as an adjustment to inventory.

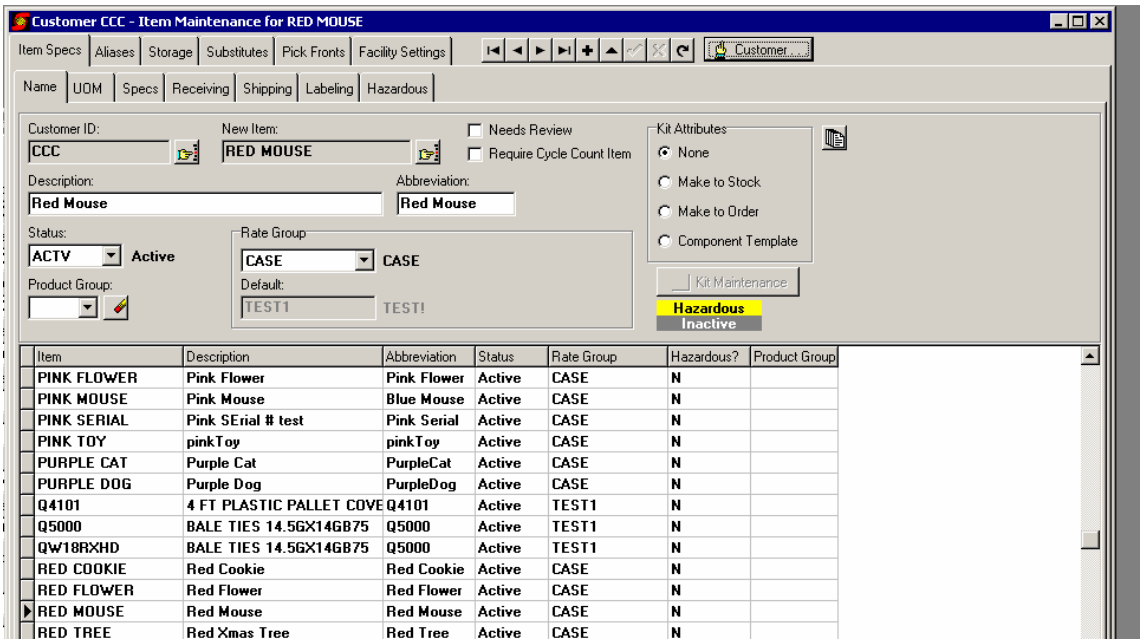
Require Cycle Count Item Processing

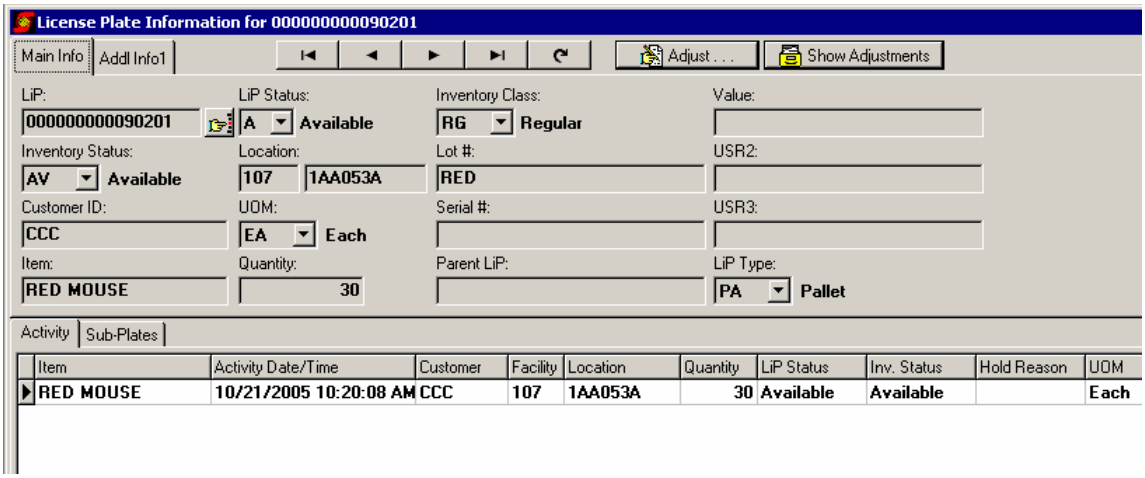
This processing allows the option to see the item and customer for a cycle count. "Require Cycle Count Item" checkbox to Customer Maintenance, Item Maintenance and Product Group Maintenance is available.

When the user cycle counts LPs, they all see the same screen and *can* enter the same fields as for regular cycle counting. If the user does not enter an item (and customer) and the "Require Cycle Count Item" is set for the item on the LP, an error message will appear (as in regular cycle counting). **If the flag is not set,** then the customer, item, description and lot are displayed and the user can either just hit enter or override any of the fields (except for description).

When the user cycle counts a pick front, the system will pre-fill the customer and item if the flag is not set for the first item for which the location is a pick front. The user can override any of the fields. After enter is pressed, all enterable fields are blanked and the user can either enter more or just press F4 to complete the count.

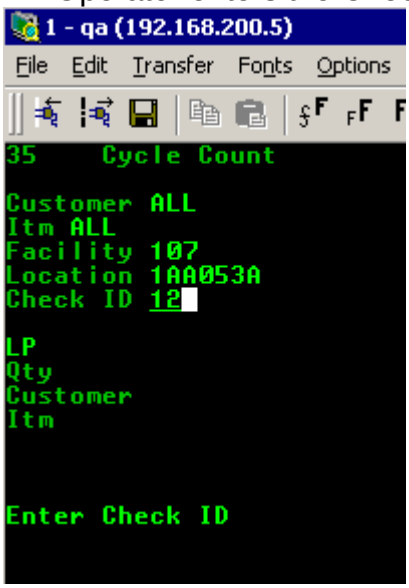




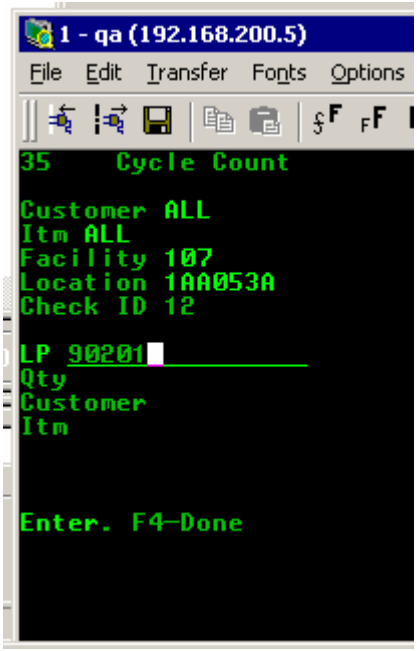

License Plate Information for 000000000090201
Main Info
Addl Info1
Adjust . . .
Show Adjustments
LiP:
000000000090201
LiP Status:
A
Available
Inventory Class:
RG
Regular
Value:
Inventory Status:
AV
Available
Location:
107
1AA053A
Lot #:
RED
USR2:
Customer ID:
CCC
UOM:
EA
Each
Serial #:
USR3:
Item:
RED MOUSE
Quantity:
30
Parent LiP:
LiP Type:
PA
Pallet
Activity
Sub-Plates
Item
Activity Date/Time
Customer
Facility
Location
Quantity
LiP Status
Inv. Status
Hold Reason
UOM
RED MOUSE
10/21/2005 10:20:08 AM
CCC
107
1AA053A
30
Available
Available
Each

A Sample count is displayed below:

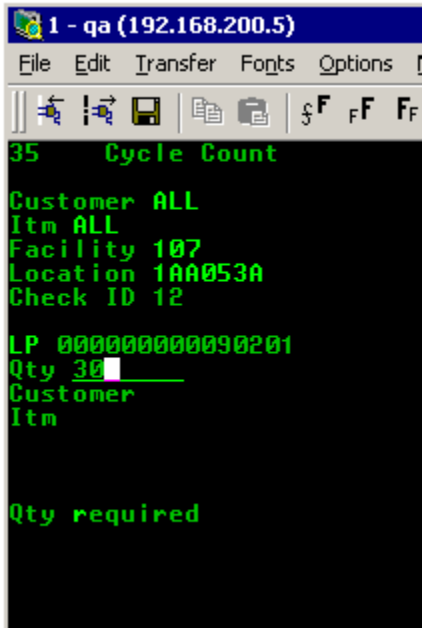
RF Operator enters the Check Digit



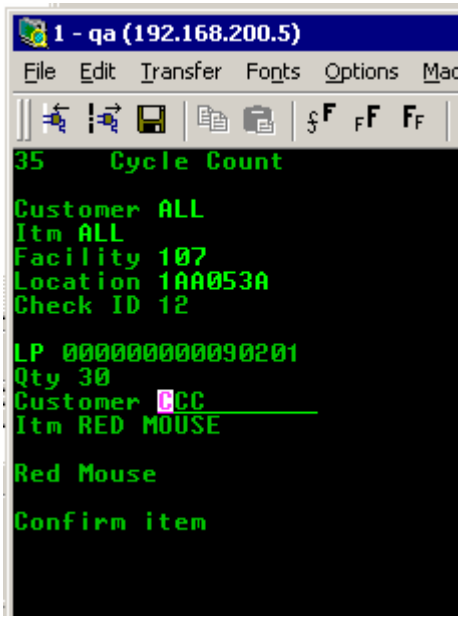
RF operator enters the plate.



RF operator enters the quantity.



RF operator uses the Enter key and the customer and item are displayed.



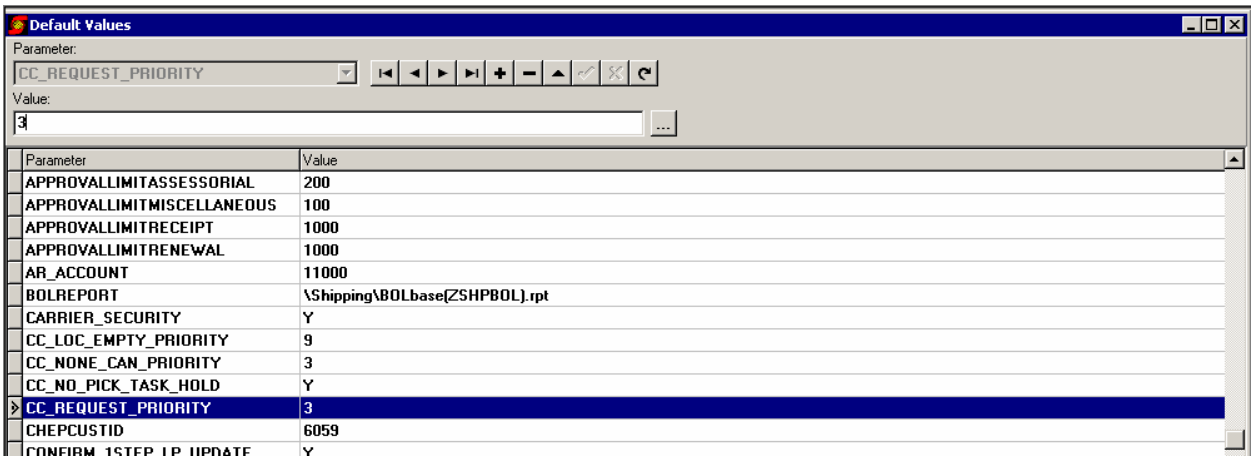
Additional Notes:

Customer ID will only be required during cycle counting if the counts are generated irrespective of customer. Therefore, if counts are created for a range of locations, customer ID will be required. If counts are created for a particular item, customer ID is not required. SUSPENSE will be used in the standard way. Multi pallets will not be countable this way.

Cycle Count Task Priority Options

There are three system default entries that determine the priority of location count tasks that are generated during picking (all types including replenishment and sortation):

- CC_LOC_EMPTY_PRIORITY - used when the RF operator responds with an N to the question "Is loc empty?". This is due to a situation where the system expects an empty location but the operator responds that the location is not empty.
- CC_NONE_CAN_PRIORITY - used when the RF operator enters a valid reason on the "Can't Pick" screen under "Or No One Can".
- CC_REQUEST_PRIORITY - used when the RF operator responds with a C to the question "Alt Loc (YNC)?" after pressing F6 during picking. (*See below). Or when the RF operator initiates a cycle count from the Location Inquiry screen.



The following rules apply:

If a system default does not exist (or is deleted), the value 9 (Hold) is used.
All 3 defaults can be initialized with a value of 9.
Valid values are 1, 2, 3, 4, 9, T where:

1 - immediate
2 - high
3 - normal
4 - low
9 - on hold
T - same as the priority of the current task

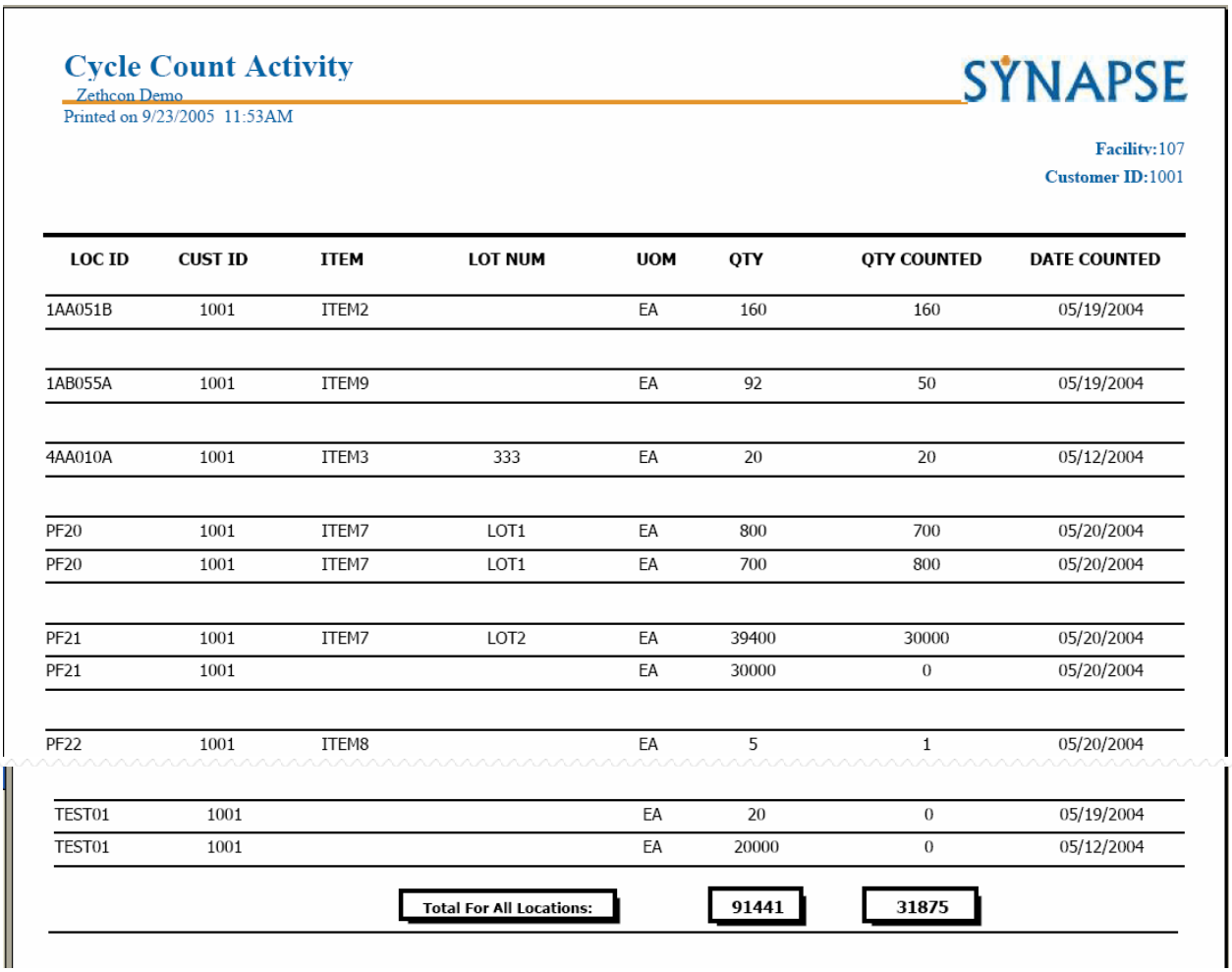
If any other value is entered into the default values table, the value 9 is used.
If an existing location count task exists and it has a lower (higher numerically) priority, the priority will be adjusted to the higher priority (lower number).

"Alt Loc (YNC)" Operator responses function as follows:

Y - try to find an alternate loc but don't generate a cycle count task
N - don't try to find an alternate loc and proceed to the Can't Pick screen
C - try to find an alternate loc and generate a cycle count task
F1 - exit the question and return to picking

Reporting

Cycle Count Activity Report



Cycle Count Activity

Zethcon Demo
Printed on 9/23/2005 11:53AM

SYNAPSE

Facility:107
Customer ID:1001

LOC ID	CUST ID	ITEM	LOT NUM	UOM	QTY	QTY COUNTED	DATE COUNTED
1AA051B	1001	ITEM2		EA	160	160	05/19/2004
1AB055A	1001	ITEM9		EA	92	50	05/19/2004
4AA010A	1001	ITEM3	333	EA	20	20	05/12/2004
PF20	1001	ITEM7	LOT1	EA	800	700	05/20/2004
PF20	1001	ITEM7	LOT1	EA	700	800	05/20/2004
PF21	1001	ITEM7	LOT2	EA	39400	30000	05/20/2004
PF21	1001			EA	30000	0	05/20/2004
PF22	1001	ITEM8		EA	5	1	05/20/2004
TEST01	1001			EA	20	0	05/19/2004
TEST01	1001			EA	20000	0	05/12/2004
			Total For All Locations:		91441	31875	