

# Shelf-to-Sheet Count



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# Shelf-to-Sheet Count

## Overview

The Shelf-to-Sheet Count SuiteApp enables you to count and record the quantity of kit items, assembly items, or inventory items, at a specific location. The SuiteApp implements shelf-to-sheet inventory count, which is the manner of counting inventory items according to how they are stored or organized by location, storage area and shelf.

The Shelf-to-Sheet Count SuiteApp has the following components and features:

- **Shelf-to-Sheet Template** — Using this custom record that comes with the SuiteApp, you can create and organize virtual representations of storage areas, shelves, and items at a specific store or branch location. You can group items to be stored in shelves, and then group shelves in storage areas, as they are organized in the real-world scenario. Only one template can be set up for a combination of subsidiary and location. For more information, see [Setting Up the Shelf-to-Sheet Template](#).
- **Shelf-to-Sheet Count record** — Using this custom transaction also included in the SuiteApp, you can start the count of the items specified in the Shelf-to-Sheet Template by entering their quantity on the record. You can then complete the count and the record goes through an approval stage. For every Shelf-to-Sheet Count record, the SuiteApp automatically creates a corresponding Inventory Count record where, after completing a count, the items and their quantity are also recorded. For more information, see [Setting Up the Shelf-to-Sheet Count Record](#) and [Starting and Completing Item Count](#).

**Note:** The Shelf-to-Sheet Count SuiteApp works best with the SuiteSuccess Restaurants and Hospitality (R & H) edition of NetSuite. You can contact your NetSuite Account Manager to request for provisioning of the R & H edition and account.

## Requirements for Using the Shelf-to-Sheet Count SuiteApp

The Shelf-to-Sheet Count SuiteApp requires the following Add-On Modules that you can request your NetSuite Account Manager to enable:

- Advanced Financials
- Advanced Inventory

In addition, before installing the Shelf-to-Sheet Count SuiteApp, you must enable several features in NetSuite.

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. Click the **Company** subtab and enable the following features:
  - a. Under Classifications section, check **Departments**, **Locations** and **Classes**.
  - b. Under ERP General, check **Multiple Units of Measure**.
  - c. Under Data Management, check **Inline Editing** and **File Cabinet**.
3. Click the **Items & Inventory** subtab and enable the following features:
  - a. Under Inventory, check the following:

- Inventory
  - Multi-Location Inventory
  - Assembly Items (if you need to use this feature, you must request for the Light Manufacturing Add-On Module)
  - Serialized Inventory
  - Lot Tracking
  - Advanced Bin/Numbered Inventory Management
  - Advanced Inventory Management
  - Inventory Count
4. Click the **SuiteCloud** subtab and enable the following features:
    - a. Under SuiteBuilder, check **Item Options**, **Custom Records** and **Advanced PDF/HTML Templates**.
    - b. Under SuiteScript, check **Client Script** and **Server Script**.
    - c. Under SuiteGL, check **Custom Transactions**.
    - d. Under SuiteTalk (Web Services), check **SOAP Web Services**.
  5. On the Enable Features page, click **Save**.

**Note:** The Shelf-to-Sheet Count SuiteApp works best with the SuiteSuccess Restaurants and Hospitality (R & H) edition of NetSuite. You can contact your NetSuite Account Manager to request for provisioning of the R & H edition and account.

## Granting Permissions to R & H Roles

If you are using the Restaurants & Hospitality (R & H) edition or an R & H account, it is pre-configured with R & H Customization and include R & H roles.

You must customize the following R & H roles that are included in the R & H Customization Bundle:

- **R & H - BOH Manager** - can create templates and perform item count on the Shelf-to-Sheet Count record
- **R & H - General Manager** can approve or reject the Shelf-to-Sheet Count record

You must customize both roles to grant them the following permissions for creating Shelf-to-Sheet Templates and Count records.

Action or Workflow	Permission
Transactions > Find Transactions	Full
Transactions > Adjust Inventory	Full
Transactions > Count Inventory	Full
Transactions > Create Inventory Counts	Full
Transactions > Shelf To Sheet Count	Edit
Reports > SuiteAnalytics Workbook	Edit

Action or Workflow	Permission
Lists > Accounts	View
Lists > Departments	View
Lists > Documents and Files	Full
Lists > Items	View
Lists > Locations	View
Lists > Notes Tab	View
Lists > Perform Search	Full
Lists > Subsidiaries	View
Lists > Units	View
Setup > Deleted Records	Optional If you want the role to be able to delete the custom records, Shelf to Sheet Template and Shelf to Sheet Count, you can grant full permission.
Setup > SuiteScript	Optional If you want the role to be able to view script execution logs, you can grant view permission.
Custom Record > Shelf-to-Sheet Template	Edit
Custom Record > Shelf-to-Sheet Count Item	Edit

For more information on roles and permissions, see the help topic [Set Permissions](#) under [Customizing or Creating NetSuite Roles](#).

To create a Shelf-to-Sheet Template or Count record, the BOH Manager or General Manager that were granted the required permissions, need to access Setup > Other Setup > Shelf-to-Sheet Template or Shelf-to-Sheet Count > New. This task path is different from the way other authorized roles can access template and count record creation.

## Installing the Shelf-to-Sheet Count SuiteApp

### To install the Shelf-to-Sheet Count SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. In the **Keywords** field, enter "Shelf to Sheet Count", or 288791, the Bundle ID.
3. Click **Search**. Shelf to Sheet Count, Bundle ID 288791, should appear in the search result.
4. Click the Shelf to Sheet Count link.
5. On the Bundle Details page, click **Install**.

The Shelf-to-Sheet Count SuiteApp is a managed bundle and is automatically updated whenever there are improvements or new features added.

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#).



## Limitations of the Shelf-to-Sheet Count SuiteApp

The following are the limitations of the Shelf-to-Sheet Count SuiteApp:


- Do not directly edit the Inventory Count record that is automatically generated when a Shelf-to-Sheet Count record is created. That Inventory Count record can only be updated by editing or changing the Shelf-to-Sheet Count record associated with it.
- After entering item quantities or memo details in the Shelf-to-Sheet View subtab of the Shelf-to-Sheet Count record, remove the cursor from the table or click outside the table, and then click Save. Clicking Save while focus or the cursor is still in the table does not save the record completely.
- Changes to the stock unit of items that are already added to a Shelf-to-Sheet Template are not automatically updated on the template. If you want the new stock unit of an item to be reflected on the template, you need to manually select that item again, with a new stock unit, on the Shelf-to-Sheet Template where it was previously added. All item entries on the Inventory Count record must use similar units defined in the Shelf-to-Sheet Count record.
- Upon creation of a Shelf-to-Sheet Count record, the corresponding Inventory Count record generated will not contain multiple entries of similar items. In addition, upon completion of Shelf-to-Sheet Count record, the final count of items must be the sum of the counts of ingredients or kit member items entered on the Shelf-to-Sheet Count record.
- On the search results page of Shelf-to-Sheet Template, the Show Inactives box is always displayed and checked. Do not inactivate any Shelf-to-Sheet template because the action is not supported and may cause issues.

## Setting Up the Shelf-to-Sheet Template

The Shelf-to-Sheet Template enables you to create and organize virtual representations of your storage areas, shelves and items at a specific location. When you create a first template for a subsidiary and location, a Count Sheet Template Folder is automatically created in the File Cabinet. The folder stores templates and data about them, including subsidiary and location internal IDs. A particular subsidiary and location combination can only have one template.


### To create and set up the Shelf-to-Sheet Template:

1. Go to Setup > Restaurant > Shelf-to-Sheet Template > New.  
If you are using a BOH Manager or General Manager role, go to Setup > Other Setup > Shelf-to-Sheet Template > New.
2. On the Shelf-to-Sheet Template page, in the **Subsidiary** field, select a subsidiary.
3. In the **Location** field, select a location.


 **Note:** A subsidiary and location combination can only have one template.

4. Click the **Template View** subtab and do the following:
  - a. Add storage areas:
    - i. Click **Add Storage**.
    - ii. On the Add Storage popup box, in the **Storage Area Name** field, enter a name for the storage area.
    - iii. (Optional) In the **Description** field, enter text describing the storage area.
    - iv. Click **Save**. Repeat the steps to add more storage areas as necessary.
  - b. Add shelves:


- i. Click the storage area where the shelf you must add should be located, and then click **Add Shelf**.
  - ii. On the Add Shelf popup box, in the **Shelf Name** field, enter a name for the shelf.
  - iii. (Optional) In the **Description** field, enter text describing the shelf.
  - iv. Click **Save**. Repeat the steps to add more shelves as necessary.
- c. Add items:

 **Note:** Before adding items, ensure that you already have records of inventory items, assembly items or kits/packages. You can create them from Lists > Accounting > Items > New.


- i. Click the shelf where the item you must add should be located, and then click **Add Item**.
  - ii. On the Add Items popup box, in the **Items** dropdown field, select an item from the list. The list displays the item records with the same location and subsidiary specified in the template.

 **Note:** You cannot add similar items in the same shelf.


- iii. Click **Save**. Repeat the steps to add more items as necessary.

 **Note:** Changes to the stock unit of items that are already added to a Shelf-to-Sheet Template are not automatically updated on the template. If a stock unit of an item changed, you manually select that item again, with a new stock unit, on the Shelf-to-Sheet Template where it was previously added. All item entries on the Inventory Count record must use similar units defined in the Shelf-to-Sheet Count record.

- d. (Optional) To move an item to another shelf, click the item and drag it under the shelf you want to move it to.

 **Note:** You cannot move an item to a shelf that already contains that same item.

- e. (Optional) Edit storage areas and shelves:
  - i. Double-click the storage area or shelf that you want to edit.
  - ii. On the Edit popup box, make the necessary changes to the name or description.
  - iii. Click **Save**.

 **Note:** You cannot edit items on the template because they are associated with an inventory item record. You can only delete and select items again.

- f. (Optional) Delete storage areas, shelves or items:
  - i. Click the storage area, shelf or item you want to delete, and click its corresponding **Delete** button.
  - ii. On the confirmation message that appears, click **Delete**.

- 5. On the Shelf-to-Sheet Template page, click **Save**.

When the Shelf-to-Sheet Template is used or referenced by a Shelf-to-Sheet Count record, the items set up in the template will be displayed on the Shelf-to-Sheet View subtab of the Shelf-to-Sheet Count record. It is the quantity of those items you will enter when Start Count is clicked on the Shelf-to-Sheet Count record.

## Setting Up the Shelf-to-Sheet Count Record

The Shelf-to-Sheet Count record sources or references the storage areas, shelves and items from its corresponding Shelf-to-Sheet Template and displays them on the Shelf-to-Sheet View subtab. For every Shelf-to-Sheet Count record created, a corresponding Inventory Count record is also created.

Before creating and setting up a Shelf-to-Sheet Count record, ensure that the following requirements are met; otherwise, record creation will fail:

- There must be an existing Shelf-to-Sheet Template for the same location and subsidiary that you will specify on the Shelf-to-Sheet Count record you will create.
- The existing Shelf-to-Sheet Template to be associated with the Shelf-to-Sheet Count record you will create, must have at least one storage area, shelf and item specified.
- The Shelf-to-Sheet Template to be associated with the Shelf-to-Sheet Count record you will create, must not contain kit items nested within more than five kits.


### To create and set up the Shelf-to-Sheet Count record:

1. Go to Setup > Restaurant > Shelf-to-Sheet Count > New.

If you are using a BOH Manager or General Manager role, go to Setup > Other Setup > Shelf-to-Sheet Count > New.

2. On the Shelf-to-Sheet Count page, enter values for the following fields:

- Subsidiary
- Location

 **Note:** The combination of subsidiary and location you selected will determine which Shelf-to-Sheet Template this Shelf-to-Sheet Count record will reference or use.

- Date
- Account

3. (Optional) Enter values for the following fields:

- Department
- Class
- Memo

4. Click **Save**.

After saving the record, the Start Count button is displayed. Also, the Shelf-to-Sheet View subtab displays the storage areas, shelves and items that were set up in the associated Shelf-to-Sheet Template with the same subsidiary and location specified on that Shelf-to-Sheet Count record.

In addition, a corresponding Inventory Count record is automatically created, where, after completing a count, the item quantity is reflected. This Inventory Count record cannot be directly edited, it can only be updated by editing or changing the Shelf-to-Sheet Count record associated with it.

**Note:** If there are changes to a Shelf-to-Sheet template, the associated Shelf-to-Sheet Count record of that template must either be deleted or approved, and then the Shelf-to-Sheet Count record must be recreated for that template with changes.

## Starting and Completing Item Count

You can start an item count on the Shelf-to-Sheet Count record, and then enter the quantity of each item on the Shelf-to-Sheet View subtab of the record. After completing the count on the record, an approval workflow follows, and the item quantities are recorded on the corresponding Inventory Count record.

**Note:** Once a count is started for a particular subsidiary and location, you cannot start another count for the same subsidiary and location until the ongoing count is completed.

### To start and complete an item count on the Shelf-to-Sheet Count record:

1. Open or edit a Shelf-to-Sheet Count record.

**Note:** In opening a Shelf-to-Sheet Count record from Setup > Restaurant > Shelf-to-Sheet Count, on the Shelf-to-Sheet Counts search results page, ensure that in the **View** field you always select **Shelf To Sheet Count Default List**. Do not select Default, as this will display a list with missing details.

2. On the Shelf-to-Sheet Count record, click **Start Count**.

The status of the record changes to Count Started.

**Note:** Once a count is started, do not edit the Shelf-to-Sheet template being referenced by the Shelf-to-Sheet Count record, because any changes in the template will not be reflected on the Shelf-to-Sheet Count record.

3. Click **Edit**.
4. On the **Shelf-to-Sheet View** subtab, under the Count Column, click the box or cell of the corresponding item that you want to enter the count or quantity of. Enter quantity of the item.

**Note:** You can only enter whole numbers and decimals. Do not enter negative numbers nor special characters.

Repeat this step for every item you want to count.

5. (Optional) In the Memo column, enter text about any details you want to note about the item. You can only enter a maximum of 512 characters.

6. Click **Save**.

You can still change the quantity of items by editing the record again.

7. Finalize the item count and click **Complete Count**. The status of the Shelf-to-Sheet Count record changes to Completed/Pending Approval. The Approve and Reject buttons are displayed.

The final count of items must be the sum of the counts of ingredients or kit member items entered on the Shelf-to-Sheet Count record.

In addition, on the corresponding Inventory Count record, the item count quantity is automatically updated.

8. The General Manager role or any authorized role validates the record by clicking **Approve**. The status of the Shelf-to-Sheet Count record is changed to Approved. Also, the status of the corresponding Inventory Count record is automatically set to Approved.

**Note:** Once the status of the Shelf-to-Sheet Count record is approved, an Inventory Adjustment record is automatically created for the items with quantity, existing in Corresponding Items of the Inventory Count record. Also, you cannot delete an approved Shelf-to-Sheet Count record.

If **Reject** is clicked, the status of the record is reverted to Count Started and the items can be recounted.

9. To print the Shelf-to-Sheet Count record, click **Print Shelf-to-Sheet Count**. A pre-formatted Inventory Count Sheet printout is displayed in a new browser window.

## Item Count Considerations

The following are some scenarios that you should consider about item counts:

- No Inventory Adjustment record is created for an item in the Inventory Count record, if:
  - the adjustment quantity is zero; or
  - the same quantity is entered for the same item in subsequent counts.
- An error occurs in updating the status of a Shelf-to-Sheet Count record from completed to approved, if:
  - an item is inactive; or
  - a scenario occurs that causes the Inventory Count to throw a null message.
- An error occurs in updating the status of a Shelf-to-Sheet Count record from started to completed, if the count entered for an item exceeds the maximum that the Inventory Count record can process.

For more information about the errors described in the scenarios, refer to [Shelf-to-Sheet Count Errors](#).

## Shelf-to-Sheet Count Errors

The following table lists the errors that you may encounter in using and processing the Shelf-to-Sheet Template and Count record, and provides the actions you may take to resolve the issues.

### Errors in Setting Up the Shelf-to-Sheet Template

Error Scenario or Cause	Error Message	Required Action
Clicking Save on the Storage Area popup box without entering a Storage Area Name.	You did not enter a Storage Area Name.	Enter Storage Area Name.
Clicking Save on the Storage Area popup box with the Storage Area Name containing special characters.	Do not include special characters in the Storage Area Name.	For the Storage Area Name, enter only alphanumeric characters. Underscore (_) and dash (-) are allowed.
Clicking Save on the Storage Area popup box with the Storage Area Name having more than 40 characters.	Storage Area Name can only have 40 characters or less.	Enter a Storage Area Name with 40 characters or less.
Clicking Save on the Storage Area popup box with the Storage Area Description having more than 80 characters.	Storage Area Description can only have 80 characters or less.	Describe the Storage Area in 80 characters or less.

Error Scenario or Cause	Error Message	Required Action
Clicking Save on the Storage Area popup box with a duplicate Storage Area Name.	Storage Area Name already exists. Enter a different name.	Enter a different Storage Area Name.
Clicking Save on the Shelf popup box without entering a Shelf Name.	You did not enter a Shelf Name.	Enter a Shelf Name.
Clicking Save on the Shelf popup box with the Storage Area Name containing special characters.	Do not include special characters in the Shelf Name.	For the Shelf Name, enter only alphanumeric characters. Underscore (_) and dash (-) are allowed.
Clicking Save on the Shelf popup box with the Shelf Name having more than 40 characters.	Shelf Name can only have 40 characters or less.	Enter a Shelf Name with 40 characters or less.
Clicking Save on the Shelf popup box with the Shelf Description having more than 80 characters.	Shelf Description can only have 80 characters or less.	Describe the Shelf in 80 characters or less.
Clicking Save on the Shelf popup box with a duplicate Shelf Name.	Shelf Name already exists. Enter a different name.	Enter a different Shelf Name.
Clicking Save on the Item popup box with a duplicate item selected.	The item already exists in this shelf. Enter a different item.	Select a different item.
Clicking Save on the Item popup box without selecting an item.	You did not select an item.	Select an item.
Clicking Save after editing the Shelf-to-Sheet Template.	Template data is corrupted, and processing cannot proceed. Please delete the template and create a new one.	Delete the template and create a new one.

## Errors in Shelf-to-Sheet Count Start, Completion or Status Update

Error Scenario or Cause	Error Message	Required Action
Entering non-numeric characters in the Count column.	You cannot enter non-numeric characters. You can only enter positive numbers and decimals.	Enter only positive numbers and decimals.
Entering a quantity of more than 1,000,000,000 in the Count column.	The quantity you entered exceeds the maximum allowed count, which is 1,000,000,000.	Enter a quantity that does not exceed 1,000,000,000.
Entering a negative number in the Count column.	You cannot enter a negative number. You can only enter positive numbers and decimals.	Enter only positive numbers and decimals.
Entering text with more than 512 characters in the Memo column.	You can only enter a maximum of 512 characters.	Enter text containing characters that do not exceed 512.
Clicking Start Count with missing details on the Shelf-to-Sheet record.	The process cannot proceed because the record is missing some details. Ensure that you have provided the required information on the record.	Provide required information on the Shelf-to-Sheet Count record.

Error Scenario or Cause	Error Message	Required Action
Clicking Start Count and an error occurs in updating the Inventory Count status to Started.	An error occurred in processing or updating the record status. Refer to the Help documentation on handling errors or consult your administrator.	Consult your Administrator or contact NetSuite Support.
Clicking Start Count and an error occurs in updating the Shelf-to-Sheet Count status to Started.	Server error. No error message.	Consult your Administrator or contact NetSuite Support.
Clicking Complete Count with missing details needed to continue processing.	The process cannot proceed because the record is missing some details. Ensure that you have provided the required information on the record.	Provide required information on the Shelf-to-Sheet Count record.
Clicking Complete Count and an error occurs in updating the Shelf-to-Sheet Count status to Complete.	An error occurred in processing or updating the record status. Refer to the Help documentation on handling errors or consult your administrator.	Consult your Administrator or contact NetSuite Support.
Clicking Complete Count and an error occurs in updating the Inventory Count status to Complete.	An error occurred in processing or updating the record status. Refer to the Help documentation on handling errors or consult your administrator.	Consult your Administrator or contact NetSuite Support.
Clicking Approve with missing details needed to continue processing.	The process cannot proceed because the record is missing some details. Ensure that you have provided the required information on the record.	Provide required information on the Shelf-to-Sheet Count record.
Clicking Approve and an error occurs in updating the Inventory Count status to Approved.	An error occurred in processing or updating the record status. Refer to the Help documentation on handling errors or consult your administrator.	Consult your Administrator or contact NetSuite Support.
Clicking Approve and an error occurs in updating the Shelf-to-Sheet Count status to Approved.	Server error. No error message.	Consult your Administrator or contact NetSuite Support.
Clicking Reject and an error occurs in updating the Inventory Count and Shelf-to-Sheet Count status back to Started.	An error occurred in processing or updating the record status. Refer to the Help documentation on handling errors or consult your administrator.	Consult your Administrator or contact NetSuite Support.
With item count started, clicking Save without entering the quantity of some items.	You have not entered the count of some items, and no inventory adjustment will be created for those items. Do you still want to submit the record?	Enter the quantity of all items in the Count column.
Clicking Save on a Shelf-to-Sheet Count record with no associated Shelf-to-Sheet template.	There is no Shelf-to-Sheet Template for the Subsidiary and Location selected on this record. You must first create a Shelf-to-Sheet Template for the Subsidiary and Location.	Create a Shelf-to-Sheet template for the Location and Subsidiary specified on the Shelf-to-Sheet Count record.
Clicking Save on a Shelf-to-Sheet Count record, but the associated Shelf-to-Sheet template contains no items.	The Shelf-to-Sheet Template associated with this Shelf-to-Sheet Count record contains no items. You must enter at least one item in the Shelf-to-Sheet Template to create its associated Shelf-to-Sheet Count record.	Enter at least one item in the Shelf-to-Sheet Template to create its associated Shelf-to-Sheet Count record.

Error Scenario or Cause	Error Message	Required Action
Clicking Save on a Shelf-to-Sheet Count record with kit items nested within more than five kits.	This Shelf-to-Sheet Count record contains kit items nested within more than five kits. Edit the Shelf-to-Sheet Template associated with this record and ensure that it contains kit items nested within five kits only.	Edit the Shelf-to-Sheet Template associated with the record and ensure that it contains kit items nested within five kits only.
Clicking Save after editing the Shelf-to-Sheet Count record.	An error occurred in processing Shelf-to-Sheet Template data. Please create a new Shelf-to-Sheet Template and Count record for the location and subsidiary.	Create a new Shelf-to-Sheet Template and Count record for the location and subsidiary.