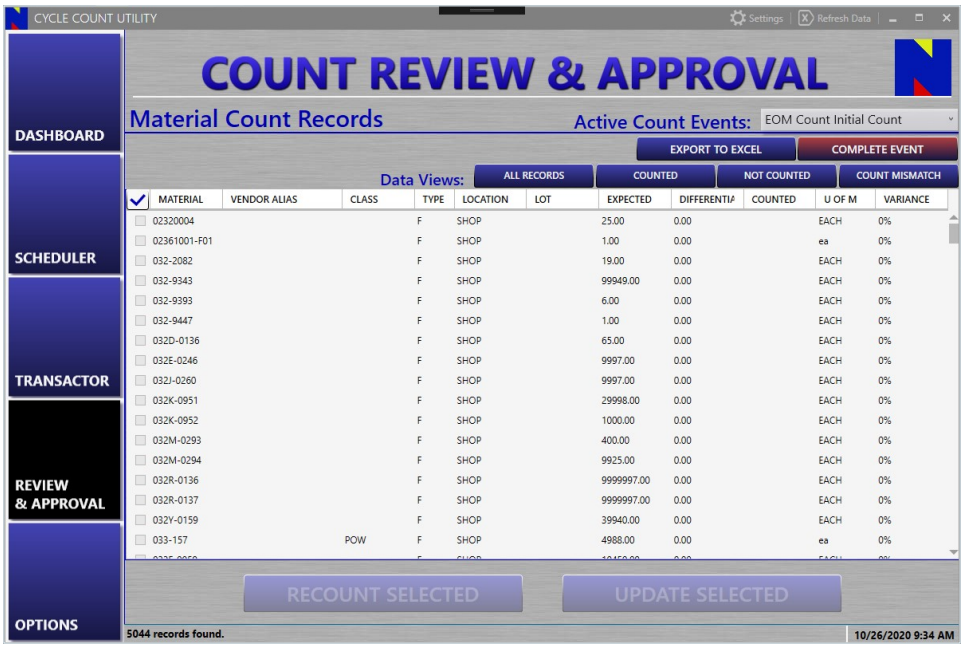
JOBBOSS SOLUTIONS

Cycle Count

Bring shop-floor counting and inventory review into one workflow.

Neptune Cycle Count gives your team a structured way to plan inventory counts, collect quantities through a browser and review the results before updating JobBOSS. Use targeted counts throughout the year or coordinate a larger inventory event with the same management process.



The desktop Count Review & Approval workspace. This repository image shows an earlier layout; current builds also include financial review columns.

Make counting easier to coordinate

- **Give counters a defined list.** Choose materials and locations, start the event and let the shop floor report quantities from the browser.
- **Review exceptions before posting.** Compare counts, review estimated inventory impact and send selected items for a recount.
- **Keep a repeatable process.** Use scoped events, cycle-planning reports, exports and retained event records to support ongoing inventory work.

For inventory managers, warehouse teams, production operations and the people reviewing inventory adjustments.

DESKTOP AND BROWSER

One workflow for office and floor

Managers coordinate the event. Counters report what they find.



Cycle Count Mobile: the browser screen identifies the item, location, lot and unit, then accepts the counted quantity.

Component	What the team does
Desktop management	Create and start events, adjust the count list, monitor submissions, review financial impact, recount or post selected records, then complete the count.
Browser counting	Open the organization's counting site on a suitable computer, tablet or browser-equipped scanner. Find the item and submit the physical quantity.
Barcode or keyboard entry	Use a scanner to enter identifiers into the search fields, or type and search. The workflow supports teams that do not have every item barcoded.

Collect counts where the work happens

Search by material, vendor alias, location or lot. With the normal reviewed workflow, reported quantities remain available for desktop review before inventory is changed. The manager can accept selected results or request another count.

Cycle Count includes both interfaces as one utility. Neptune can confirm the workstation, internal website and device setup for your environment.

CAPABILITIES

Turn count results into decisions

Review quantity differences and their estimated inventory impact.

Capability	Practical value
Targeted count events	Select material types, classes and locations, with optional custom-field filters. Count the portion of inventory that needs attention.
Movement-aware review	The desktop posting workflow uses recorded inventory movement after count submission to help reconcile the count with current stock.
Financial review and export	Review the estimated adjustment quantity and valuation impact. Export the selected count set to Excel for further analysis.
Selective recounts	Create a new count set for selected questionable items while retaining the original event context.
Cumulative counts	Add quantities found in several places within the same material/location/lot scope.
Unexpected stock	Use a User Can Add Material event to capture existing items found outside the planned list.
Excel count import	Bring prepared material, location, lot and whole-number counted quantities into a count for review.
Recurring cycle plans	Use the configured classification reports and last-count dates to prepare focused repeat-count lists.

Choose the right level of review

The normal workflow stages counts for a manager to review. For a deliberately controlled count, the optional Direct Inventory Update mode sends browser submissions straight to JobBOSS. Set that option when defining the event, according to your counting procedure.

Financial impact is an inventory review estimate. It helps the team prioritize differences before posting and verify the resulting transactions afterward.

WORKFLOW AND LEARNING

Build a count your team can repeat

Keep the operating guide, input template and shared recording together.

1. **Plan and start**
   Define the event, choose its material/location scope and options, then explicitly start it.

2. **Count and submit**
   Counters use the browser or the desktop operator records the quantities. Excel count import is available for prepared data.

3. **Review and resolve**
   Refresh the results, review differences and estimated impact, then recount selected items or post the reviewed quantities.

4. **Verify and complete**
   Confirm the JobBOSS balances and transactions, retain the useful exports and complete each finished count set.

Training and resources

Illustrated Training Guide
Neptune-Cycle-Count-Training.pdf covers both interfaces, event options, first-count practice, movement and valuation review, recounts, posting, Excel import and cycle planning.

Count-import template
Neptune-Cycle-Count-Count-Import-Template.xlsx supplies the four-column layout for the current count-data import. The training guide explains its scope and whole-number quantity requirement.

Watch the shared inventory webinar

The recording covers both Physical Inventory / Inventory Assistant and the paperless Cycle Count utility. Review the Cycle Count portion with this guide. GoTo Webinar registration is required.

Talk with Neptune

Discuss your count process, confirm the appropriate installed workflow and arrange setup or training assistance.

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