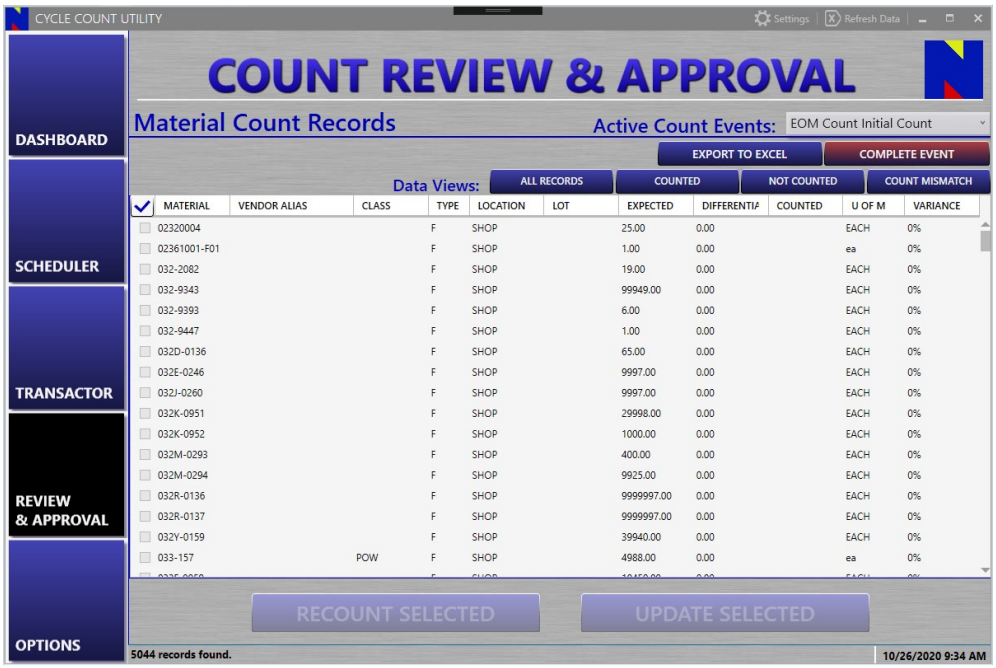
TRAINING GUIDE

Cycle Count

Plan the event. Capture the count. Review and update JobBOSS.

Neptune Cycle Count combines a desktop management console with a browser interface for people counting inventory. This guide starts with the normal reviewed workflow, then explains the options and advanced tasks that extend it.



Recognize the desktop application: Scheduler, Transactor, Review & Approval and Options. The repository images show an earlier layout; current financial columns are explained in this guide.

A submitted count is a review item

With **Direct Inventory Update off**, browser counts and desktop entry are staged in the utility. The manager uses **UPDATE SELECTED** to apply reviewed results to JobBOSS. Direct Inventory Update is a separate immediate-posting option.

The desktop operator signs in with a JobBOSS user ID. Browser counters use their Employee ID. Both work on the same count events, with different tasks and controls.

Begin with the preparation and navigation on page 2, then run the first complete count on page 3.

READINESS AND NAVIGATION

Prepare the team and environment

Start with a small location and a few representative materials.

Prepare	Confirm before counting
Desktop and database	Use the configured Cycle Count management application connected to the intended JobBOSS database. Have the setup contact resolve connection or installation issues.
Browser access	Use the organization's supplied internal counting URL on an approved device that can reach it. Save the address as a shortcut if useful.
People and identifiers	Identify the desktop operator, counters and reviewer. Have the JobBOSS user ID and Employee IDs ready; they are different identifiers.
Count scope and units	Choose a small location, valid material IDs and applicable lots. Count in the stocking unit displayed for the item.
Operating method	Use the reviewed workflow with the three event options off for the first exercise. Confirm how physical stock movements will be recorded during the count.

Find the task you need

Task	Pages
First complete count and sign-in	3-4
Schedule, define scope and start	5-7
Browser counting and desktop entry	8-10
Review, post, verify and recount	11-15
Found stock, WIP, cumulative and transfer work	16-18
Excel import, recurring plans and completion	19-22
Practice, troubleshooting and resources	23-25

QUICK START

Your first complete count

Use one small scope and follow it through to verification.

1. **Create the event**
   In SCHEDULER, select the date, choose EDIT SELECTED COUNT DAY, then ADD NEW EVENT. Give the event a clear title and leave the three optional modes off.

2. **Define and start the scope**
   Add the intended material types, classes and Count Event Locations. Save, check the scope, then use START EVENT. The date on the calendar does not start it automatically.

3. **Open the count on the browser**
   Sign in with the counter's Employee ID and choose the started event. Search for an item or run an open search to view the available list.

4. **Report the physical quantities**
   Check material, location, lot and stocking unit. Enter the actual quantity and choose COUNT MATERIAL. A confirmed zero is a real count; an untouched row is still uncounted.

5. **Refresh and review**
   In the desktop console, return to Dashboard, reopen Review & Approval and reselect the event. Inspect submitted counts, Differential and the financial review values.

6. **Resolve and post**
   Use RECOUNT SELECTED for a result that needs another count. For accepted rows, confirm transaction settings, select the rows and use UPDATE SELECTED.

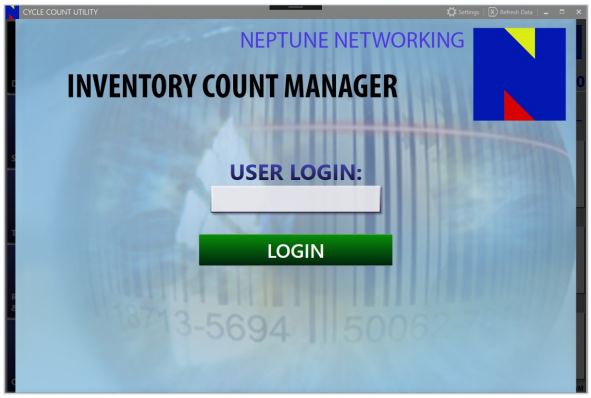
7. **Verify, then complete**
   Allow processing to finish. Refresh and verify the material/location/lot balances and transaction history in JobBOSS. Export useful results, finish any recounts and complete the finished count set.

For the first exercise: use an approved training database or a small authorized live count. Keep Direct Inventory Update off so the team can see the review step clearly.

DESKTOP AND BROWSER ACCESS

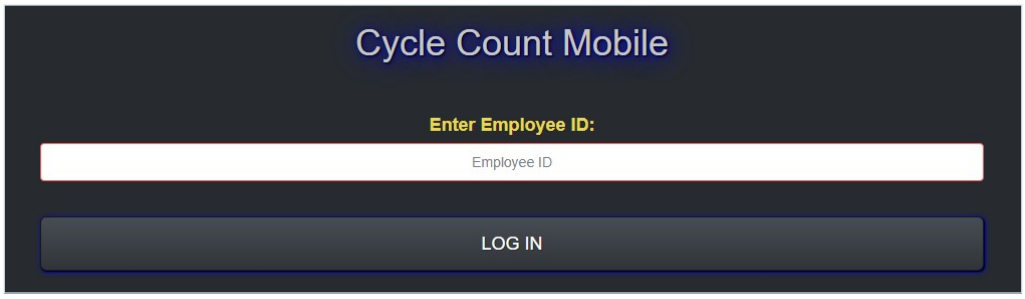
Sign in to the right interface

Use the identifier associated with the task.



The desktop Inventory Count Manager asks for the JobBOSS user ID.

Desktop operator: open the configured management application, enter your valid JobBOSS user ID and select LOGIN. The dashboard shows count events; the menu at the left opens the working sections.



The browser interface asks for an Employee ID.

Counter: open the supplied internal URL, enter the Employee ID used for your shop-floor/data-collection identity and select LOG IN. Choose the intended active event. If only one event is available, the application can open it directly.

If access or an event is missing

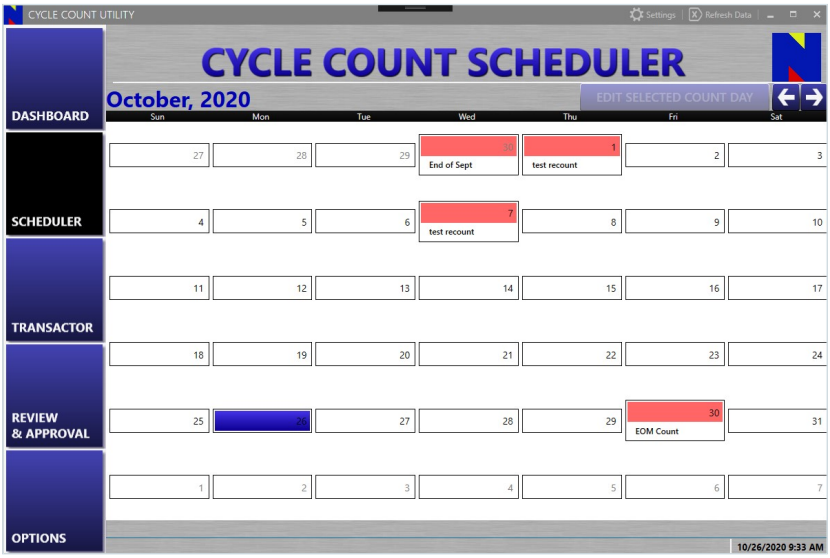
Confirm the correct URL, device network, database and identifier. Ask the setup contact to check the installation and employee record when needed. A scheduled or held event is not available for normal browser counting; the manager must start or resume it.

A scanner is optional. A suitable browser with keyboard entry is sufficient for the counting workflow; scanner setup can be added to match the shop's labeling process.

MANAGER PROCEDURE

Create and schedule an event

Scheduling prepares the event; starting makes it available to counters.



The calendar scheduler shows count events on their scheduled days.

1. **Choose the day**
   Select the required day in SCHEDULER, then click EDIT SELECTED COUNT DAY.

2. **Create the definition**
   Choose ADD NEW EVENT. Enter an Event Title and useful description or notes. Use a title that identifies the date, location or purpose.

3. **Choose scope and options**
   Select the material types, classes and locations described on page 6. Set the event options deliberately before starting.

4. **Save and start when ready**
   SAVE places the event on the calendar. Review it and use START EVENT when counters should begin. Starting takes the initial material/location/lot snapshot and locks the event definition.

The first set appears as **Initial Count**. Recounts create additional numbered count sets under the event. A future or past calendar date does not automatically start, post or complete an event.

EVENT SCOPE

Define exactly what is being counted

The final selections determine the starting material/location/lot list.

Scope control	How to use it
Material Types	Add Finished Goods, Raw Stock, Hardware or Supplies. Use ADD ALL TYPES when all are intended. The selected types must remain in the event's list.
Material Classes	Add the relevant JobBOSS classes or use ADD ALL CLASSES. Include NO CLASS when unclassified materials belong in scope.
Warehouses and locations	Choose a warehouse grouping to populate available locations. Select the locations and use ADD SELECTED LOCATION(S). The Count Event Locations list is the actual location scope.
Multiple selections	Use the list controls, including Ctrl/Shift selections where appropriate. Remove selections that do not belong in this event.
Material Custom User Values	Optional exact-value filters use Text1-Text5. Multiple filters narrow the list together. Check them in the same edit session in which the event is started.

Check the list before starting

- An ordinary event needs material types, classes and Count Event Locations. An empty required scope can produce an empty count.
- Selecting a warehouse does not itself add its locations to the final scope. Confirm the far-right Count Event Locations list.
- Custom-field filters are not retained as reusable definitions when the event editor is reopened. Recheck them before START EVENT.
- User Can Add Material is intentionally different: that option starts an empty count even when scope selections were made.

After the event starts, use the Transactor's add/remove controls for individual scope changes. The original event-definition controls are locked.

EVENT BEHAVIOR

Choose options, then start

All three options are off for a standard reviewed count.

Option	When it is useful	What changes
Direct Inventory Update	A deliberately controlled count that should post immediately from the browser.	COUNT MATERIAL writes JobBOSS immediately and bypasses desktop review.
Cumulative Update	The same material/location/lot may be found in several places or in separate passes.	Each submission adds an increment. Counted items remain accessible.
User Can Add Material	Counters need to report valid items found outside a predefined list, or collect WIP observations.	The event starts empty and the browser provides an add-material form.

Start is an explicit action

Use START EVENT and confirm the prompt only after the definition is correct. An ordinary event captures its material/location/lot list and on-hand snapshot at that point. Starting creates count records, not an inventory adjustment.

Keep the normal review path for your first counts

With Direct Inventory Update off, counters can submit results while the manager reviews differences and requests recounts. Desktop posting applies its movement review and transaction settings.

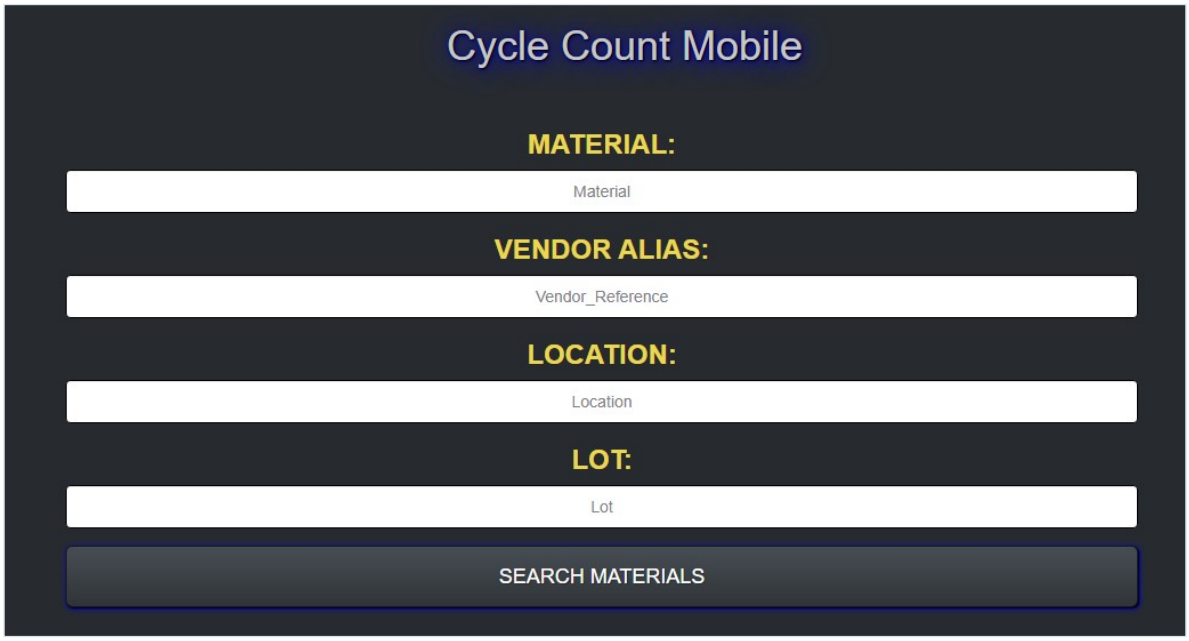
Direct Inventory Update uses a separate immediate path. It does not use the desktop Differential adjustment or update the material last-count Date2 in the same way. Use it only when that behavior matches the planned count.

Use page 17 for cumulative entry and page 16 for found-stock/WIP events. Set options before the event starts.

BROWSER PROCEDURE

Find the item on the shop floor

Search by the identifiers available in front of you.



Cycle Count Mobile search fields accept typed values or suitable barcode-scanner input.

1. **Choose the intended active event**
   Check the event title before searching. An Initial Count and a Recount are different count sets.

2. **Search or scan**
   Enter Material, Vendor Alias, Location or Lot as needed, then choose SEARCH MATERIALS. An open search shows the available materials on that count.

3. **Select the exact stock row**
   If one matching item is found, the count page can open directly. Otherwise choose the row that matches the material, location and lot you are physically counting.

Barcodes are optional. Type the identifiers when labels are unavailable. The supplied Dynamic Barcode Report can support a barcode-based workflow when installed and configured for the site.

The browser displays the expected quantity and stocking unit. This is not a blind-count screen; count the physical stock carefully even when an expected balance is visible.

BROWSER PROCEDURE

Report a physical count

Check the item, location, lot and unit before submitting.



Enter the counted quantity, then use COUNT MATERIAL. This normal event displays Qty Expected and the stocking unit.

1. **Read the stock identity**
   Confirm the material description, location, lot and unit. Count the stock represented by that row, using the displayed stocking unit.

2. **Enter the actual quantity**
   For an ordinary noncumulative event, enter the complete physical quantity for this row. Enter zero only after confirming that none is present.

3. **Submit once**
   Choose COUNT MATERIAL and check the response. With Direct Inventory Update off, the quantity is staged for review. In a normal noncumulative event the item then drops off the available list.

4. **Continue through the list**
   Return to the event/search as needed. If additional stock is found after a normal row disappears, ask the manager to correct the staged count or arrange a recount.

Zero, blank and additional quantities

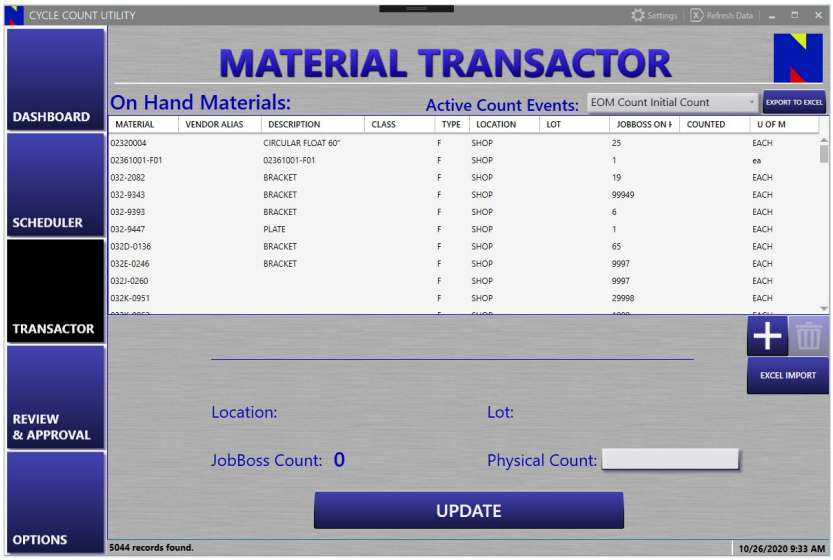
A submitted zero is a counted result and can reduce stock when posted. A row with no submission is uncounted. For Cumulative Update events, enter only each additional quantity; the running-total example is on page 17.

Use nonnegative physical quantities. Browser and desktop manual entry support fractional quantities where the stocking unit requires them; the current Excel count-import route accepts whole numbers only.

DESKTOP PROCEDURE

Manage the staged count

Use the Transactor to maintain the count list and entered quantities.



Material Transactor with event selection, add/remove controls, Excel import and desktop Physical Count entry.

Action	What it does
Select Active Count Events	Loads the selected started count set and its material/location/lot rows.
Plus button	Adds existing material/location/lot combinations to the count. A new stock combination can start with an expected quantity of zero.
Trash button	Removes an unprocessed row from the count. It does not delete the material master or reverse a posted inventory transaction.
Physical Count → UPDATE	Stages a desktop-entered quantity. It replaces the staged count in a normal event or adds an increment in a cumulative event.
EXCEL IMPORT	Adds prepared rows and counted quantities using the workflow on page 19.

After browser submissions, return to Dashboard, reopen Transactor or Review & Approval and reselect the event. Switching directly between Transactor and Review can retain an older view of the data.

REVIEW FUNDAMENTALS

Understand movement and value

Snapshot quantity, counted quantity and current stock are different values.

Value	Meaning for the reviewer
Expected	The on-hand snapshot recorded when the stock row entered this count set. It is not automatically the current live balance.
Counted	The quantity physically reported by a counter or entered/imported by the desktop operator.
Differential	Eligible inventory movement recorded after the latest count submission, used in the normal desktop posting calculation.
Adjustment quantity	The reviewed target quantity after movement adjustment, compared with current live JobBOSS on hand.
Valuation impact	The estimated value of that adjustment. Current review uses Standard Cost for manufactured items and Last Cost for purchased/other items.

A simple movement example

What happened	Quantity
Counter submits the physical count	25
A later recorded JobBOSS issue removes one	-1
Ordinary reviewed target after that movement	24

The physical movement must be recorded correctly in JobBOSS. Review the displayed Differential before posting, especially when a count has been open for some time or stock has moved between locations.

Confirm the reviewed target

Investigate an unexpected Differential or negative target before posting the affected rows. A mismatch against the original snapshot is not the same as the final adjustment against current stock.

Direct Inventory Update follows a different immediate path; this movement review describes desktop posting. See page 12 for the financial review and its cost basis.

REVIEW FUNDAMENTALS

Review estimated financial impact

Use the estimate to prioritize differences before approving inventory changes.

The current review estimate compares the movement-adjusted target with current live JobBOSS stock. Its value represents the estimated inventory change, not the total value of all counted stock and not a separate GL journal.

Excel export field	What to check
COST BASIS	Manufactured items use Standard Cost. Purchased/other items use Last Cost. This is distinct from the Costing Method chosen for desktop transaction posting.
UNIT COST	Shown as $$$ Unit on the review screen. The material amount selected from the review basis; check unusual results.
ADJUSTMENT QTY	The reviewed target quantity after movement adjustment minus current live on-hand quantity.
VALUATION IMPACT	Shown as $$$ Impact on the review screen. Adjustment quantity multiplied by the review unit-cost basis.
COST STATUS	Use the export to identify missing cost, such as MISSING LAST COST. A blank impact is not evidence of no inventory effect.
Zero versus missing cost	A genuine zero cost is distinct from a missing amount. Confirm the intended basis before approving the affected items.

Check units before using an approval threshold

The current estimate does not automatically convert differing stocking and costing units. Review those items separately and confirm the valuation basis before using the displayed impact as an approval threshold.

Export the complete review

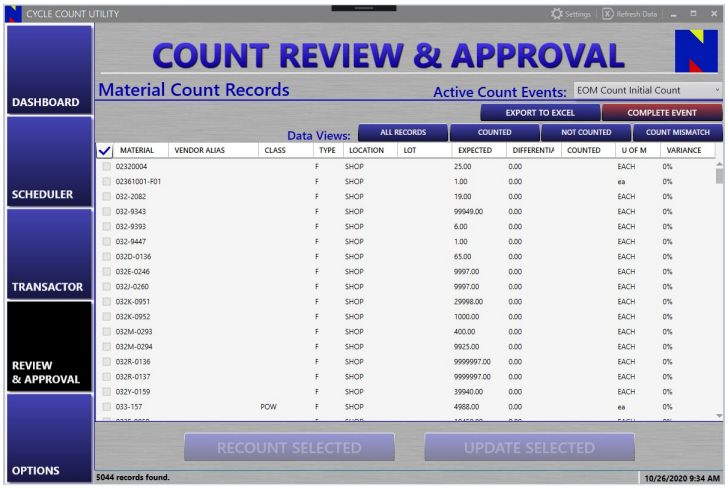
Use Review EXPORT TO EXCEL for the count identity, quantities, cost basis, unit cost, adjustment quantity, valuation impact and cost status. It exports the whole selected count set; filters and checked rows do not limit it.

After posting, use JobBOSS balances and transaction reports to verify what was actually written. The current estimate and the transaction Costing Method serve different parts of the workflow.

DESKTOP PROCEDURE

Review the results and select actions

Refresh the data before making the posting decision.



Review & Approval provides count views, processing selections and the recount/update actions. Current financial columns extend this earlier repository view.

1 **Load fresh results**
Return to Dashboard, reopen Review & Approval and reselect the set. Check quantities, location/lot, Differential and financial impact.

View	Use it to review
ALL RECORDS	The complete selected count set.
COUNTED	Rows with a submitted count, including a genuine zero.
NOT COUNTED	Rows with blank counter information; check submitted zeros through COUNTED.
COUNT MISMATCH	Reported quantities differing from the original snapshot. This is not necessarily the final net adjustment after movement.

2 **Choose the intended rows**
Use the row checkboxes. Recount a questionable result with RECOUNT SELECTED, or post reviewed rows with UPDATE SELECTED. Selecting a checkbox alone does not update inventory.

Processed or recounted rows are disabled for normal further action. Do not treat the top select-all control as a substitute for reviewing which eligible rows it has selected.

LIVE INVENTORY UPDATE

Post and verify the selected counts

UPDATE SELECTED is the normal desktop action that changes JobBOSS.

Check the transaction settings

Setting	What to confirm
Transaction Date	The intended transaction date; the setting defaults to today.
Transaction Reason	Choose the appropriate JobBOSS adjustment reason. A distinctive reason can help locate the count's transactions in reporting.
Costing Method	Standard Cost, Average Cost or Last Cost for the inventory transaction. This setting is separate from the fixed make/buy basis used by the current financial review estimate.

1. **Review fresh data and selections**
   Check the selected stock rows, their reported quantities, Differential and estimated impact. Finish any outstanding cumulative counting before posting.

2. **Choose UPDATE SELECTED**
   Confirm the prompt and allow processing to finish. A progress or success message alone is not the final verification of every row.

3. **Refresh the utility**
   Reopen the count set through Dashboard and Review. Check which rows have been processed and investigate any unresolved messages.

4. **Verify the live result**
   Open the relevant material/location/lot balances in JobBOSS. Use the Material Transaction Register or installed transaction report with date, type and reason to confirm the changes.

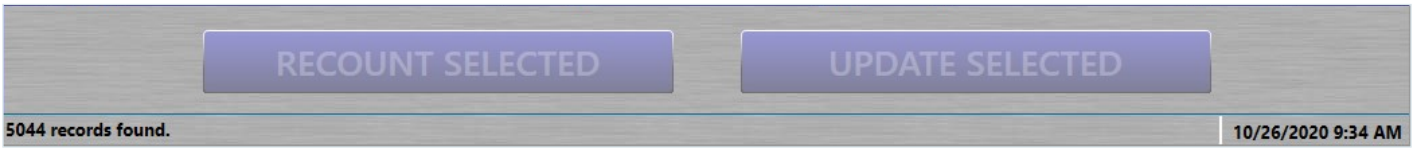
Check representative increases, decreases, genuine zeros, new stock locations/lots and any transfer pair. A no-change result can be marked processed without creating a quantity change; desktop processing still updates the material last-count Date2.

If the result is uncertain: preserve the count/export, inspect actual JobBOSS balances and transactions, and resolve the outstanding work before retrying. Posting is not an all-or-nothing batch rollback.

EXCEPTION HANDLING

Send selected items for a recount

Create a fresh count set for the items that need another look.



Use RECOUNT SELECTED for another count or UPDATE SELECTED for the reviewed inventory update.

1. **Identify the questionable rows**
   Refresh and select the relevant submitted counts. Check the physical location, lot, unit and any movement before deciding whether another count is needed.

2. **Choose RECOUNT SELECTED**
   Confirm the prompt. The utility creates a new numbered count set for the selected rows under the same event.

3. **Direct the counter to that set**
   Ask the counter to refresh event selection and choose the same event title with its new Count Number. The new set takes a fresh snapshot and needs new physical quantities.

4. **Review the new result**
   Refresh the desktop, choose the Recount set and compare the new quantities and impact. Recount again if required, or post the accepted result.

5. **Finish each relevant count set**
   Verify posted results and complete the sets that no longer need action. Completing one selected set does not resolve all other initial/recount work automatically.

What happens to the original result?

The original selected rows are marked as sent for recount and disabled for normal further action. That action does not post their old quantities to JobBOSS. Continue the workflow from the newly created Recount set.

If a row is simply left unprocessed, no automatic approval occurs later. Decide whether to correct it, recount it or leave it out before completing the set.

USER CAN ADD MATERIAL

Capture unexpected stock and WIP observations

Keep a separate event for valid items found outside the planned list.

1. **Create an empty companion event**
   Define a clearly named event, turn on User Can Add Material and leave Direct Inventory Update off. Save and start it. It intentionally starts without a material list.

2. **Add the found item from the browser**
   Choose that event. Enter the existing Material ID, existing Location and actual Quantity. Supply Lot when applicable; it can be blank.

3. **Refresh and review the additions**
   In the desktop, reopen the event through Dashboard. Confirm the stock identity, quantity and estimated impact of the newly added rows.

4. **Post only intended stock changes**
   Use the normal reviewed posting procedure for genuine inventory adjustments. Verify the new or changed material/location/lot balances afterward.

Field	Meaning
Material / Location / Quantity	Required. Use valid existing JobBOSS material and location identifiers and the physical quantity.
Lot	Optional, up to 20 characters. Use the applicable stock lot rather than inventing a placeholder.
Vendor Alias	Optional reference. Supply the actual Material ID for adding a row; an alias does not substitute for it in this add workflow.
Job	Optional reference to an existing job for a WIP observation or export.

WIP observations are an export workflow

The Job field can help describe parts observed on the floor. It does not post job labor, operation completions or a JobBOSS WIP count. For WIP-only tracking, review and export the observations without posting inventory adjustments. A Job reference does not prevent UPDATE SELECTED from changing stock on that row.

ADDITIONAL QUANTITIES

Use cumulative counts correctly

Each entry adds an increment to the same material/location/lot count.

Counter action	Enter	Running quantity
Find ten pieces and submit the first count	10	10
Find two more pieces and submit again	2	12
Do not enter the new total as the second entry	12 would add again	22 instead of 12

Prepare the event

Turn on Cumulative Update before starting. Keep Direct Inventory Update off for the reviewed workflow. Counted items remain available on the browser so additional quantities can be reported.

Coordinate the counting team

- Assign clear areas or stock portions so two people do not report the same physical quantity twice.
- Submit each increment once. Repeating the action adds it again; it is not a harmless refresh or replacement.
- The remaining browser list does not shrink in the usual way. Use the agreed coverage plan and desktop review to determine when the work is finished.
- Finish all counting on the affected rows before posting. Tell counters when the count set is closed for further entries.

Correct a mistake deliberately

In an ordinary event, desktop Physical Count → UPDATE replaces the staged amount. In a cumulative event that same action adds another increment. Do not enter a replacement total there expecting it to overwrite the old total.

Ask the reviewer to reconcile the entries or create a clean recount for the affected items. Use the normal reviewed posting and verification steps after the final cumulative quantities are settled.

ADVANCED CUMULATIVE WORKFLOW

Handle a location transfer

Review both sides of the move before posting.

Transfer fields are available when **Cumulative Update is on**, **User Can Add Material is off** and **Direct Inventory Update is off**. Use a small representative example with Neptune before adopting this workflow for a larger relocation.

1. **Report the source quantity first**
   Count the source material/location/lot and submit it. Its recorded quantity must cover the amount to be moved.

2. **Reopen the item and identify the destination**
   Choose a different To Location and the applicable To Lot. A lot-only change within the same location does not initiate this transfer path.

3. **Enter the amount being moved**
   Submit the transfer quantity once. The utility stages the reduction at the source and the addition at the destination; stock has not yet been posted.

4. **Review both source and destination**
   Refresh the desktop and inspect both rows. The manager must select the intended source and destination rows; the system does not automatically pair the posting selections.

5. **Post and verify both sides**
   Use UPDATE SELECTED after review. Verify both stock balances and the resulting JobBOSS transactions. Resolve any discrepancy before processing additional moves.

Example: move four after counting ten

The source staged quantity becomes 6. If the destination was previously uncounted, its staged result includes its starting balance plus 4; it becomes 4 only when that starting balance was zero. If the destination already had a count, the move adds 4 to that count.

A move can interact with ordinary count adjustments on the same row. Check transaction quantities, types and values as well as the final stock balances; do not assume a paired, zero-value result from the entry alone.

ADVANCED INPUT WORKFLOW

Import counted quantities from Excel

Use the four-column count template supplied with this package.

Col.	Header	Enter
A	Material	Existing JobBOSS Material ID.
B	Location	Existing JobBOSS Location ID.
C	Lot	Applicable lot, or blank. Maximum 20 characters.
D	Counted_Quantity	Actual whole-number count. Zero means none found; blank is not a count.

1. **Prepare the input**
   Use Neptune-Cycle-Count-Count-Import-Template.xlsx. Keep one sheet, row 1 headers and the four columns in order. Format Material, Location and Lot as text before entering data to preserve leading zeros. Start on row 2, then save/close.

2. **Open the intended started count**
   Use a new intentionally empty event for a clean import, or an existing set for new combinations. In Transactor, select that set, choose EXCEL IMPORT and select the saved file.

3. **Process and inspect**
   Choose PROCESS SPREADSHEET. Read the validation/result messages and review the rows and quantities prepared for import.

4. **Accept into the count**
   Use ACCEPT to add the rows and their counted quantities to the utility. This stages the counts; it does not post inventory.

5. **Refresh, review and post normally**
   Reopen Review & Approval through Dashboard, select the event and inspect the staged values before any UPDATE SELECTED action.

Current import scope: existing material/location/lot rows are skipped, not overwritten. This adds new count rows. Use browser or desktop entry for fractional quantities.

Older layouts differ. The repository's original three-column sample and historical selection-list exports do not match this current count importer. Do not import them unchanged, and do not fill missing quantities with zero just to create an uncounted list.

REPORT-DRIVEN SELECTION

Plan recurring cycle counts

Use classifications and last-count dates to select manageable repeat work.

The configured cycle-planning reports complement the event scheduler. They can select eligible stock for recurring counts by material type, cycle code, dates and workload. The scheduler itself contains manually created events; the calendar date does not automatically start them.

Material custom field	Documented planning role
Text1, or the report's selected Text1-Text5 field	Stores the cycle-count classification. Confirm the field used by the installed report before assigning codes.
Date1	A forced/next scheduled count date. Future-dated items wait until eligible under the report's rules.
Date2	The material's last processed count date, updated by normal desktop posting. Direct browser update does not stamp it through that same path.

Example classification plan

Code	Counts in the documented 12-month plan	Typical interval
A	6	About 2 months
B	4	About 3 months
C	2	About 6 months
D	1	About 12 months

Use the actual frequency, period and daily-selection parameters configured for your report. Rotation is based on the last count and next eligibility; it is not a promise to catch up a missed annual quota automatically.

The documented report route selects positive on-hand stock with eligible codes. Review code assignments periodically and agree on the custom-field mapping before using fields that already serve another business process.

The next page explains how to bring a selected list into an event without confusing a planning export with actual counted quantities.

REPORTING WORKFLOW

Use planning reports and count exports

Choose the output that matches the question you need to answer.

Resource	Use
Cycle Count Export / configured planning report	Prepare a recurring selection using the site's cycle-code field, period, material filters and daily workload parameters.
Cycle Count Summary	Review event/count information using the installed report parameters. Confirm the appropriate event or date scope.
Dynamic Barcode Report	Provide barcode references for materials when that helps the counter's workflow. Verify the report's database and selection.
Review EXPORT TO EXCEL	Export the complete selected count set with quantity and financial review columns. The current filter and checked rows do not limit this export.
Transactor export	Review the count list and staged quantities; User Can Add exports can include Job references. This layout is not the four-column count-import template.
JobBOSS Material Transaction Register	Verify inventory transactions after posting using the appropriate date, type and reason filters.

From a planning list to a count event

1. **Review the report parameters**
   Check the classification field, period, eligibility dates, material type and requested list size against the site's counting plan.

2. **Create the intended event**
   Define the equivalent scope in Scheduler or add selected items through Transactor. Use only a list-import workflow confirmed for the installed build.

3. **Keep selection separate from count data**
   The four-column importer in this package adds actual counted quantities. A three-column selection export must not be loaded into it unchanged or padded with invented zero counts.

Retain the relevant review export and resulting transaction report with the team's count records. Missing valuation values should be investigated through COST STATUS rather than treated as zero impact.

EVENT LIFECYCLE

Hold, cancel or complete the count

Complete a count set only after its intended work has been verified.

Action or state	What it means
Scheduled / SAVE	The definition is saved on the calendar. Counters cannot use it until it is started.
START EVENT	Begins the count and captures the starting stock scope. Definitions and options become locked.
HOLD EVENT / RESUME EVENT	Temporarily pauses and resumes the event. Resuming does not take a new full-event snapshot.
CANCEL EVENT	Ends that event's workflow. It is not an inventory rollback and has no normal resume action.
DELETE EVENT	Available for a scheduled event before it is started.
COMPLETE EVENT	Marks the selected event/count-number set complete and removes it from active work. It does not post unfinished rows or resolve other recount sets.

Before choosing COMPLETE EVENT

- Check that intended counts have been posted, recounted or deliberately excluded and that JobBOSS results have been verified.
- Finish and verify the relevant initial and recount sets. Complete each set that no longer needs action.
- Export the useful review information and retain the related transaction report or purchasing/inventory records used for verification.
- Tell counters that the work is finished, especially after cumulative counting.

Completed data remains in the utility's count tables for reporting. There is no normal Uncomplete action in the reviewed interface, so finish the review before completing the set. Completing or canceling an event does not reverse inventory already changed.

TEAM EXERCISE

Practice the normal reviewed workflow

Use three rows to cover an ordinary count, a zero and a recount.

Use an approved training database or a small authorized live count with known materials and locations. Leave all three event options off. Choose examples that can be checked directly in JobBOSS.

Practice item	Counter action	Reviewer action
Item 1: a known quantity	Submit the actual nonnegative quantity.	Verify the quantity and estimated change; post when correct.
Item 2: confirmed none found	Submit a genuine zero.	Confirm it in COUNTED even if the counter/date display is blank; verify the intended zero-stock result.
Item 3: a result needing a second check	Submit the first observed quantity.	Use RECOUNT SELECTED, collect the second count, then review and post that set.

1. **Create, scope and start**
   Check that the event contains the intended material/location/lot rows and appears on the browser after START EVENT.

2. **Count and refresh**
   Submit the quantities, then return to Dashboard and reopen Review. Confirm the difference between uncounted and submitted zero.

3. **Resolve and update**
   Handle the recount, confirm transaction settings and post only the reviewed rows.

4. **Verify and close**
   Check stock balances and the transaction report. Export the count review and complete the finished initial/recount sets.

Optional movement exercise

In a training environment, submit 25 and then record an authorized issue of 1 in JobBOSS. Refresh the reviewed count and confirm the ordinary Differential of -1 and target 24 before posting. This checks the installed movement workflow; do not invent a live transaction merely to imitate the example.

OPERATOR REFERENCE

Common questions and fixes

Use the observed state to choose the next action.

Question or symptom	Practical response
The event is on the calendar but absent from the browser	Confirm START EVENT was used. Scheduled dates do not start counts automatically; held/completed sets are not normal active browser work.
Login does not work	Use the correct interface's identifier: JobBOSS user ID for desktop, Employee ID for browser. Check the internal URL and setup with the site contact.
The count starts empty	Check types, classes and final Count Event Locations. A User Can Add event is deliberately empty. Recheck optional custom-field filters before starting.
An item disappears after counting	Normal noncumulative counts remove submitted items from the available browser list. Ask the manager to correct or recount if more stock is later found.
An item stays visible after counting	Cumulative Update keeps it available for additional quantities. Each new submission adds again.
A submitted zero looks uncounted	Use the COUNTED view and actual submitted record. The older counter/date display can be blank for a zero.
Recent browser entries are missing in Review	Return to Dashboard, reopen Review & Approval and reselect the event. A direct Transactor-to-Review switch can reuse older data.
Financial impact is blank or unexpected	Check the current stock, Differential, selected material and COST STATUS in the review export. Missing cost is different from zero cost.
An Excel selection list produces unexpected counts	Stop. Confirm the four-column count-data format. Older three-column list-only files are not compatible with the current importer.
Posting was interrupted or the result is unclear	Do not resubmit automatically. Inspect the processing state, actual JobBOSS balances and transactions, then resolve the outstanding rows with the reviewer or Neptune.

REFERENCE

Resources and daily checklist

Keep the operating guide and current template available to the team.

Before each count

- Confirm the event title, database, scope, units and options. Start explicitly when counters should begin.
- Make it clear whether the event is normal, cumulative or User Can Add, and whether any immediate posting is enabled.
- Refresh before review. Check quantity differences, Differential, missing costs and estimated impact.
- Post reviewed rows once, verify JobBOSS results, retain the useful outputs and complete each finished count set.

Companion resources

Product overview
Neptune-Cycle-Count-Marketing.pdf explains the business use, desktop/browser workflow and capabilities.

Count-data import template
Neptune-Cycle-Count-Count-Import-Template.xlsx contains one sheet, four headers and no sample records. Use it for actual whole-number counts with the current import workflow.

Watch the shared inventory webinar

The recording covers Physical Inventory / Inventory Assistant and the paperless Cycle Count utility. Use the Cycle Count portion for this product. GoTo Webinar registration is required; older screens may differ from the reviewed workflow.

Contact Neptune

Provide the event title/count set, material/location/lot, the action taken, exact message and relevant export or screenshots through your normal support channel.

This guide uses genuine repository application images and reconciles the current source with historical training. The first workflow is the normal desktop-reviewed mode; Direct Inventory Update and historical import layouts have distinct behavior.

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