

Stocktake checklist

One location, one section, one sitting. Tick each box as you go.

Binly

Date	Location	Section or shelf	Counted by
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Before the count the day before, or first thing

- ☐ **Pick one location and one small section.** A shelf, a supplier or a collection. A section you can finish in one sitting stays accurate.
- ☐ **Copy the Expected quantities from Shopify** (on hand, for that location). Write down the date and time you copied them.
- ☐ **Set new deliveries aside, still sealed.** Receive them after the section is counted, not during.
- ☐ **Name every shelf or bin** and give each person their own, so nobody counts the same shelf twice.
- ☐ **Print the Count sheet or open it on a tablet.** For a blind count, hide the Expected column until counting is done.
- ☐ **Clear the 8 example rows** in the sheet. Select the cells and press Delete, and keep the grey formula columns.

During the count shelf by shelf

- ☐ **Count units, not boxes.** For an open case, write cases times units per case.
- ☐ **Type 0 when a shelf is empty.** Leave Counted blank only for lines you have not reached yet.
- ☐ **Move counted stock to one side** or mark the shelf, so a counted item is never counted again.
- ☐ **Keep damaged, open and returned units apart** and write them in Notes. Do not mix them into the count.
- ☐ **Write down anything that is not on the sheet.** No SKU, no barcode, wrong shelf. Do not guess a match.
- ☐ **Note each sale or delivery that lands during the count,** with the time. Stock moves while you count.

After the count before you change anything in Shopify

- ☐ **Unhide Expected and read the Summary sheet.** Red lines are short, amber lines are over.
- ☐ **Recount the big gaps with a second person,** blind. Our rule of thumb is 2 units or more, or \$50 or more in value. Set your own and keep it the same every time.
- ☐ **Look for the usual causes first:** a delivery never received, a return never restocked, damaged stock never written off, a typo, an item on the wrong shelf.
- ☐ **Account for sales since you copied Expected.** If orders came in, apply the difference you found (for example minus 2), not the counted total.
- ☐ **Enter the changes in Shopify and check a few lines** to confirm they match what you counted.
- ☐ **Save the sheet with the date in its name.** Note any SKU that is off again and again. That one is a process problem, not a counting one.

Where a spreadsheet stops. It covers a count by hand. It does not know about sales, it does not change Shopify, and several people typing into one file at once is slow and error-prone. If you count every week, or your catalog is large, a count tool saves the typing.