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Note: You can contact [support@coderedr.com](mailto:support@coderedr.com) to get the latest version of the extension.

Cycle Count and Inventory Audit Worksheet

File Edit View Insert Format Data Tools Extensions Help

Item Barcode	Description	Master	Audit	Diff
upc_00000000	Description	0	1	1
upc_00000001	Description	1	1	0
upc_00000002	Description	2	2	0
upc_00000003	Description	3	5	2
upc_00000004	Description	4	4	0
upc_00000005	Description	5	4	-1
upc_00000006	Description	6	57	51
upc_00000007	Description	7	7	0
upc_00000008	Description	8	33	25
upc_00000009	Description	9	9	0
upc_00000010	Description	10	12	2
upc_00000011	Description	11	13	2
upc_00000012	Description	12	143	131
upc_00000013	Description	13	13	0
upc_00000014	Description	14	43	29
upc_00000015	Description	15	15	0
upc_00000016	Description	16	16	0
upc_00000017	Description	17	200	183
upc_00000018	Description	18	19	1
upc_00000019	Description	19		
upc_00000020	Description	20	19	-1
upc_00000021	Description	21	21	0
upc_00000022	Description	22	24	2
upc_00000023	Description	23		
upc_00000024	Description	24	24	0
upc_00000025	Description	25	23	-2
upc_00000026	Description	26	25	-1
upc_00000027	Description	27	27	0
upc_00000028	Description	28	22	-6
upc_00000029	Description	29		
upc_00000030	Description	30	30	0
upc_00000031	Description	31		
upc_00000032	Description	32	32	0
upc_00000033	Description	33		

\* Compare system quantity ("Master") with physically counted quantity ("Audit").

\* Highlight differences ("Diff") based on a selected margin of error (percent or quantity).

\* Update system quantity once the new count is accepted.

CodeREADr Cycle Count

Import data

Import using "Download Link"

Export data

Update "Export" Save as CSV

Accept Audit quantity

Accept selected Accept ALL

Update

Margin of error

Percent Value

0 0

Save

Message

Create new Template (same folder)

NEW TEMPLATE

Master Export to CodeREADr Import from CodeREADr Worksheet Explore

# Cycle Count and Inventory Auditing

## A. Instructions for the CodeREADr Cycle Count Extension

The intention of sharing this **CodeREADr Extension** is to help companies audit their inventory. It is useful for:

1. Repetitive cycle counts of selective items.
2. Full, simultaneous audits of an entire inventory database, locally or globally.

### Features

1. **Barcode scanning app** integrated with web services to scan items, record physical counts, and present the results in Sheets. [Note: You do not have to use the CodeREADr app. You can collect item quantity data using whatever resources you want.]
2. View your inventory database and **compare it to the physical count** with margins of error automatically calculated based on a percentage of error or a specified quantity.
3. **Auto-update your inventory database** after accepting or correcting errors.

### Getting Started

1. **You must be familiar with Google Sheets to use this tool.** You also need access to a copy of your company's inventory database for uploading to the sheet in a specific format to the Master Sheet.
2. You need a Google Account (Gmail, Sheets, Drive). It does not have to be a paid account. Note: You should **only have one Google Account open** in the same browser when using this Extension.
3. [Use this link to make a copy of the Cycle Count spreadsheet.](#) You will use the copy, not the original.
4. Click on **Extensions** in the sheet's header and then click **CodeREADr** and **CodeREADr Cycle Count** to open the sidebar.

### Master Sheet

1. Start here. Import your inventory database. The columns must be in the following order and **the headers must be maintained exactly as-is.**
  - Column 1 (**Item Barcode**) must be formatted as **plain text**.
  - Column 2 (**Description**) is a short description of the item.

- Column 3 (**Quantity**) is the starting quantity in your database before the audit. It will be auto-updated after the audit is complete and you've approved changes from the audited quantities.

### **Export to CodeREADr**

1. The purpose of this sheet is to configure the Master sheet data for importing to CodeREADr's servers in the required format. On the sidebar click **Update Export** and when done, click on **Save as CSV** which will generate a file in Drive to import to CodeREADr.

### **Import from CodeREADr**

1. The purpose of this sheet is to pull scan records (barcode values + quantities) from CodeREADr to compare the physical count to the Master sheet's quantities.
2. Once imported, the scan records are transferred to the Worksheet's Audit column. Importantly, all duplicate quantities are added together to create one total for the import and Worksheet.
3. When importing scan records from CodeREADr, **each import CLEARS the previous data**. That means that the quantities for the barcode values in the Worksheet will change to the new quantities. However, for any barcode values previously transferred to the **Worksheet** will not be affected.

### **Worksheet**

1. The headers must be in this order and **the header's names must be maintained**.
2. The **Item Barcode** and **Description** column data are pulled directly from the Master sheet. The **Quantity** header here is broken down into 3 columns. The **Master** column quantity is pulled directly from the Master sheet. The **Audit** column is pulled from the **Import from CodeREADr** sheet. The **Diff** column shows the difference between the Master and Audit columns.
3. Each cell in the Diff column will indicate a color based on the difference. If it is green, the quantity matches. If orange, the audited quantity is higher or lower than the original Master quantity.
4. With the sidebar's **Margin of error** option, you can define when the orange color is used. You can select a percentage difference or a quantity difference. If left at "0" the quantities must match exactly.

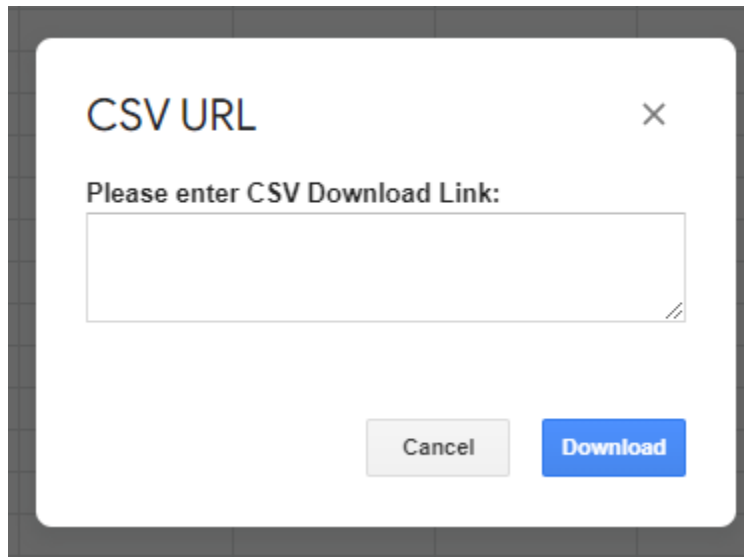
### **Create New Template**

1. This will create a new Google Spreadsheet if you want to have multiple audits running for different inventories..

## **B. Instructions for Creating CodeREADr Services**

To use the CodeREADr app with this extension or for any data capture application you will need to create a "Service" on the CodeREADr website.

1. Please look here for general instructions to configure the special service [Instant Count Verification](#). You can use the CodeREADr website's Chat Now option for real-time assistance or email [support@codereadr.com](mailto:support@codereadr.com). IMPORTANT: When using the CodeREADr Cycle Count Extension you will need to configure these CodeREADr options:
  - a. The [Export Template](#) must match the columns used in the sheet **Importing from CodeREADr**.
  - b. When you create your [task to download scan records](#) and you filter which scans to download, you need to check the Advanced Search Option "**Only recent scan for each barcode**".
  - c. After creating the download task be sure to copy the "**Link to Download**".
2. The **Link to Download** is needed for automating the CodeREADr imports. To see the sidebar for entering you need to:
  - a. In the sheet's ribbon, click on **Extensions >> CodeREADr >> CodeREADr Cycle Counts** to see the sidebar on the right hand side of the sheet. Then click on the button **Import using "Download Link"**. You will then be asked to confirm the import and then enter the download link.



CSV URL

Please enter CSV Download Link:

Cancel Download

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The code can be found by clicking **Extensions** in the sheet's ribbon and then clicking Apps Script.

```
1  /*****
2  Copyright (C) 2022 CodeREADr Inc.
3  This program is free software: you can redistribute it and/or modify it under the terms of the GNU General Public License as published by the Free Software Foundation, either version 3 of
4  the License, or (at your option) any later version.
5  This program is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the
6  GNU General Public License for more details.<http://www.gnu.org/licenses/>
7  *****/
8
9  /*****
10 * onOpen
11 * creates menu and show default sidebar
12 *
13 *****/
14 function onOpen() {
15   var ui = SpreadsheetApp.getUi();
16   ui.createAddonMenu()
17     .addItem('CodeREADr Cycle Count', 'showSidebar')
18     .addToUi();
19
20   checkTabs();
21   showSidebar();
22 }
```

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