

Checklist

Stocktaking Preparation Checklist

A simple inventory count checklist for teams preparing warehouses, vans, tool rooms, and IT storage for stocktaking.

Before Count Day

- Define count areas, cutoff time, and responsible counters.
- Freeze transfers, issues, and receipts if required.
- Print or prepare count sheets, labels, and scanners.
- Group items by location, category, or asset owner.
- Flag damaged, missing, or untagged items in advance.

During Review

- Check variances against expected quantities or records.
- Review high-value and critical assets a second time.
- Document missing tags, duplicates, and location errors.
- Collect signed count sheets or digital confirmations.
- List follow-up actions for reconciliation and corrections.

Discrepancies / Follow-Up
