

Transactions Allowed When Physical Was Created to Lock the Warehouse

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Issue:

A Physical count batch was created and the option to Lock Warehouse was selected.

The screenshot shows the 'My Lock Edit' window. The 'Code' field contains 'My Lock'. The 'Setup Information' tab is active, showing the 'Detail' section with 'Description' set to 'My Lock', 'Warehouse' set to 'Mine', and 'Start Date' set to '3/28/2024'. The 'Lock Warehouse' checkbox is checked. The 'Count Sheet' section has 'Sort Count Sheet By' set to 'Product Line', 'Then:' set to 'Row', and 'Then:' set to 'Part Code'. There are three unchecked checkboxes: 'Print Value on Variance', 'Print Quantity on Sheet', and 'File Skipped Parts As Zero Quantity'. The 'Get Parts' button is visible next to the 'Lock Warehouse' checkbox. At the bottom of the window are buttons for 'Release Physical', 'View Variance List', 'Save', and 'Close'.

Transactions were still allowed in the warehouse after the count was created.

Why?

Resolution:

The start date defined is the date that the Physical Count should be the date the count will be done in the warehouse(s).

The start date is also the **only date** that a warehouse will be locked from activity.

On the Start Date, users will receive a message that inventory cannot be relieved because the warehouse has been locked.

If the entering of the final counts into SedonaOffice takes more than one day to complete, users will be able to continue all inventory activity starting on the day after the start date.

SedonaOffice will keep track of the transactions that take place after the start date. The application will automatically adjust the on-hand quantity of parts taking these transactions into account after the physical has been released.

The release date of your inventory must always be the same date as your start date so that on hand amounts are modified for activity taking place after the actual date of the count.
