Cycle Counting & Stocktake Manager

User Guide

Odoo 18 / 19 · Community Edition

Inventory & Operations

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1. Overview

Cycle Counting & Stocktake Manager replaces chaotic year-end stocktakes with controlled, ABC-driven cycle counts. Classify products A/B/C, schedule how often each class is counted, run blind counts, route variances through an approval step, and post the resulting inventory adjustments.

Counters never see the system quantity (blind counting), variances above tolerance are reviewed and approved before any adjustment, and approved sessions post standard Odoo stock adjustments.

Who is it for?

Warehouse and inventory managers who want accurate perpetual inventory through disciplined cycle counting rather than disruptive full stocktakes.

Technical name	gb_cycle_counting_stocktake_manager
Category	Inventory & Operations
Depends on	stock
Edition	Odoo 18 / 19 Community (no Enterprise required)
Licence	LGPL-3

2. Installation

The module installs like any standard Odoo application. You need a user with the Administration / Settings access right to add an app.

- Activate Developer Mode (Settings ▸ General Settings ▸ Developer Tools) if the Apps menu is hidden.
- Open Apps and click Update Apps List so Odoo re-scans the add-ons path.
- Search for “Cycle Counting & Stocktake Manager” (technical name **gb_cycle_counting_stocktake_manager**).
- Click Install. Odoo loads the models, security groups, menus and any scheduled actions.
- Refresh the browser; the new top-level menu Cycle Counting appears.

Dependencies

This app depends on stock. Odoo installs any missing dependency automatically.

3. Configuration

Set up ABC classes and schedules; sessions are then generated automatically or on demand.

ABC Classes — Cycle Counting ▸ Configuration ▸ ABC Classes

Define ABC classes (cycle.count.class) and their count frequency — typically A items counted most often.

Schedules — Cycle Counting ▸ Configuration ▸ Schedules

Schedules (cycle.count.schedule) decide which locations/products are counted and when; Generate / ABC creates sessions.

Variance approval

Variance lines have a Pending → Approved/Rejected step so adjustments are controlled.

4. Step-by-step Usage Walkthrough

Generate a session, count blind, review variances, then post.

Step	What you do
1. Generate session	Use Generate / ABC (action_generate_session) or let the cron create due sessions; a count session is created in Draft.
2. Start counting	Press Start (action_start); the session becomes Counting. Counters record counts blind (system qty hidden).
3. Submit review	Press Submit for Review (action_submit_review); variances are calculated and the session moves to Review.
4. Approve variances	On each variance line press Approve or Reject (or Set Zero); large variances need approval.
5. Post	Press Post (action_post); approved counts post standard inventory adjustments and the session becomes Posted.
6. Recounts	Reject a line to trigger a recount before posting.

Status lifecycle

Session: Draft → Counting → Review → Approved → Posted. Variance line: Pending → Approved (Counted → Adjusted).

5. Feature Reference

ABC classification

Products grouped into A/B/C classes with class-based count frequency.

Count schedules

Schedules that generate due count sessions automatically (with a cron) or on demand.

Blind counting

Counters do not see the system quantity, removing bias.

Variance approval

Variance lines reviewed and approved/rejected before any adjustment is posted.

Adjustment journals

Approved sessions post standard Odoo inventory adjustments.

Session lifecycle

Draft → Counting → Review → Approved → Posted with clear control at each step.

6. Tips, Troubleshooting & FAQ

Q. What is blind counting?

A. Counters record what they physically find without seeing the expected quantity, so the count is unbiased.

Q. How does ABC drive scheduling?

A. Each ABC class has its own frequency — high-value A items are counted more often than C items.

Q. Who approves a variance?

A. An authorised user reviews variance lines in the Review state and approves, rejects (recount) or sets zero before posting.

Q. Does posting change stock?

A. Yes. Posting an approved session creates standard inventory adjustments to align system stock with the count.

Q. Can sessions be created automatically?

A. Yes. A scheduled action generates due sessions from your schedules.

Q. Do I still need a year-end stocktake?

A. Disciplined cycle counting keeps inventory accurate continuously, reducing reliance on a disruptive full count.

7. Support

We provide application support and integration guidance for this module. If you hit an issue, please include your Odoo version (18 or 19), the module version, and a short description with a screenshot.

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Thank you for choosing Cycle Counting & Stocktake Manager. This guide documents the features as implemented in the module; menu labels and field names match what you see in Odoo.