Stocktake checklist

11/3/26, 11:54 AM

This list is a starting point, not a verified template. It may contain errors or gaps. Review it and add what your business needs before you use it.
Online and as an app template: checkloop.app/checklists/stocktake/

Storage area

Count date

Count team

Planning – weeks before

- [ ] Count date set
- [ ] Method chosen: full count, cycle count or sampling
- [ ] Count teams assigned: one person counts, one writes
- [ ] Count sheets prepared by storage location
- [ ] Process agreed with your accountant

Preparation – days before

- [ ] Storage areas tidied, stock sorted
- [ ] Damaged and expired stock set aside
- [ ] All deliveries and dispatches before the count date booked in
- [ ] Third-party and consignment stock labelled
- [ ] Scales, scanners and counting devices checked

Count day

- [ ] Stock movements stopped
- [ ] Every item counted, weighed or measured
- [ ] Quantity and unit recorded

- [ ] Counted areas marked
- [ ] Unclear items counted again
- [ ] Count sheets signed

Afterwards

- [ ] Count results entered
- [ ] Counted stock reconciled against the system
- [ ] Larger discrepancies investigated
- [ ] Stock adjustments posted
- [ ] Stock valued
- [ ] Paperwork filed

Open this list in CheckLoop
https://app.checkloop.app/?template=stocktake