

MAS Mobile Inventory Counting module overview



ABC Type as selection type for Count Books feature
releasing with version 9.2

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Agenda

Introduction

- Timeline of available functionality

MAS Mobile

Inventory Counting – ABC as Selection Type for Countbook

- Generate Count books based on the Selection type of ABC Type
- Use Count books in MAS Mobile

Demo

Storeroom Clerk Mobile



Fred

Also known as: Inventory clerk, Inventory Specialist, Stock clerk, Warehouse clerk, Package handler, Storeroom manager...

Duties

- Receive & stock materials into inventory
- Pick and Stage materials from inventory
- Issue materials from inventory
- Transfer materials across storerooms
- Ship materials from inventory
- Perform cycle counts
- Reconcile inventory counts
- Identify and remove obsolete inventory



Storeroom Clerk Main Experiences

MAS Mobile inventory Applications



Inventory Counting

(available from **8.9**)

- Identify items to count
- Count with Count Books created in Manage or Ad-hoc counting of items in Storeroom
- Reconcile discrepancies in RBA or on Mobile device
- Recount/Verify/Adjust
- Updated UX, optimized loading



Inventory Receiving

(available from **8.10**)

- Accept PO deliveries
- Inspect material if required
- Return processing
- Voiding Receipts
- Create Rotating Assets
- Set BIN, attributes on receipt
- Updated UX, filters, search



Shipment Receiving

(available from **8.11**)

- Accept internal shipment
- Inspect internal shipment
- Return internal shipment
- Create Rotating Assets on mobile device



Issues and Transfers with Inventory Usage

(available from **8.11**)

- Issue Reserved Items for Work Orders, Material Requisitions
- Issue items without reservation
- Create, Save, Open Inventory Usage Records
- Transfer without-, with reservation (internal POs), Shipment creation
- Staging
- Storeroom selection

Storeroom Clerk Main Experiences – Planned for MAS Mobile 9.2

MAS Mobile inventory Applications



Inventory Counting

(available from **8.9**)

- Identify items to count
- Count with Count Books created in Manage or Ad-hoc counting of items in Storeroom
- Reconcile discrepancies in RBA or on Mobile device
- Recount/Verify/Adjust
- Updated UX, optimized loading

Planned for 9.2

- Access to all Storerooms at insert site
- Upload/update item Images
- ABC Type based count books



Inventory Receiving

(available from **8.10**)

- Accept PO deliveries
- Inspect material if required
- Return processing
- Voiding Receipts
- Create Rotating Assets
- Set BIN, attributes on receipt
- Updated UX, filters, search

Planned for 9.2

- Service Receipts
- Direct Issues
- Access all POs at insert site
- Upload/update item images
- Upload attachments



Shipment Receiving

(available from **8.11**)

- Accept internal shipment
- Inspect internal shipment
- Return internal shipment
- Create Rotating Assets on mobile device

Planned for 9.2

- Access all Shipments at insert site (to any Storeroom)



Issues and Transfers with Inventory Usage

(available from **8.11**)

- Issue Reserved Items for Work Orders, Material Requisitions
- Issue items without reservation
- Create, Save, Open Inventory Usage Records
- Transfer without-, with reservation (internal POs), Shipment creation
- Staging
- Storeroom selection

Planned for 9.2

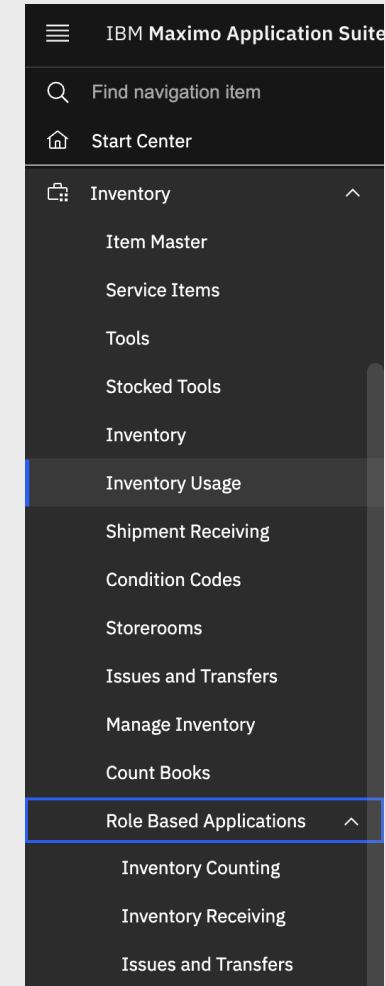
- Return issued items
- Return legacy issues

Role Based Applications

MAS Mobile Inventory Apps are also available as **Role Based Applications**

Users can access these versions via (mobile) browsers using the same authentication / security

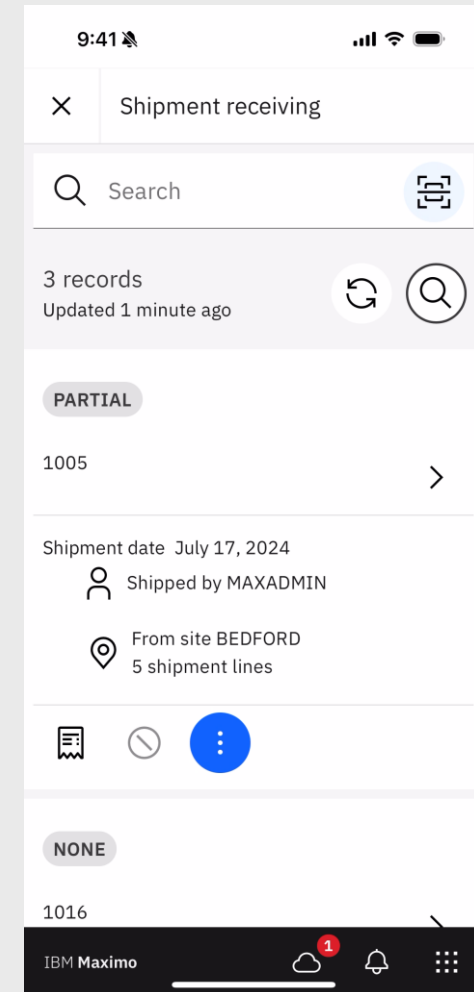
- **Same UI**, functions as the Device version
- Can **use MAS Mobile functions** from bookmarks
- **Always-connected** (directly records data/transactions to server, requires connection)
- Certain Inventory functions **available only in RBA**
 - **Display available balance** (Issues and Transfers)



Scanner functionality

The MAS Mobile Inventory App allows users to **scan in Barcodes, QR Codes and NFC Tags** with their mobile devices.

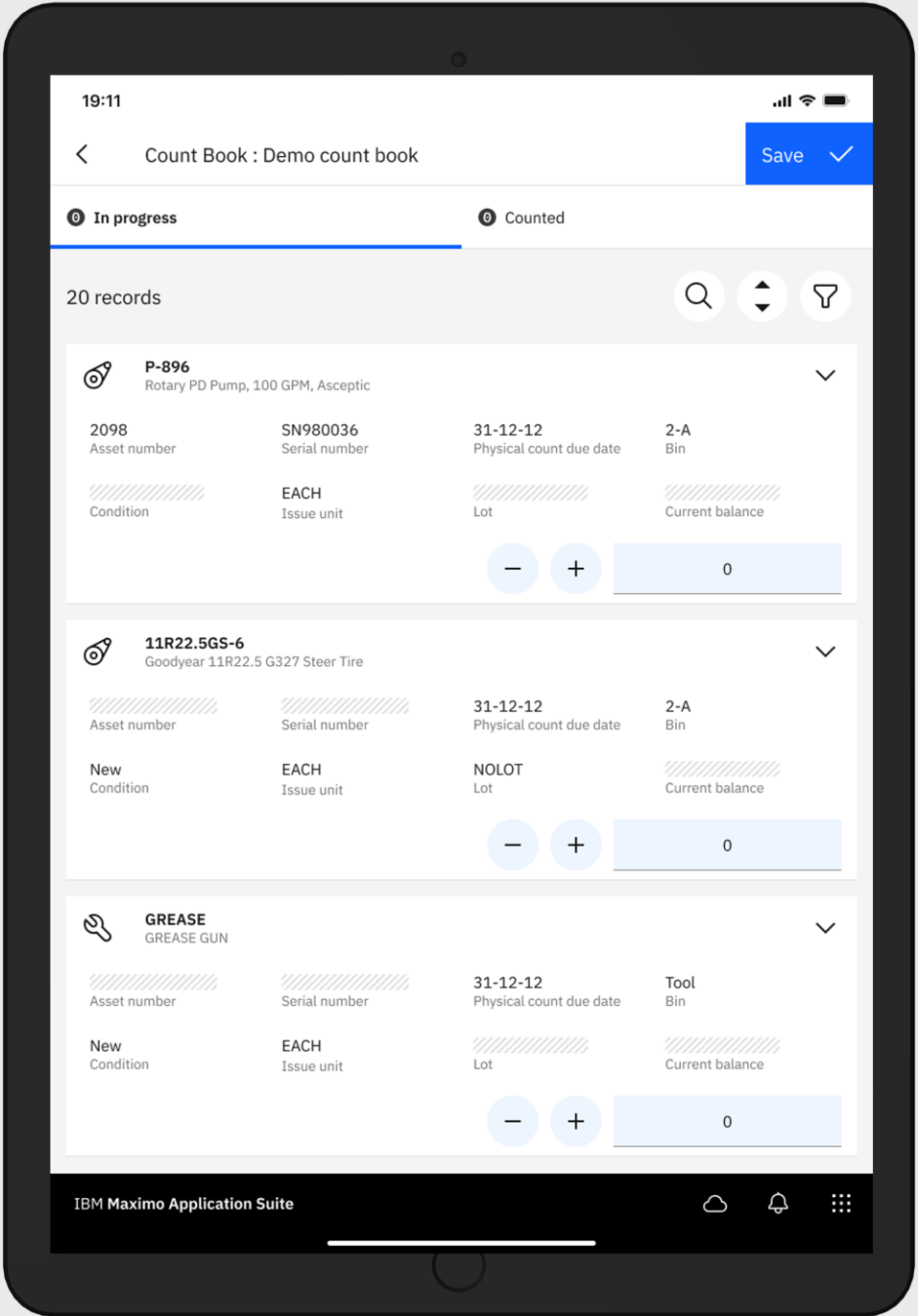
- Available on both **consumer iOS / Android devices** using the device camera
- **And dedicated scanners** supported by MAS Mobile (eg. Zebra TC53, TC45, TC52, Bluetooth scanners)
- This allows the user to
 - **Interact less with the screen** (faster work)
 - **Make less mistakes typing in values** (more reliable data)
 - **Identify items, records, storage units** (based on labels and tags physically present)



Cycle Count scenarios

Inventory management tasks

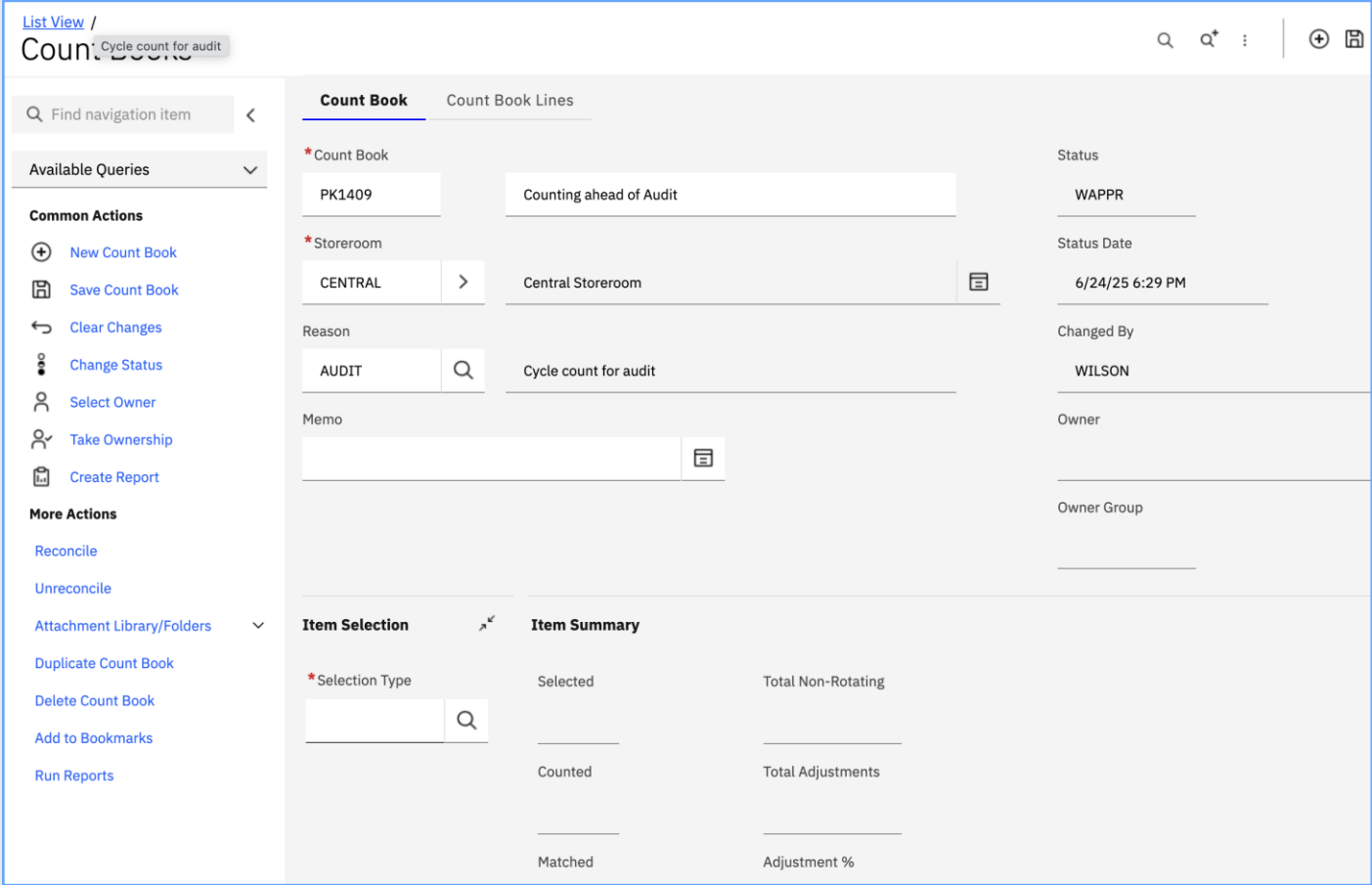
- **Cycle Count**
- **AdHoc count / Zero count**
- **Reconciliation**



Cycle Count – Count Book application in Maximo Manage

Creating count book for Cycle Count

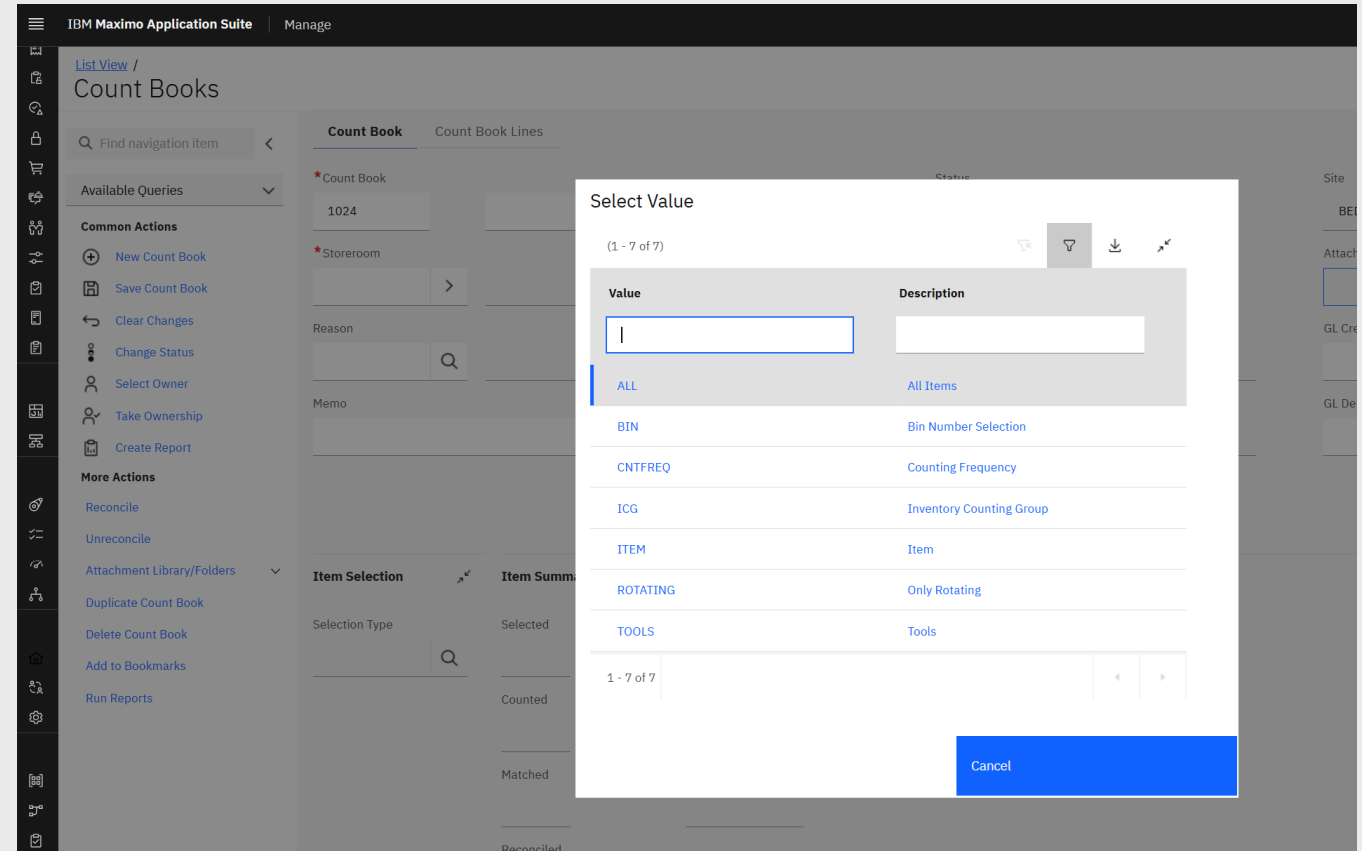
- **Count book ID and description**
- **Set Reason** (optional)
- **Set owner** (not an access setting)
- **Cycle Frequency**
Cycle count requirement in days
- **Count Tolerance**
Acceptable margin for matched counts
- **Inventory Count Group (ICG)**
Grouping items to count together



Cycle Count – Count Book application in Maximo Manage

Creating count book for Cycle Count

- Group items together in Count Books based on various criteria to begin a cycle count
- **Selection Types**
 - **ALL** – All items in the Storeroom
 - **BIN** – Specify BINs to recount items in
 - **CNTFREQ** – Items based on specific count frequencies.
 - **ICG** – Inventory Counting Group. You can assign items to an ICG on their Inventory record
 - **ITEM** – Choose specific Items within the Storeroom
 - **ROTATING*** – All Rotating Items in storeroom
 - **TOOLS** – All Tools in storeroom
- *Rotating Asset counts do not affect balances, are for record keeping / review / audit purposes



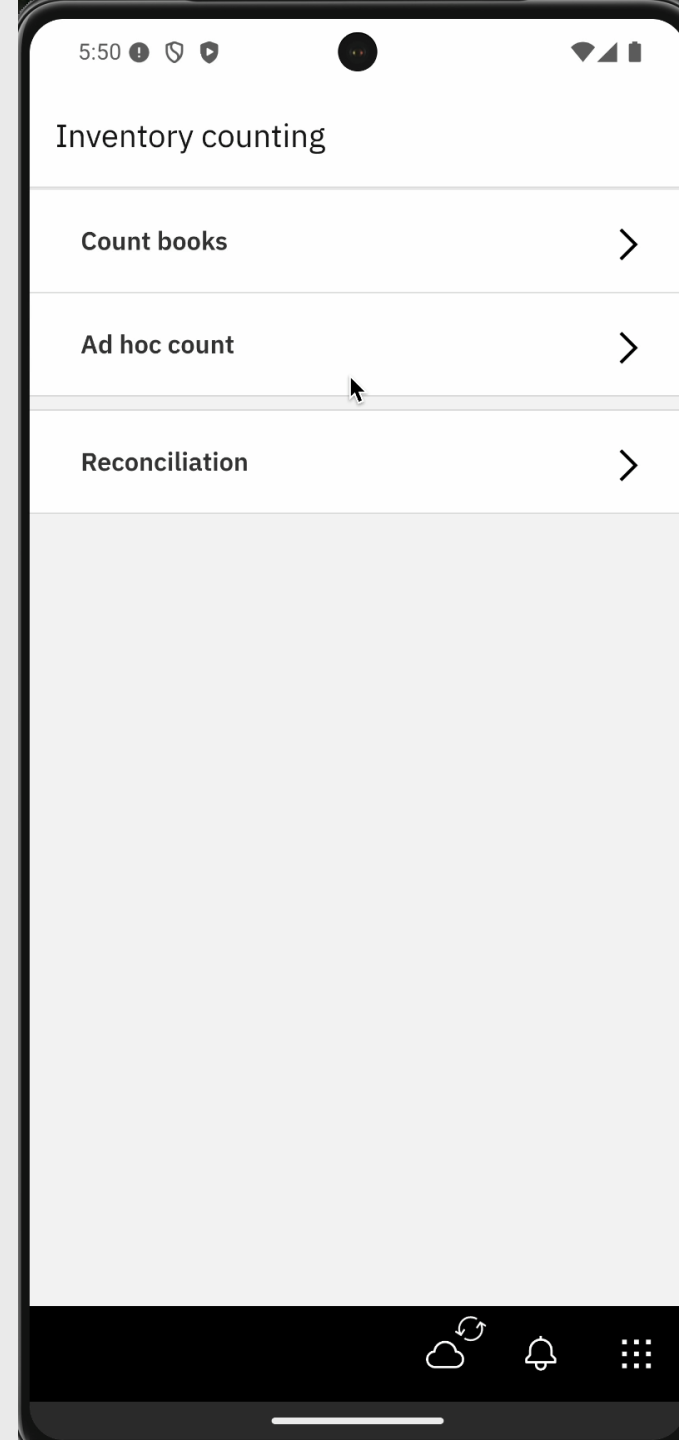
ABC Type
as a
Selection
Type for
Count book



Inventory Counting – Count Books update in 9.2

ABC Type as a Selection Type for Countbooks

- Users can open the new ABC Type selection Count books in the MAS Mobile Inventory Counting module, works the same as other types
- Updated UX to display the ABC Type of the item from the Inventory record on the info cards (following AdHoc counting, which already shows this information from MAS Mobile 9.1)



Inventory item records, ABC Type attribute

- **Inventory records**
 - **ABC type**
categorize items into segments representing the greatest investment for the company in terms of monetary value and turnover rate
- **ABC type analysis**
 - **ABC Analysis Report**
BIRT report in Maximo, displays ABC Category as before/current and after/recommended based on the number of parts issued YTD, and the part's last costs averaged from its storerooms, excluding 'N/A' category items

[List View /](#)
Inventory

Find navigation item <

Available Queries ▾

Common Actions

Save Inventory

Clear Changes

Change Status

Create Report

More Actions

[View Status History](#)

[Reorder](#) ▾

[Add/Modify Reservations](#)

[Change Cost Type](#)

[Issue Current Item](#)

[Issue Current Item to Multiple ...](#)

[Transfer Current Item](#)

[Assemble Kit](#)

[Disassemble Kit](#)

[View Item Availability](#)

[View Vendor Analysis](#)

[View Inventory Transactions](#)

[View/Edit Consignment Details](#)

Inventory Reorder Details Rotating Assets Where Used

Available Balance Summary	Other Balance Summary Information	ABC Analysis
Current Balance 56.00	Quantity Currently Reserved 21.00	ABC Type <input type="text" value="B"/>
Hard Reserved Quantity Not Staged 17.00	Hard Reserved Quantity 19.00	*Count Frequency <input type="text" value="60"/>
Hard Reserved Quantity Shipped 2.00	Soft Reserved Quantity 2.00	
Total Quantity Shipped 2.00	Quantity Staged 0.00	
Expired Quantity in Stock 0.00	Quantity in Holding Location 0.00	
Quantity Available 39.00	Picked Quantity 0.00	
Count Group <input type="text"/>	Plus Count Tolerance <input type="text"/>	Minus Count Tolerance <input type="text"/>

Cycle Count – Count Book application in Maximo Manage

Additional Count Book information

- **Count Book Lines**

On each SAVE of the Count Book before starting the Cycle Count the system finds items matching the criteria and adds them, broken out by BIN, Condition, Lot to the list of Count Book Lines

- **Life cycle of a Count Book, statuses**

- **Waiting for approval** – can be adjusted, physical counts can't be recorded
- **Approved** – Settings are read-only, users can begin counting which will move it to In-progress
- **In-progress** – Counts can be added, other attributes are read-only
- **Complete** – On completion matched counts (those inside count tolerance) are automatically Reconciled. Mismatched counts can be Reconciled manually in the Reconciliation Role Based Application or in MAS Mobile. Alternatively in MAS Manage in the Inventory Application.

The screenshot displays the 'Count Book Lines' application in Maximo Manage. At the top, there is a table with columns for 'Count Book', 'Count Book Lines', and various attributes. The table contains three rows, with the third row highlighted in grey. Below the table, a 'Details' section provides information for the selected line (11453).

Count Book	Count Book Lines	Item	Condition Code	Rotating?	Batch	Reconcile?	Match?	Current Balance	Count Date	Accuracy
▼	<input type="checkbox"/>	2-A	P-896	<input checked="" type="checkbox"/>						
▼	<input type="checkbox"/>	2-A	P-896	<input checked="" type="checkbox"/>	PD876155					
▼	<input type="checkbox"/>	2-A	P-896	<input checked="" type="checkbox"/>	PD876157					
^	<input type="checkbox"/>	A-4-9	A-431	<input type="checkbox"/>						

Details

Item: 11453 Seal, Mechanical, Self Aligning- 1 In ID

Bin: A-4-9

Asset: _____

Physical Count: _____

Counted By: _____ >

GL Credit Account: _____ 🔍

Condition Code: _____

Batch: A-431

Is Tool?

Adjusted Balance: _____

Count Date: _____ 📅

GL Debit Account: _____ 🔍

Rotating?

Reconcile?

Match?

Current Balance: 29.00

Accuracy: _____

Cycle Count – Count Books in MAS Mobile

- **Identifying tasks, priorities**
Scan, Filter, sort, search for the relevant Count Book, see Overdue badge for Books with items overdue for cycle count
- **Scan to find Item, Bin, Asset**
- **Filter/Sort to item subsets to expedite count process**
Reorder the items on Count Books lines by any combination of filters and sorting options to allow for going by storage location, due date, other attributes
- **Enter, adjust physical count**
- **Bind counting setting**
- **Mismatched count warnings**
- **SAVE to move In Progress to Counted**
- **Complete**
Completion dialog displays information on Reconciliation and status change

Wednesday June 18, 2025

 Issues and Transfers >

 Approvals >

 Assets >

 Inventory Receiving >

 Service Requests >

 Inspections >

 My Schedule >

 Materials & Tools >

 Map >

 Inventory Counting >

 Start Center >



AdHoc Counts, Reconciliation in MAS Mobile

- **AdHoc counting**
Unscheduled physical count entry, immediate and streamlined, lists all items in the Storeroom that have a balance record.
- **Scan to find Item, Bin, Asset**
- **Filter/Sort to item subsets to expedite count process**
Reorder and filter down to items in the Storeroom by any combination of filters and sorting options to allow for going by storage location, ABC Type and other attributes
- **SAVE to instantly update Physical Count**
- **Reconciliation**
Review unmatched Count Book entries and both matched, unmatched AdHoc physical count entries.
See the differences indicated compared to balance, choose records to reconcile to apply the difference

Inventory counting

Count books



Ad hoc count



Reconciliation



Ad hoc count Save

141 In progress **2** Counted

141 records

G22713 Bracket- Carton Machine **ABC type:C**

10/5/95 11:18:00 am A-6-2
 Next physical count due date Bin Condition

EACH
 Issue unit Lot

- +

231177 Guide- Carton Machine **ABC type:C**

10/5/95 12:47:00 pm B-4-2
 Next physical count due date Bin Condition

EACH
 Issue unit Lot

- +

4-0030 Grommet- Chain Wash Machine **ABC type:C**

10/5/95 1:03:00 pm A-5-7
 Next physical count due date Bin Condition

EACH
 Issue unit Lot

- +

IBM Maximo

Ad hoc count Save

141 In progress **2** Counted

141 records

G22713 Bracket- Carton Machine **ABC type:C**

10/5/95 11:18:00 am A-6-2
 Next physical count due date Bin Condition

EACH
 Issue unit Lot

- +

231177 Guide- Carton Machine **ABC type:C**

10/5/95 12:47:00 pm B-4-2
 Next physical count due date Bin Condition

EACH
 Issue unit Lot

- +

The physical count does not match the current balance.

4-0030 Grommet- Chain Wash Machine **ABC type:C**

10/5/95 1:03:00 pm A-5-7
 Next physical count due date Bin Condition

EACH
 Issue unit Lot


- +

IBM Maximo

ABC type	Enter value
Bin	
Condition code	
Cycle count frequency	
Inventory count group	
Item number	
Last physical count date	
Lot	
Physical count due date	

Reset 



ABC type	66 records
Bin	 Search
Condition code	0001 <input type="checkbox"/>
Cycle count frequency	10C2 <input type="checkbox"/>
Inventory count group	2-A <input type="checkbox"/>
Item number	A-3-4 <input type="checkbox"/>
Last physical count date	A-3-5 <input type="checkbox"/>
Lot	A-3-8 <input type="checkbox"/>
Physical count due date	A-4-1 <input type="checkbox"/>
	A-4-7 <input type="checkbox"/>
	A-4-8 <input type="checkbox"/>
	A-4-9 <input type="checkbox"/>
	A-5-1 <input type="checkbox"/>

Reset 



4 records

Check for updates



1023
high turnover

Approved 2 overdue

0 of 3 counted Items Counted	3/19/26 12:41:57 pm Last Count	4/20/00 9:52:39 am Due
Owner	Reason	Overdue

1007
Rotating Items

Approved

0 of 44 counted Items Counted	11/3/25 4:47:03 am Last Count	1/16/26 12:37:56 am Due
Owner	Reason	Overdue

1020

Approved 137 overdue

0 of 208 counted Items Counted	3/19/26 12:42:52 pm Last Count	4/10/26 8:29:29 pm Due
Owner	Reason	Overdue

1021
warehouse bin

In Progress

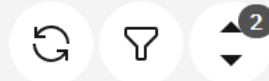
8 of 25 counted Items Counted	4/11/99 5:56:31 am Last Count	Due
Owner	Reason	Overdue



3 In progress

0 Counted

3 records



Search items

251111
Fitting, Bulkhead

Asset number	Serial number	Physical count due date
B-2-6 Bin		9/5/95 1:00:00 pm

Condition	EACH Issue unit	Lot
-----------	--------------------	-----

Count

- + 1

The physical count does not match the current balance.

0-0514
Tubing, Copper- 15/16 In ID X .030 In Wall

Asset number	Serial number	Physical count due date
C-4-2 Bin		9/6/95 4:55:00 am

Condition	FEET Issue unit	Lot
-----------	--------------------	-----

Count

- + --



Reconcile Balances

Select a different GL control account or GL shrinkage account if required. To reconcile the balance for the item in the displayed storeroom, click OK.

Storeroom

PKG

Control GL Account

6610-800-800



Shrinkage GL Account

6610-810-800



Cancel

OK

Questions?



Thank You!