



INDITION CYCLE COUNTS

Cycle Counts

Setup Guide — prepare the Indition system, grant access, and roll the app out to counting devices.

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Who this guide is for

This guide is for the Indition administrator or IT contact who prepares a system for Indition Cycle Counts. It covers the server-side prerequisites, the permissions counters need, the settings that decide what happens to a synced count, and the device rollout. Day-to-day counting is covered in the **Cycle Counts User Manual**.

Setup is short. There is nothing to configure inside the app beyond the system address, and there is no separate mobile server to install — the app talks to the same Indition system your staff already sign in to.

Step 1 · Check the prerequisites

COMPONENT	REQUIREMENT	HOW TO CHECK
Indition Inventory module	Installed and enabled	Admin → Modules. The app refuses to connect with "Inventory is not enabled for this system."
Inventory version	1.2.27 or later — supplies the mobile cycle count tables and routes	Admin → Modules → Inventory
POSFront version	1.4.7 or later — supplies the mobile API route the app calls	Admin → Modules → POSFront
HTTPS	A valid certificate on the system address	Open the address in a browser
Warehouses and locations	At least one active warehouse with at least one active location	Inventory → Warehouses

Both module patches must have been applied. If either is missing the app reports it plainly rather than failing quietly:

- Missing Inventory migration → "Install the Mobile Cycle Counts Inventory migration before connecting."
- Missing POSFront route → the app cannot reach the API at all.

Install the module updates through the normal Indition module update process. The Inventory migration creates five tables and cannot be rolled back — offline counts are business records, so the rollback path deliberately refuses to discard them.

Step 2 · Confirm your warehouses and locations

The app lists **every active location in every active warehouse**. Two rules decide what a counter sees:

- The **warehouse** must be active.
- The **location** must be active.

Sales-channel and store mappings are not used. Counting follows physical inventory, so a warehouse that is not mapped to any storefront is still countable. Deactivating a warehouse or a location removes it from the app on the next connection.

Before rollout, check that your location **codes** and **names** are meaningful on a small screen. The app displays them as `Warehouse · CODE Name`, for example `Main Warehouse · A-12 Bulk Rack`. Codes that are unique and short make it far easier for a counter to confirm they are standing in the right place.

Step 3 · Grant cycle count permission

Every request the app makes is checked against Inventory's own cycle count permissions — signing in is not enough.

APP ACTIVITY	PERMISSION CHECKED
Signing in, downloading the catalog, listing assigned counts, checking status	Inventory cycle count count permission
Preparing a count, uploading lines, submitting, requesting a recount	Inventory cycle count start permission

Give counting staff both. A user with only the lower permission can connect and download, but cannot submit — which is rarely what you want.

If a user is missing the permission entirely, the app tells them: "Your account needs Inventory cycle count permission."

Approving counts is a separate, existing Inventory permission and is unchanged by the app.

Step 4 · Decide what happens to a synced count

A count that arrives from a phone is an ordinary Indition cycle count. Your existing Inventory settings decide what happens next — there is no separate mobile policy to maintain. Review them under Inventory → Settings before rollout.

SETTING	EFFECT ON MOBILE COUNTS	DEFAULT
Approval required	Every synced count stops at <i>Pending Review</i> for a supervisor	Off
Tolerance — quantity	A line whose variance exceeds this many units forces review	Not set
Tolerance — percentage	A line whose variance exceeds this percentage forces review	Not set
Tolerance — value	A line whose variance value exceeds this amount forces review	Not set
Allow self approval	Whether the counter may approve their own count	On
Approvers (users / roles)	Who may approve	Empty
Email notifications	Notify approvers when a count needs review	On
QuickBooks journal	Post a journal entry for the adjustment	Off
Blind count default	Hides expected quantities in the back office	Off

Two of these deserve a decision before you hand out phones:

- **Tolerances.** With no tolerance set, a count inside your rules posts straight through. Setting even a modest quantity or value tolerance means a surprising variance gets a second pair of eyes without stopping routine counts.
- **Approval required.** Turning this on is the strictest option: nothing a counter sends adjusts stock until someone approves it. It is the right setting for a first rollout while you build confidence.

The phone is **always blind**. Expected quantities are never shown to the counter, whatever the back-office blind setting says. The *Blind count default* setting affects the admin screens only.

Step 5 • Install the app

The app is distributed for both platforms:

PLATFORM	REQUIREMENT
iOS	iPhone or iPad on iOS 18.6 or later
Android	Phone or tablet on Android 8.0 (API 26) or later
Camera	Recommended. Devices without a usable camera can still count using manual code entry
Microphone	Only needed for optional voice entry. Voice needs Android 12 or later on Android
Storage	Allow room for the catalog. The app shows its local database size on the Sync Catalog screen

Install it on each counting device from the App Store or Google Play. There is no enterprise provisioning step and no device enrolment requirement.

Step 6 · Connect a device

On each device:

1. Open the app.
2. Enter the **system address** — the same host your staff use in the browser, for example `store.indition.com`. Do not include `https://` or a path.
3. Sign in with the counter's **own** Indition account. Do not use a shared login: counts are tied to the account that made them, and only that account can sync them back.
4. Tap **Sync Catalog** → **Download Product Catalog** and let it finish on Wi-Fi.

Repeat for each device. Each device keeps its own catalog and its own counts.

Give each counter their own account. A count saved on a phone can only be synced by the account that created it. Shared logins make it impossible to tell who counted what, and they break the audit trail that makes cycle counting worth doing.

Step 7 · Prepare voice entry (optional)

Voice quantity entry runs entirely on the device, offline. It needs speech data that usually has to be downloaded once, so prepare it while the device is on Wi-Fi:

1. **Settings** → turn on **Voice Quantity**.
2. Tap **Check Offline Voice**. The app verifies offline English recognition and an installed English spoken voice.
3. On Android, if either is missing, tap **Offline Voice Settings** to open the device's text-to-speech installer, install English (US), then check again.
4. Tap **Test Voice · No Count Saved** and try a few numbers. This test never touches inventory.
5. Put the device in airplane mode and run the test again. That is the real proof it will work in the warehouse.

If a device cannot do offline English, leave voice off. Typed entry is always available and is the default.

Step 8 · Run a pilot count

Do not roll out to the whole team on day one. Run one deliberate pilot:

1. Pick a small location with known stock — twenty to thirty SKUs.
2. Have a counter download the catalog, walk the location, and count it with **Entire location**.
3. Include at least one serialized product and one deliberate zero.
4. Turn the device to airplane mode partway through to prove counting continues offline.

5. Sync, then review the count in Inventory → Cycle Counts and check the variances against what you expected.

A pilot surfaces the things that are worth fixing before scale: location codes that are ambiguous on a shelf, barcodes missing from the catalog, and products that should be flagged fractional or serialized but are not.

Step 9 · Assigning counts (optional)

Counts created in Indition and assigned to a user appear in the app under **Assigned Counts**, with the location, count type, due date and note. The counter taps **Download & Start**.

This is the tidiest way to run a scheduled counting programme: schedule and assign in the back office, and let counters pick up their work from the phone rather than being told verbally which shelves to walk.

Only counts that are **open** or **in progress**, assigned to that user, and not already started on a phone are offered.

Ongoing administration

Catalog refreshes. Tell counters to refresh the catalog after a significant product import. A refresh only transfers what changed, so it is cheap. New SKUs and new barcodes are invisible to the phone until it refreshes.

Deactivating locations. A location that goes inactive disappears from the app. If a counter has an unfinished count there, syncing it reports that the location is no longer active.

Storage. The Sync Catalog screen shows the local database size. Catalogs already in use by an unfinished count are retained on purpose.

Leavers. Because counts belong to an account, a departing counter should sync their outstanding counts before their account is disabled.

Security notes

- All traffic is HTTPS to your own system address. Insecure connections are blocked at the operating-system level on both platforms.
- The app uses the same login as the Indition point-of-sale front end. It stores a session, never a password, in the platform keychain or keystore, restricted to the unlocked device.
- After five minutes in the background the app locks and needs biometric or passcode confirmation to reopen.
- Every write request carries a per-session token issued by the server; a request without it is refused.
- A count can only be uploaded by the account and device that created it.
- Camera images and voice audio never leave the device. Voice recognition is on-device; nothing is recorded.
- No advertising, no analytics tracking and no in-app account creation.

Setup checklist

- ☐ Inventory module installed and enabled, version 1.2.27 or later
- ☐ POSFront version 1.4.7 or later
- ☐ Warehouses and locations active, with clear codes
- ☐ Cycle count **count** and **start** permissions granted to counting staff
- ☐ Approval and tolerance settings reviewed and agreed
- ☐ App installed on each device from the App Store or Google Play
- ☐ Each device connected with its own account and a complete catalog
- ☐ Voice prepared and airplane-mode tested, if you intend to use it
- ☐ Pilot count completed and reviewed