

## PREPARING A MOTIONMD ACCOUNT FOR AN INVENTORY AUDIT

An upcoming inventory audit is the ideal opportunity to assess the overall health of your inventory and refresh inventory in MotionMD. Outlined below is the recommended timeline and considerations to prepare for an upcoming audit:

### **Audit Timing:**

- All audits should be planned and scheduled in advance to allow adequate time to prepare inventory
- An audit count should be completed first thing in the morning or at the end of business day when inventory isn't moving

### **MotionMD Inventory Re-Upload:**

An inventory re-upload may be requested by a MotionMD account conducting an upcoming audit count. It's a great opportunity to refresh MotionMD and set new counts with your current audit results.

### **How to request an inventory re-upload?**

#### **2 Weeks Prior to Audit Date:**

- Submit a MotionMD Help Ticket requesting an Inventory Re-upload. Provide the date of the audit count and how the count will be completed (Beacons Scan, RGIS, etc.). The MotionMD Customer Success team will assist you with the needed steps for preparation

In addition to re-uploading the new on hand and par level counts, the MotionMD Customer Success team will review the overall health of your inventory operations. The comprehensive review includes the following:

- Phase-Out/Obsolete product identification
- SKU's counted as On Hand without existing Stock Records in MotionMD
- SKU's not counted with existing Stock Records in MotionMD
- Identify SKU's that are invalid
- Review and Check-In-outstanding PO's as appropriate
- Ensure all SKU's are set up properly

#### **1-3 Weeks Prior to Audit Date:**

- Request a Par Level Report from OC Logistics. Oracle inventory items/counts can differ from counts in MotionMD and what you have on the shelf. It is helpful to compare the inventory listed on the Par Level report with what you have On-hand and note any discrepancies ahead of time

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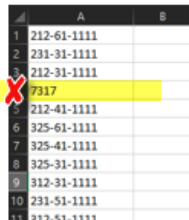
- Process all Defective Product or Overstock returns. This will ensure product is decremented from Oracle inventory
- Special Billing (as applicable): All files need to be submitted to OC Logistics prior to audit so those items are accounted for. If claim isn't submitted prior to the audit, account for those items in the audit count
- Review and reconcile any pending open PO's

### Day Before Audit:

- Complete any paper PPAs and upload them into MotionMD creating a MotionMD PA, if applicable
- If counting at the start of the day, make sure to place a Restock Order in MotionMD at end of same day for any outstanding items. This gets the data into Oracle and counted
- Separate out any accessory items or products that should not be counted as stock

### Day of Audit:

- If counting at the end of day, place a Restock Order in MotionMD for any outstanding product from PA's created during the day prior to counting. This gets data into Oracle and counted
- Be sure to count any products that arrive that day via UPS
- Scan all inventory On-hand including any products on PPA's not uploaded in MotionMD, if applicable
- Periodically review the audit count to validate SKU's were scanned properly. This provides you the opportunity to fix any incorrectly scanned products.



	A	B
1	212-61-1111	
2	231-31-1111	
3	212-31-1111	
4	7317	
5	212-41-1111	
6	325-61-1111	
7	325-41-1111	
8	325-31-1111	
9	312-31-1111	
10	231-51-1111	
11	312-51-1111	

### Immediately After Audit:

- If completing the audit on Beacons, sync the app when count is complete to submit the data to OC Logistics
- Email RSM/RSSM and let them know audit is complete so they can run the Audit Reconciliation Report
- You may resume-creating PA's and placing restock orders
  - **NOTE: If an inventory re-upload has been requested you should continue to HOLD creating PA's and restocks until given the green light by the MotionMD Customer SuccessTeam**