



Physical Inventory Dashboard Guide

Real-Time Progress, Multi-Year Comparisons, and Service Company Analytics

Part of ScanIt Parts
Inventory Management System

Innovative Programming Systems
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1. Dashboard Overview

The Physical Inventory (PI) dashboard gives you live visibility into every counting event. You can watch progress in real time from any device. You can also compare results across years to spot trends.

The dashboard is built for three types of users:

- **Parts managers** - Watch your team count in real time. See which zones are done and which need help.
- **Dealers and owners** - View final results and compare year over year.
- **Service companies** - Track all your client counts in one place.

You do not need to install anything. Open the dashboard in any web browser. It works on desktops, tablets, and phones.

Tip: Bookmark the PI dashboard on your phone. This lets you check progress from anywhere in the store.

1.1 Home Page KPI Cards

The PI home page (pi.ipsdev.com) opens to five KPI cards at the top. They give you a one-glance view of your company's PI activity.

Card	What It Counts
Total Inventories	All inventories with more than 100 parts scanned. The 100-part floor filters out test or aborted inventories so the number reflects real work.
Active Inventories	Inventories currently In Progress (with more than 100 parts scanned). Glance here first thing in the morning.
Finished YTD	Count of inventories finalized since January 1 of the current year.
Total Pad YTD	Sum of all parts scanned to finished inventories so far this year — your annual volume.
Total Users YTD	Sum of unique scanner users across finished inventories so far this year. Helps you forecast headcount for upcoming counts.

If a corporation is selected at the top of the page, the five cards scope to that corporation. With no corporation selected, the cards roll up your entire company.

Why some inventories are not in the count: Total Inventories and Active Inventories only include inventories with more than 100 parts scanned. The floor exists so a small test inventory does not skew the dashboard. If you expect to see a small inventory in the count, check that it has crossed the 100-part mark.

1.2 Dealer Dashboard Mini Widget

Dealers running PI from their own ScanIt Parts dashboard see a smaller PI widget on their dashboard home. It shows the same key counts for their active inventories — not the company-wide totals above.

A **refresh icon** at the top right of the widget lets you pull the latest counts on demand. Click it any time you want to confirm a recent scan landed.

2. Real-Time Progress Tracking

During a physical inventory event, the dashboard updates as your team counts. You see progress the moment each scan happens. No need to refresh the page.

2.1 Zone Progress

The dashboard shows each zone with a progress bar. Every zone displays:

- Zone name and number
- Percent complete (color-coded)
- Number of bins counted vs total bins
- Number of parts counted in that zone

Color	What It Means
Green	Zone is complete (100%)
Blue	Zone is in progress
Gray	Zone has not started yet
Orange	Zone is behind schedule

2.2 Scanner Activity

See which scanners are active right now. For each scanner, the dashboard shows:

- The user name logged in
- Which zone they are working in
- Their scan count for the current session
- Their last scan time

Tip: Assign one person as the "lead" to watch the dashboard. Their job is to move help to slow zones and keep the count on track.

2.3 Count Totals

The top of the dashboard shows high-level totals:

- **Total parts counted** vs **total parts expected**
- **Running total value** of all counted parts
- **Time elapsed** since the count started
- **Estimated time left** based on current pace

Note: The "estimated time left" updates as your team speeds up or slows down. It gets more accurate as the count goes on.

3. Live Metrics During Counting

These metrics update in real time. Use them to spot problems early and keep the count moving.

3.1 Parts Per Hour

See how fast each scanner is counting. The dashboard shows parts per hour for every user. This helps you find:

- Who is ahead of pace
- Who may need help or a break
- Which zones are harder to count (more parts per bin, tight aisles)

3.2 Accuracy Rate

The accuracy rate compares scanned counts to expected counts. A high rate means the count matches what the DMS says you should have. A low rate means there are gaps.

The dashboard shows accuracy as a percent for:

- The whole event
- Each zone
- Each scanner or user

3.3 Variance Alerts

The system flags parts with large quantity gaps. If a bin has 10 parts in the DMS but your counter finds 2, the dashboard marks it.

Variance alerts help you:

- Catch counting errors early
- Recount problem bins before the event ends
- Find theft or misplaced stock

Important: Do not ignore variance alerts. Large gaps are much easier to fix during the count than after it ends.

3.4 Bins Not Yet Counted

This number shrinks as zones finish. It shows how many bins still need a scan. Use it to make sure no area is skipped.

If the count is "done" but bins remain, someone missed a section. Send a counter back to finish those bins before you close the event.

4. Multi-Year Comparisons

ScanIt Parts keeps 5 years of PI data. You never lose past results. Compare this year against any prior year to see how your store is doing.

4.1 Inventory Value

See your total inventory value year over year. This tells you:

- Is your stock growing or shrinking?
- How does this year's count compare to last year?
- Are you carrying more or less inventory?

4.2 Shrinkage Trends

Shrinkage is the gap between what the DMS says you have and what the count finds. Track it over time to see:

- Is shrinkage getting better or worse?
- Which categories have the most loss?
- Did process changes reduce shrinkage?

Tip: Use multi-year data in management reviews. It shows how scanning pays for itself. Shrinkage trends are great for proving the value of the system.

4.3 Accuracy Over Time

Your first PI may show low accuracy. That is normal. Over time, accuracy should rise as your team gets better at scanning and bin management.

The comparison view shows accuracy for each year side by side. Look for steady gains. If accuracy drops, dig into which zones or categories caused the dip.

4.4 Zone-by-Zone Comparison

Some zones always have problems. Maybe the body shop parts area is hard to count. Maybe the overstock area has bins that are too full.

The zone comparison shows:

- Each zone's accuracy across all years
- Which zones improve and which stay the same
- Where to focus training or better labeling

Tip: If the same zone has problems every year, fix the root cause. Add bin labels. Clean up the area. Move slow stock out. The dashboard will show the results next year.

5. Service Company Dashboards

If you run a counting service or manage PI for multiple dealers, you get a special view. The service company dashboard gives you everything in one place.

What You See

- **All active events** - Every dealer count that is running right now
- **Real-time progress** - Live updates for each dealer's PI
- **Cross-dealer analytics** - Compare results across all your clients
- **Past results** - Look up any previous count for any dealer
- **Employee stats** - See how your counters perform across all events

Managing Multiple Events

The dashboard lists each dealer as a card. Tap a card to see that dealer's full PI dashboard. Switch between dealers with one tap.

Key features for service companies:

- See which events are on schedule and which are behind
- Move your best counters to the dealers that need them
- Track total parts counted across all clients
- Build reports for dealer owners showing year-over-year results

Note: Service company dashboards are set up by IPS. Contact support to get your service company view turned on. Call 810-695-9332 or email support@ipsdev.com.

6. After the Count

Once counting is done, the dashboard shifts to a review view. Follow these steps to close out the event.

- 1

Review the variance report. Look at the parts with the largest gaps between expected and counted.
- 2

Check Bins Not Counted. Make sure every bin got a scan. If any bins were missed, send someone back to count them.
- 3

Use the reconciliation workflow. Investigate large variances. Recount bins if needed. Mark items as verified.
- 4

Post to DMS. When you are satisfied with the count, post the results to your DMS. This updates your stock levels.
- 5

The event archives on its own. The dashboard saves everything for future comparison. You do not need to export or save files.

Important: Do not post to DMS until you have reviewed all variances. Once posted, the DMS stock levels change. It is much harder to fix mistakes after posting.

Tip: Print or export the variance report before posting. Keep a copy for your records. This is useful if questions come up later.

6.1 Key Review Reports

The PI reports area has a full set of reports. These are the ones most dealers use to review a count and check it before posting. Every report exports to PDF, XLS, or CSV.

Report	What It Shows	When to Use
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Inventory Analysis	A one-page summary of the whole count. Shows total pad value, the net difference, an Over/Under breakdown, parts and bins not counted, posting errors, and a list of issues to check. Many numbers link to the matching detail report.	First. Get the big picture before you dig in.
Pad Variance	Every part where the scanned count does not match the pad count. Filter by Bin, Part #, Over/Under, smallest gap, and smallest dollar gap. Hide verified rows. You can change a scanned bin in batch. Gaps are color-coded.	Main review report. Work the biggest gaps first.
Negative Quantity Parts	Parts the DMS shows with a negative on-hand quantity. Columns: Bin, Make, Part #, Description, Pad Qty.	Before counting. A negative on-hand is almost always a DMS data error.
Scan Detail	Every single scan record. Filter by Bin, Part #, User, or show only zero-quantity scans. Shows scan time, who scanned it, the quantity, and the status. An Applied badge marks the scan that counts as the final count.	Anytime. Drill into the raw scan data or trace a problem part.
User Variance	All variances, broken down by the employee who scanned the part. Shows who had the most gaps.	After counting. Spot counters who may need training.
User Analysis	A per-employee scorecard: scan time, parts and pieces scanned, bins, dollars, parts per hour, cores, write-ins, and misplaced parts. Set a star rating here.	After counting. Grade your counters.

7. Data Retention

ScanIt Parts keeps all PI data for **5 years**. Every scan, every count, every adjustment is saved. Each record includes a timestamp and the user who made the change.

What Gets Saved

- Every bin scan with part number, quantity, and time
- Every user who counted and which zones they worked
- All variance reports and adjustments
- Final posted results
- Zone setup and configuration for each event

Why 5 Years Matters

Some competitors auto-delete PI data after 18 months. ScanIt Parts keeps yours for 5 years. That is 3.5 times longer.

Feature	ScanIt Parts	Some Competitors
Data retention	5 years	18 months
Audit trail	Full (user + timestamp)	Varies
Year-over-year comparison	Up to 5 years	1 year (if data exists)

Your audit trail is always available. If an auditor asks about a past count, you can pull up every detail. No need to dig through old files or spreadsheets.

Note: Data retention is automatic. You do not need to back up or export anything. ScanIt Parts handles it for you.

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