

Storage & Inventory Worksheet

Define the count, organization, or relocation work you need.

1 / PROJECT CONTACT & LOCATION

Company / contact

Email / phone

Facility name & full address

Unit size / general location

Site contact / access appointment

Arrange gate codes and other access credentials separately.

Preferred work date / deadline

Who can approve scope changes?

2 / CURRENT STOCK & RECORDS

Product types / approximate item count / number of SKUs

Boxes / cases / pallets / loose items

Approximate stock weight, if known

☐ SKU labels ☐ Barcodes ☐ Mixed boxes ☐ Unlabeled stock

☐ Excel list ☐ Other inventory system ☐ No current records

Inventory file name / date / unit of count (pieces, cases, etc.)

Current layout / shelving / fragile or restricted items

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3 / REQUESTED WORK

- ☐ Count ☐ Reconcile records ☐ Sort / label ☐ Organize
- ☐ Build shelving ☐ Relocate contents ☐ Disassemble shelves

Priority areas / included stock / excluded stock

Desired layout / labeling method / supplies needed

4 / COUNTING & REPORTING RULES

How should damaged, opened, or unidentifiable items be recorded?

Recount / discrepancy approval contact

Will stock move during the count?

- ☐ Updated spreadsheet ☐ Discrepancy list ☐ Photos ☐ Summary report

Required report columns / file format / completion deadline

5 / RELOCATION OR DISPOSAL, IF REQUESTED

Destination address / access / preferred timing

Items to move / retain / set aside; disposal approval contact

Counts, transport, supplies, shelving, and disposal are scoped separately as needed.

No stock is discarded without customer authorization.