

Navigation Menu: Audit

- [Web Portal: Audit: View, Create, Start, Close](#)
- [Web Portal: Manual Input: Adding Products Manually to an Audit](#)

Web Portal: Audit: View, Create, Start, Close

All Audits View

The **Audit** page in the Simple RFID Web Portal serves to create, manage, and review inventory audits.

To access the page, select **Audit** from the left navigation menu.

The Audit page displays a list of all Audits. Click any Audit to view its details, progress, and results.

Use the top filters to quickly locate an Audit:

- **Location** – Filter by inventory location.
- **Type** – View **Full**, **Partial**, or **Template** Audits.
- **Status** – Filter by the Audit's current status, such as **Draft**, **Open**, or **Completed**.
- **Date** – Display Audits created or performed within a specific date range.

To create a new Audit, click the **blue + (plus)** button in the upper-right corner of the page.

Ryan's Testing Sandbox

- Inventory
- Audit**
- Resolve & Sync
- Scan Sessions
- Orders
- Printing
 - Quick printing
 - Print jobs
- Products

Location: Select Locations ▼ Type: Select type ▼ Status: Select statuses ▼ Date: mm/dd/yyyy 📅 +

Draft Start Audit

Audit: Partial Walkthrough

📅 05/12/2026 01:05 PM 📍 Store Location ➡ Partial 🛒 Shopify

— / —	— / —	—	—	—	—	—
🔍 Items	📦 Products	✅ Matched	⚠️ Mismatched	⬇️ Under expected	⬆️ Over expected	🕒 Scan time

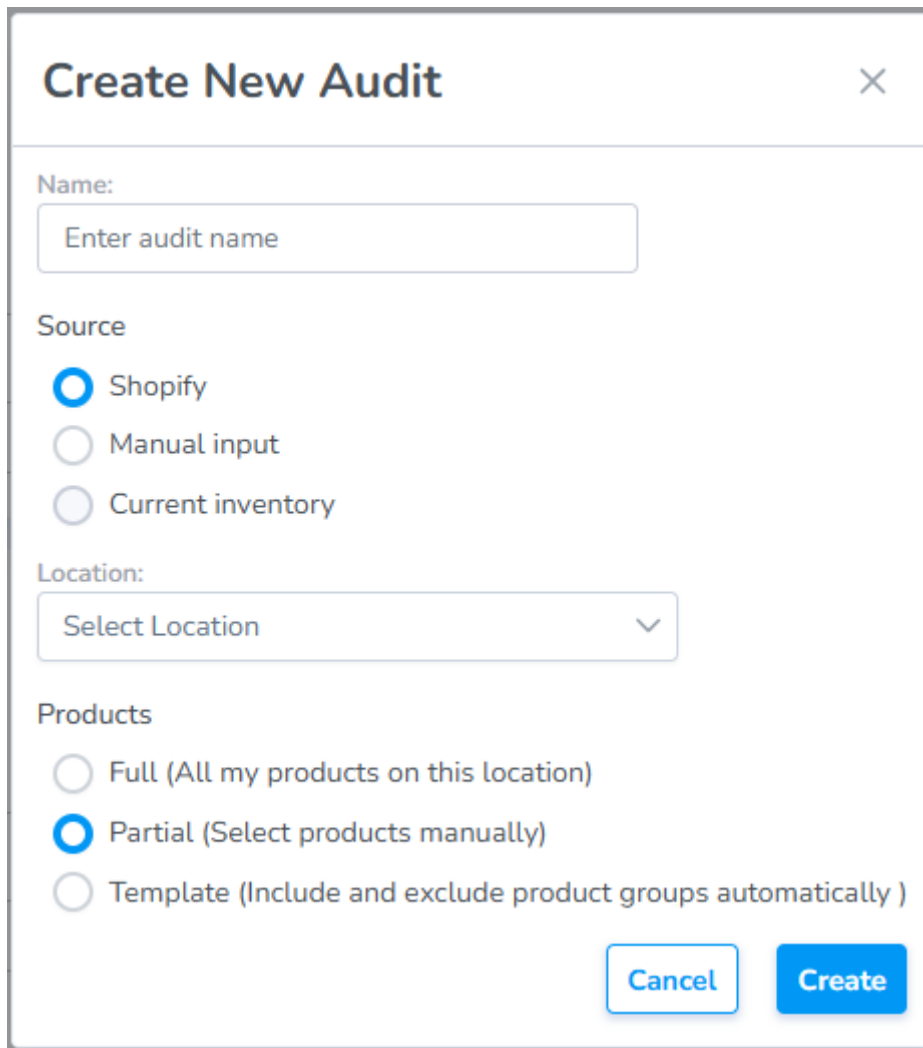
Draft Start Audit

Audit: Template Walkthrough

Create a New Audit

You can also create an Audit from the [Mobile App](#)

From the **Create New Audit** pop-up window, enter the **Name** of the Audit, the **Source** of the comparison, the **Location** where the audit is being conducted, and the **Products** being audited:

A screenshot of a 'Create New Audit' pop-up window. The window has a title bar with the text 'Create New Audit' and a close button (X) in the top right corner. Below the title bar, there are four sections: 'Name:', 'Source', 'Location:', and 'Products'. The 'Name:' section has a text input field with the placeholder text 'Enter audit name'. The 'Source' section has three radio button options: 'Shopify' (selected), 'Manual input', and 'Current inventory'. The 'Location:' section has a dropdown menu with the placeholder text 'Select Location' and a downward arrow. The 'Products' section has three radio button options: 'Full (All my products on this location)', 'Partial (Select products manually)' (selected), and 'Template (Include and exclude product groups automatically)'. At the bottom right of the window, there are two buttons: 'Cancel' and 'Create'.

Name:

- This is a free text field to name the audit anything you choose. If you choose to keep this field blank the system will auto-generate an Audit Name for you.

Source:

- **Integrated Platform:** Shopify, Apparel Magic, etc.
- **Manual Input:** This option allows you to enter your own data manually input or uploaded from a spreadsheet. To learn how to create audits using your own data source please follow the [steps found in this article](#).
- **Current Inventory:** Not yet implemented.

Location:

- Choose the location where the audit is being conducted

Products:

- **Full:** All of the products in your location
- **Partial:** Specific products that you define
- **Template:** Products from a reusable template you define

Click "**Create**" to create

- The Audit will be created in **Draft** status.
- From inside the **Audit**, you can **Assign** a user, add **Notes** for future reference, or **Delete** the audit.

Audit Name:

Walkthrough

Draft

Created: 05/08/2026 01:18 PM

Store Location

Shopify

Full audit

Start Audit

Delete

Assignee:

Select users

Notes:

Enter your notes here...

— / —

— / —

—

—

—

—

—

Items

Products

Matched

Mismatched

Under expected

Over expected

Scan time

Title	SKU	Expected*	Scanned*	Diff
No products.				

Back to list

Add Products to an Audit

Product inventory quantities are not displayed until you click **Start Audit**.

When you start an Audit, Simple RFID retrieves the latest inventory quantities from the selected **Source** (such as Shopify or Apparel Magic). These quantities become the baseline for comparing your RFID scan results during the Audit.

Important: Once you click **Start Audit**, the Audit is locked. You will no longer be able to add or remove products from the Audit.

Full Audit

If you selected **Full**, you do not need to manually add products.

Clicking **Start Audit** loads all products from the selected **Source** and **Location** automatically into the Audit along with their current inventory quantities.

Partial Audit

If **Partial** is selected, the Audit will include an **Add Items** button.

Click **Add Items** to search for and select the specific products you want to include in the Audit before starting it. Once you have added all desired products, click **Start Audit** to load their current inventory quantities and begin the Audit.

Audit Name:

Partial Walkthrough

Draft

Created: 05/12/2026 01:05 PM

Store Location

Shopify

Partial audit

Start Audit

Delete

Assignee:

Select users

Notes:

Enter your notes here...

— / —
Items

— / —
Products

—
Matched

—
Mismatched

—
Under expected

—
Over expected

—
Scan time

+ Add Items

Search by SKU or Name...

Matched

Under expected

Over expected

Title	SKU	Expected*	Scanned*	Diff
No products.				

Back to list

Template Audit

If you wish to add item from a specific category, group, or brand select **Template**.

To create a new template or modify template settings, click the **Configuration** icon in the **Templates for Product groups** window which opens the **Templates** side panel.

From this window, you can:

- View existing templates.
- Create a new template.
- Edit an existing template.
- Delete a template.

Audit Name:
Template Walkthrough

Draft

Created: 05/12/2026 01:02 PM

Store Location

Shopify

Template audit

Start Audit

Delete

Assignee:
Select users

Notes:
Enter your notes here...

Templates for Product groups

Select the Template

Items

Products

Matched

Mismatched

Under expected

Over expected

Scan time

Search by SKU or Name...

Matched

Under expected

Over expected

Title	SKU	Expected*	Scanned*	Diff
No products.				

Back to list

Managing Audit Templates

Use the controls in the Templates window to manage your saved Audit Templates:

- Click the **+** (**Plus**) button to create a new template.
- Click the **Pencil** icon to edit an existing template.
- Click the **Trash** icon to permanently delete a template.
- Click **Use Template** (or **Include**) to apply the selected template to the current Audit.

Templates

×

Create product groups for targeted audits.
Click card to select

+

Jumpers & Tee Shirts

Include:

Jumpers

T-shirts

Creation date:
05/11/2026

UseTemplate

Creating a New Template

When creating a new template, provide the following information:

- **Name** – A descriptive name for the template.
- **Description** – An optional description to help identify the template's purpose.
- **Categories** – Select the product categories to include in or exclude from the template.

Category values are populated from the product **Type** field in Shopify. Products are included in the template based on the categories you select.

Create New Template



Template name:

e.g., Electronics (no Computers)

Description:

Description of what this template covers

Define which products to include or exclude from audits

Include: Products that will be audited

Enter category

Add

Exclude: Products that will be skipped

Enter category

Add

Cancel

Create Template

When you have finished configuring the template, click **Create Template** to save it.

After applying the template to the Audit, click **Start Audit** to retrieve the current **On Hand** inventory quantities for the selected products.

Start Audit

Once all desired products have been added to the Audit, click **Start Audit** to move the Audit to Open status.

The Audit grid displays information for each product including:

- **Expected** – Displays the current **On Hand** inventory quantity retrieved from the selected source (such as Shopify or Apparel Magic). This serves as the baseline for comparison during the Audit.
- **Scanned** – Initially displays **0** for every product because no RFID tags have been scanned. As RFID tags are scanned and uploaded, this value updates to reflect the total number of tags detected for each product during the current Audit.
- **Diff** – Displays the difference between the **Expected** and **Scanned** quantities, allowing you to quickly identify inventory discrepancies.

Audit Name:

Walkthrough

Open

Created: 05/08/2026 01:18 PM

Store Location

Shopify

Full audit

Assignee:

Select users

Notes:

Enter your notes here...

Complete Audit

Cancel

0 / 10

Items

0 / 3

Products

0

✓ Matched

3

⚠ Mismatched

3

↓ Under expected

0

↑ Over expected

—

⌚ Scan time

Title	SKU	Expected*	Scanned*	Diff
Elephant	012345678905	5	0	-5
Tiger	098765432104	3	0	-3
Hawk	5012345678900	2	0	-2

Scanning Items in Audit from Mobile App

Next the user will open the mobile device and scan the products. Please view the [Mobile App: Audit: Scan Items in Audit](#) article to view these steps.

Completing an Audit

After all RFID scans have been completed and uploaded, refresh the Audit page in the Simple RFID Web Portal to view the latest results.

The Audit displays the updated **Expected**, **Scanned**, and **Diff** values for each product, allowing you to quickly identify **Matched**, **Over Expected**, and **Under Expected** inventory counts. These results highlight any discrepancies between your partner system's inventory (such as Shopify or Apparel Magic) and the inventory detected through RFID scanning.

Audit Name:
Walkthrough

Open

Created: 05/08/2026 01:18 PM

Store Location

Shopify

Full audit

Assignee:
Select users

Notes:
Enter your notes here...

Complete Audit

Cancel

10 / 10
Items

3 / 3
Products

1
Matched

2
Mismatched

1
Under expected

1
Over expected

—
Scan time

Title	SKU	Expected*	Scanned*	Diff
Elephant	012345678905	5	5	0
Tiger	098765432104	3	2	-1
Hawk	5012345678900	2	3	+1

When you have finished scanning and verified the Audit results, click **Complete Audit**.

Completing the Audit changes its status to **Completed** and prevents any additional RFID scans from being uploaded.

Manage Mismatches

After the Audit has been completed, navigate to the [Resolve & Sync](#) page to review all mismatches via the Manual Review process to determine the appropriate corrective actions that need to be completed.

Web Portal: Manual Input: Adding Products Manually to an Audit

Source: Manual Input

Do you want to create an audit using data from another system? This article walks through the steps to load your own data into an audit.

Steps

To create an audit using our own data source, follow the same steps found in the Audit with an Integration article with a few small exceptions:

From the **Create New Audit** pop-up:

- Select **Manual input** as your Source
- The Products selector will default to **Partial**

Create New Audit

Name:

Spreadsheet of data

Source

☐ Shopify

☒ Manual input

☐ Current inventory

Location:

Shop location

Products

☐ Full (All my products on this location)

☒ Partial (Select products manually)

☐ Template (Include and exclude product groups automatically)

Cancel

Create

- Finally, click "**Create**" to create

The Audit will be created in **Draft** status.

Add Products Manually/Spreadsheet to an Audit

Important: Once you click **Start Audit**, the Audit is locked. You will no longer be able to add or remove products from the Audit.

Next, add products to your audit via two methods:

- **+ Add Items** button to search and add items manually
- **Import from Excel** button to upload a spreadsheet

Audit Name:
Spreadsheet Audit

Draft

Created: 07/10/2026 04:14 PM

Shop location

Spreadsheet

Partial audit

Start Audit

Delete

Assignee:
Select users

Notes:
Enter your notes here...

Items

Products

Matched

Mismatched

Under expected

Over expected

Scan time

+ Add Items

Import from Excel

Search by SKU or Name...

Matched

Under expected

Over expected

Ignore Products with a 0 quantity in both Simple RFID and Partner

Title	SKU	Expected*	Scanned*	Diff
No products.				

+ Add Items Manually

Clicking **+ Add Items** opens the **Add Items** pop-up window which allows the user to search for and select the specific products to include in the Audit.

Audit Name:
Spreadsheet Audit

Draft

Created: 07/10/2026 04:14 PM

Shop location

Spreadsheet

Partial audit

Assignee:
Select users

Items

Products

Matched

Mismatched

Under expected

Over expected

Scan time

+ Add Items

Import from Excel

Search by SKU or Name...

Matched

Under expected

Over expected

Ignore Products with a 0 quantity in both Simple RFID and Partner

Title	SKU	Expected*	Scanned*	Diff
-------	-----	-----------	----------	------

Add Items

Ray

Ray Ban Wayfarer 2 | V2-WAY-BRN

RBN-JCL

Ray Ban Wayfarer 2

V2-WAY

Ray Ban Wayfarer 2

V2-RBN-YL

Cancel

Add to Audit

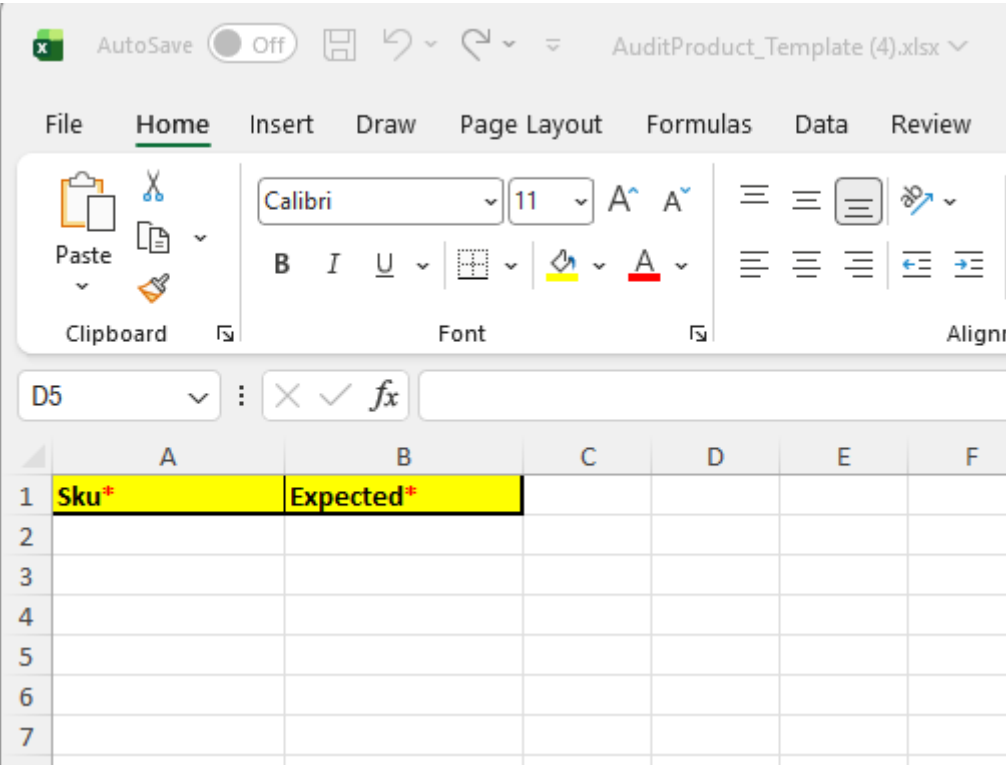
Import from Excel

Clicking the Import from Excel button opens the Import Pop-up.

You can use the template provided to enter details, or use your own sheet and map the corresponding columns.

Use the Simple RFID Template

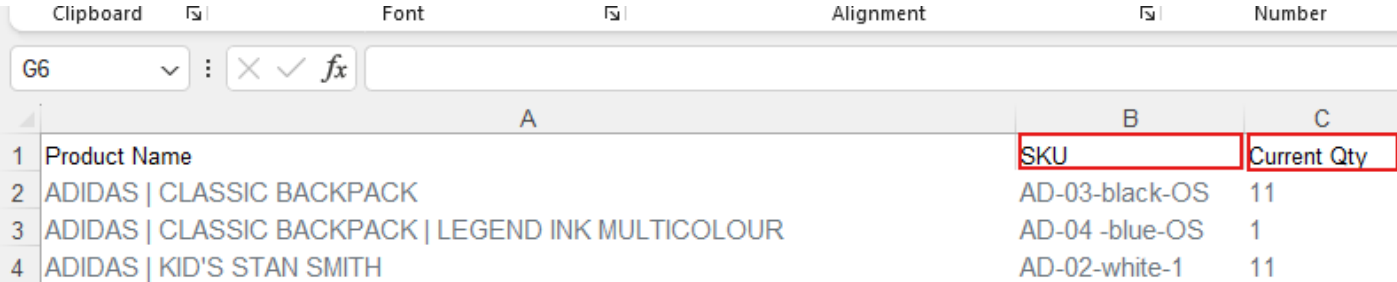
- From the pop-up window click "Get Template" to download a formatted spreadsheet
- The sheet contains two columns: SKU and Expected quantities



Use your Own Spreadsheet and Map Columns

Click the **Custom column mapping** link to associate the corresponding columns from your own spreadsheet.

Choose **Match by Title** if your sheet contains an identifiable column header



Choose **Match by Index** if you wish to map by the column letter: A, B, C, etc.

	A	B	C
1	ADIDAS CLASSIC BACKPACK	AD-03-black-OS	11
2	ADIDAS CLASSIC BACKPACK LEGEND INK MULTICOLOUR	AD-04 -blue-OS	1
3	ADIDAS KID'S STAN SMITH	AD-02-white-1	11
4	ADIDAS KID'S STAN SMITH	AD-02-white-2	4
5	ADIDAS SUPERSTAR 80S	AD-01-white-5	3

Import from Excel

Get Template

Use our template or any spreadsheet with SKU and Expected columns.

+ Choose

Custom column mapping

Upload your file and match the column names to SKU and Expected.
The mapping will be saved automatically.

☒ Match by Title

☐ Match by Index

SKU:*

AD-03-black-OS

X

▼

Expected:*

11

X

▼

Import

Finally, click Import to add the products to your audit.