

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 location.
- **Type** – Filter by the type of Audit: **Full**, **Partial**, or **Template**.
- **Status** – Filter by the Audit's status: **Draft**, **Open**, or **Completed**.
- **Date** – Filter to view 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

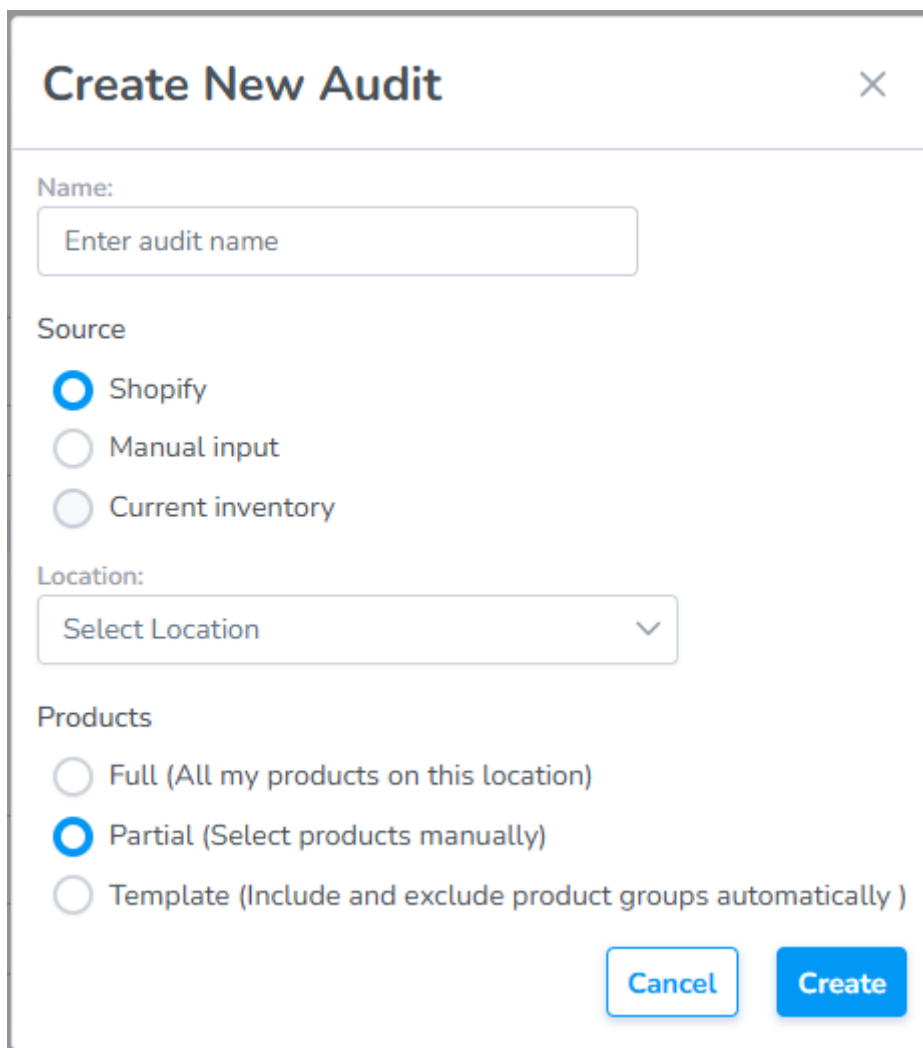
Draft Start Audit

Audit: Template Walkthrough

Create a New Audit

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

After clicking the + button the **Create New Audit** pop-up window will appear. Here you'll 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 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 or uploaded from a spreadsheet). To learn how to add your own data source to an audit 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.
- Once created, 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.				

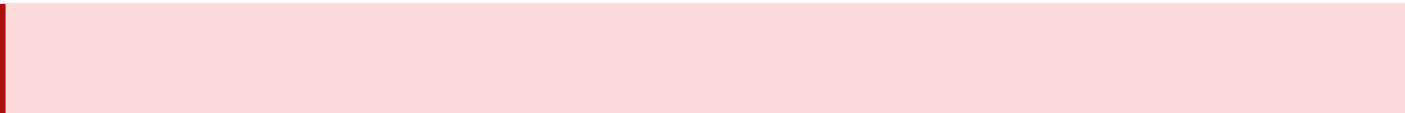
Back to list

Add Products to an Audit

No Integration?: Enter **YOUR data** (manually or uploaded from a spreadsheet) into the Audit using the steps found in this article.

The instructions below relate to Adding Products to an Audit via an integration

Product inventory quantities are not displayed until you click **Start Audit**. When the Audit is Started, Simple RFID retrieves the on hand 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 select **Full**, you do not need to add products.

Clicking **Start Audit** loads all active products from the selected **Source** and **Location** automatically into the Audit along with their on hand 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. 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 or exclude products from a specific category, brand or price select **Template**.

To create a new template or modify template settings:

- Click the **Configuration** icon in the **Templates for Product groups** window to open the **Templates** side menu.

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 create and 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 (Status: Open)

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

0 / 3

0

3

3

0

—

Items

Products

Matched

Mismatched

Under expected

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.

Closing an Audit (Status: Completed)

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

Complete Audit

Cancel

Assignee:

Select users

Notes:

Enter your notes here...

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.