



C-STORE TIPS

Inventory Count Best Practices



QUESTIONS TO ASK YOURSELF PRIOR TO A PHYSICAL INVENTORY

	YES	NO
Are you scanning at a rate greater than 99%?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have PLUs set up in C-Store Office to account for items without UPCs?	<input type="checkbox"/>	<input type="checkbox"/>
Are all invoices accepted properly?	<input type="checkbox"/>	<input type="checkbox"/>
Are managers trained to look for errors before accepting invoices, such as checking GPMs on invoices?	<input type="checkbox"/>	<input type="checkbox"/>
Are shippers dealt with properly on invoices? That is, are the shippers' UPCs deleted and line items of products inside shippers added?	<input type="checkbox"/>	<input type="checkbox"/>
Are parent-child relationships setup in C-Store Office?	<input type="checkbox"/>	<input type="checkbox"/>
Do all items have correct departments and categories setup in C-Store Office?	<input type="checkbox"/>	<input type="checkbox"/>
Are Ingredient Method of Accounting Departments setup correctly in C-Store Office for food service items?	<input type="checkbox"/>	<input type="checkbox"/>
Are all invoices entered by line item?	<input type="checkbox"/>	<input type="checkbox"/>
Are all unit case sizes setup correctly in C-Store Office?	<input type="checkbox"/>	<input type="checkbox"/>
Are merchandise transfers between stores added by individual UPC?	<input type="checkbox"/>	<input type="checkbox"/>
Is spoilage entered daily into C-Store Office?	<input type="checkbox"/>	<input type="checkbox"/>
Have all pending price change tickets been processed?	<input type="checkbox"/>	<input type="checkbox"/>
Have you enabled all price changes to be recorded through price change tickets, counted by the manager and updated in the system?	<input type="checkbox"/>	<input type="checkbox"/>
Are managers following up with all outstanding credits from vendors?	<input type="checkbox"/>	<input type="checkbox"/>
Have you synced your handheld to load the most current prices and price book before starting the inventory count?	<input type="checkbox"/>	<input type="checkbox"/>



PRIOR TO AN INVENTORY COUNT

- Plan your inventory for the day of the week when your inventory is at its lowest. This is usually the day before your main supplier's delivery date.
- Hire an outside company to do, at least, an initial item inventory count. This initial item-level inventory count is to create a starting point.
- Discuss the inventory process in advance with the counters such as the ways to count, what to count first and what should be counted last.
- Prepare count cards and place them in the areas that will be counted. Index cards work well as count cards.
- Create a diagram of the store layout so that areas are counted the same way each time.
- Create displays, keeping like products together, such as 12 packs of coke, 12 packs of diet coke etc., versus in separate rows and/or mixed throughout the store.
- Organize, clean and place UPCs in the inventory counter's line of sight. This applies to UPCs in your backroom, cooler, backstock and other areas of the store.
- Use cardboard insert in dump bins to separate like products in one area of bin for easier counting.
- Train cashiers to ring up items by their individual UPC. For example, 3 Gatorade flavors need to be rung up as 3 separate UPCs, not scanned as 1 flavor (UPC) for all 3.
- Train cashiers to process returns by refunding the item and then ringing in the new item. For example, if a Marlboro pack is scanned but a customer wants Marlboro Lights, a refund should be done first for the Marlboro pack and then the Marlboro Lights pack should be rung up.



DURING AN INVENTORY COUNT

- Close the shift right before the inventory count is started.
- Open a new shift.
- Count each section at a time, then place a count card in the section to flag the area as counted.
- Sync the handheld devices after each section is counted. This helps to safeguard the data during the count if the scanner's battery dies or experiences a technical problem.
- Do not move inventory during the count and/or stock shelves.
- Close the shift when the inventory count is complete.



AFTER AN INVENTORY COUNT

- Print out the items missed report.
- The supervisor, manager and counters should all review inventory discrepancies together and sign off before inventory is processed.
- Process the count as a Full Inventory in CSO.
- Find, research and identify the cause of error(s).
- Eliminate the cause of error(s).
- Correct parent-child relationship and pack size errors.
- Retrain staff to avoid future errors.



INVENTORY COUNT WORKFLOW

