

## Preparing for Physical Inventory

It's getting closer to that time of the year where many customers are doing a physical inventory (PI) of their stores. This can seem like a very daunting task, but as long as you prepare for it correctly, your Retail STAR PI experience should be relatively painless!

### You can never be too prepared!

Thorough preparation is the first step to a successful PI. There are many things that you want to check, clean, and close before you start an inventory. Finding these before you start the PI can do wonders for both your PI and your sanity!

### Check:

Retag any items that may be missing tags. Check the displays and shelves to make sure products are in their correct places, which will make counting them easier.

### Clean:

Take a look at the other areas of your store, like stock rooms, hold areas, and cashier stations. These places are notorious for holding "missing" items from a count. Clean them out before you even start the inventory to decrease the chances of your counts being inaccurate.

### Close:

Documents or receipts that are waiting for more information or are waiting to be completed are called "open". If you find and close documents that are no longer needed after you have counted your inventory, you will have altered the stock of your inventory, and your counts will no longer be accurate. Be sure to close out any open documents or receipts that you don't need to keep open before you start your inventory.

## Counting Tips for PI

When taking a Physical Inventory, the most important part is the counting. This is how you correct inventory discrepancies in the system by physically counting the items and having the system record that number. There are three different ways to get your counts into the system.

**Manual:** This is the method most people are familiar with. When you create a worksheet in Retail STAR, you add the items either through the populate feature; or by typing each style individually.

**PDT:** You can also place your counts into the system using a handheld device, known as a PDT. The advantage of a PDT is that you can go around your store and scan or type in the counts for items that you find, and then you can download those counts into the system, eliminating the need to hand enter them.

PDT units also have increased usefulness as they can be used for receiving and adjustment quantities as well.

**File:** The final method would be to use an Inventory company like RGIS. These companies are hired to come in and count everything in the store; then they give you a file afterwards with all your counts. When you have created your worksheet, you can import this file to place all the counts in your system. The advantage here is that you do not personally count all your items, which frees you up for other tasks.

This is only the beginning to true PI Preparation, but implementing these actions can give you very good results. Happy counting!

If you have more questions, contact Support at (800) 949-1470 and use option 6.

### i.STAR Help Phone Line

If you have an i.STAR website and need assistance or technical support, there is now a live support option over the phone!

i.STAR Technical Support is available Monday through Friday from 8 AM to 5 PM PST.

The phone number for i.STAR Technical Support is (800) 949-1470 Option 8.

## Did You Know?

Did you know that your anti-virus software program might be interfering with a Retail STAR software installation or upgrade?

While anti-virus protection programs are critical for maintaining the health and longevity of your computer's operating system, they often impede the installation and upgrade processes of software programs by classifying certain executable files and functions as a virus or spyware. So it is important to temporarily stop your anti-virus program when installing Retail STAR or when running a Retail STAR upgrade.

## Daily Process Settings

If you have an i.STAR site and suddenly stop getting orders, or perhaps you are missing deposits in the Make AR Deposit window or you are not seeing new receivers show up in the Match AP Invoice window, you might want to check the settings in the Daily Process window. Options in this window can be unchecked for various reasons so it is important to re-check these settings when you first notice a problem.

To verify that the settings in the Daily Process window are set according to the needs of your business, select Sales Order/Invoice option from the Retail STAR Office STAR main menu. Then select the Daily Process option on the right side of the window.

If you aren't receiving i.STAR orders, be sure that the first option in the screen, Process i.STAR Orders, is checked. If you are missing receivers in the Match AP Invoice window, make sure the Process Receivers option is checked. If you are missing deposits in the Make AR Deposit window, be sure the Process Payments for "Make AR Deposit" and Paid In/Out option is checked.

**IMPORTANT NOTE:** If you have never seen the Daily Process screen before or if you have never run the Daily Process before, it is important that you call Accounting Solutions support at 800-949-1470, ext 9 and leave a message for a call back. Making sure these settings are correct before you a Daily Process is critical to normal system function and a technical support specialist will help you make the right decisions about what should or should not be checked before you proceed with running the process.

## Editing Report STAR Column Widths

If you are running Retail STAR version 8.5.86 and above, chances are you are using the new Report STAR report module and you might have noticed that the totals at the bottom of your reports are printing too close together or that are perhaps missing parts of the figures all together. This is because the new Report STAR module allows you to adjust the width of the printable columns on the report and the default setting might be too small for the figures printing on your personal report.

Changing the column widths to suit your personal needs is easy and can be done as often as needed, but remember that the settings you make govern the column width for all reports, not just the current report you are working on, so be sure to set them according to your needs for all reports.

To change the column widths for all reports, click on Tools and then Options from within the Report STAR window. A screen will pop with four column width options: units, percent, dollars, and other numeric. The maximum number of characters allowed for each of the four options is 15. To find out what settings are best for you, we recommend making small adjustments to the settings and then running your reports to see if those settings will work. If they make the columns too wide or not wide enough, simply go back to the Options window and made adjustments as needed. It's that simple!

## Printing Supplies

Are you looking to reduce the time spent buying from multiple suppliers or the time spent researching whether your supplies are compatible with your POS system? If so, you can order supplies directly from CAM for both your tag and receipt printers by calling 1-800-726-3282, ext. 223 (Monday through Friday, 6am to 2:30pm PST). You can also purchase these supplies through our online store at [www.camcommerce.com](http://www.camcommerce.com) or by emailing us at [supplies@camcommerce.com](mailto:supplies@camcommerce.com).

If you need adhesive labels or hang tags that we don't stock, we will be happy to provide you with a custom quote.

Note that orders placed by 2pm PST can be shipped the same day.