

Physical Inventory Count Tips

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. Since counts are so important to a successful PI, Retail Star has several ways to insert them into your PI worksheet. Here is a little more information about them so you can decide which method works best for you!

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. When the style is on the worksheet, you can manually type in any number in the Count column. This is how you can manually enter in the counts for your items, though it can become time intensive with large databases.

PDT: Using a handheld device, known as a PDT, can also allow you to place your counts into the system. There are several different types of PDT units, like the PDT3100 and the MC3000. The advantage a PDT offers is that you can go around your store and scan or type in the counts for items that you find. If you have several PDT units, you can assign them to sections of the store and complete the counts in half the time!

When you have finished with the counting, simply bring the PDT units to your designated PI workstation, and you can download the counts from the handheld unit into the computer, bypassing the need to type in the actual counts manually. PDT units also have increased usefulness as they can be used for receiving and adjustments 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 did not have to actually count all your items, which is usually the longest process of an inventory.

These three methods have their own advantages and disadvantages, and you can choose which one works best for your situation. Ultimately, all three will lead to a successful physical inventory!

Daylight Saving Time Change!

In 2005, President Bush signed the Energy Policy Act, which changed the dates that Daylight Saving Time is observed. This year, the clocks were set ahead on March 9th, and will be set back on November 2nd.

Most likely, if you have kept your windows system up to date, your computer will automatically adjust itself on November 2nd. However, it would be wise to make sure that your system is set at the correct time and the end of October and the beginning of November.

Retail Star gathers its time and date from the information on your system, so if your computer is wrong, Retail Star will be wrong. This can cause issues with receipts being rung up for wrong times, and employees clocking into Time Clock incorrectly.

Make sure your system does not change in October, and that on November 2nd you are operating on the correct time. And also, enjoy that extra hour!

Upcoming Retail Star User Group Meetings

- Oct. 29th Sarasota, FL
- Oct. 30th, Winter Park, FL
- Nov. 5th, Fort Washington, PA

If you are interested in attending, please contact Dianne McGee at Dianne.Mcgee@camcommerce.com

Helpful Hint

How to make a Product specific note prompt in POS

You can use this hint to add information to a specific product. This is useful if the item has a different return policy, or needs to be sold with something else, or you need to remind the cashier of something.

1. In Product Maintenance, pull up the product you want to add the note for.
2. Click on Tools and then click Product Notes
3. Here, click on F6 Insert, and then under Note Type, select "Suggested Selling Prompt".
4. In the Note field, type the message you want to be displayed at POS.
5. Click F10 Save, and then F12 Exit.

After that, the note should be all set. Verify by going into POS and pulling the item up. You should see the prompt pop up!