

Mobile Inventory Guide

September 2020





Mobile Inventory Guide

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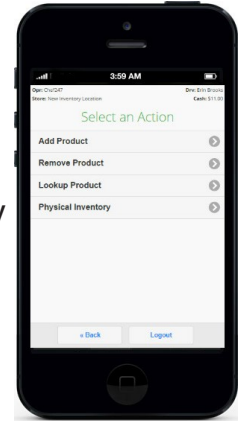
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Introduction

Go to <https://365smartinventory.com/R43s/> and login with your SmartHQ Credentials.

365 Smart Inventory is a mobile optimized website, that can be accessed from a number of devices (including 365's Smart Inventory Bundle). The Smart Inventory site has been designed for in-store inventory updates, typically performed by the route driver.



Add/Remove Product

Go to <https://365smartinventory.com/R43s/> and login with your SmartHQ Credentials.

The Add/Remove Product functions make it fast and easy to manage your perpetual inventory counts.

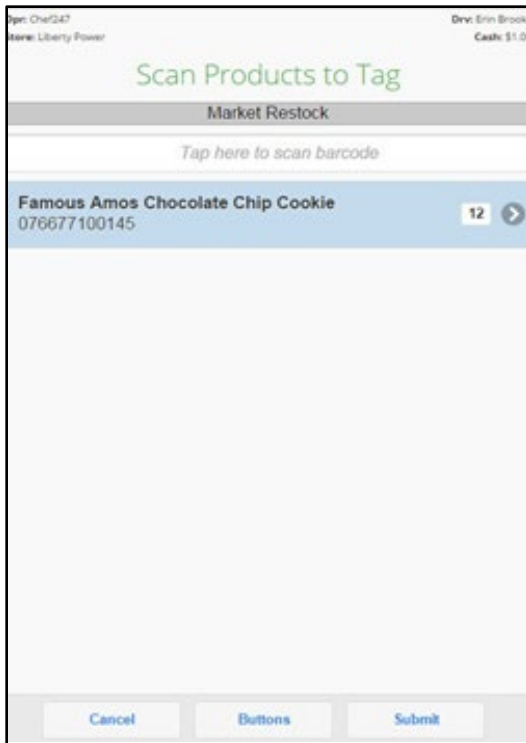
To adjust "on-hand" product quantities:

1. Select **Add** or **Remove Product** from the main menu. Selecting either option will display a list of reason codes that are associated with either positive adjustment (Add Product) or negative adjustment (Remove Product). You can set which reason codes are associated with adding/removing in the **Manage Reason Codes** section of SmartHQ.
2. Select a **Reason Code**. The reason code you select will be applied to every item scanned from that point forward until you press Submit or cancel your current scanning session. The selected reason code is also clearly displayed at the top of the screen for quick reference.



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3. **Scan Products.** When you have selected a reason code, scan the product(s) you are adding or removing. Notice that scanning the same barcode multiple times will increment the number of that product on the same line.



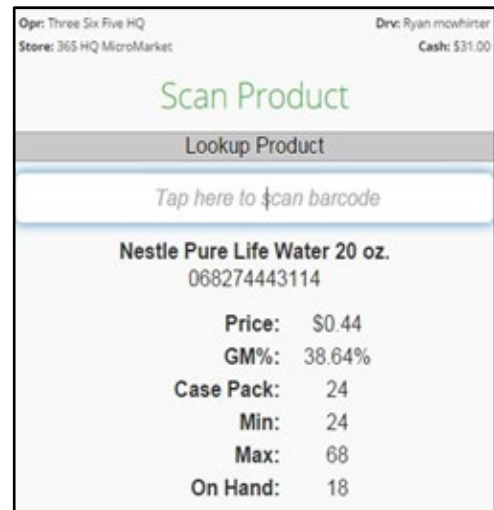
4. **Adjust as needed.** If you have a large quantity of the same product, you can scan the item once, and then select the row.
5. **Submit.** When you have completed your scanning for that reason code, press the **Submit** button to commit those changes. After submission, the Main menu will display, where you can repeat this process, by selecting a different reason code(s) as needed.

Lookup Product

Lookup Product is a quick way to view the details of a particular item. Select this function and scan a product's barcode to view its:

- On-hand quantity
- Price
- GM percent, Case Pack quantity
- Min and Max

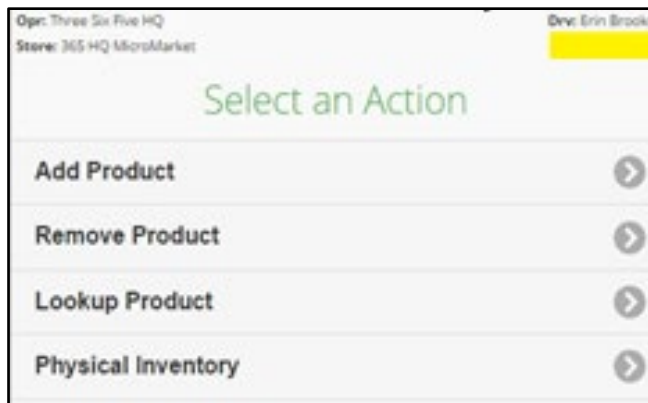
This is a handy feature to perform price checks and make sure you are always filling to the correct par level for your market.



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Kiosk Cash Preview

To check the current cash balance of your kiosk bill acceptor, go to the **Main** screen for your location. In the upper, right corner you will see the total of all bills currently in the validator.

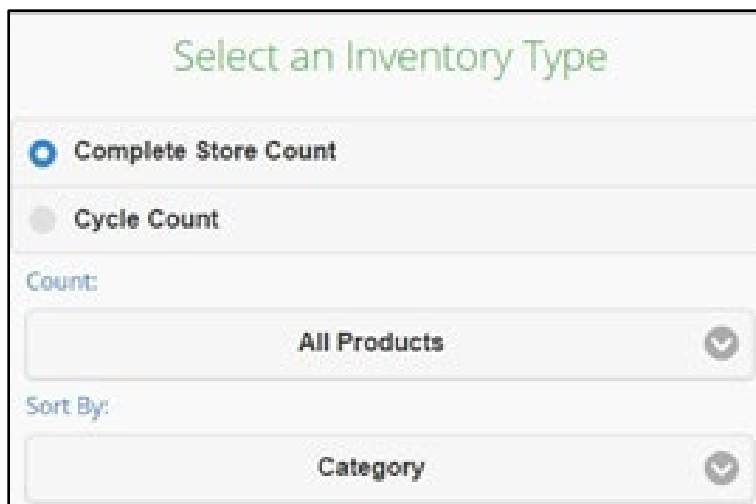


Physical Inventory

The best way to be sure that your on-hand counts are accurate is by performing regular physical inventories. Best practice is to complete a full store count once per month, prior to closing your books. Between full physical inventories, you can also perform regular cycle counts of just one, or a few product categories, giving you even better information on product flow.

To perform a Physical Inventory:

1. Select **Physical Inventory** from the main menu.
2. Select either **Complete Store Count** or **Cycle Count**.



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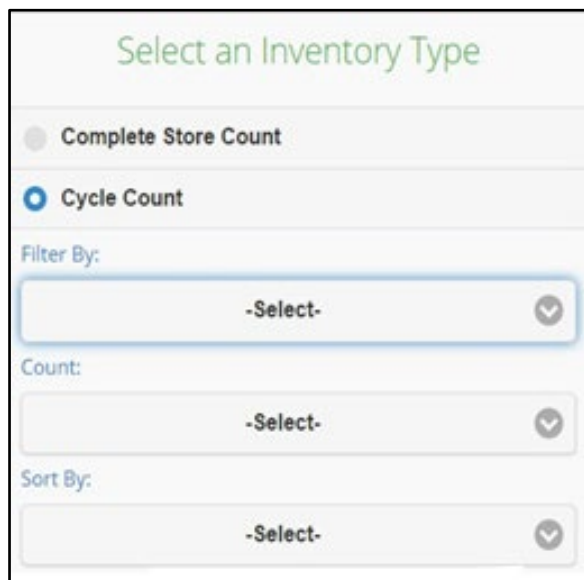
Complete Store Count

A complete store count will cycle through every active product in your market, based on the filters you set.

Cycle Count

A cycle count will also cycle through the active products based on the filters you select, however with a cycle count, you have the added filter of selecting the:

- Category(s)
- UPC
- Product ID range to limit the physical inventory



The screenshot shows a mobile application interface titled "Select an Inventory Type". It features two radio button options: "Complete Store Count" (unselected) and "Cycle Count" (selected). Below these are three dropdown menus: "Filter By:" (set to "-Select-"), "Count:" (set to "-Select-"), and "Sort By:" (set to "-Select-").

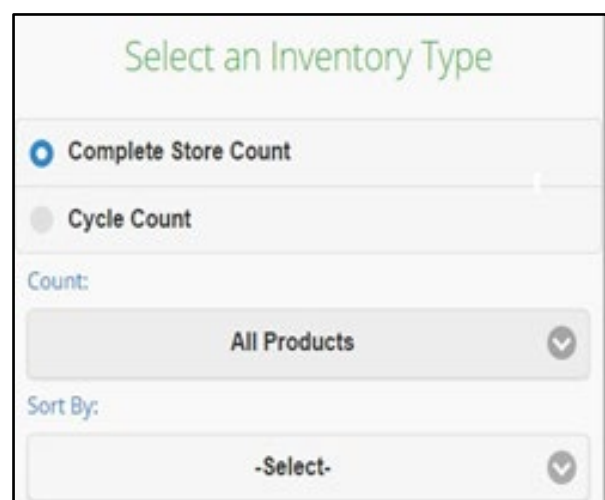
Typically for a full store count, you will want to go by Category, but other sort options like UPC or Product ID can be useful for cycle counts.

Count

Select a group of products to count by choosing from:

- All Products
- Zero & Positive Items Only
- Positive Count Items Only
- Negative Count Items Only

Typically for a Physical Inventory, all products should be counted, but other options can be useful for cycle counts or periodic negative inventory reviews.

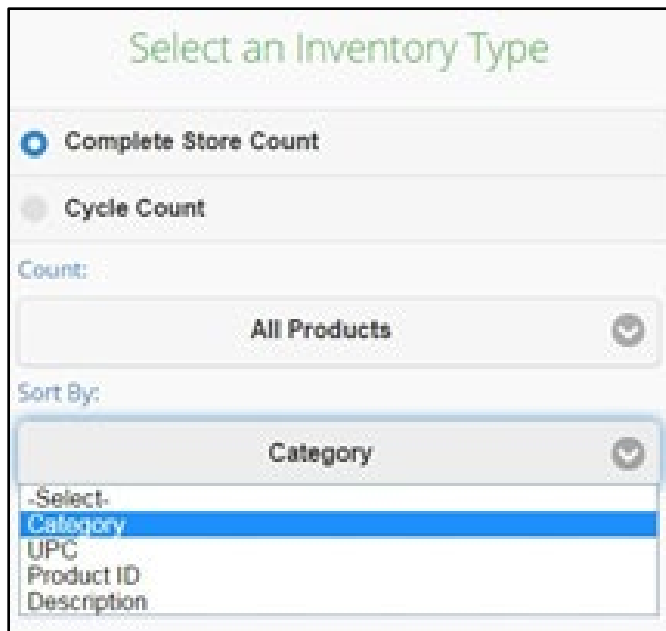


The screenshot shows the same "Select an Inventory Type" screen, but with "Complete Store Count" selected. The "Count:" dropdown menu is now set to "All Products", while "Filter By:" and "Sort By:" remain set to "-Select-".

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Sort By

Choose a sort order to determine the order in which SmartInventory will prompt you for items to be scanned.



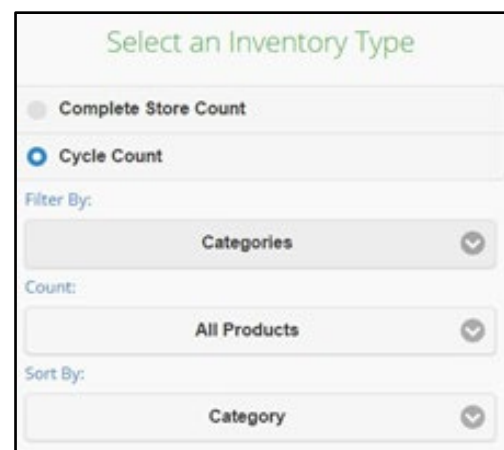
- **Sorting by Category** will order products alphabetically by Category, e.g., Beverages, Candy, Chips.
- **Sorting by UPC** will order products numerically by UPC.
- **Sorting by Product ID** will order products numerically by Product ID.
- **Sorting by Description** will order products alphabetically by description.

Typically, you will want to order by Category for the most streamlined inventory. The other sort orders are useful for cycle counts of a specific manufacturer or distributor's products.

Filter By

The Filter By option is available for Cycle Counts, to restrict your inventory to only the range of products that you need to inventory.

- **Filtering by Category** will allow you to check one or multiple categories.
- **Filtering by UPC range** will allow you to enter a UPC Start and UPC End. This is useful for conducting an inventory on only a certain manufacturer's products, as the first four to six digits of a UPC are usually consistent across a manufacturer's product range.



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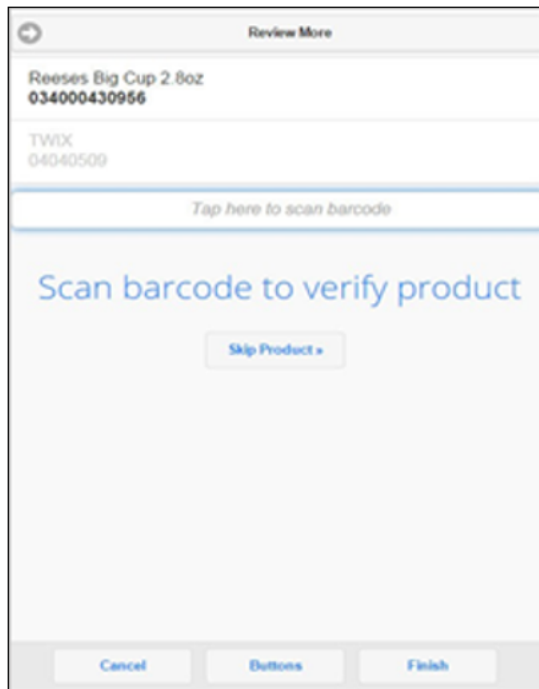
- **Filtering by Product ID** will allow you to enter a Product ID Start and a Product ID End. This is useful for conducting an inventory of only a specific distributor's products.

Each filter option coincides with a sort option. When running a Cycle Count, we recommend that you match your **Filter By** and **Sort Order** selections.

Counting Inventory

Smart Inventory will guide you through the inventory process by displaying the description and barcode for the item you need to scan.

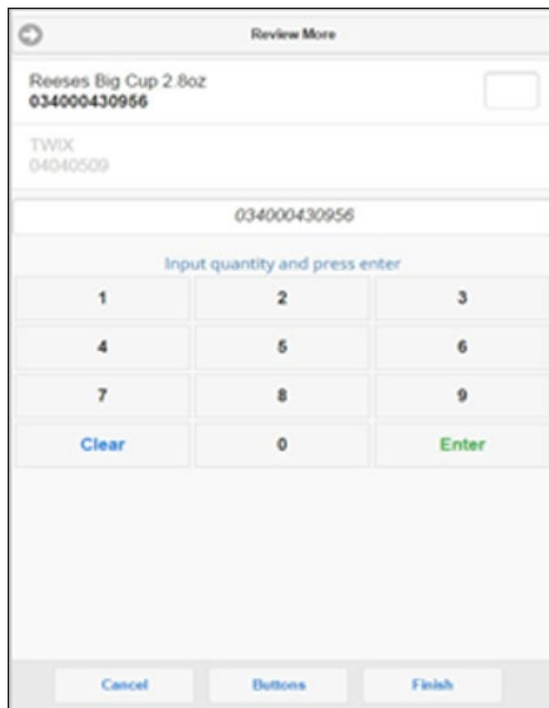
1. Scan the barcode.



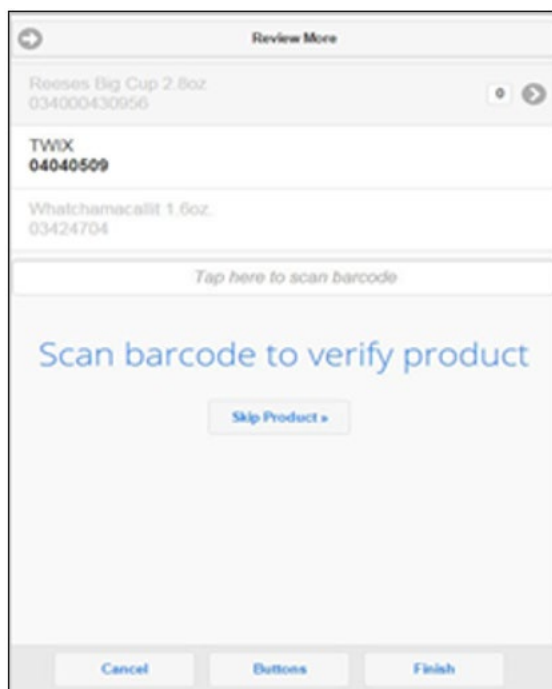
2. Count the quantity of that product.

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3. Input the quantity.

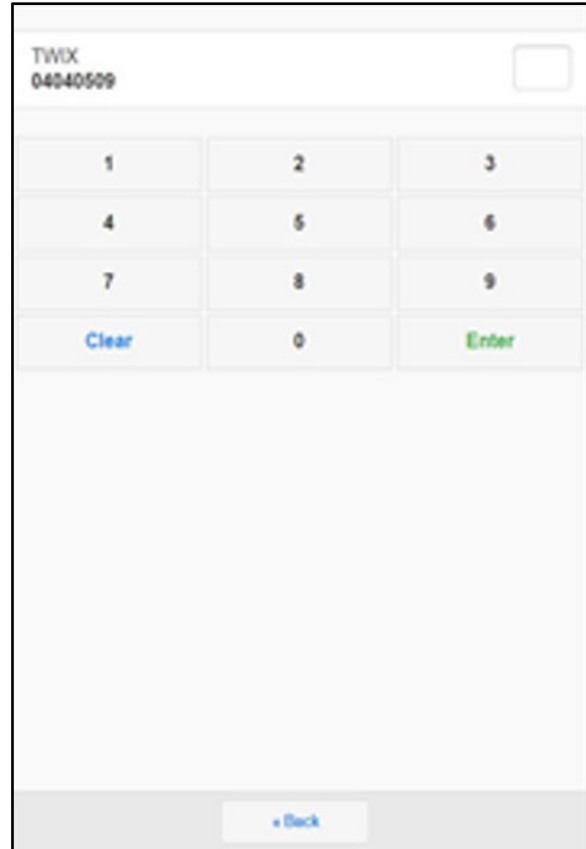
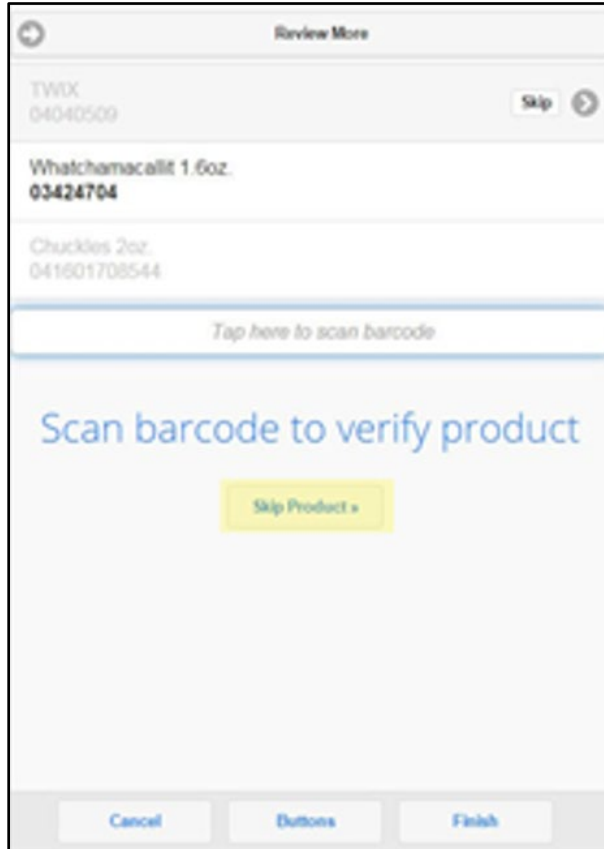


4. Press **Enter** to advance to the next item.



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If you encounter a product you cannot scan, either because of a damaged barcode or the product is missing, tap the **Skip** button to skip the scan, then tap the **Quantity** field and enter the appropriate value. If the quantity entered exceeds your max par level, you will be prompted to confirm the amount before scanning the next product.



Kiosk Buttons

To inventory the items in your system as kiosk on-screen buttons, press the **Button** option at the bottom of the page to bring up all of your products, and add quantities for those.



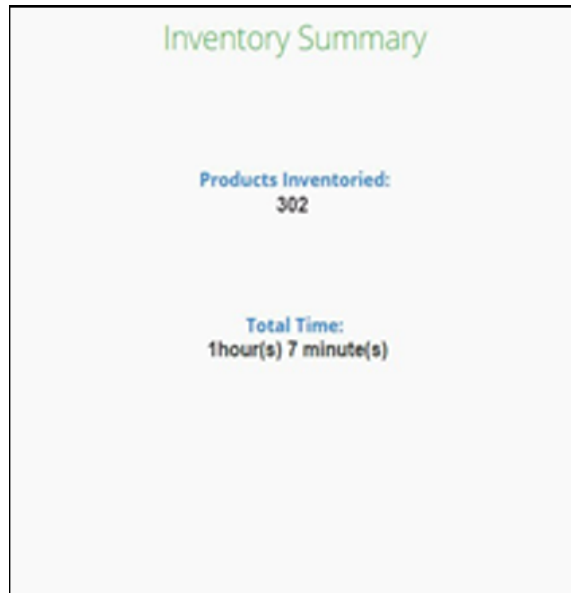
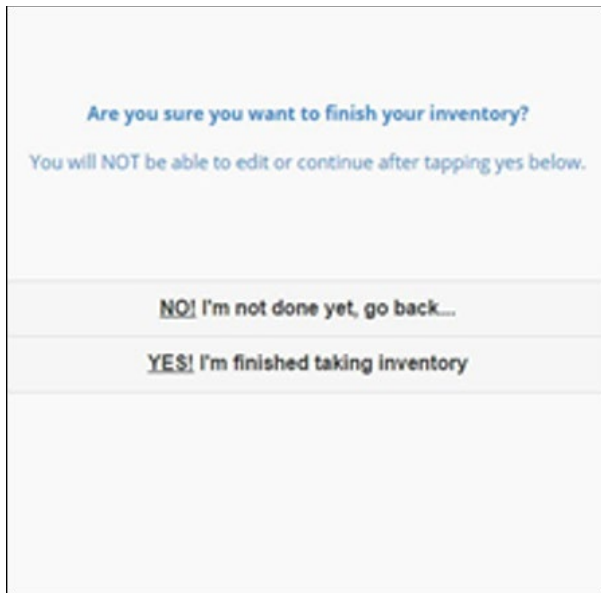
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Submitting Your Inventory

When you are finished going through each product, press **Submit** to finish your inventory and send the results to SmartHQ.



Please be aware that all on-hand values entered during your Physical Inventory will replace the current values in SmartHQ.



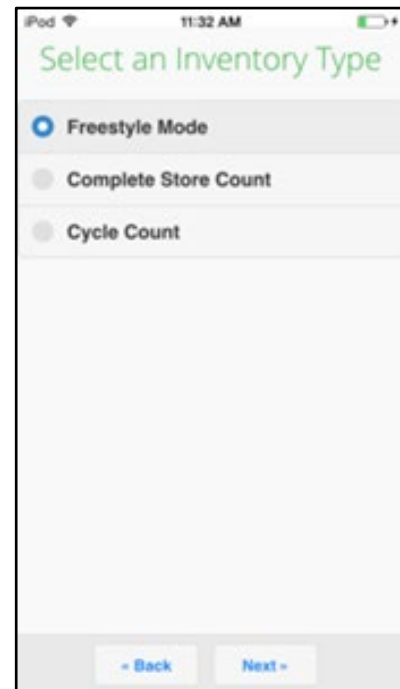
Freestyle Mode

For a quick, easy and efficient inventory method, use the Freestyle Mode. This function allows you to scan and count products in any order, then provides a prompted list of any un-inventoried products for review prior to completion. This prompt ensures that all products are accounted for and allows you to zero out any inaccurate positive inventory amounts.

To perform a Freestyle Inventory, select **Physical Inventory** from the **Main** menu, then select **Freestyle Mode**.

Freestyling

While in Freestyle Mode, use the scanner to scan any product barcode. After scanning the barcode, you will be prompted to enter the on-shelf quantity of that product. Use the number pad to enter the amount and press **Enter** to submit that quantity.



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Be sure to count carefully, as this new quantity will replace the old value in SmartHQ when the inventory is submitted. Continue scanning product barcodes and entering the on-shelf quantity until you reach the end of your market.

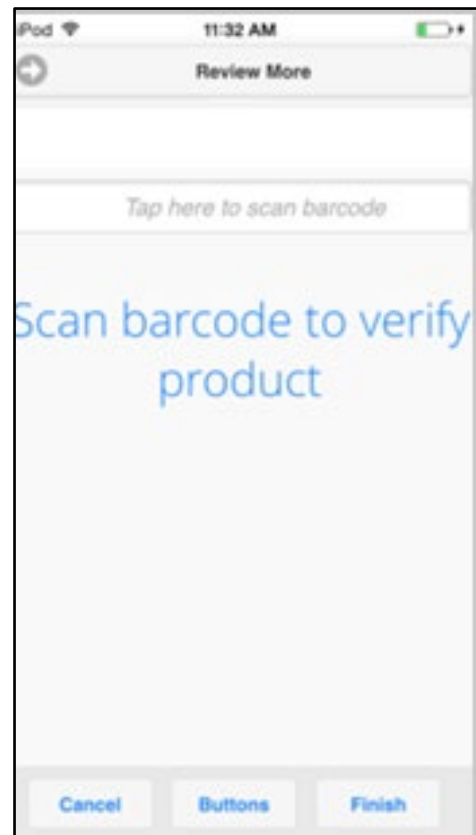
If you need to adjust any of the quantities entered, tap **Review More** to review and change any products amounts before submitting your inventory. Any non-barcoded products which are sold using kiosk buttons can be inventoried by tapping **Buttons**. When all products have been counted, press **Finish**.

Review

When you finish your Freestyle Inventory, if there are any active items that show a +/- count in your inventory, you will be prompted to review them. These items are grouped by category, to make it easy to skip any groups of products that are not subject to inventory. Tap any category to deselect it from review, then touch **Next** to review your un-scanned items. Some of these items may be present in the market but were missed during the first count. For these products, scan the barcode, then enter the quantity of the item, as you would during a standard inventory.

Other items may be out of stock but have an incorrect positive or negative quantity in SmartHQ. If you are asked to inventory an item that is out of stock, press **Skip** to skip the scan, then tap the **Quantity** field and enter **0**. This will adjust your on-hand to zero, so that your Pick List will reflect the new quantity needed.

Reviewing your Freestyle Inventory is optional, but we strongly recommend it for best accuracy. If you choose not to review your un-inventoried products after a Freestyle Inventory, you can press **Skip All** and the **Completed Inventory Summary** page will display. It shows the number of products inventoried and the total time spent.

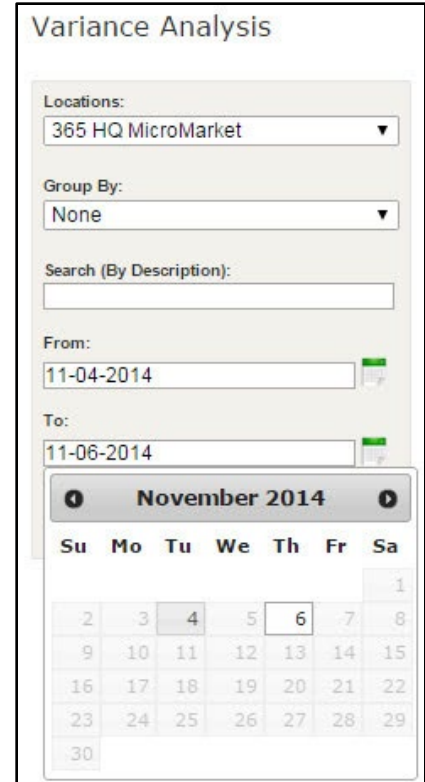


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Variance Analysis

This report works by comparing two inventories completed on different dates. It shows the expected quantities of each item based on adds, removals and sales against the inventory quantity and then calculates the variance between those values.

To run a Variance Analysis report, select your location and two different inventory dates, (SmartHQ will only allow you to select dates on which a Physical Inventory was run.)



From left to right, these are your **Variance Analysis** fields and what they display:

BarCode	Description	Item Type	11/4/2014	Adds	Removes	Sales	Expected	11/6/2014	Variance	Variance Cost

BarCode – Product UPC **Description** – Product Description **Item Type**.

Date 1 – Quantity of the product as reported by a Physical Inventory on that date.

Adds – Quantity of product added to inventory between Date 1 and Date 2.

Removes – Quantity of product removed from inventory between Date 1 and Date 2.

Sales – Quantity of product sold between Date 1 and Date 2.

Expected – Quantity of product reported on Date 1, plus the quantity added, less the quantities removed and sold.

Date 2 – Quantity of the product as reported by a Physical Inventory on that date.

Variance – Difference between the Expected Quantity of product and quantity of product reported by the Physical Inventory on Date 2.

Variance Cost – Variance quantity multiplied by Product Cost.

The items in green, **Adds**, **Removes**, and **Sales** are functional links. Click on any of the numbers to get enhanced visibility on product additions, removals, and sales. (See below



BarCode	Description	Item Type	11/4/2014	Adds	Removes	Sales	Expected	11/6/2014	Variance	Variance Cost
611269818994	Red Bull 12 oz	BEVERAGE	4	0	0	0	4	11	7	\$15.05
073800002963	Faygo Red Pop 20 oz	BEVERAGE	2	0	0	1	1	8	7	\$3.36
052000328660	Gatorade G Series Fruit Punch 20 oz.	BEVERAGE	4	0	0	2	2	8	6	\$3.54
052000324822	Gatorade Fierce Grape 20 oz	BEVERAGE	3	0	0	0	3	8	5	\$4.60
073360377518	La Croix Lemon	BEVERAGE	5	0	0	4	1	3	2	\$0.62
073360237515	La Croix Lime	BEVERAGE	-	12	0	2	6	7	1	\$0.31
012000286223	Pure Leaf Raspberry Tea 18.5 oz	BEVERAGE	7	0	0	2	5	6	1	\$1.24

Location	Time Sold	UPC	Item Type	Item Description	Pay Method	Amount	Tax 1	Tax 2	Deposit	Total	Item Discount
365 HQ MicroMarket	11/5/2014 7:13:39 AM	073360377518	BEVERAGE	La Croix Lemon	ACCOUNT	\$0.54	\$0.03	\$0.00	\$0.00	\$0.57	\$0.00
365 HQ MicroMarket	11/5/2014 11:09:34 AM	073360377518	BEVERAGE	La Croix Lemon	ACCOUNT	\$0.54	\$0.03	\$0.00	\$0.00	\$0.57	\$0.00
365 HQ MicroMarket	11/6/2014 12:36:43 PM	073360377518	BEVERAGE	La Croix Lemon	ACCOUNT	\$0.54	\$0.03	\$0.00	\$0.00	\$0.57	\$0.00
365 HQ MicroMarket	11/6/2014 1:15:55 PM	073360377518	BEVERAGE	La Croix Lemon	ACCOUNT	\$0.54	\$0.03	\$0.00	\$0.00	\$0.57	\$0.00

Using the Variance Analysis Report

1. Run the Variance Analysis Report after you have completed at least two Physical Inventories.
2. Sort the report to show your high variance items at the top of the list by clicking the **Variance** header.
3. Review the stock adjustments in the *Adds & Removes* columns to determine if your driver is adding and removing product from SmartHQ properly.
 - a. **Positive variances** typically indicate that products are not being added to SmartHQ after they are stocked. They will appear at the top of your *Variance Cost* column.

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- b. **Negative variances** can indicate that products not being removed from SmartHQ when it is taken from the market or can also indicate shrink. Review your Variance Analysis report periodically to identify repeat issues. Click the Export link to save an Excel copy of your report.

BarCode	Description	Item Type	11/4/2014	Adds	Removes	Sales	Expected	11/6/2014	Variance	Variance Cost
611269818994	Red Bull 12 oz	BEVERAGE	4	0	0	0	4	11	7	\$15.05
073800002963	Faygo Red Pop 20 oz	BEVERAGE	2	0	0	1	1	8	7	\$3.36
052000328660	Gatorade G Series Fruit Punch 20 oz.	BEVERAGE	4	0	0	2	2	8	6	\$3.54
052000324822	Gatorade Fierce Grape 20 oz	BEVERAGE	3	0	0	0	3	8	5	\$4.60
073360377518	La Croix Lemon	BEVERAGE	5	0	0	4	1	3	2	\$0.62
073360237515	La Croix Lime	BEVERAGE	-	12	0	2	6	7	1	\$0.31
012000286223	Pure Leaf Raspberry Tea 18.5 oz	BEVERAGE	7	0	0	2	5	6	1	\$1.24
052000328677	Gatorade G Series Orange 20 oz.	BEVERAGE	7	0	0	0	7	7	0	\$0.00
052000328684	Gatorade G Series Lemon-Lime 20 oz.	BEVERAGE	8	0	0	0	8	8	0	\$0.00
028300003224	Shamrock Farms 2% Chocolate Milk 12 oz.	BEVERAGE	-	12	0	1	8	8	0	\$0.00
052000324815	Gatorade G Series Cool Blue 20 oz.	BEVERAGE	8	0	0	0	8	8	0	\$0.00
012000041396	Starbucks Iced Coffee 11 oz	BEVERAGE	10	0	0	0	10	10	0	\$0.00
02248808	Orbit Wintermint	40-Gum & Mints	6	0	0	1	5	5	0	\$0.00
041601708544	Chuckles 2oz.	01 - CANDY	5	0	0	0	5	5	0	\$0.00
028000010775	Baby Ruth	01 - CANDY	9	0	0	0	9	9	0	\$0.00
01264904	Starbucks Frappuccino Mocha 9.5 oz	BEVERAGE	-	0	0	0	1	0	-1	(\$1.16)
012000374029	Starbucks Refreshers Raspberry Pomegranate 12 oz	BEVERAGE	-	0	0	0	1	0	-1	(\$1.24)
078000206401	Schweppes Ginger Ale 20oz.	BEVERAGE	-	0	0	0	1	0	-1	(\$1.04)
016300150314	Floridas Natural Apple Juice 10 oz	BEVERAGE	-	0	0	0	1	0	-1	(\$0.67)
070847811749	Monster Khaos Energy Juice	BEVERAGE	6	0	0	0	6	5	-1	(\$1.38)
094187014653	Motrin 4 Caplets	MEDICINE	5	0	0	0	5	-	-	-
02248303	Orbit Sweet Mint 14 pcs	Gum	9	0	0	0	9	-	-	-
Grand Totals:			98	24	0	13	119	108	-24	(\$23.23)