**Job Aid: Lightspeed Inventory Counting**

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**Additional Resources:**

* Video: Entering Item Counts with the Scanner App and Retail POS

Shape

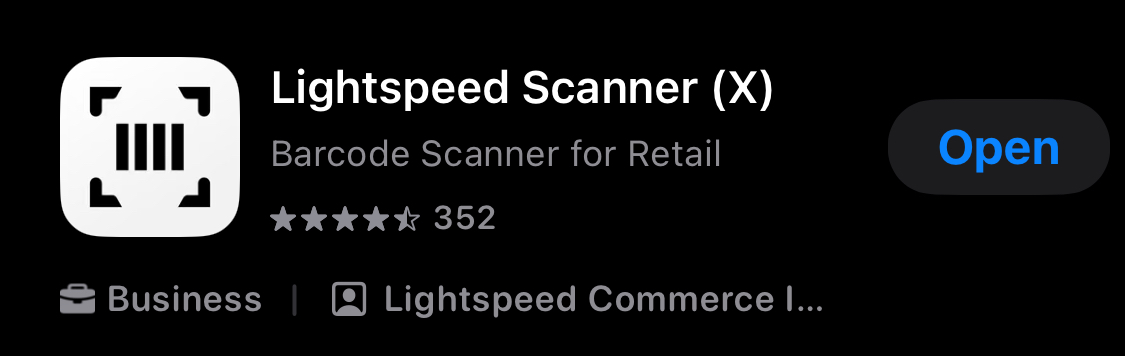
**1. Preparing for Full Inventory Counts**

* **Scheduling a Full Inventory Count:**
  + Stores will count their entire product assortment at least twice per fiscal year. Typically, these counts occur in April and October. Additional counts may be scheduled based on the needs of the individual location, or at the discretion of the Regional Manager, Director of Retail, or SLT.
  + The count should be conducted between the 21st and the last day of the inventory month. It is not recommended to count on the very last day of the month, to allow time to properly review and correct the inventory before completing it.
  + Full inventory counts should be completed outside of the store’s business hours when possible.
  + Lightspeed inventories can be set up ahead of time and scheduled for the day you will be counting. This will be done by following the step-by-step instructions in Section 2 of this job aid. Notify your Regional Manager of the count date as far in advance as possible. **For the first inventory in February 2025, DO NOT setup your inventory prior to attending an inventory setup session. Complete the February 2025 Physical Inventory Count Scheduling to choose both a date to count your inventory and a date to attend a setup session.**
* **Preparing to count:**
  + Think about the items and resources you'll need to complete your stock-taking ahead of time. Review your plan with your Regional Manager or Physical Inventory STAR especially if you are a new employee and you have NOT done a stock-taking yet.
  + A Wi-Fi connection is required for some steps of this job aid. If you do not have Wi-Fi throughout the entire count area, review the options with your Regional Manager or Physical Inventory STAR.
  + Pre-count items in the stock room(s) prior to the count day and label them with the total count. **DO NOT begin scanning** backstock before the scheduled start time of the inventory, which should be set outside the business hours of the store when possible. Once scanning begins, expected quantities for the inventory are locked in and can only be updated by discarding the inventory and setting up a new count. Any sales that occur during scanning may result in a discrepancy in inventory totals.
  + The day before the count, power on the store’s iPhone and connect it to the store’s Wi-Fi. The phone or scanner app may need to install new updates. Leave the iPhone plugged in to fully charge.
* **Before counting, complete the following tasks:**
  + Receive Purchase Orders or Transfers for all items that have been delivered to the store.
  + Complete transfers for all Damaged, Donated, and Stolen items.
  + Perform Inventory Adjustments for any items with a negative on-hand quantity. **For your first inventory, any updates to negative quantities will be made during the Full Physical Inventory. Once a job aid for adjustments is available, you will correct zero on-hand quantities prior to full counts in the future.**
* **2. Instructions for Setting up a new inventory count in Retail POS**

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| **Step** | **Action** |
| 1. | * Select the **Inventory tab** in the left navigation column. * Click on the **Inventory counts** subcategory.      * A message window will appear that says: “Creating your data”. You may experience a long wait during this step. * When the page reloads, click the blue **Add inventory count** button. |
| 2. | * Enter the **Start date** and **Start time** of the scheduled inventory. * The Start time must be set for the hour you intend to begin scanning items, which must be outside of the store’s business hours.     *Note:* ***DO NOT******begin scanning*** *items before the scheduled start time that is set in this step. Once scanning begins, expected quantities for the inventory are locked in and can only be updated by discarding the inventory and setting up a new count.* |
| 3. | * Select the store you are inventorying from the Outlet drop down.      * Name the count in the Count Name field. Use the following naming format:   **YEAR –** **MONTH** – **FULL** - **LOCATION NUMBER**.  *Example:* ***2024 - Dec - Full - 904V***    *Note: Please use the exact naming format above, listing the information in the order shown, using the 3-letter abbreviation for the month, and the alpha-numeric store number. Do not add a number sign (#). This will ensure consistency between all locations.* |
| 4. | * In the “Choose products to count” section, you **MUST** choose **Partial Count**, even if you are counting the entire inventory of a location.   **DO NOT SELECT FULL COUNT UNDER ANY CIRCUMSTANCE.**    *Note: Counting the full assortment at a store is a “Partial count” of the entire organization's inventory. If “Full count” is selected, there is a risk of affecting item quantities across the organization, not just the individual store location. Therefore, it is critical that every inventory is set up as a “Partial count* |
| 5. | * Type the location number into the search box that says: *“Search for suppliers, brands, categories, tags, or SKUs.”.* * Select the result that shows “**Store # TAG”** Do not add any additional filters.   This is how the properly set filter looks in the search box: |
| 6. | * Items assigned to the location will appear below the search box once the filter has been set. Wait for this list to load, which may take a few seconds.      * Double check this list to make sure that the items showing here are the expected items for the location. * Click **Save and exit**     **DO NOT click Start Count.** Doing so will lock in the expected item quantities and any sales made before the count date will not be reflected in the inventory. Only click Start Count when you are ready to start counting on the scheduled inventory date. |
| 7. | * You will be returned to the Inventory Count page. Select the Upcoming tab to find the inventory. * Review the Count column to verify it says Partial next to the inventory that was just created. Confirm that the inventory date and time are correct.     **If the inventory shows Full in the Count column DO NOT PROCEED with the count. Full counts must be discarded and set up again as Partial counts.**   * To discard a Full inventory, open the inventory by clicking on the inventory name. Then, click the **Review** button.      * Next, click **Discard**.      * A small window will open. Click **Abandon** to discard the inventory. * Return to Step 2 of this section and set up a new inventory count as a Partial count. |
| 8. | * Inform your Regional Manager that the inventory count has been scheduled and set up so that they can confirm it is set up as a Partial.   **DO NOT PROCEED to sections 3-6 of this job aid until the scheduled inventory date and time.** |

**3. Instructions for Item counts on the iPhone Scanner app**

* Lightspeed Scanner app makes performing inventory counts quick and efficient. Multiple devices can complete an inventory count at the same time, without overriding each other. All count information is synced right to Retail POS.
* The app will be pre-installed on the store’s iPhone. You may also download the scanner app to a personal phone to increase the number of devices counting at once. In the App Store or Google Play Store, search “Lightspeed Scanner (X).



* A Wi-Fi connection is required to access the inventory count, and to sync the counts to the web after scanning is finished, but not during the scanning process. If your internet connection is disrupted, items can be scanned offline. They will be synced to the inventory once the device is reconnected to the internet.
* Do not use the Scanner app to set up a new inventory for counting. You must complete inventory setup in the Retail POS website before using the Scanner App.
* The barcode scanner will be most effective for use in the stockroom, where you are likely to only scan an item one time. For the best counting experience, use the iPhone scanner in the stockroom and count the sales floor with the Surface Pro.

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| **Step** | **Action** |
| 1. | **Complete all steps from the prior sections before beginning this section of the Job Aid. DO NOT begin scanning before the scheduled date and start time of the count.** |
| 2. | * Open the Lightspeed Scanner App. The app icon looks like a barcode inside a small square box.     Upon opening the app, you will be prompted to sign into a Lightspeed Retail account.   * Enter the following in the Store name field: **easternnationalusa** * Click **Sign in to Lightspeed Retail** * On the following screen, enter your individual Lightspeed retail username and password. * Click **Log in** |
| 3. | * Select the correct Outlet from the list of stores you have permission to view.   If you need to change to a different outlet:   * Select your name in the top left corner of the screen, then select Sign Out. * Complete Steps 2-3 again. * Select the new outlet. |
| 4. | * Select the **Inventory** tab at the bottom of the screen. * Select the **Count** button to open a list of inventories that are open for counting at the location. * Select the inventory that was set up in Section 2 of this job aid.   A loading screen will appear that says: “Preparing your count”. This may take several minutes to load - please be patient.  *Note: If you have a poor internet connection, this step could take much longer than expected. If you get stuck on the loading screen for more than 10 minutes, proceed to Section 4 of the Job Aid to count items using the Lightspeed Retail POS website while you wait for the scanner app to load the inventory.* |
| 5. | * Use the in-app camera to scan a product barcode or search for a product in the search field.   + *Be Aware: Each scan counts a quantity of 1. Manual adjustments may be required if you scan an item multiple times. For the best counting experience, avoid counting an item twice with the barcode scanner. If an item is displayed in multiple locations, counting with the Surface Pro is suggested.* * Scan and count all items to be included in the inventory count. Continue to repeat these steps until all items have been added the inventory count. |
| 6. | Once you have finished counting all your products:   * Select **Finish Counting** in the top right corner of the screen. * Then select **Done** in the top right.   The count will now be ready for review or continued scanning in Lightspeed Retail POS website. |

**4. Instructions for adding and editing item counts in the Retail POS website**

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| **Step** | **Action** |
| 1. | * In the Lightspeed Retail POS website, select the **Inventory tab** in the left navigation column. * Click on the **Inventory counts** subcategory. * Click the name of the inventory that is being counted. The next page may take a few minutes to load. |
| 2. | Search for items to count:   * In the Search Products field, type the item number or description of the item. Select the item from the search field’s drop-down menu. * Enter the item quantity in the Quantity field. * Click the Count button.     **Quick-Scan mode:**  Quick-scan mode enables you to rapidly scan each item's barcode in your store to add it to your inventory count one at a time. Your scanned item will automatically be counted as a quantity of 1 as soon as you scan the barcode. You cannot enter a custom, total quantity in Quick-scan mode.  If you'd prefer to look up the item and then enter the total quantity before submitting it, do not tick the Quick-scan mode box. |
| 3. | Quantities can also be entered by clicking on any item in the Product list.   * Click on the item name to add it to the search field. * Enter the item quantity in the Quantity field. * Click the Count button. |
| 4. | The most recently counted items will appear in a list on the right.   * Double check item quantities as you enter them. * Click the Trash Can icon to delete any previous count. Doing so will remove the deleted quantity from the total that has been counted for that item. |
| 5. | To edit item quantities:   * Search for the item in the Search Products field or click on the item from the product list. * To count more of the selected item, enter the quantity to add in the Quantity field and click count. This quantity will be added to the previously counted quantity for the item. * To remove counts from the selected item, enter a negative quantity in the Quantity field and click count. This quantity will be removed from the previously counted quantity of the item. |

**5. Instructions for Reviewing and approving the count in Retail POS**

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| **Step** | **Action** |
| 1. | Once all items are counted and scanned, review your counted items in the Retail POS website.   * Open Retail POS in the web browser and navigate to **Inventory** > **Inventory counts**. Find the inventory count from the list. * Click the inventory count name to open it and then click **Review**. |
| 2. | When you open the review page, you will see five tabs along the top:   * **Uncounted:** This lists all items where the total counted is 0. This includes items with an expected count of 0. * **Unmatched:** This lists all items that had a count greater or less than the expected amount. This includes items where you expected a negative amount and counted 0. * **Matched:** This lists all items you've counted where the total counted equals the expected amount. * **Excluded:** Any items you manually exclude from your count. * **All**: All items in the count.   Each product list can be sorted by clicking the column headers: **Product**, **Expected**, **Total**, **Unit**, and **Cost**.   * Click the header once to sort the list Low to High, or A to Z. * Click the header twice to sort High to Low, or Z to A. |
| 3. | Review each tab as follows and use the instructions in Step 4 of this section to make corrections.   * **Uncounted:**    + Click the Expected column header one time to sort this list Low to High by Expected count. Any items with a negative OH quantity will appear here. Although negative items should be addressed before beginning an inventory count, if any remain, they will appear at the top of this list. Double check any items with a negative expected count.   + Click the Expected column header once more to sort this list High to Low by Expected count. These are items that were expected in the inventory but were not scanned. Double check any item with an expected count.   + If an item has an expected quantity, but there are none on-hand in the store, enter a count of zero for that item so that it no longer shows as Unmatched.   + Address items until there are no Unmatched items remaining with an expected quantity. * **Unmatched:**   + Recount all items on this list.   Tip: You can print the lists of uncounted and unmatched items by pressing CTRL + P on your keyboard. |
| 4. | To correct item discrepancies:   * Check the box to the left of each item that needs to be corrected. * Click the purple **Choose an action button.** * Click **Recount Items** from the drop-down. A small window will appear, then click the red **Reset Count** button. This will reset the count to zero for each item selected.      * Click **Continue**, then search for each item and enter the correct count.      * Once you've checked and confirmed your inventory count, and are satisfied all items are accounted for, alert your Regional Manager that the count is ready for their review. DO NOT CLICK **Complete.** * The Regional Manager will review and may recommend additional recounts. Recommended recounts will appear as Unmatched items with an expected quantity. Repeat Step 4 of this section as needed to update recounted items. * All recounts must be completed before the store reopens for business. |
| 5. | **Regional Management/Directors of Retail Only:**   * Use this section of the job aid to review inventory results and recommend recounts as needed. * When you have reviewed and are satisfied with the results of the inventory, click **Complete**. * Inventories must be completed before the store reopens for business. * Once completed, notify the Store Manager that they may begin sales and that inventory reports are available in Retail POS. |

**6.** **Inventory Reports**

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| **Step** | **Action** |
| 1. | You can access historic inventory counts by navigating to **Inventory** > **Inventory counts** > **Completed**.   * Click the name of the inventory to open it. * You can review the data and generate a PDF or CSV report. * At the top of the page, choose a report to generate by clicking either the **Generate PDF report or Generate CSV report** button. The button will then appear greyed out with a loading icon. * When the button reactivates, it will appear blue and say **Download PDF/CSV report.** Click the button to download the report.     **PDF Report:**  This gives you a formatted PDF report, summarizing the expected and final counts, change in cost, and total value of each product's inventory after the count for each product. You'll also have a summary of total changes for your whole count.  **CSV Report:**  This gives you a more detailed CSV file with a line for each product in the count. You'll also have columns for the SKU, supplier code, expected stock and actual quantity, stock count difference, difference cost, and inventory value of each product's inventory after the count. This is typically used for importing into another system or creating your own reports. |

[Lightspeed Job Aid Feedback Form](https://forms.office.com/r/77azX8dKEs)