



### BEFORE YOUR COUNT DAY

# How to prepare for your Self-Scan count. A simple checklist.

Self-Scan lets your own team run the physical count while Apex handles the scanners, configuration, file setup, and POS-ready export. A smooth count comes down to three things: the right people scheduled, the floor organized, and your product file ready. This guide walks large grocery, large hardware, and liquor operators through each one so count day runs fast and accurate.

#### 1 · Your people

- ✓ Schedule enough staff for the floor size — plan in scanning teams, not lone counters
- ✓ Name one in-store lead as Apex's point of contact
- ✓ Block the count window; avoid major delivery or restock days
- ✓ Confirm everyone attends the Apex training session

#### 2 · Your floor

- ✓ Finish put-away — no stock left in carts, trucks, or back-of-house aisles
- ✓ Face and front product so labels and barcodes are reachable
- ✓ Clear blocked aisles and group obvious overstock
- ✓ Flag damaged, expired, or no-barcode items in advance

#### 3 · Your data

- ✓ Send Apex your current product/source file early
- ✓ Share your POS export specs (Petrossoft, Gilbarco, Passport, etc.)
- ✓ List the sections/departments you want reported
- ✓ Note any house items or non-scan SKUs

## The 3–4 week countdown

### 1 3–4 weeks out — Kickoff & file intake.

Send your product file, POS specs, and store details to Apex. Lock the count date and set your success goals.

### 2 2 weeks out — Configuration & section mapping.

Apex builds your count file, configures the scanners, and maps sections to your real floor layout. You confirm the department list.

### 3 1 week out — Training & walkthrough.

Your team is trained (virtual or in person) and Apex walks the site so the count plan matches your store, not a template.

### 4 Count week — Final floor prep.

Complete put-away, face product, clear aisles, and confirm staffing. Pre-configured scanners arrive ready to use.

### 5 Count day — Scan & close.

Your team counts the floor; Apex is on-call (or on-site if added) for live support. Apex processes the data and returns a POS-ready export.

**The single biggest time-saver:** finish all put-away and product facing the night before. Counts slow down most when teams have to dig for hidden stock or hunt for unreachable barcodes — not from the scanning itself.



## TIPS BY STORE TYPE

### Prep that fits your floor.

Every retail format counts a little differently. Use the notes for your store type alongside the general checklist on page 1.

#### Grocery

LARGE

- ✓ Coordinate the count around perishable deliveries and dated stock
- ✓ Pre-weigh or pre-tag bulk, deli, and produce items with no UPC
- ✓ Make sure cooler, freezer, and backroom sections are accessible and lit
- ✓ Separate spoiled/expired product before scanning begins
- ✓ Have department managers confirm their section boundaries

#### Hardware

LARGE

- ✓ High SKU count — confirm bin labels and shelf tags are legible
- ✓ Pre-resolve loose fasteners, bulk lumber, and by-the-foot items
- ✓ Provide ladders/lifts for high-rack and overstock zones
- ✓ Flag serialized or high-value tools needing extra care
- ✓ Group seasonal and clearance stock so it counts cleanly

#### Liquor

SPIRITS

- ✓ Confirm every shelf and back-bar bottle has a scannable barcode
- ✓ Pre-tag open singles, gift sets, and mixed cases
- ✓ Account for state/regulatory reporting needs up front
- ✓ Keep backroom and cooler stock organized by category
- ✓ Note breakage or short cases before the count starts

#### Day-of count checklist

- ✓ In-store lead on site and reachable
- ✓ Scanning teams briefed and assigned to sections
- ✓ Floor fully stocked, faced, and clear of carts
- ✓ Scanners charged and distributed
- ✓ Damaged / no-barcode items already flagged
- ✓ Quiet count window — minimal customer or restock traffic
- ✓ Apex support contact open (or supervisor on site)

#### What slows a count down

- ✗ Counting while stock is still being put away
- ✗ Receiving deliveries or restocking mid-count
- ✗ Unreadable, missing, or covered barcodes
- ✗ Too few people for the floor size
- ✗ No single point of contact to make decisions
- ✗ Leaving expired/damaged product mixed into shelves

**Remember:** Apex configures and supports everything — you supply an organized floor and a scheduled team. The more your store looks like a normal, fully-stocked sales day (just without the customers), the faster and more accurate your count will be.

#### Ready to schedule your Self-Scan count?

Request a quote and we'll send pricing, lead time, and a recommended count plan.

Oregon City (503) 406-8023  
Salem (503) 569-6576  
[apexinventoryservice.com/quote](https://apexinventoryservice.com/quote)