



Get Your Store Count-Ready

The Store Owner's Pre-Audit Prep Checklist

A professional count is only as fast -- and as accurate -- as the store allows. A well-prepped store means fewer hold-ups, fewer re-counts, and a tighter final report. This checklist tells you exactly what to do, and when.

2-3 Weeks Before the Count

Lock in the logistics now so nothing catches you off guard.

- Confirm your count date and start time with your Apex coordinator
- Confirm the full scope: which areas are in -- sales floor, back room, storage, cooler, cage, any off-site locations
- Designate a single point person from your staff (owner, manager, or lead) who will be available and reachable on count day
- Notify all staff -- floor crew, overnight stockers, and receivers -- that a count is scheduled and what it means for their shifts
- If your store uses count tags, shelf labels, or section placards, locate or order them now
- Plan incoming deliveries around the count date -- flag any orders likely to arrive in the final 48 hours so you can coordinate with your Apex coordinator on how to handle them
- If applicable: flag any consignment stock, vendor-managed product, or display units that are not owned inventory so we can discuss exclusion before count day

1 Week Before the Count

Clean up your data and organize your merchandise. This is where accuracy is made or lost.

- Pull a current inventory report from your POS or back-office system -- this is the baseline Apex reconciles against
- Review your item file for obvious errors: duplicate SKUs, items with no UPC, items listed at \$0.00, or products you no longer carry that are still active in the system
- Resolve any known receiving discrepancies -- items that were delivered but never formally checked in, or credits that have not posted
- Complete all vendor returns, pull-backs, and product rotations before count day; anything leaving the store should be gone before we arrive
- Consolidate backstock -- group like products together in the back room and storage areas so nothing is scattered across multiple locations
- Ensure all back-room boxes are labeled with what is inside; a box labeled "chips" saves a counter from opening it to find out

- Move damaged, expired, or unsaleable product to a clearly marked "excluded" area and keep it physically separated from saleable stock
- If you sell regulated products (alcohol, tobacco, lottery, fuel): confirm those areas are accessible and that any required documentation is current

The Day Before the Count

Finish stocking. Clear the path. Set the stage.

- Complete all routine stocking and merchandising -- the count team should find the floor as close to "normal operations" as possible
- Face up and zone the sales floor: products pulled to the shelf edge, facings neat, misplaced items returned to their home location
- Do a final backstock pass -- anything that belongs on the floor should go out now; disorganized backstock is the single most common source of count delays
- Double-check the "excluded" area: damages, returns, and consignment items physically separated and clearly labeled
- Confirm that all storage rooms, coolers, cages, and locked areas will be accessible to the count team -- and that you (or your point person) has keys
- Walk the store with fresh eyes: any area that might confuse a counter (unlabeled section, unusual storage spot, items in transit) -- flag it with a note or tag
- Pause or complete any non-routine receiving before the count begins; mid-count deliveries require special handling and slow the process

Day of the Count

Your job on count day is to stay available and keep operations predictable.

- Your designated point person is on-site and reachable for the duration of the count
- All lights are on throughout the store, back room, and storage areas -- counters need to see clearly; poor lighting causes misreads and slow zones
- Confirm with your Apex coordinator that receiving is paused for the count window, or that any arriving delivery has been flagged in advance

- Registers are at a logical stopping point -- your coordinator will confirm the cutoff time for transactions so the system snapshot and physical count align
- Aisles and work areas are clear of carts, hand trucks, and obstacles -- the count team moves through the store methodically and congestion costs time
- Non-inventory items stored in the count area (office supplies, cleaning products, personal items) are either removed or clearly marked as excluded
- If overnight crew normally stocks during this window, they have been redirected -- no merchandise should move during the count
- Document any changes you are making based on the findings -- tighter receiving process, updated item file, staff policy adjustments
- Schedule your next audit -- consistent, recurring counts are how you close the gap between what the system says and what you actually have

After the Count

The report is a tool. Use it.

- Review the full variance report when it arrives from Apex (typically within 48 hours)
- Walk through the category summary -- look for which departments show the largest variance, positive or negative
- Identify whether discrepancies point to a data issue (receiving errors, item-file problems) or a shrink issue (theft, spoilage, breakage)
- Share the report with your accountant, lender, or ownership group if required

Common Things That Slow a Count Down

Avoid these. Each one adds time and reduces confidence in the result.

- **Backstock chaos** -- product scattered in multiple locations, unlabeled boxes, or stock mixed with non-inventory items
- **No designated point person** -- counters hit a question and there is nobody to answer it; the team stops or guesses
- **Mid-count receiving** -- a delivery arrives during the count and its status is unclear (in or out of scope?)
- **Locked or inaccessible areas** -- a cooler, cage, or storage room nobody has the key for forces a partial count or a return visit
- **Damaged and saleable stock mixed together** -- the count team cannot tell what should be counted and what should be excluded
- **Unsettled item file** -- duplicate SKUs, missing UPCs, and \$0.00-priced items force manual decisions on every problem product
- **Lights out or poor lighting** -- slow scanning, misreads, and re-scans in dark aisles; a simple problem with a real cost

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