

Physical Inventory Pre-Count Preparation

What is it? A quick test run of the physical inventory count process using sample **Criteria ID 3724**. This pre-count preparation exercise will take no more than 5 minutes to complete.



Remember to use **Criteria ID 3724** to complete this exercise quickly.

When to do it? 1-2 days prior to the Day of Count.



For Before Day of Count the actual Day of Count process, refer to the **Wall-to-Wall Count Process Guide** on the **RPM Help & Learning** site.

Steps

1. Complete or cancel all current counts.
2. From **RPM Central**, open **Store Operations**, ensure the correct site is displayed in the **Site #** field. If not, press **F9** for a list of sites and select the site.
3. To start the physical inventory pre-count, go to **Physical Inventory > Generate Count Sheets**.
The **Generate Count Sheets** screen displays.
4. Specify the following details on the **Generate Count Sheets** screen.
 - **Count Description** Type in a description for the count. (ex. *Test Count*)
 - Select **External Count** This will automatically populate the **External Agency** field with the right format. Click **Next**.
5. On the **Generate Count Sheets** screen, under **Criteria Selection**, enter **Criteria ID 3724** and click **Include**.



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6. On the bottom of the screen, click **Generate**.
7. Click **OK** on the displayed message to close it and then click **Active Counts**.
The **List Active Counts** screen displays the generated active count status as **Generating**.
Once the status changes to **New**, you can start the physical inventory count.
8. On the **Home** menu, go to **Physical Inventory > Start Physical Count**.
The **Start Physical Count** dialog displays.
9. Press **F9** in the **Count ID** field to get the count and then click **Start**.
A message displays confirming the count has started, click **OK**.
10. To view count status, go to **Physical Inventory > List Active Counts**.
Once the status changes to **Started**, you can download the exported count file.
11. From **RPM Central**, open **Data Import/Export** and then log in using your RPM Username and Password.
12. On the **Integration Manager** menu at the top, go to **Physical Inventory > Download Requested Counts**.
13. Specify the following details on the **Download Requested Counts** page.
 - **Site** Enter your site number or select from the drop-down list.
 - **File** Select **RGIS_OUT.DF** from the drop-down list.
14. Click **Download**. When prompted, click on the drop-down and select **Save** to save the file to the default **Downloads** folder.
15. Navigate to the **Downloads** folder and select the **RGIS_OUT.DF** file. Copy the file to an empty USB drive for your external inventory count partner.

The pre-count process is now complete. Make sure to go back and cancel the original count.