# Best Practices for PICS Reports in RetailEdge

Inventory Management · https://retailedge.com/docs/best-practices-for-pics-reports-in-retailedge

**1. Import the transferred data file into RetailEdge.**

* It is important to note this step will not replace the quantities you have for your inventory. What this does if you can picture is places the scanned items into a container allowing for the comparison between what was scanned and what quantities you have in Inventory.

Download the files sent to your Email.

In RetailEdge select Inventory from the top left of the screen. Verify that the PICS list is empty by selecting PICS | Empty PICs. Then select | PICS | Import

On the PICS Import Screen select the File Folder next to File Name (w/path):
On the Open Window navigate to the Directory where you saves the upload from section 4 0f this document.
Highlight the file and select Open.
Select Import on the PICS Import window.

**2. Print out PICS Reports.**

*Best Practice: When running these reports they can be several dozen to several hundreds of pages. You can export each report in RetailEdge as either PDF, Excel, or text document. It is recommended to export these as the type of file for your intended purpose i.e. PDF for simply viewing the information with out the ability to edit, Excel for data manipulation.

* Best Practice: Some of these Reports can generate hundreds of pages of data, with that said it is recommended to run some of these reports in two fashions, One is raw where you run the report with out filters and export (Unless you are a multilocation business where you may want to run a location based filter) the second where you run a filter not equal to 0 (<>).

**In RetailEdge Select Reports | Inventory | PICS**

PICS List: Typical you can run this with out any filters. This is useful as consolidated list if you imported numerous files.

PICS Inventory Compare: Typical you can run this with out any filters. This report compares the PICS container with the Inventory Container.

Exceptions: Typical you can run this with out any filters. This is a list of the scanned items that for one reason or another RetailEdge does not recognize.

Differential: It is recommended to run this report both raw and with filtering. This report identifies where the quantities of the items in the PICS container are DIFFERENT than the quantities in Inventory.

Shrinkage: It is recommended to run this report both raw and with filtering. This Report identifies where the quantities in the PICS container are less than the quantities in Inventory

Shrinkage with Costs: It is recommended to run this report both raw and with filtering. This report is similar to the Shrinkage Report above except it gives the cost impact of the Shrinkage

Differential (Inventory Based): It is recommended to run this report both raw and with filtering. This is an inventory based report that lists all inventory items that are 1. In the PICs list with PICs quantities GREATER or less than the inventory quantities.2. Not found in the PICs List (to account for shrinkages to 0 that an Inventory count would not have found).

Differential- with costs (Inventory Based): It is recommended to run this report both raw and with filtering. This report is similar to the Differential (Inventory Based) Report above except it gives the cost impact of the difference.

**3. Perform a RetailEdge Backup.**

To back up all RetailEdge data:

Select Tools | Backup| Backup from the top of your RetailEdge screen

Select the Folder button to select a file name and location or type in a name and location for the backup file.

Press the OK Button to begin the backup.

**4. Zero Out Inventory (Optional)**

*This step is optional depending on your physical Inventory preferences further out lined in step 9

Select Inventory | PICS | Zero Inventory from the top left in RetailEdge.

On the PICS: Zero Inventory window select OK

On the Filtering screen select the appropriate filter criteria from the Current Filters (right hand side) applying those selections by selecting the replace button. * If you are looking to zero everything make use of the all button then select replace. Select OK.

Next are the confirmation screens Select YES only if you confident you have made the proper selections.

*Best Practices: It is strongly recommended to back up whenever you see the 3 confirmation warning screens in ReatilEdge as the changes made whenever these screens are displayed are not reversible.

**5. Update Inventory.**

Select **Inventory | PICS | Update** from the top left in RetailEdge.

On the PICS Update window select the PICS Target Table

* Best Practices: Typically you would want to select the Inventory table but take note of the other target tables available. PICS can be used for so much more than Physical Inventory. You can learn more by going to uses for PICS.

* Please note for multi Location businesses that you have the proper location set.

Select OK and follow the confirmation window prompts.

**6. Print desired inventory Reports**

Repeat the steps from section 1 if desired.