How Do I Perform a Physical Inventory using PICS (Physical Inventory Collection System) and the Cipherlab 8000 or 8230?

Setup & POS Hardware · https://retailedge.com/docs/how-do-i-perform-a-physical-inventory-using-pics-physical-inventory-collection-system-and-the-cipherlab-8000-or-8230

This is the process for performing a Physical Inventory with a Cipherlab 8000 or 8230 Portable Data Collector. It looks long and complicated but it is really pretty easy and only about 11 steps.

Print Existing Inventory Value Reports

Before doing anything you should run and print (or save to file/export) your inventory reports. This will allow you to compare the inventory value before the physical with the inventory value after the physical inventory so that if adjustments are made you have a baseline from witch to compare.

To run your inventory reports select Reports | Inventory from the Report Selector.

At a minimum you should run an Inventory Value (Items by Category) report.

For better comparisons between before and after inventory levels you may also want to run the following reports:

Reports | Inventory | Items - Physical with Costs/Retail Price.
Reports | Inventory | Items | Items
Items by Bin/Shelf, Category
Item Detail - Grouped by Location/ Stock Number

Delete Data in the Portable Data Terminal

Make sure that all the existing data in the Portable Data Terminal has been deleted before using the device to collect new information. To do this for the Cipherlab 8000/8230 and Honeywell/Metrologic Optimus, select Utilities | Delete Data -> Clear Records from the main menu on the device.

Enter Items into the PDT (Portable Data Terminal

For the from the main menu on the Cipherlab 8000/8230 & Honeywell/Metrologic Optimus select Run Program. Then select One Prompt or Two Prompt and then push the center button closest to the display screen to scan items. One Prompt is best if your physical inventory plan is to scan each and every item. Two Prompt is best if you are looking to scan an item and then manually enter in the quantities after every scan.

Transfer Data from the PDT (portable data terminal, or your cipherlab)

For the Cipherlab 8000/8230

A. Launch the ForgeAG.exe from C:\CipherLab\Forge\Batch\8 Series (This is the typical install path).

B. Select File:
For the Cipher Lab 8000 select Convert to 8000
For the Cipher Lab 8230 select Convert to 8200

C. Select Transfer Direct-Link Data Transfer

D. Data Read screen
Properties
Save data to file selected and save mode:
Overwrite: This mode will overwrite(delete and replace) the same save to file each time an upload takes place. Only use this method if you are experienced user.
Append: This mode will append the upload data to the existing file each time an upload takes place. This is a safer method for non experienced users.

File Name Rule
Generate Automatically: This generates randomized numerical value as the File name.
Customized: This enable you to select the file path where you would like to save the
Upload the file and give the file a name.

E.Select the Browse button, navigate to the desired directory and enter a file name

Tip: Create a folder in the selected direction and give it a name such as Inventory_Mar_2015. This helps keep a record where if you needed to reference that data in the future it is easily identifiable.

Tip: Using the Customized option allows you to name the uploaded files in a manor where they can be easily identifiable i.e. Upload 1, Upload 2 or Back wall, Rack 1, stock room. This is useful for spot checks or if you identify an issue with items not recognized in RetailEdge when you import.

Communication Parameters

This information should have been configured during the install of the device. If you need assistance with this please contact the RetailEdge Support Dept.

Uploading scans from the Cipher lab 8000/8230

A. On the Device select Option 2 Upload from the Main Menu and place the device in the cradle.

B. On your computer select OK from the Data Read window.

You should see the data upload. If you encounter any errors with communication here are a couple of things to check:
A. Make sure the device is properly seated in the cradle
B. Verify that you can see the cradle listed with a com port in control Panel/ Devices and Printers as an unspecified device.

If you need assistance please contact RetailEdge Support, if you call in the call maybe billable.

Import the transferred data file into RetailEdge.

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 saved the upload from Section 5 of this document.
Highlight the file and select Open.
Select Import on the PICS Import window.

Note: 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.

Print out PICS Reports.

Once your information has been imported into the PICS list you should run your PICS reports that will identify exceptions, problems and inventory changes you are going to be making once you update your inventory from the PICS List. A list of reports can be found here.

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.

Zero Out Inventory (Optional)

*This step is optional depending on your physical Inventory preferences further outlined 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.

Tip: When you see 3 confirmation warning screens (Are you Sure?), you should always make a backup a these as the functions are making a lot of changes to your data and restoring a backup is your only way to reverse the changes.

Update Inventory

Select Inventory | PICS | Update from the top left in Retailedge.

On the PICS Update window select the PICS Target Table

Tip: Normally you would select the Inventory table but take note of the other target tables available. PICS can be used for so much more than Physical Inventory (i.e., sales, receiving, purchase order, transfer order creation)

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

Select OK and follow the confirmation window prompts.

Print desired inventory Reports

Repeat the steps from section 1 if desired.