**The Independent Store Owner’s Software Success Kit**

**Choose, Setup & Optimize Your Inventory System**

**1. Software Selection Assessment**

**Is Your Current System Costing You Money? Take this quiz:**
• Is your inventory count always accurate? ……… Yes / No
• Do you spend more than 2 hours/week fixing inventory errors? ……… Yes / No
• Are stockouts a regular problem? ……… Yes / No
• Do you have auto-reorder for fast sellers? ……… Yes / No
• Is your POS connected to inventory in real-time? ……… Yes / No
• Can you track shrink or loss easily? ……… Yes / No
• Does your system provide mobile access? ……… Yes / No
• Are all features actually used by your team? ……… Yes / No

**Count your No's:**

* [ ] 0–2: Well-managed.
* [ ] 3–5: Could improve.
* [ ] 6+: Upgrade needed.

**Feature Must-Haves (Check all that matter for your store):**
☐ Barcode scanning
☐ Mobile access
☐ Auto-reorder
☐ Vendor support
☐ POS integration
☐ Analytics/reporting
☐ Custom categories

**Recommended System:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
*(based on quiz score & store needs)*

**2. Software Comparison Matrix**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Feature/Need | System 1 | System 2 | System 3 | Essential? (Y/N) |
| Barcode Scanning |  |  |  |  |
| Mobile Access |  |  |  |  |
| Auto-Reorder |  |  |  |  |
| POS Integration |  |  |  |  |
| Vendor Support |  |  |  |  |
| Analytics |  |  |  |  |
| Custom Categories |  |  |  |  |

**3. ROI Calculator Worksheet**

| **Metric** | **Value/Notes** |
| --- | --- |
| Manual hours per week on inventory | \_\_\_\_\_\_\_\_\_\_\_ |
| Stockout incidents per month | \_\_\_\_\_\_\_\_\_\_\_ |
| Average loss per stockout ($) | \_\_\_\_\_\_\_\_\_\_\_ |
| Current system monthly cost ($) | \_\_\_\_\_\_\_\_\_\_\_ |
| Projected savings after upgrade ($) | \_\_\_\_\_\_\_\_\_\_\_ |
| Notes |  |

**4. Setup & Implementation Toolkit**

**Product Setup Checklist:**
• [ ] List all SKUs in spreadsheet or POS
• [ ] Import/enter data into new software
• [ ] Test barcode scanners on top 10 SKUs
• [ ] Review/correct product categories
• [ ] Confirm vendor & pricing info is accurate
• [ ] Train staff on all major features
• [ ] Set up reorder points for top sellers
• [ ] Double-check permissions by user/role

**POS Integration Checklist:**
• [ ] Confirm POS compatibility
• [ ] Backup existing POS data
• [ ] Schedule install/connection with vendor
• [ ] Test a full sale (scan to payment to inventory deduct)
• [ ] Train team on new process
• [ ] Set up error alerts/notifications
• [ ] Reconcile daily inventory vs. POS totals

**Troubleshooting Quick Reference:**
• [ ] Inventory not updating: Sync settings, check internet
• [ ] Barcode error: Re-scan, re-enter code, check device battery
• [ ] POS sale not recorded: Check integration status, call support

**5. Mobile Optimization & Vendor Communication Templates**

**Mobile Setup Steps:**
• [ ] Download app from App Store/Google Play
• [ ] Log in with store credentials
• [ ] Sync to central inventory
• [ ] Test real-time updates (scan item, check dashboard)

**Email to Vendor Automation Template:**
Subject: [Store Name] – Inventory Software Support Needed

Hi [Vendor Rep],
We are integrating a new inventory system and need your support for setup and training.
Please send any resources and best practices. Thank you!

**6. Implementation Timeline**

|  |  |  |
| --- | --- | --- |
| Week | Milestone | Done? (✓) |
| 1 | Assess current system [ ]  |  |
| 2 | Compare software options [ ]  |  |
| 3 | Set up & train staff [ ]  |  |
| 4 | Go live & monitor results [ ]  |  |

**7. Success Story Log**

| **Owner/Manager** | **Result (Time, Accuracy, $ Saved)** | **Notes** |
| --- | --- | --- |
| Frank | Saved 6 months, $4,000 |  |
| Priya | 67% accuracy improvement |  |
| Hassan | 2 hours saved daily |  |
|  |  |  |

Add your success story: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_