



# C-Store Inventory Reset

A count, a reorder worksheet and a repeatable review for independent gas stations and convenience stores.

**YOUR FINISHED RESULT**  
  
One verified category count, one dated order decision and a named person responsible for the next review.

## Start with one shelf section

Pick 5-10 ordinary items that are often missing, hard to count or overstocked. Use a single size and pack for each line. Bring a sales report, current open orders, a calculator and a pencil. A paper record works if your POS cannot export a report.

| Do this                           | Use these pages                              |
|-----------------------------------|----------------------------------------------|
| Count and investigate differences | 2-3: method and completed example            |
| Plan the next order               | 4-5: calculation and timing checks           |
| Work on your own items            | 6-7: printable count and reorder sheets      |
| Make it a routine                 | 8: first-week rollout; 9: sources and checks |

Free to use. No purchase or wholesale account required. Your staff use these tools; this guide does not include onsite counting, software or a managed inventory service.

# Make the count comparable

A difference is a question to investigate, not a reason to assume theft.

## 1. Define the item and the cutoff

Write the item code, size, units per case and all stock locations. Record the POS quantity and its exact time. If possible, count the small section between transactions. Otherwise log every sale, receipt, transfer and hold affecting that section while you count.

## 2. Count physical units

Count shelf stock and back stock once each. Separate sellable stock from damage, returns awaiting inspection and other holds. Check case labels; never assume that every supplier uses the same pack size. An item code should represent one consistent selling unit.

### CASE CONVERSION

Sellable units = (complete sellable cases x units per case) + loose sellable units. Keep the held quantity separate. Convert the system record to the same unit before comparing.

## 3. Recount, then resolve

Recount any difference without looking at the first count if another person is available. Check late receipts, case conversion, wrong-item scans, transfers and recorded damage. Bring both counts to the same cutoff before an authorized person adjusts the inventory record. Save the reason and reference.

## 4. Choose what gets counted next

Give frequent sellers, high-cost items and repeatedly disputed lines more attention. Start with a schedule your staff can actually finish, then revise it based on the differences found. Small repeated counts support accuracy; a tax or accounting stocktake may still be needed. [1, 2]

If the system includes held stock in on-hand, compare total physical stock to that record first, then classify the sellable portion. Do not compare a sellable count to a total-stock number.

# What does a four-unit difference mean?

Hypothetical item: a single roll of paper towels. Each case contains 12 rolls.

| Step                             | Calculation / result                     |
|----------------------------------|------------------------------------------|
| Shelf stock at 9:10              | 15 sellable rolls                        |
| Back stock at 9:10               | 2 full sellable cases x 12 = 24 rolls    |
| Sellable physical count          | 15 + 24 = 39 rolls                       |
| System sellable quantity at 9:00 | 45 rolls                                 |
| Sales from 9:00 to 9:10          | 2 rolls; no receipts, transfers or holds |
| Expected sellable at 9:10        | 45 - 2 = 43 rolls                        |
| Difference at the same time      | 39 - 43 = -4 rolls                       |

A recount confirms 39. The manager finds a dated note showing that four damaged rolls were moved out of sellable stock yesterday, but the hold adjustment was never entered. The manager posts that specific adjustment using the note as evidence. The corrected sellable record becomes 39.

## WHAT THIS EXAMPLE DOES NOT PROVE

A negative count is not automatically shrink from theft. If no cause is found, record an unresolved discrepancy and have the authorized manager decide the next step. Do not invent an explanation to make the worksheet balance.

Quick check: if you count 3 cases of 12 and 7 loose sellable units, the physical sellable quantity is **43 units**, not 10. If the system shows 4 cases, convert it to 48 units before comparing.

# Review weekly? Cover the full waiting period.

This is a simple periodic-review planning rule for reasonably steady demand, not an automatic order.

A weekly review must look beyond delivery lead time: the next chance to order is also a week away. Use calendar days consistently, including zero-sale days when the store is closed. [3]

| Input                     | What to write                                                                                                                 |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Daily demand estimate (d) | Units sold / calendar days in a representative period. Flag stockouts, promotions and unusual weeks before using the average. |
| Review interval (R)       | Days between order reviews, such as 7 for weekly.                                                                             |
| Lead time (L)             | Days from placing an order until stock is ready to sell; confirm supplier cutoff and delivery days.                           |
| Buffer (B)                | Extra units the owner chooses for uncertainty. Record why and revisit it; no service-level guarantee is implied.              |

## WRITE THE CALCULATION

Target units =  $d \times (R + L) + B$

Planning position = sellable on-hand + confirmed open supply - extra commitments

Unrounded order =  $\max(0, \text{target units} - \text{planning position})$

Count each open order once, with its due date. Use only supply due inside the planning window. Extra commitments mean specific demand not already included in your sales estimate. If the POS on-hand figure already excludes reservations, do not subtract them again. [4]

Round positive order quantities up to complete case packs only after checking shelf life, storage, available cash and supplier minimums. Review late orders separately before placing replacements.

# A suggested order is only half the answer

Hypothetical Monday review for one ordinary nonperishable item; all quantities are individual selling units.

| Input             | Value          | Input               | Value    |
|-------------------|----------------|---------------------|----------|
| Observed sales    | 168 in 28 days | Daily estimate      | 6 units  |
| Review interval   | 7 days         | Lead time           | 3 days   |
| Chosen buffer     | 12 units       | Case pack           | 12 units |
| Sellable on-hand  | 30 units       | Confirmed due day 2 | 12 units |
| Extra commitments | 0 units        | Protection window   | 10 days  |

**Target:**  $6 \times (7 + 3) + 12 = 72$  units.

**Planning position:**  $30 + 12 = 42$  units.

**Unrounded order:**  $72 - 42 = 30$  units.

**Case-pack proposal:** round  $30 / 12$  up to 3 cases = 36 units.

## Will stock last until it arrives?

Before day 2, about 12 units are expected to sell:  $30 - 12 = 18$  remain. After the 12-unit delivery, about 30 remain. By day 3, about 24 remain; the proposed 36-unit delivery would bring physical stock to about 60. This estimate assumes even demand and on-time deliveries.

### TIMING CAN OVERTURN THE FORMULA

If on-hand were 6 units and the old 12-unit order were due on day 5, the store would have about one day of cover. A normal day-3 delivery would arrive too late. Confirm faster supply or a revised plan; do not rely on the total on-order number.

If demand is seasonal, sparse or changing sharply, review the underlying dates and upcoming events instead of treating this average as a forecast. Lost sales during stockouts do not appear in the sales report.

# Count one category

Print additional copies. Record quantities in one selling unit. Use the back for movement details if needed.

Store / category / date / counter / reviewer

System snapshot time / count time / selling unit and case-pack notes

| Item / size / code | Shelf units | Back units | Held units* | System at cutoff** | Final sellable |
|--------------------|-------------|------------|-------------|--------------------|----------------|
|                    |             |            |             |                    |                |
|                    |             |            |             |                    |                |
|                    |             |            |             |                    |                |
|                    |             |            |             |                    |                |
|                    |             |            |             |                    |                |

\*Held units are separate from the shelf/back sellable columns. \*\*Use a sellable system balance or first reconcile total stock as explained on page 2.

Sales / receipts / transfers / holds during count, with time and reference

Difference, recount, explanation and authorized adjustment reference

# One-item reorder decision

Complete one sheet per item. Do the timing check before approving the quantity.

Store / item code / review date / next review date / reviewer

| Input                                              | Your value | Evidence / note |
|----------------------------------------------------|------------|-----------------|
| Units sold / days in period                        |            |                 |
| Daily estimate (d)                                 |            |                 |
| Review days (R) / lead days (L)                    |            |                 |
| Chosen buffer (B) / reason                         |            |                 |
| Target = $d \times (R + L) + B$                    |            |                 |
| Sellable on-hand                                   |            |                 |
| Confirmed open units / due dates                   |            |                 |
| Extra commitments, not double-counted              |            |                 |
| Position = on-hand + open - extra                  |            |                 |
| Order = $\max(0, \text{target} - \text{position})$ |            |                 |
| Units per case / rounded cases                     |            |                 |

Earliest possible stockout / delivery dates / late-order action

Storage, shelf-life and cash check / approved quantity / approver

# A suggested first-week rollout

Spread the work across your own schedule. These are checkpoints, not promised completion times.

| When                  | Action                                                  | Evidence of completion                             |
|-----------------------|---------------------------------------------------------|----------------------------------------------------|
| First session         | Choose one category and confirm unit conversions.       | List of 5-10 exact item codes.                     |
| Next quiet period     | Count and reconcile the section.                        | Signed count sheet; unresolved issues have owners. |
| Before order cutoff   | Use current sales and open orders to plan.              | Completed reorder sheet and dated approval.        |
| When delivery arrives | Count what actually arrived and note exceptions.        | Receipt and updated open-order record.             |
| At the next review    | Compare the plan with actual sales and remaining stock. | One change to an input, with a written reason.     |

## Track three simple checks

**Count accuracy:** exact-match lines / lines counted, with the same cutoff and unit. Record unresolved lines separately.

**Availability:** note empty-shelf observations and their times. This is not a measured lost-sales total.

**Plan follow-through:** did the review happen, did the supplier deliver when expected, and did the approved order match the receipt?

**KEEP THE LEARNING SMALL**

If a count keeps failing, fix the receiving or unit-conversion step before expanding the count list. If stock keeps expiring or sitting, reduce the scope of the next order and review the demand estimate with the owner.

Next review date / owner / one process change to try

# Know when to stop and investigate

| Signal                                      | Next action                                                                                       |
|---------------------------------------------|---------------------------------------------------------------------------------------------------|
| No sales during the period                  | Do not divide by zero or conclude demand is zero. Check availability, item setup and seasonality. |
| Negative inventory or duplicate open orders | Resolve the record before using it to place an order.                                             |
| Case rounding exceeds space or shelf life   | Ask about smaller packs or a shorter review cycle; document a revised order.                      |
| Supplier due date is uncertain              | Verify it; do not count uncertain stock as guaranteed supply.                                     |

Research checked October 13, 2026. Click a source title to open it. Source organizations do not endorse MH Wholesale or these guides.

**1. Shopify | Cycle counting**

Small, repeated counts and discrepancy investigation.

**2. Shopify | Inventory reconciliation**

Comparing physical stock with records and investigating differences.

**3. MIT OpenCourseWare | Inventory Management, lecture 6 (2004)**

Slides 24-25: periodic review considers lead time plus the review interval.

**4. Oracle | Min-max replenishment calculations**

Inventory position, dated open supply, demand and order multiples. We use these concepts in a simpler paper worksheet, not an Oracle implementation.

All store scenarios, numbers, schedules and blank forms are original illustrations. They are not customer results. Adapt the worksheets to your own records and approved procedures.