# Inventory a micromarket on the same day as a Collect or Service Visit

Following these steps will create two visits on the same day for the same market.

These are our suggested best practices to ensure the data from both visits are not lost/overwritten and your operation knows who completed each action for the market that day.

1. First, create and assign a route in Gimme VMS for the person who will **inventory** the market
   a. If you inventory the micromarket with a username that does not have a route assigned to it, the visit will complete under an "Unknown Route"
2. Next, there are two options to proceed:
   a. On the Schedule page in VMS, create a route schedule for the POS
      i. Select the number of Weeks in Rotation
      ii. Select the day and label as a Service visit
      iii. Select the Inventory toggle (red means "on" and you will see an "!" on the selected day)
      iv. Select Preview to review your schedule settings in a calendar view
      v. Here is an example of creating a route schedule to inventory once per month:
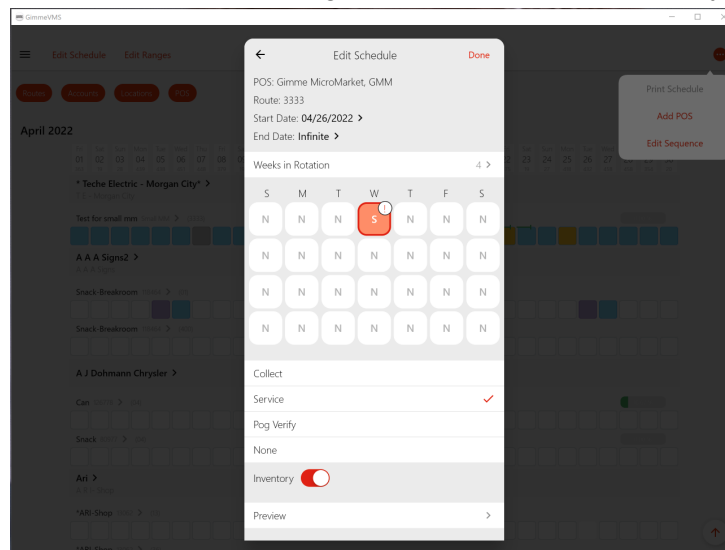
   b. OR when the person inventorying the market is on-site, manually create a visit in **Gimme Field** by searching and opening the intended POS
      i. This will automatically create a **Collect** visit - if you are not collecting at the time of the inventory:
         1. Open the visit
         2. Tap on the **top right, red menu button**
         3. Select **Service** (this will automatically return you to the visit checklist)

3. <u>**This part is important:**</u> **the Gimme Field user who services the market must complete their visit <u>BEFORE</u> the Gimme Field user opens (or manually creates a visit)!**
   a. **Failure to ignore this will result in time-consuming consequences!**
   b. If you try to inventory the market before a visit is complete, one of two things will happen:
      i. If the service/collect visit has not started, then clearing the Adds (pick order items for the market) in Gimme Field will also clear the Adds for anyone visiting that market on the same day
      ii. If the service/collect visit was started, but incomplete, the last person to sync will override the other person's visit data
   c. How to know when it is safe to open the inventory visit in Gimme Field:
      i. (Best option) If you have access to VMS, open the **Operations** page and search for the market you want to inventory. Verify that the visit is complete.
      ii. (Next best option) If the person who serviced the market is on-site, confirm that the visit on the **Schedule** page in Gimme Field has moved from the **To-Do** column to the **Completed** column, then re-sync **Gimme Field** from the **Settings** page
4. Now that the service/collect visit has been confirmed complete, and the person inventorying the market is logged into the route created in **Step 1**, it is time to open (or manually create) the inventory visit in **Gimme Field**
   a. Tap on the **top right, red menu button**
   b. Tap **Clear All Adds** - this will navigate you back to the visit checklist
5. Now it's time to count!
   a. Tap on **Spot Check** and scan products, or manually search, then enter the on-hand quantity
      i. Some users count from the Planogram screen specifically for a partial inventory, however, products on this screen must meet the following conditions in Gimme:
         1. 1 or more items on hand in the market
         2. Restock value of one or more
         3. Capacity value of one or more
      ii. For more details about this process, read Micro Market: POG view vs. Inventory builder
      iii. Counting from this screen could result in missing products that have zero in all three of these categories
6. Once you have finished counting, return to the visit checklist in Gimme Field and complete the checklist
   a. **ALL of the checklist bubbles must have a green checkmark!** A visit will not complete in Gimme Field unless all of the bubbles contain a green checkmark!
7. Verify that the visit in Gimme Field moves from the **To Do** column to the **Completed** column on the **Schedule** screen.
   a. If the visit is still on the To-Do column, return to Step 6
   b. If you are still experiencing issues with completing the visit, move to an area with stronger mobile signal or try actions listed in the Troubleshooting Gimme Field Issues (Gimme Support will ask you to perform the same actions to resolve or diagnose the issue)