

MiniPOS™

PDT3100 V2 (Beta) Hand Held Terminal OPERATORS GUIDE

Beta Version Release Notes
February 2001

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INTRODUCTION

This Operator Guide details the procedures for the use of the Beta Version of the new MiniPOS PDT3100 functions. These functions are still under development and this beta version provides Stock Take and Product Look-up facilities which checks stock data downloaded from the Back Office PC. By downloading stock data the PDT3100 can check that a code scanned or typed in, exists in the back office data. If using the PDT3100 for stock taking, the operator will be warned if a code is not recognised. The Product Lookup facility displays stock details for the code scanned or typed.

DATA TRANSFER

When the MiniPOS Back Office software communicates with the PDT3100 the following events occur:

1. Any scanned or entered bar codes in the PDT3100 memory are transferred to the back office.
2. The stock lookup data is transferred from the back office to the PDT3100.
3. If the above events occurred correctly, the scanned or entered bar codes in the PDT memory are deleted.
4. The transferred scanned or entered bar codes from the PDT3100 are displayed in downloaded data list on the Back Office screen.

GENERAL USE INFORMATION

The downloaded data list in the back office can be added to at any time with multiple downloads from the PDT3100. The list will be auto consolidated to show the total quantity for each code.

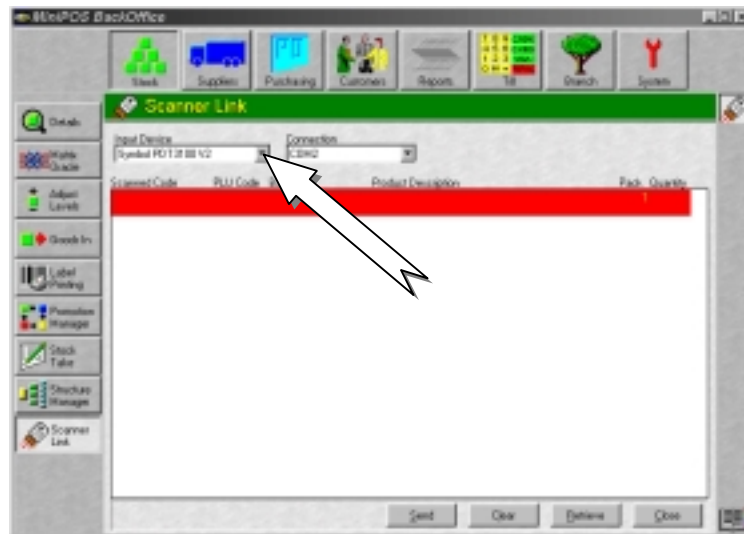
The PDT3100 V2 Stock Take function allows both scanned and typed codes to be entered. Bar Codes, Supplier Reorder Codes and PLU Codes are all checked when entering a code as part of the Stock Take. If a code is not recognised the PDT3100 will emit a long beep to warn the operator. The operator should remove the item from the shelf or location and collect other non-scanning items for remedial action in the back office. A count for the non-scanning item should be entered on the PDT3100 as this data will be transferred to the back office as part of the data transfer. Once the bar codes have been added in the Back Office for the items that did not scan, the unidentified codes in the downloaded data list can be processed as part of the stock take.

INITIALISING THE PDT3100 FOR STOCK TAKING

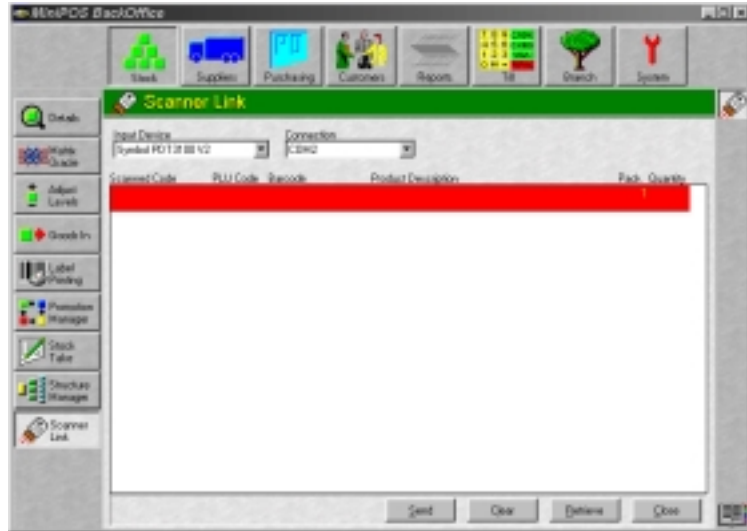
1. Ensure that the PDT3100 Comms Cradle is powered and connected to one of the Back Office PC Comm ports. Insert the PDT3100 into the Comms Cradle.
2. Click the **Stock** Control Module button at the top of the MiniPOS screen and then click the **Scanner Link** function button from the function on the left of the screen:



3. On the **Scanner Link** form that is now displayed, click on the **Input Device List** button and select the **Symbol PDT3100 V2** option from the list:




- Click on the **Connection** List button and select the Comm port on the Back Office PC that the PDT3100 Comms Cradle is connected to:



- On the **PDT3100** press the Red **PWR** button to display the PDT3100 options. The PDT LCD Display is as follows:

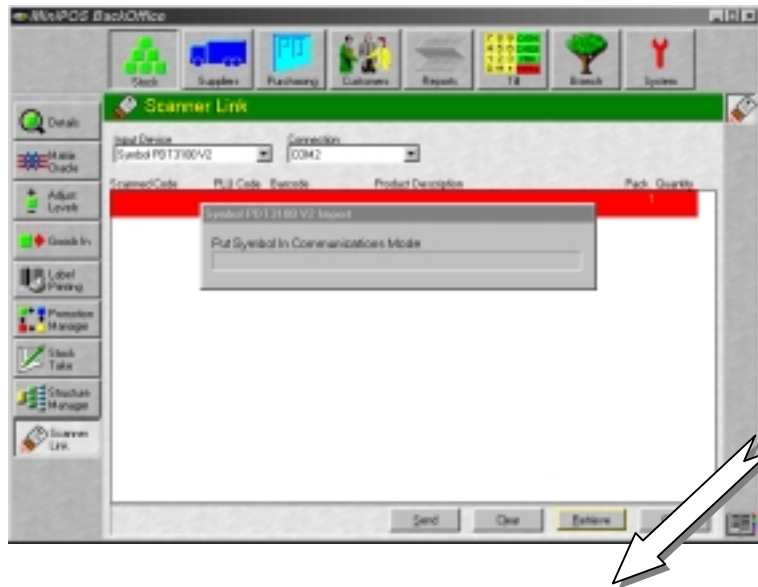


The PDT3100 LCD display will automatically switch off after a few minutes. To show the display again simply press the Red **PWR** button again.

- Press the  key on the PDT3100 to move the **Mode Select Arrows** on the LCD display to the **Communications** option in the list.
- Ensure that the PDT3100 LCD display is on. Then on the Back Office screen click on the **Retrieve** button at the bottom of the screen. The system will build a data export file and display a prompt on screen instructing you to put the PDT3100 into Communication Mode.
- Press the **ENTER** button on the PDT3100. This must be done within 10 seconds of the prompt to select the communications mode on the the Back Office.
- The PDT3100 will display an **Initialising** message followed by a **Receiving File** message. When the transfer of data is complete the PDT3100 will display:

SUCCESS
Press <ENTER>

- Press the **ENTER** key on the PDT3100 to return to the Mode Select Screen.



11. If the PDT3100 had any scanned or entered codes in it's memory, these would now show in the download list. As we are initialising the PDT3100 for a new stock take, you should clear the downloaded data list by clicking on the **Clear** button at the bottom of the screen.

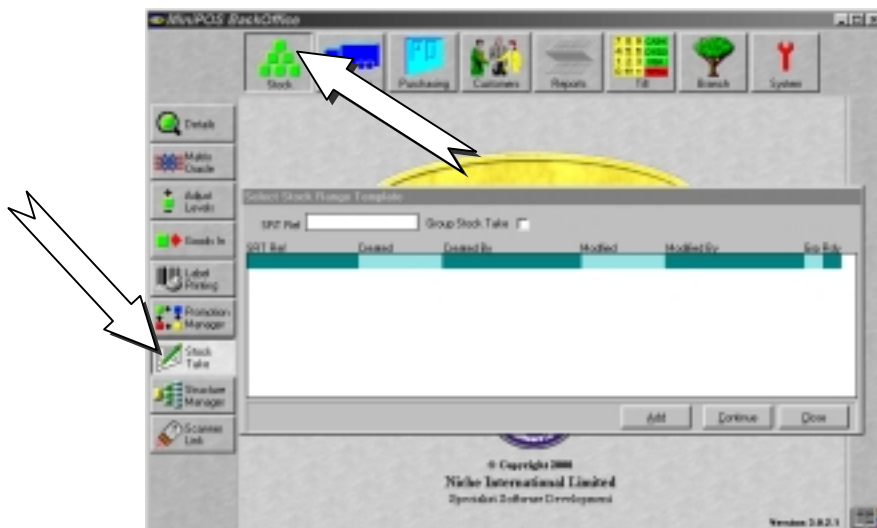
The PDT3100 will now have the stock lookup data in it's memory ready for stock take checking and the back office downloaded data list is clear ready for this stock take downloads. This clearing of the downloaded data list is only done at the beginning of a new stock take. **You do not clear the list in between multiple downloads for the same stock take.**

PREPARING THE BACK OFFICE PRIOR TO PDT3100 STOCK TAKE

The MiniPOS Stock Take function allows you to stock take **all** or just **some** of the items in the stock file. By defining a limited range of items to stock take you can perform *perpetual stock taking* checking a different range of items frequently instead of the usual annual nightmare. Perpetual stock taking will alert you early-on if a particular items level is seriously incorrect. Whichever way you stock take you must define the range of items that you will count on you stock take, even if it is the entire stock file.

Before we use the PDT3100 to collect stock take data you must enter a Stock Range Template in the Stock Take form as follows:

1. Click on the **Stock Module / Stock Take Button** from the MiniPOS main screen.



- The **Select stock Range Template Pop-Up** will appear as shown above. In The **SRT Ref:** field, type in a reference for this stock take, e.g. ABC260600. This is used to separate different SRT's that are being worked on at the same time. When you have entered an SRT Reference click the **Add Button**. The following form will now appear:

The screenshot shows a 'Stock Take' window for 'Abingdon Main Branch'. At the top, there are fields for 'Code', 'Product Search - Both Descriptions', 'SRT Reference' (containing 'ABC260600'), 'Department', 'Sub Department', 'Brand', 'Category', and 'Supplier'. Below these is a table with the following columns: 'Product Code', 'Description', 'Recode', 'Map', 'Received', and 'Current'. The table is currently empty. At the bottom of the window are buttons for 'Print', 'Cancel', 'Add', 'Add All', 'Delete', 'Stock Take', 'Enter', and 'Done'.

- The top **Product Browser List** is used to define the range of items on this SRT. If you are stock taking the entire stock file, simply click on the **Department Filter** drop down list box and select the **Blank Department** field. The entire stock file will list in the top section.
- To send **all** of the items in the top list to the bottom **stock take action list**, click on the **Add All Button** at the bottom of the form as follows:

This screenshot shows the same 'Stock Take' window, but the table is now populated with items. The top section of the table (items 100002 to 100007) is highlighted in red, indicating they are on the SRT. The bottom section (items 100000 to 100001) is highlighted in blue. Two white arrows with black outlines point to the 'Department' filter dropdown at the top and the 'Add All' button at the bottom.

Product Code	Description	Recode	Map	Received	Current
100002	18- Blouse - Short Sleeve - Fullon Red - Size 12	1	0	0	10
100003	18- Blouse - Short Sleeve Red - Size 14	1	0	0	10
100004	18- Blouse - Short Sleeve Red - Size 16	1	0	0	1
100005	18- Blouse - Short Sleeve/NoVid White - Size 10	1	0	0	1
100006	18- Blouse - Short Sleeve White - Size 12	1	0	0	1
100007	18- Blouse - Short Sleeve White - Size 14	1	0	0	20
100000	GOLD COAT WITH DIAMOND T3 BODIED	0	0	0	0.00
ALEX01N EVE-0	Alexon 3/4 Length Evening Dress Size 8, Red	0	0	0	0.00
ALEX01N EVE-1	Alexon 3/4 Length Evening Dress Size 8, Navy	0	0	0	0.00
ALEX01N EVE-18	Alexon 3/4 Length Evening Dress Size 12, Red	0	0	0	0.00

- All of the items in the **Product Browser List** are now highlighted in Red to signify that these items are on an SRT and cannot now be selected by another users SRT. The manual stock count entry screen can be viewed by clicking on the **Enter Button** at the bottom of the form. As we are using the HHT to enter item counts we can now close this form and return to the MiniPOS Main Screen.
- If you wanted to stock take only a limited range of items, you would list that range in the **Top Product Browser List** by selecting the relevant filters and or item description

search and send each item to the *Bottom Stock Take List* by either pressing the **Enter Key** to each item in the list or by clicking the **Add All Button** to send the complete list defined.

The items defined in an SRT are used to import the scanned item counts from the PDT3100.


NB: It is important therefore to ensure that you have scanned the correct range of items for this SRT you will be downloading against.

USING THE PDT3100 FOR STOCK TAKING

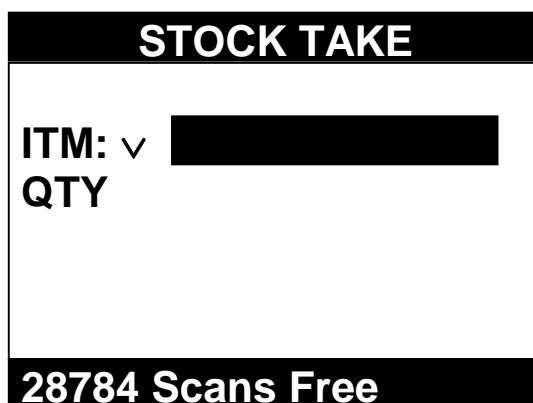
Before using the PDT3100 V2 to collect stock take data ensure that the PDT3100 has been initialised, the downloaded dat list is clear and the Stock Take Range Template has been defined for the range of items you are about to stock take. *See previous Text.*

1. Remove the PDT3100 from the Comms Cradle and press the Red **PWR** button. The LCD display will show the Mode Select options as follows:



Press the  key on the PDT3100 to move the **Mode Select Arrows** on the LCD display to the **Stock Take** option in the list.

2. Press the **ENTER** key to display the Stock Take Screen:



3. Begin scanning or entering codes for the items on this stock take. To scan a bar code, point the laser head of the PDT3100 at the bar code and press either the **Black** button on the side of the PDT3100. The laser will fire and remain scanning until the code is read. A short beep will be heard if the scanner reads the bar code and a second short beep will sound if the code is recognised. If the code is not recognised there will be a long beep to warn the operator. The code will appear in the **ITM:** field and the product description will display.
4. If a code will not read (first short beep) you can type in the code by pressing the numbered key pad on the PDT3100 followed by the **ENTER** key.
5. When a code is scanned or entered the cursor moves to the **QTY:** field. If you are scanning individual items one at a time, simply continue to scan or enter codes for each item. The PDT will assume a count of 1 for each code entered. *This is achieved by the software detecting codes in the **QTY:** field that are greater than 99999 i.e. six or more digits long. It assumes that this must be another code and set the **QTY:** field to 1 for the last item scanned and places the code just entered into the **ITM:** field.*
6. If you are scanning an item and then entering a quantity for that item, *this obviously faster than scanning each item individually*, then first scan or enter the code in the **ITM:** field, then enter the quantity in the **QTY:** field followed by the **ENTER** key.

STOCK TAKE	
ITM: √	5678891234445
QTY √	5
MAN UNITED HOME SHI BLACK SIZE LB	
28784 Scans Free	

7. Continue to stock take each item for this stock take. You can at any time return the PDT3100 to the Comms Cradle to download the data so far or leave the data in memory for further stock take sessions. Remember if the display switches off due to a period of no use, simply press the Red **PWR** button to display the last operation.

DOWNLOADING THE STOCK TAKE DATA

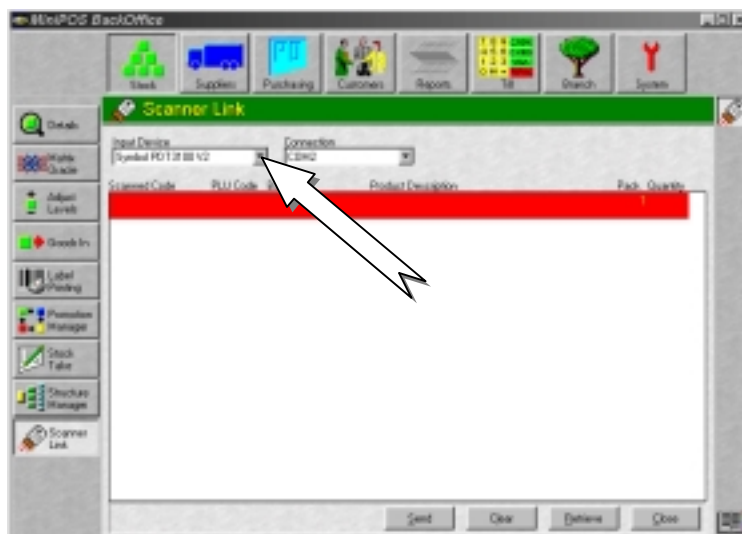
The PDT3100 can download data in multiple sessions or as a single stock take download. The data downloaded will appear in a list on the back office screen and the stock take data in the PDT3100 memory will be cleared. The downloaded data list can be added to at any time prior to processing. Each download will be added to the items in the list and quantities automatically consolidated as required.

When all data has been downloaded for a particular stock take, the list can be processed against a specific SRT previously created.

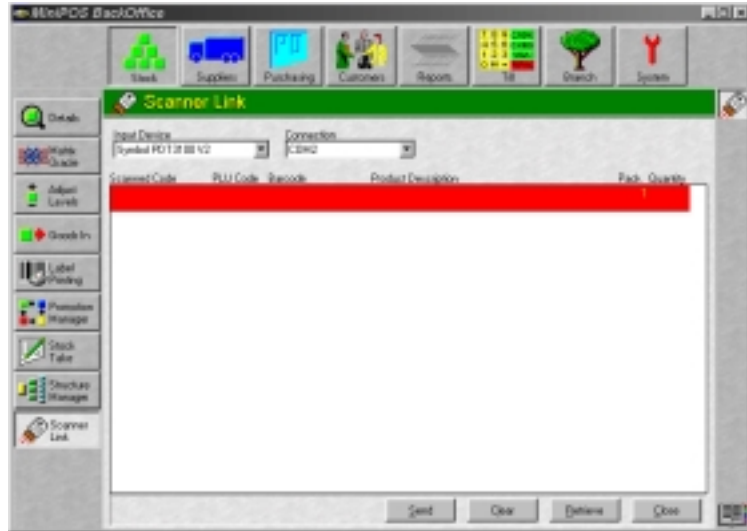
1. Return the PDT3100 to the Comms Cradle and ensure that the cradle is powered and connected to the back office PC.
2. Click the **Stock** Control Module button at the top of the MiniPOS screen and then click the **Scanner Link** function button from the function on the left of the screen:



3. On the **Scanner Link** form that is now displayed, click on the **Input Device List** button and select the **Symbol PDT3100 V2** option from the list:




- Click on the **Connection** List button and select the Comm port on the Back Office PC that the PDT3100 Comms Cradle is connected to:



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- Ensure that the PDT3100 LCD display is on. Then on the Back Office screen click on the **Retrieve** button at the bottom of the screen. The system will build a data export file and display a prompt on screen instructing you to put the PDT3100 into Communication Mode.
- Press the **ENTER** button on the PDT3100. This must be done within 10 seconds of the prompt to select the communications mode on the the Back Office.
- The PDT3100 will display an **Initialising** message followed by a **Receiving File** message. When the transfer of data is complete the PDT3100 will display:

SUCCESS
Press <ENTER>

- Press the **ENTER** key on the PDT3100 to return to the Mode Select Screen.

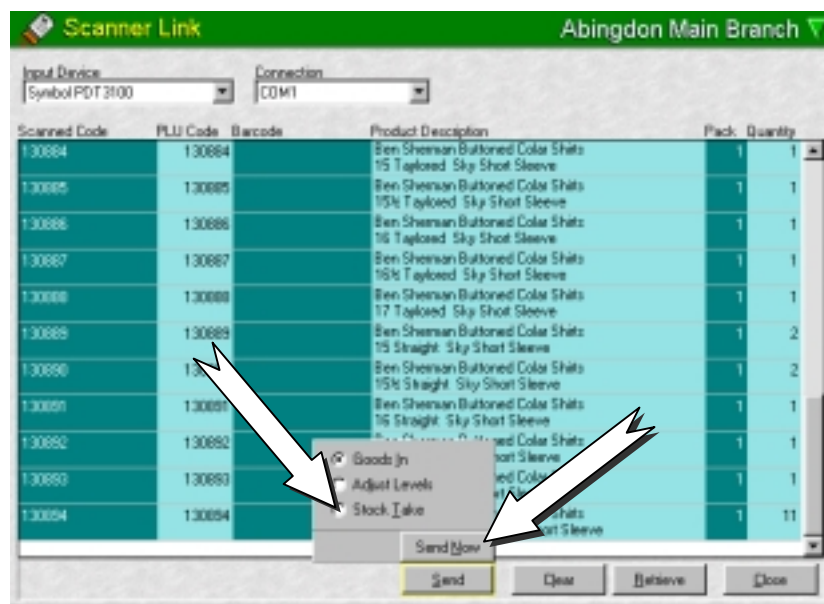
PROCESSING THE DOWNLOADED DATA LIST

When all stock take data has been downloaded for the range of items on this stock take, the list can be processed. By 'processed' we mean that each item and its quantity is checked against a selected Stock Range Template (SRT). Where a corresponding item is found the stock take quantity is entered by the system. A stock take variance report can now be printed for authorisation before the stock take count is finally processed and becomes the live stock figure.

Any items in the SRT that do not have a corresponding item in the downloaded data list will have their count set to Zero. This auto zeroing ensures non-counted items are set to zero as part of the stock take process.

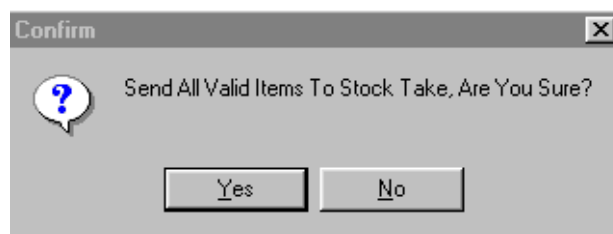
PROCESSING A STOCK TAKE

1. Click on the **Send Button** at the bottom of the form. The following pop-up will appear:



2. First click the **Stock Take Option** followed by the **Send Now Button**.

3. A **Confirmation** pop-up will appear as follows:

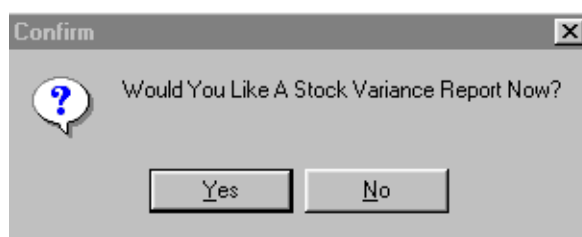


If you wish to proceed to process the downloaded data as a stock take, click on the **Yes Button**.

6.d. The **SRT Ref: List** pop-up will now display for you to select which SRT the downloaded data is to be processed against. Select the SRT for this stock take data and click the **Continue Button** at the bottom of the SRT Ref: List.

4. The system will now process the downloaded data entering the counted amounts against the SRT selected. When processing has finished the downloaded data list will be cleared except for any unrecognised bar codes.

5. In addition a **Confirmation** pop-up will appear as follows:



If you click on the **Yes Button**, MiniPOS will print a **Stock Take Variance Report** which compares the system stock levels to the downloaded counted levels and list any differences.

If you do not wish to print the report at this stage click the **No Button**. A Stock Take Variance Report can be printed from the Stock Take Form at any time.

6. You can now close the **Scanner Link Form** and view the counted data in the Stock Take Form for the relevant SRT as follows:



6. When you are happy with the stock take counts for this stock take click the **Stock Take** Button at the bottom of the screen.

7. A pop-up will ask if you wish to **mark this SRT as ready for processing to the Main Stock File**. If all is correct select the **YES** button. A second confirmation will appear, if you are sure that you are ready to make the stock take counts live then press the **YES** button. The stock file will now be updated with the stock take counts and any non counted items in the SRT will be set to Zero quantity.

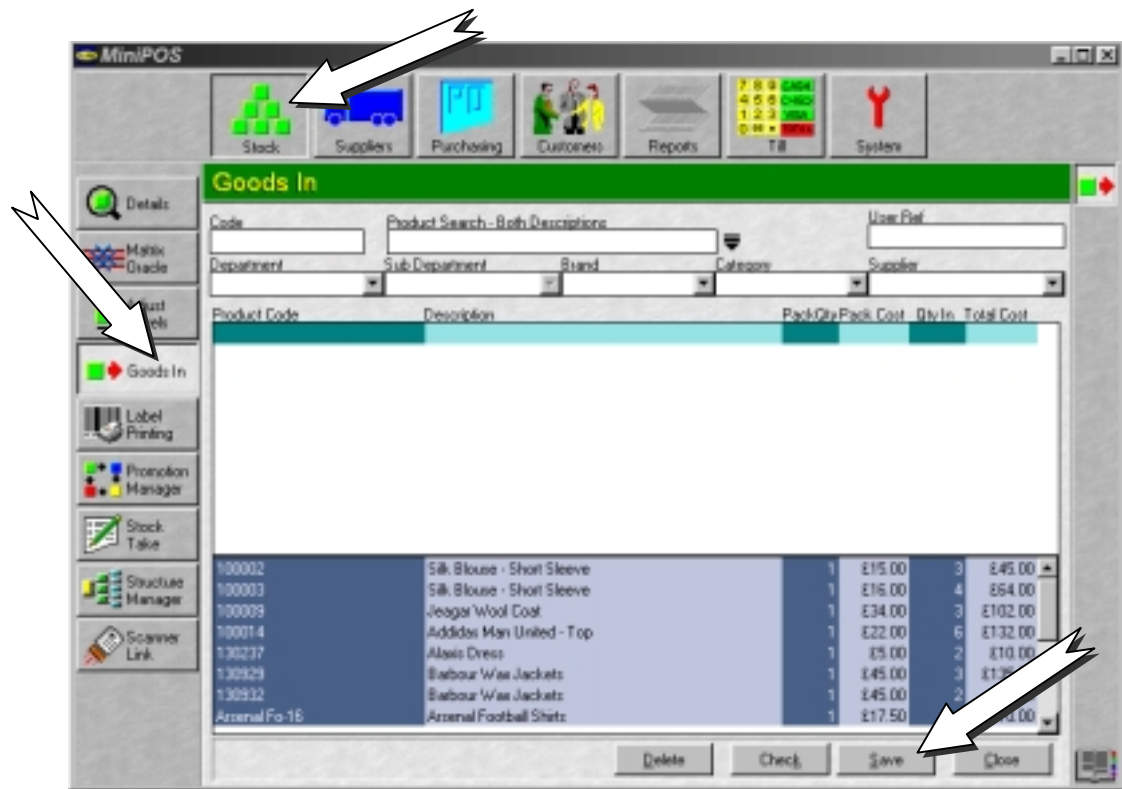
Process Downloaded Bar Codes For Goods In & Adjustments:

The PDT3100 can be used to collect Goods In quantities by scanning the items in a delivery, downloaded the data as with the stock take and then instead of processing the list as a stock take, you can select the **Goods In** option.

6.a Click the **Send Button** at the bottom of the form. Next select the relevant *Process Option* i.e. **Goods In** or **Adjust Levels** as appropriate. A pop-up confirmation box will appear. Click **Yes** to process the items in the list or **No** to return to the list.

6.b. A pop-up will display the progress of the item processing and will automatically close when complete.

6.c. Next close the **Scanner Link Form** and open the relevant Stock Control Form for the processed data, i.e. **Goods In**. The processed products from the **Scanner Link Form** will appear in the Stock Control Process List. The following Goods In display gives an example of processed data from the Hand Held Terminal via the Scanner Link Form:



Any products that were processed with a pack quantity will be converted into singles before being added to the above list.

6.d. Once you have checked the list and made any cost adjustments as required, you can now process the Goods In list in the normal way by clicking on the **Save Button**.