PBS Retail User Guide

V1.0.075.0

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3 PBS Retail Overview

PBS Retail is an application that has been designed to perform common functions in retail / warehousing and other related businesses where the need to scan items and record quantities is part of the daily routine. PBS Retail is very easy to use and allows businesses to achieve productivity improvements immediately in terms of accurate and timely data capture.

PBS Retail consists of two core components, those being PBS Retail Connect and PBS Retail for the PDA. The following sections describe each of the components in detail and the specific features of each.

Note:

4 PBS Retail Connect

PBS Retail Connect is PC based software that facilitates the exchange of data between the host PC and the PDA device.

PBS Retail Connect must be running on the HOST PC when the exchange of data is taking place.

You must have Microsoft Active Sync installed on the PC running PBS Retail Connect in order for communications to PDA's to operate correctly. Microsoft Active Sync is available for download from www.microsoft.com.

When the PDA is placed into the cradle, The PDA should connect with Microsoft Active Sync. You will be asked to set up a partnership. You should do this. It is required to be done once and once only.

Start PBS Retail Connect. The following screen is presented.

You will need to configure PBS Retail Connect so that it operates as you expect it to.

By default the standard configuration for the server is as follows

Server Name: localhost
Port: 8568

In most cases, these do NOT need to be changed. If you have a firewall running on your SERVER PC, you will need to unblock port 8568.

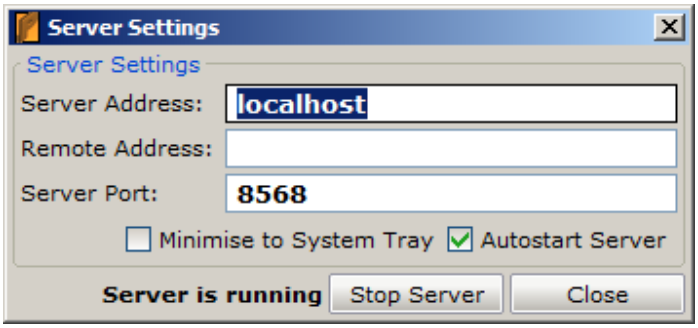
4.1 PBS Retail Configuration

There are several screens of information that need to be configured before PBS Retail can be used. These are simple to use and need only be done once.

4.1.1 Server Settings

Enter in the Server Name and the port address that PBS Retail connect will operate on.

The defaults are displayed below.



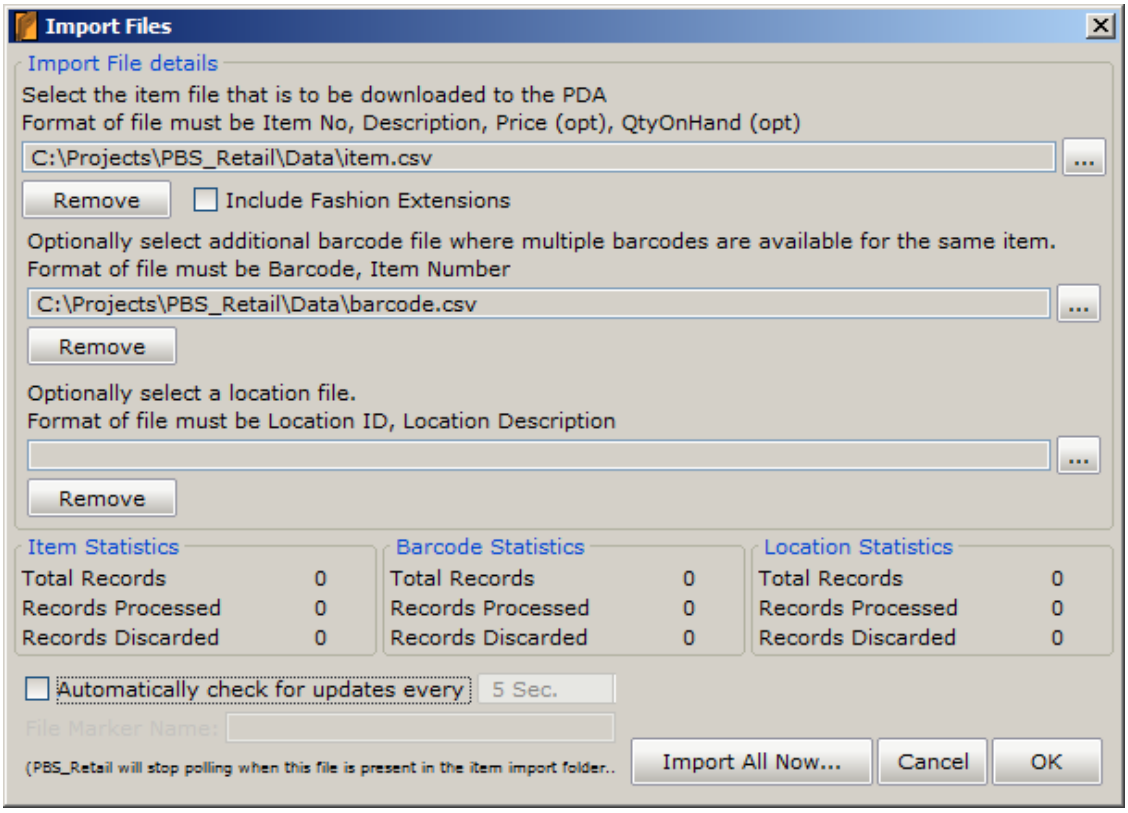
You may wish to enable "Minimise to System Tray". If this is this checked, then when PBS RetailConnect starts or is minimised, an icon will appear in the system tray as follows

4.1.2 File Import

When you wish to send product details to the PDA, you must nominate the location and file name of the Item file, Barcode file and location file. PBS Retail supports two different file formats.

The file formats supported are Standard and Fashion Extensions. Fashion requires the use of style, color and size to accurately track items.

4.1.2.1 Standard



4.1.2.1.1 Item File

The Item file is MANDATORY.

The ITEM FILE format MUST be in the following format

Item No, Description, Price

4.1.2.1.2 Barcode File

The BARCODE FILE must be in the following format. This file is OPTIONAL.

Barcode, Item No.

The Barcode file will be checked to ensure that any references it makes to the item file are in fact valid. Invalid barcodes will be discarded (and logged).

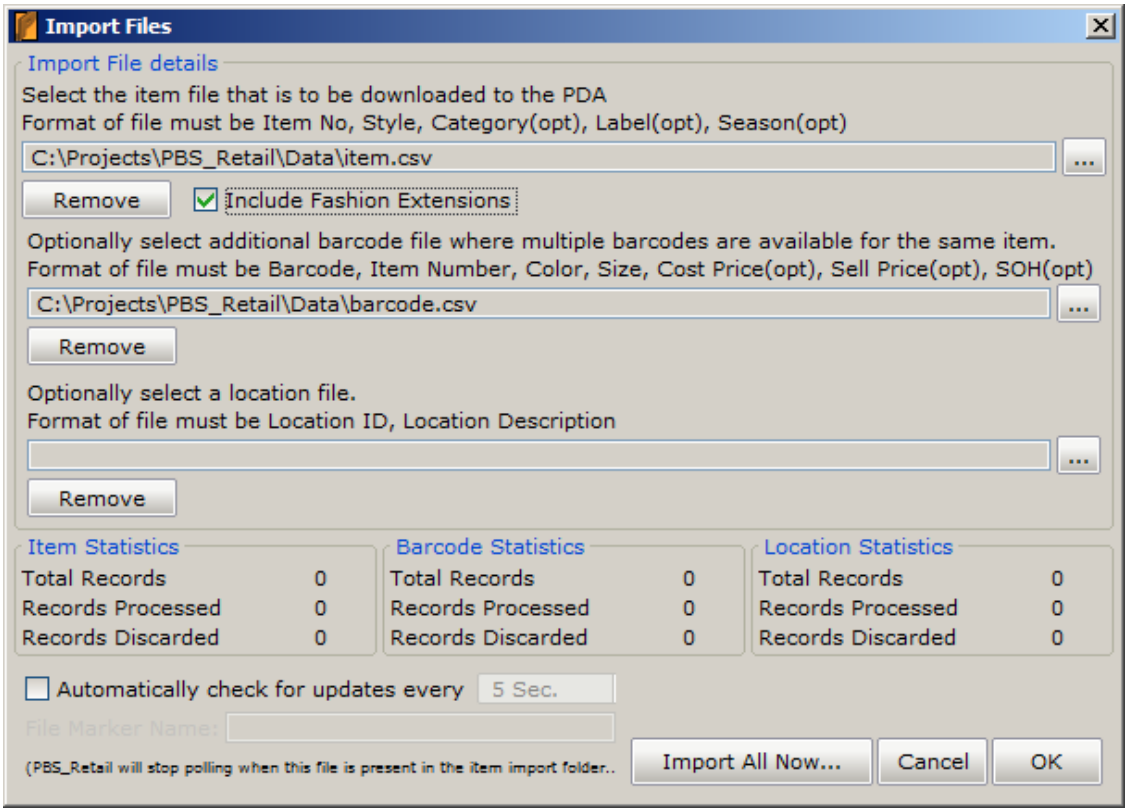
4.1.2.1.3 Location File

The LOCATION FILE must be in the following format. This file is OPTIONAL.

Location ID, Location Description

4.1.2.2 Fashion Extensions

The file formats for fashion change. See below…



4.1.2.2.1 Item File

The Item file is MANDATORY.

The ITEM FILE format MUST be in the following format

Item No, Style, Category(optional), Label(optional), Season(optional)

4.1.2.2.2 Barcode File

The Barcode file is MANDATORY.

The BARCODE FILE format MUST be in the following format

Barcode, Item No, Color, Size, Cost Price(optional), Sell Price(optional), SOH(optional)

4.1.2.2.3 Location File

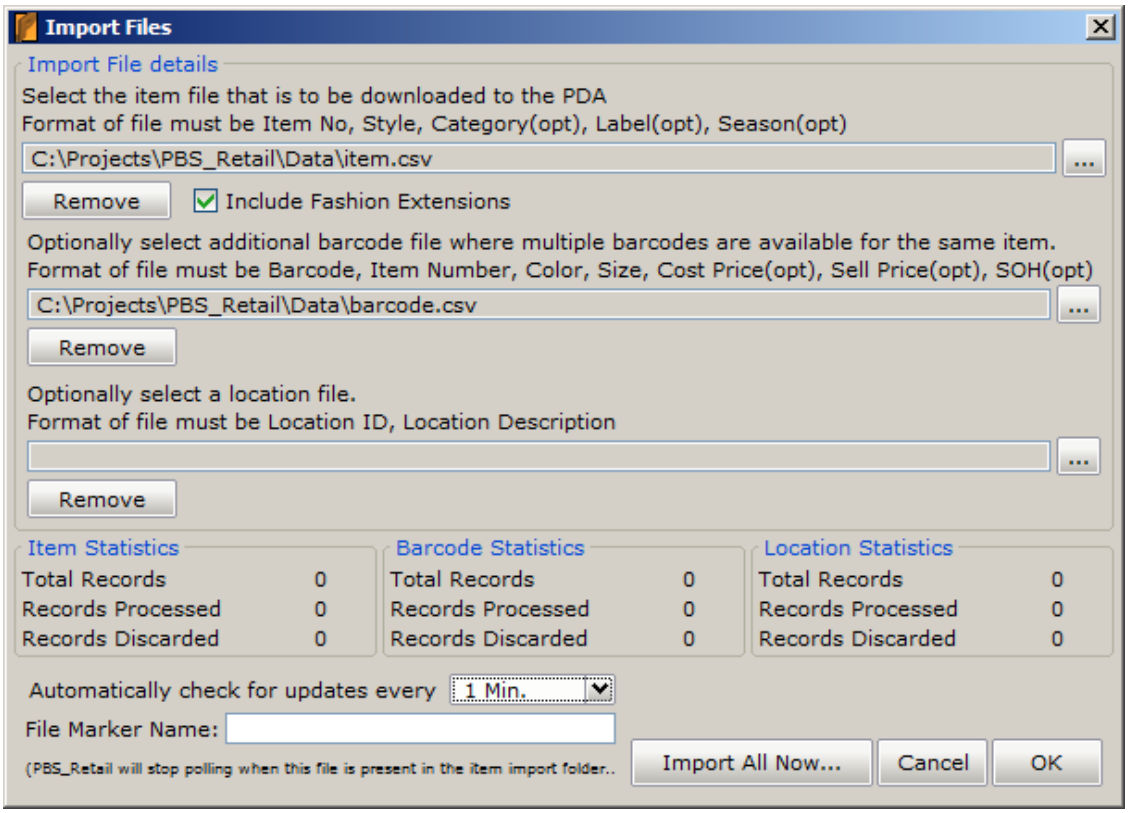
The LOCATION FILE must be in the following format. This file is OPTIONAL.

Location ID, Location Description.

Auto Import

PBS Retail is designed to be simple to use and to operate without too much intervention once it has been configured. PBS Retail is designed to INTERFACE into existing systems and as such there must be an exchange of data (assuming you wish to download product details to the PDA).

PBS Retail can auto import the item, barcode and location files.



The automatically check for update option will search for and import the appropriate files if they exist. Next time the PDA requests reference data, the new information will be sent to the PDA.

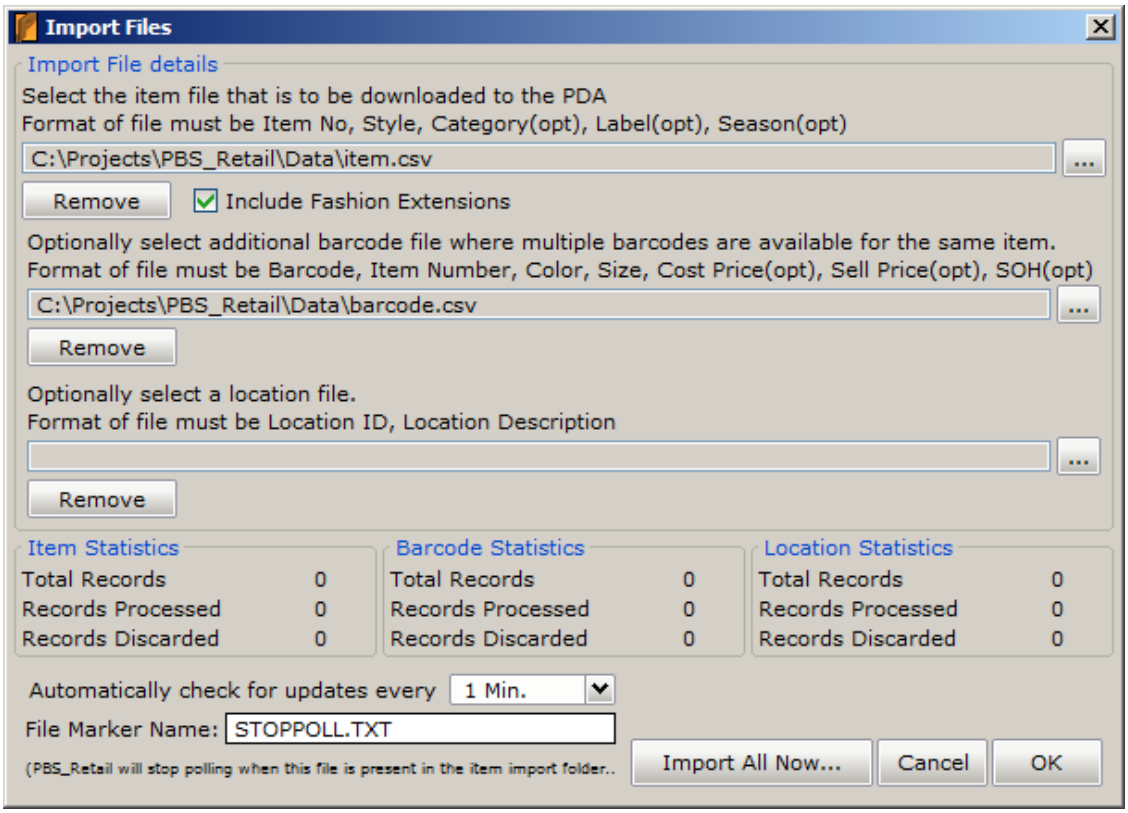
After the import is complete, the files are DELETED. This needs to take place to ensure they are not constantly imported.

To ensure PBS Retail Connect does NOT attempt to consume the data files from the back end systems, the back end system may create a file marker. The file marker

will STOP PBS Retail Connect from importing the data files while they are being created.

The file marker can be a filename of your choice. For example STOPPOLL.TXT placed in the same folder location as the item file (in our example this would be C:\Projects\Purpose Built Software\PBS Retail) would STOP PBS Retail Connect from importing the data files UNTIL the file marker (STOPPOLL.TXT) is removed by the back end system generating the data files.

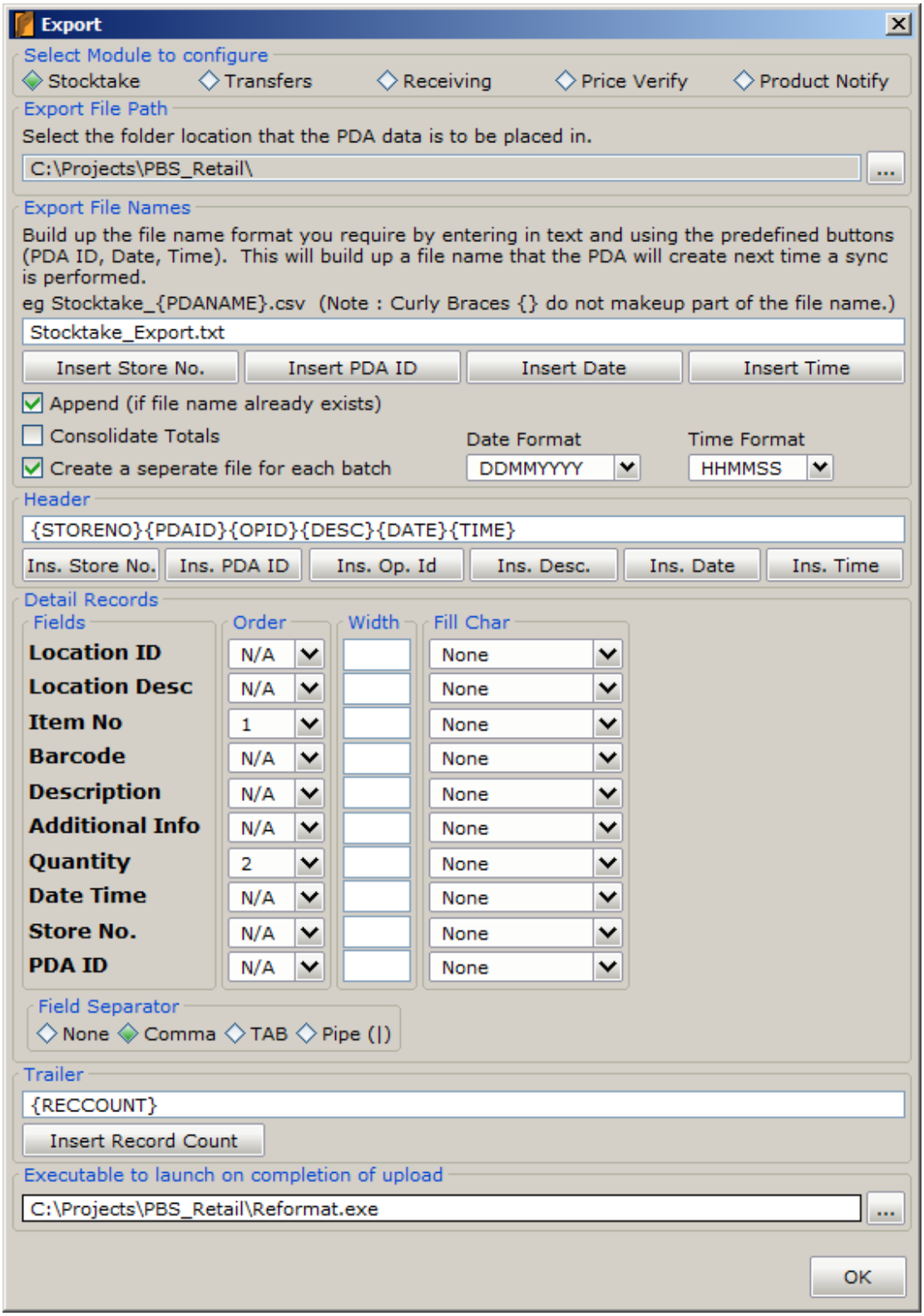
E.g.



4.1.3 File Export

The file export screen is critical in the use of PBS Retail. There are five modules to configure.

They are Stocktake, Transfer, Receiving, Price Verify and Product Notify.



By default ALL modules will EXPORT Item No and Quantity. If you require other information, then you will need to configure that module specifically.

The same configuration parameters are basically available for each application. The data that can be exported may change slightly depending on the application however the principle remains the same.

The Export routines allow you to customise the output file that your back office will ultimately process.

4.2 File Name

Select where the data is to be stored and what the file name is to be called. You may include the Store No, PDA ID, Date and time in the file name and any other "static" text you desire so long as a valid file name is ultimately produced.

You also have the option to APPEND to the file if it already exists. If it does not exist then it will be created for you.

You may also elect to consolidate totals. What this means is that when you perform an upload from the PDA device, if more than one of the same barcode has been scanned, then the total quantity will be added up and a single line item in the output file with the total quantity will be produced.

The PDA also has the capability to have multiple batches stored on it. If you require a separate file to be produced for each batch, then you should select this option.

4.3 Header Record

An optional header record can be produced. Certain key attributes are available to make up the header. You may also enter in "static" text.

The following information can be included as part of the header record.

- Store No.
- PDA ID
- Operator ID
- Module Description / Details (from PDA when creating the batch)
- Date
- Time

4.4 Detail Record

The detail record may be customised to meet your requirements. The following attributes are available to be included in the detail record (dependent on application module)

- LocationID,
- Location Description
- Item No
- Barcode
- Description
- Quantity
- Date / Time
- Label Request (Price Check Only)
- New Price (Price Check Only / Receiving)
- Store No
- PDA ID

The field making up the detail record can be separated by COMMA, TAB, PIPE or made to be fixed width and left or right justified.

4.5 Trailer Record

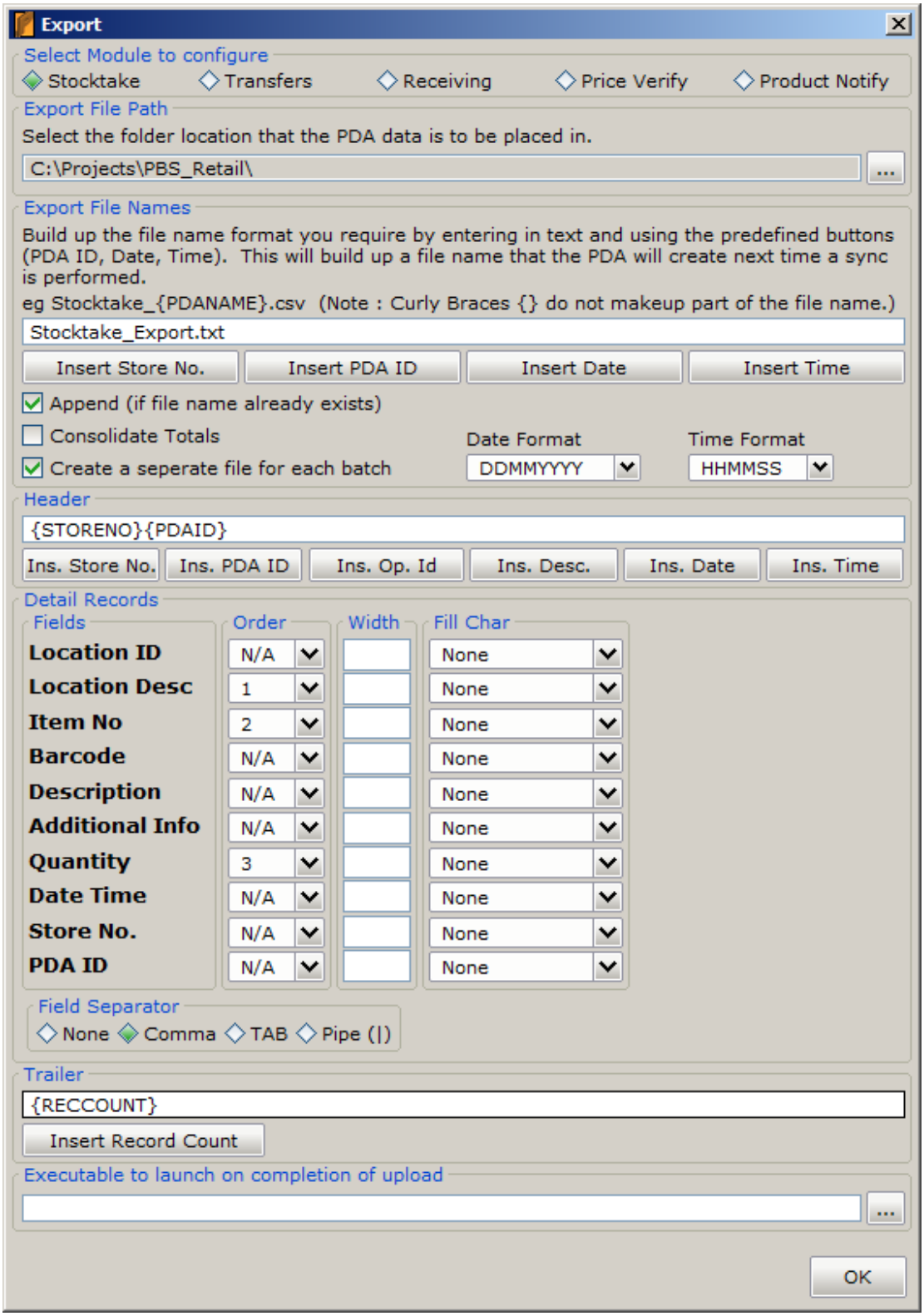
If the back office system requires a trailer record, then PBS Retail caters for this requirement as well. The trailer can consist of static text and/or the detail record item count.

E.g.

There is a fair degree of customisation that can be achieved with the configuration parameters. You will need to experiment with the options to achieve the output format you desire.

Here are just a few of the examples that you can produce from the stocktake application.

E.g. #1

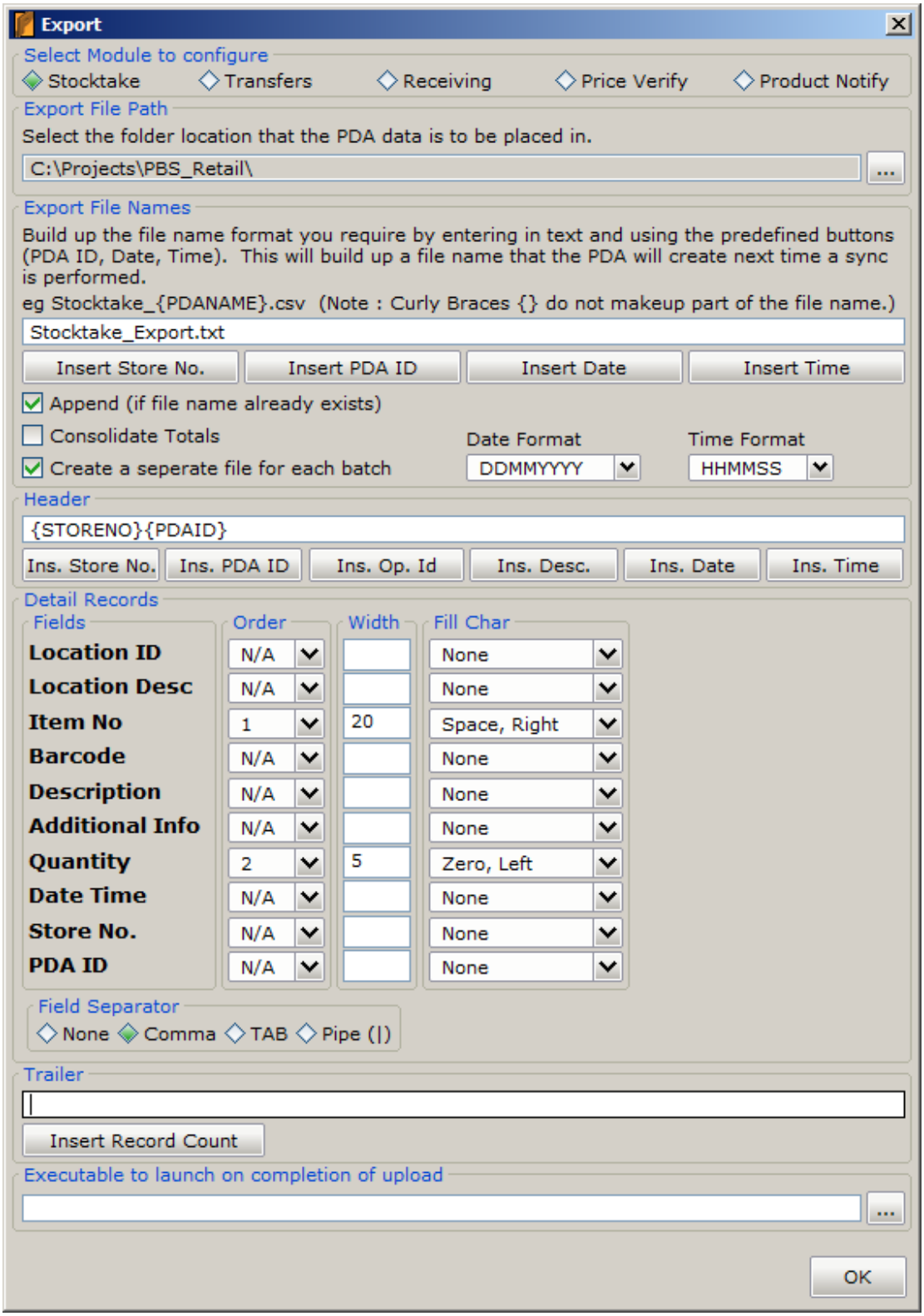

Export
Select Module to configure
Stocktake
Transfers
Receiving
Price Verify
Product Notify
Export File Path
Select the folder location that the PDA data is to be placed in.
C:\Projects\PBS_Retail\
Export File Names
Build up the file name format you require by entering in text and using the predefined buttons (PDA ID, Date, Time). This will build up a file name that the PDA will create next time a sync is performed.
eg Stocktake_{PDANAME}.csv (Note : Curly Braces {} do not makeup part of the file name.)
Stocktake_Export.txt
Insert Store No.
Insert PDA ID
Insert Date
Insert Time
Append (if file name already exists)
Consolidate Totals
Create a seperate file for each batch
Date Format
DDMMYYYY
Time Format
HHMMSS
Header
{STORENO}{PDAID}
Ins. Store No.
Ins. PDA ID
Ins. Op. Id
Ins. Desc.
Ins. Date
Ins. Time
Detail Records
Fields
Order
Width
Fill Char
Location ID
Location Desc
Item No
Barcode
Description
Additional Info
Quantity
Date Time
Store No.
PDA ID
N/A
1
2
3
None
Field Separator
None
Comma
TAB
Pipe (|)
Trailer
{RECCOUNT}
Insert Record Count
Executable to launch on completion of upload
OK

Would product the following output in a file called Stocktake_Export.csv located on the C:\ folder.

576,001
Location,Barcode,Qty
Location,Barcode,Qty
00002

Where 576 = Store No, 001 = PDA ID and 00002 is the record count of the items.

E.g. #2

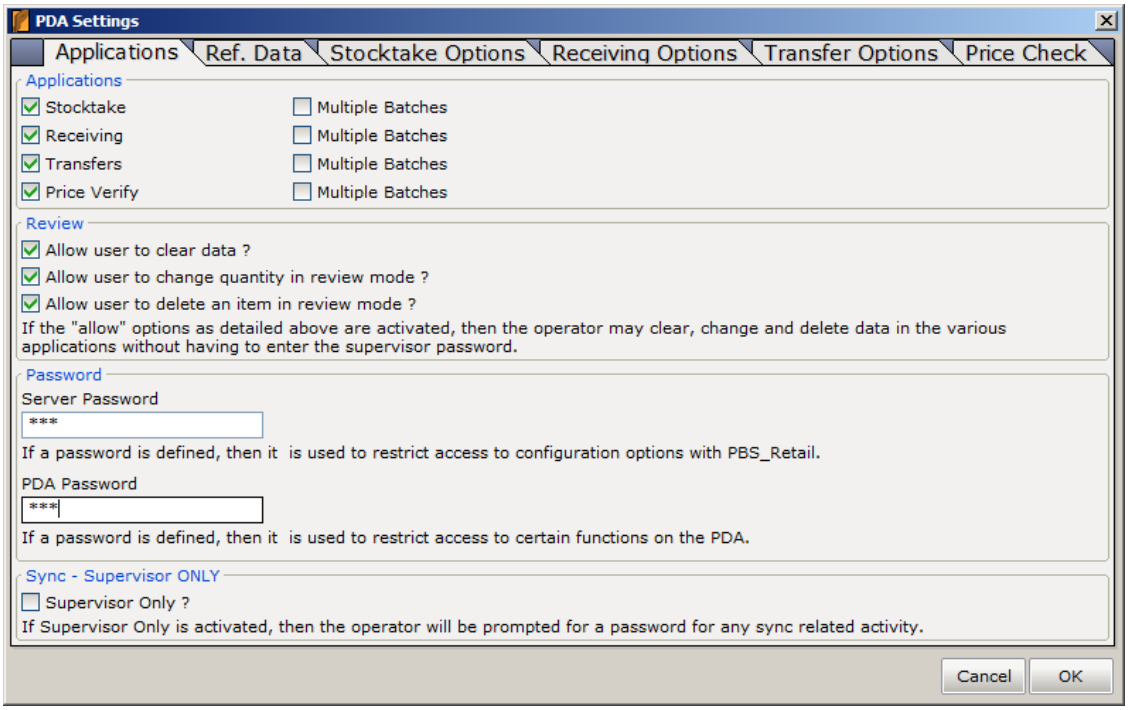

Export
Select Module to configure
Stocktake
Transfers
Receiving
Price Verify
Product Notify
Export File Path
Select the folder location that the PDA data is to be placed in.
C:\Projects\PBS_Retail\
Export File Names
Build up the file name format you require by entering in text and using the predefined buttons (PDA ID, Date, Time). This will build up a file name that the PDA will create next time a sync is performed.
eg Stocktake_{PDANAME}.csv (Note : Curly Braces {} do not makeup part of the file name.)
Stocktake_Export.txt
Insert Store No.
Insert PDA ID
Insert Date
Insert Time
Append (if file name already exists)
Consolidate Totals
Create a seperate file for each batch
Date Format
DDMMYYYY
Time Format
HHMMSS
Header
{STORENO}{PDAID}
Ins. Store No.
Ins. PDA ID
Ins. Op. Id
Ins. Desc.
Ins. Date
Ins. Time
Detail Records
Fields
Order
Width
Fill Char
Location ID N/A None
Location Desc N/A None
Item No 1 20 Space, Right
Barcode N/A None
Description N/A None
Additional Info N/A None
Quantity 2 5 Zero, Left
Date Time N/A None
Store No. N/A None
PDA ID N/A None
Field Separator
None
Comma
TAB
Pipe (|)
Trailer
Insert Record Count
Executable to launch on completion of upload
OK

Would product the following output in a file called Stocktake_Export.csv located in the C:\ folder. Assume 3 barcodes scanned with numbers 00001, 00002 and 00003 with quantities of 9, 4, and 12

00001	00009
00002	00004
00003	00012

4.5.1 PDA Settings

The options available on the PDA can be controlled via the PDA Settings screen as shown below. The options selected here have a direct impact on the PDA and what PDA users can and can't do.



4.5.1.1 Applications Tab

PBS Retail has four applications. All four applications can be made available or any combination of these four applications.

Multi Batch

Next to each application is a check box called "Multiple Batches". This controls whether or not a user is able to create more than one batch of scanning before uploading for the same application.

For example, some people may wish to conduct a stocktake of Shop Floor AND storage areas and may wish to keep the two separate and therefore create TWO distinct batches.

4.5.1.1.1 Review

When the user is reviewing the items that have been scanned, there are several options that allow the user to edit / delete the data. These options can be password controlled. If the option is selected, no password will be requested. The user is free to perform the function.

4.5.1.1.1.1 Clear

Allow the user to Clear the entire batch (if location available / selected then only within that location).

4.5.1.1.1.2 Change

Allow the user to change the quantity.

4.5.1.1.1.3 Delete

Allow the user to delete an item.

4.5.1.1.2 Password

Server Password

If a password has been entered in here, then the configuration options of Server, Import, Export and PDA will request a password when a user attempts to change any of the configuration options.

PDA Password

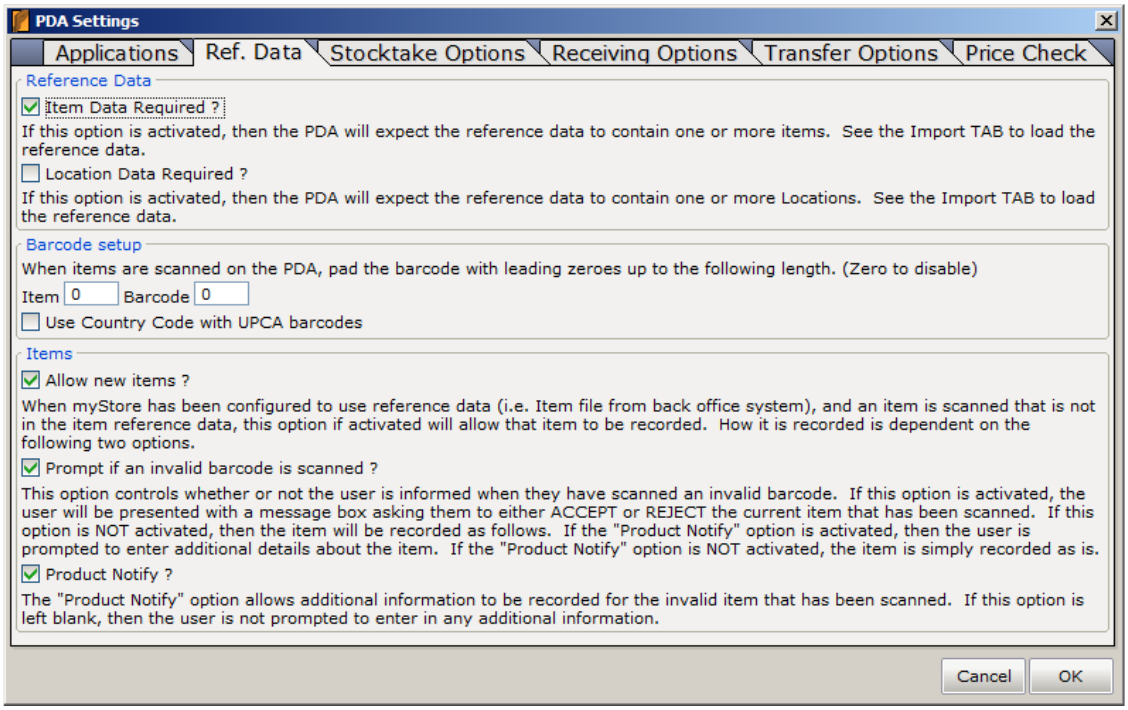
If a password has been entered in here then certain functions on the PDA will require a password to be entered in order to perform them.

The password is used with the Sync request and changing item quantity / price, deleing items or clearing batches.

4.5.1.1.3 Sync – Supervisor Only

This option control whether or not the PDA user can Sync the PDA without the PDA asking for the Supervisor Password. If this option is activated, then the Sync process will require the supervisor password.

4.5.1.1.4 Reference Data Tab



4.5.1.1.5 Reference Data

Within this group, there are two options. Item data and location data are the available options.

If these options are selected, then the PDA will attempt to validate any items scanned / manually entered against the reference data.

You can elect to have item data only, location data only or both or none at all.

If item data and location data are not activated, then the PDA will do NOT validation of any items / locations.

Note: If you have elected to validate against either item data or location data or both, then you should Import the relevant item or location data via the import process described in Section 4.1.2.

4.5.1.1.6 Pad Leading Zeroes

The PDA may also add leading ZEROES onto any barcode that has been scanned up to the length specified. For example, if you scan an EAN-13 such as 9300624364061 and have the pad value set to 14, then ONE leading Zero will be added to the scanned barcode. The value will be "09300624364061". This value will then be

used to compare against any reference data that may be loaded onto the device. This is used when the reference data exported form the back office software contains leading zeroes.

You may pad the Item No and / or the Barcode.

4.5.1.1.7 Items

The items section contains options on how the PDA should treat items that are not found (assuming item reference data is loaded). This section offers EXTREME flexibility on how you want the PDA to behave. Please read this section carefully to ensure you obtain the results you are looking for.

4.5.1.1.7.1 Allow New Items

When PBS Retail has been configured to use reference data (i.e. Item file from back office system), and an item is scanned that is not in the item reference data, this option, if activated will allow that item to be recorded. How it is recorded is dependent on the following two options.

4.5.1.1.7.2 Prompt if an invalid barcode is scanned

This option controls whether or not the user is informed when they have scanned an invalid barcode. If this option is activated, the user will be presented with a message box asking them to either ACCEPT or REJECT the current item that has been scanned or if "Product Notify" option (see below) is activated, then the user can either ACCEPT, REJECT or record additional details via "Product Notify".

If "Prompt if an invalid barcode is scanned" is NOT activated, then the item will be recorded as follows. If the "Product Notify" option is activated (see below), then the user is immediately prompted to enter additional details about the item. If the "Product Notify" option is NOT activated (see below), the item is simply recorded as is and the description will be recorded as "N/A".

4.5.1.1.7.3 Product Notify

The "Product Notify" option allows additional information to be recorded for the invalid item that has been scanned. If this option is left blank, then the user is not prompted to enter in any additional information.

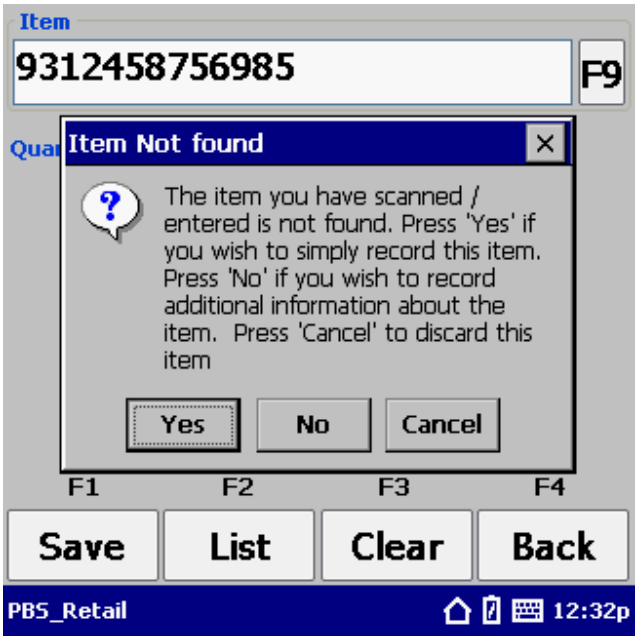
Certain attributes may be recorded. See product notify Section 7.

4.5.1.1.7.3.1 Example #1

Setting	Option
√	Allow new items
√	Prompt if invalid barcode is scanned
√	Product Notify

User scans / enter an invalid barcode

User is presented with the following screen



Press YES to simply record the item – No additional details are recorded.

Press No to record additional details – See Product Notify section

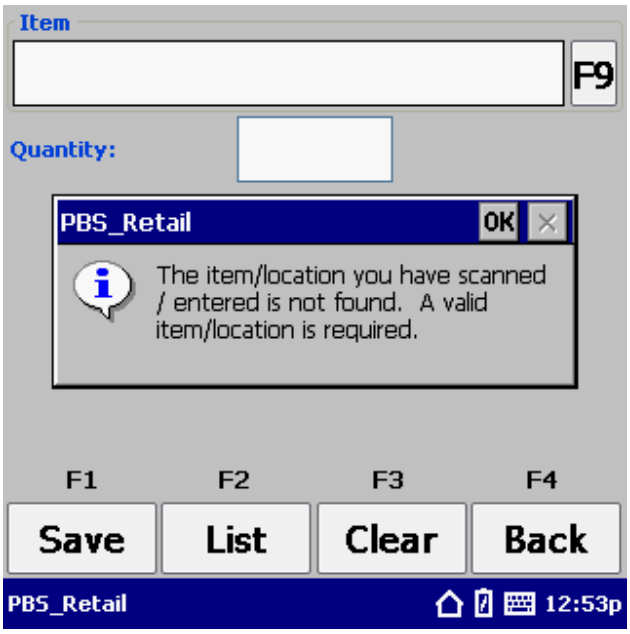
Press Cancel to Discard

4.5.1.1.7.3.2 Example #2

Setting	Option
	Allow new items
	Prompt if invalid barcode is scanned
	Product Notify

User scans / enter an invalid barcode

User is presented with the following screen



Notice the user cannot RECORD the barcode. They are simply informed the barcode is invalid.

4.5.1.1.7.3.3 Example #3

Setting	Option
√	Allow new items
	Prompt if invalid barcode is scanned
	Product Notify

User scans / enter an invalid barcode and the barcode is simply recorded. No prompting of the user is provided.

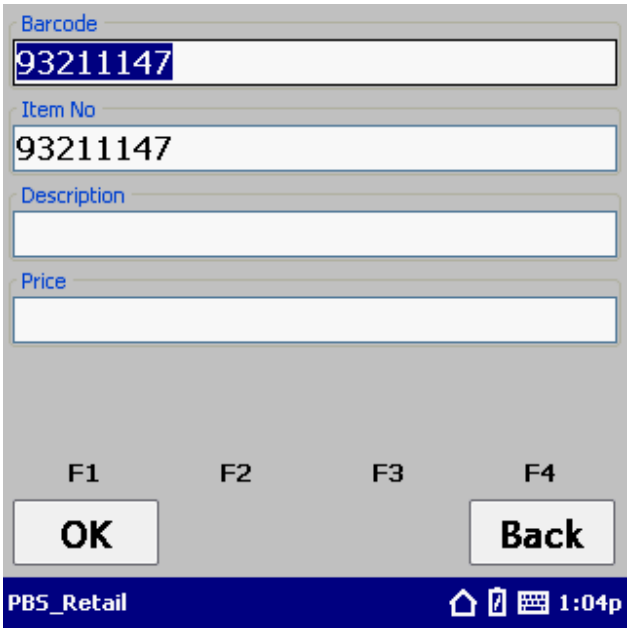
The PDA will have the following details on the screen. The Description will be set to Not Available.

4.5.1.1.7.3.4 Example #4

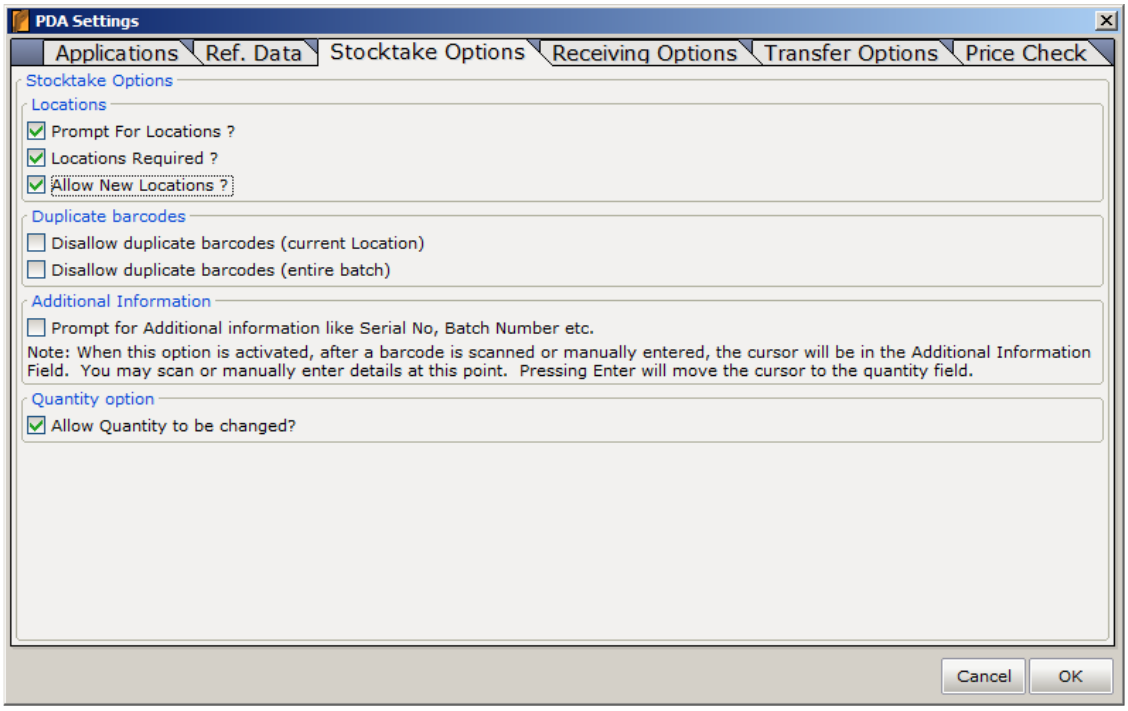
Setting	Option
√	Allow new items
	Prompt if invalid barcode is scanned
√	Product Notify

User scans / enter an invalid barcode

User is presented with the following screen immediately. In other words they are taken DIRECT to the product Notify data entry form.



4.5.1.1.8 Stocktake Tab



Stocktake is a complicated process and many people perform stocktake in a slightly different way. The options available for stocktake are discussed below.

4.5.1.1.9 Locations

Locations may consist of store locations or locations within a store. It is up to each individual site as to how the location is treated. It may also contain both store locations and locations within a store at the same time.

4.5.1.1.9.1 Prompt for location

When selected, the PDA will prompt for location in those applications that have the ability to record a location. (Presently this is a stock take function only)

4.5.1.1.9.2 Locations required

If prompt for location is selected, this option controls whether or not the location is required or optional. If the location is required, select this option. If the location is not required then unselect this option.

4.5.1.1.9.3 Allow new locations

If a location is scanned that does not exist or the user wishes to add a new location, this option determines if that is possible.

If this option is selected, then the user can add new locations. If this option is not selected, only valid locations (as per the reference data) can be selected.

4.5.1.1.10 Duplicate Barcodes

The duplicate barcodes option allows a user to select if they wish to allow duplicate barcodes to be scanned. In a typical library or Video Shop or asset stock take, this option will probably be set to "disallow". You have the option of disallowing for the current location or the entire batch (across many locations)

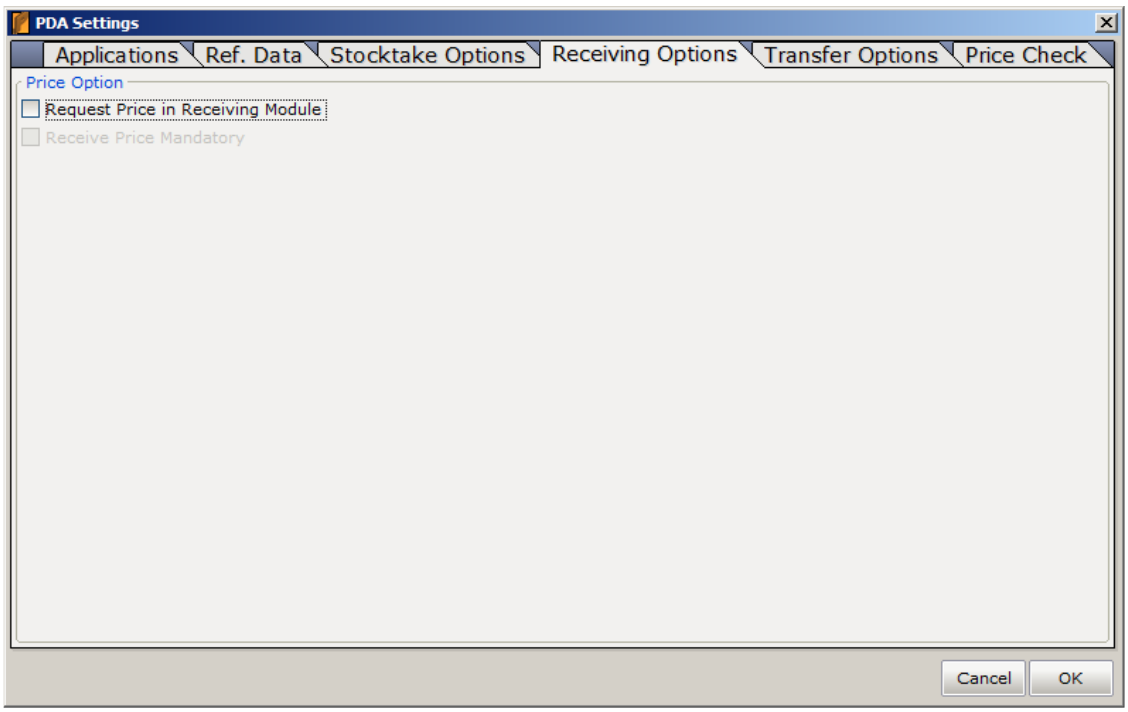
4.5.1.1.11 Additional Information

If this option is enabled, then the PDA will prompt for an additional field after the item has been scanned. This field can be used to record additional information such as serial number, batch number etc.

4.5.1.1.12 Quantity Option

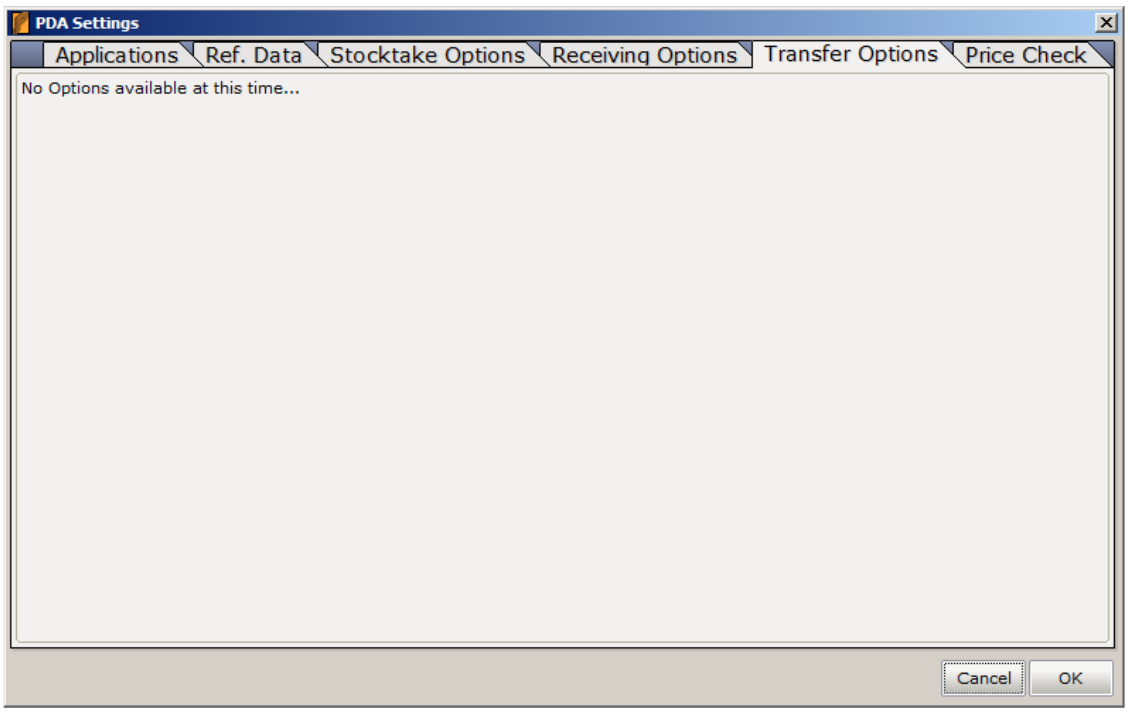
This option determines if the quantity can be changed when performing a stock take.

4.5.1.1.13 Receiving Tab



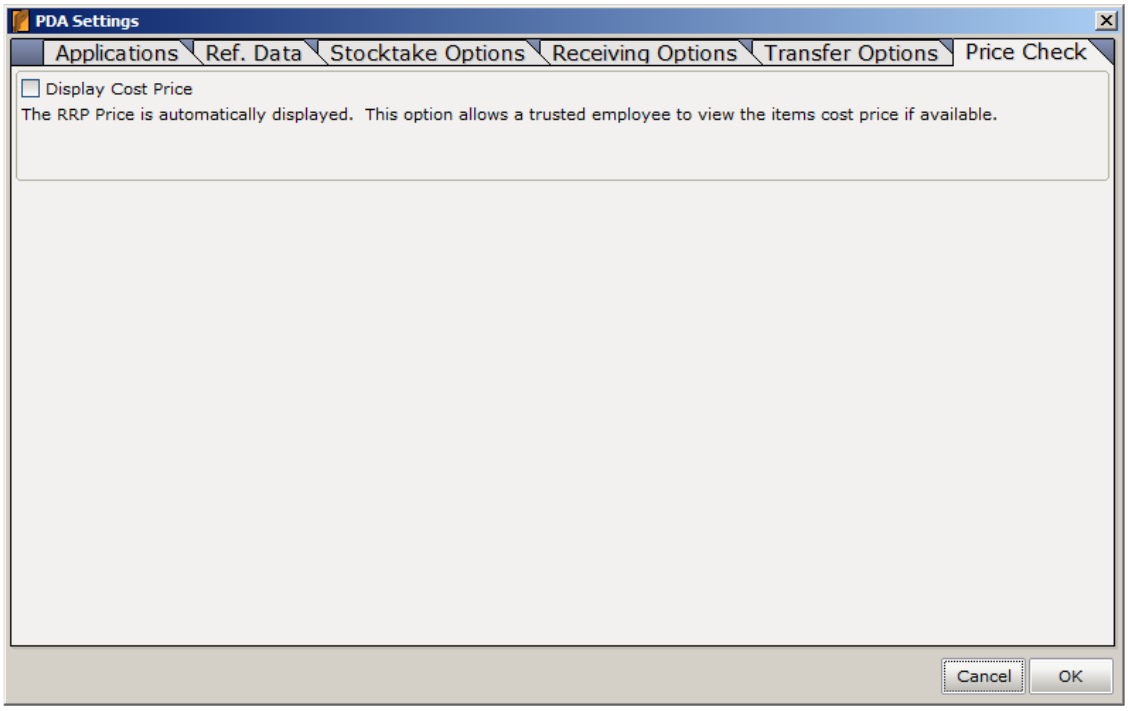
These simple options determine whether or not a price should be prompted for in the receiving module. If the price is to be prompted for you have the option of making the price a mandatory field. I.e. The user must enter a price.

4.5.1.1.14 Transfer Tab



No options available at this time…

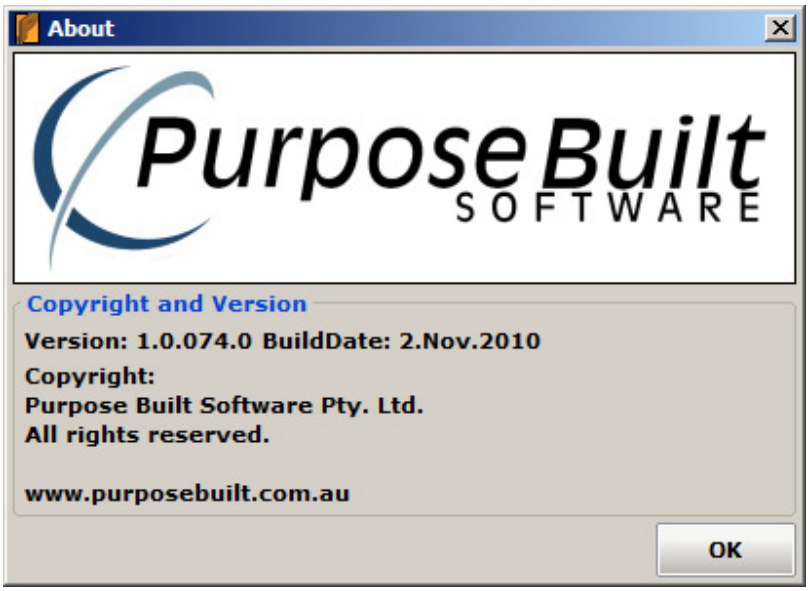
4.5.1.1.15 Price Check Tab



If using Fashion Extensions and a Cost Price is available, then this option determines if the cost price is to be displayed on the users PDA.

4.5.2 About

Version and Copyright information is displayed here.

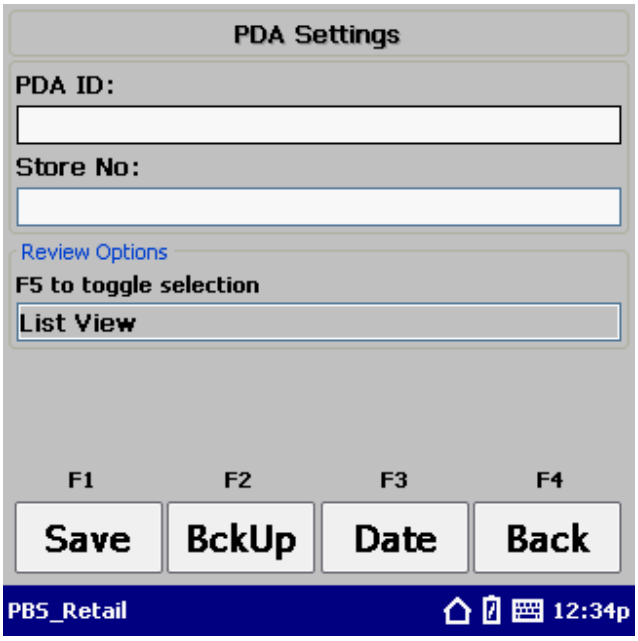


5 PDA

5.1 PDA Settings

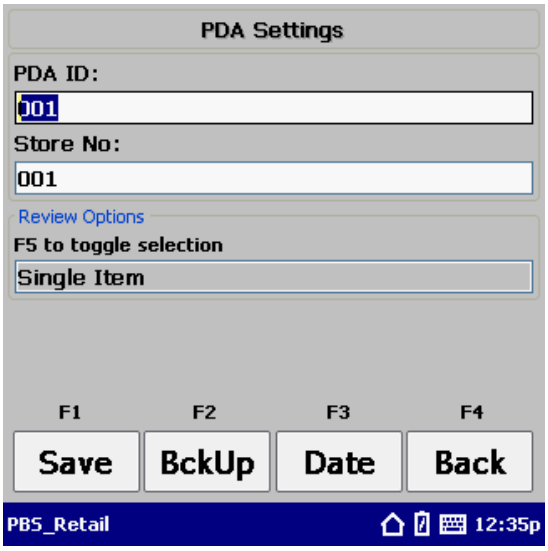
The PDA may be configured with a store number and PDA ID. It also requires a Server Port and Address. See below for further information.

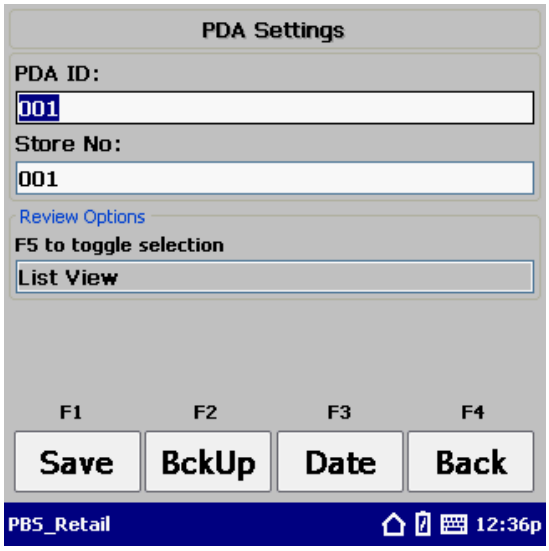
The PDA comes configured as follows. There is NO NEED to change it unless you require a different configuration. Press F6 on the MAIN MENU to display the following screen



5.1.1 Review Options.

By default the review screen is in "Single Item". Some users may not like this option and prefer a List View. They may select their preference by toggling between "List View" and "Single Item".

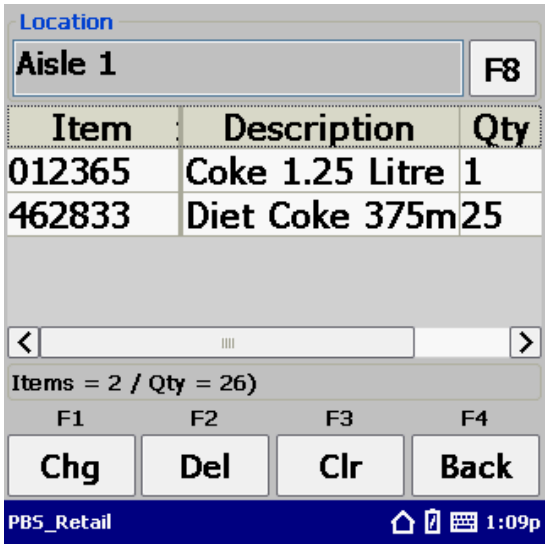




This changes the way the review screen is displayed.

Single Item

List View



Single Item key pad control

Key	Description
LEFT ARROW or 4	Move to PREVIOUS record
RIGHT ARROW or 6	Move to NEXT record
UP ARROW or 2	Move to FIRST record
DOWN ARROW or 8	Move to LAST record

5.1.2 Backup Options

The Backup / Restore options allow you to backup and restore the transactional data to an SD Card if one is available.

The following Menu is displayed.

Option 1 will backup the transactional data to the SD Card. It will REPLACE whatever was on the SD Card.

Option 2 will restore the transactional data from the SD card to the PDA. It will replace the data on the PDA.

Option 3 will take you back to the main menu.

5.1.3 Setting Date / Time

The date and time is AUTOMATICALLY set to that of the server PC. It is NOT necessary to use this option.

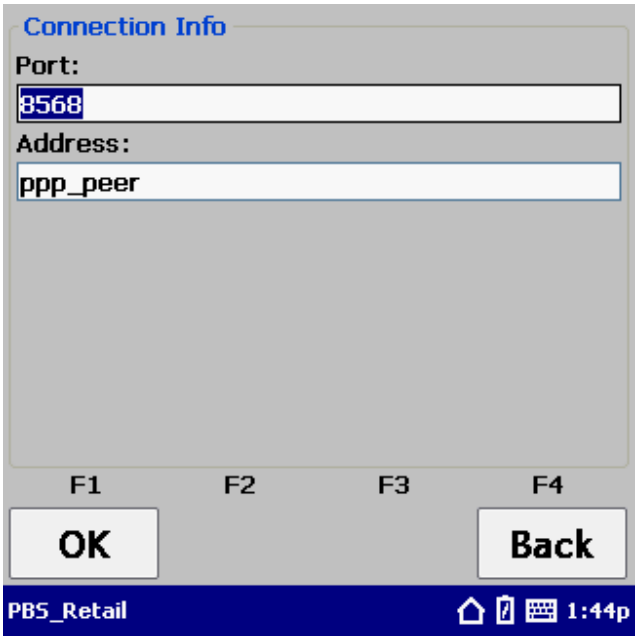
Use up and down arrow key and ENTER key to change between columns. Press F1 to SAVE else F4 to discard changes ands return.

5.1.4 Server Settings

The PDA will be pre loaded with PBS Retail and set up to communicate with the PBS Retail Connect Application default settings. Should you be required to change any of these, then that may be done here.

Press F7 on the Main Menu to display the following screen.

The default settings for the PDA are as follows



The Port and Address should not need to change. If you do make some changes, you must make corresponding changes to PBS Retail Connect.

The "ppp_peer" is required if using active sync to connect to the PBS Retail Connect Server. If you wish to connect wirelessly, then you will need to enter in your server host name or IP address.

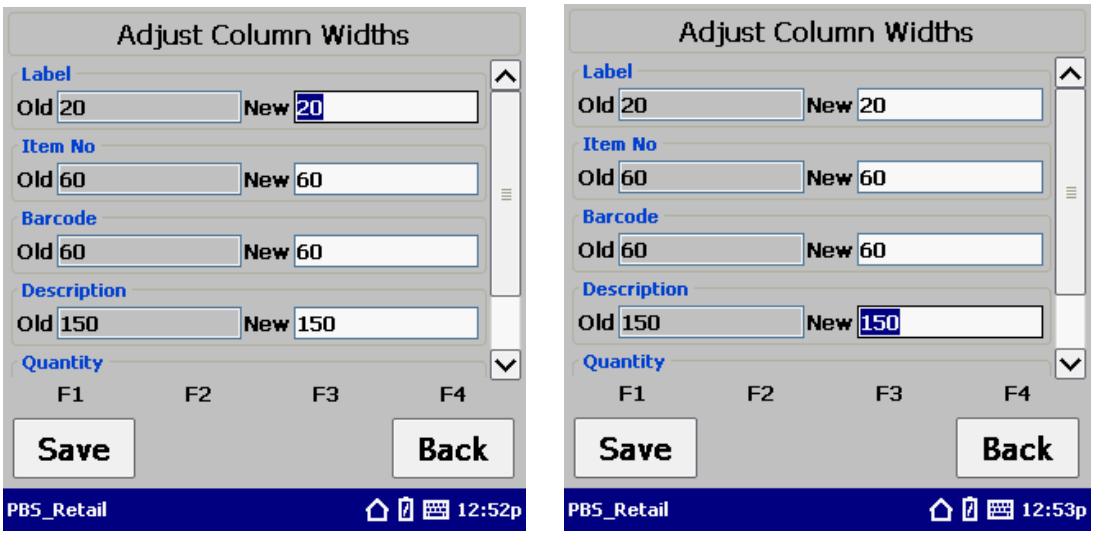
5.2 Common Functions

5.2.1 Adjust Column Widths

The column widths may be adjusted by dragging the columns and resizing to the size you require or on NON touch screens, by pressing F6.

Pressing F6 will display the following screen showing the old width and allow a new width to be entered.

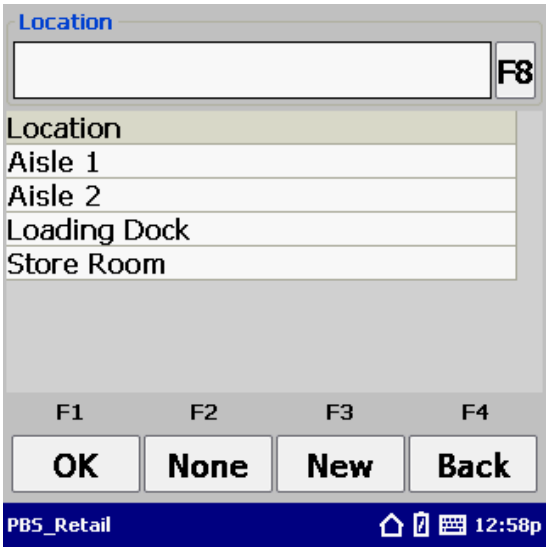
In the example shown below, the Price Check application (List Screen) has 5 columns. Each of these may be adjusted to suit.



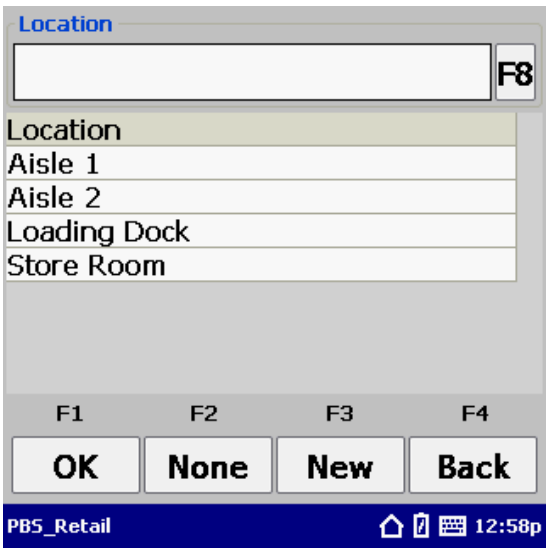
Enter in the New Column Widths and press F1 to save. The column widths will be remembered from this point forward.

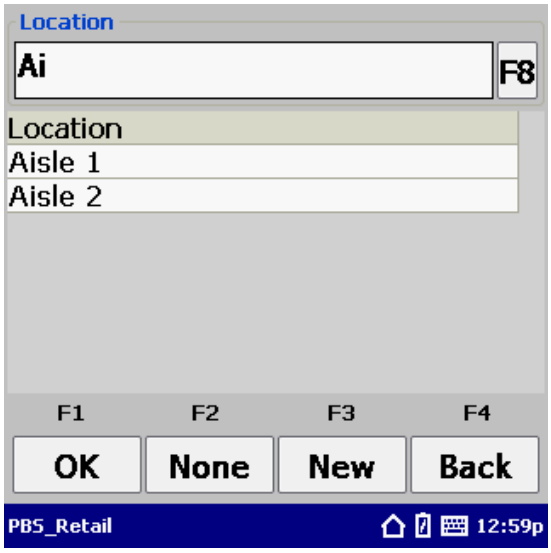
5.2.2 Location Selection

You may scan a location. If for some reason, the bar code is missing or unable to be read, then you may select a location from a list.



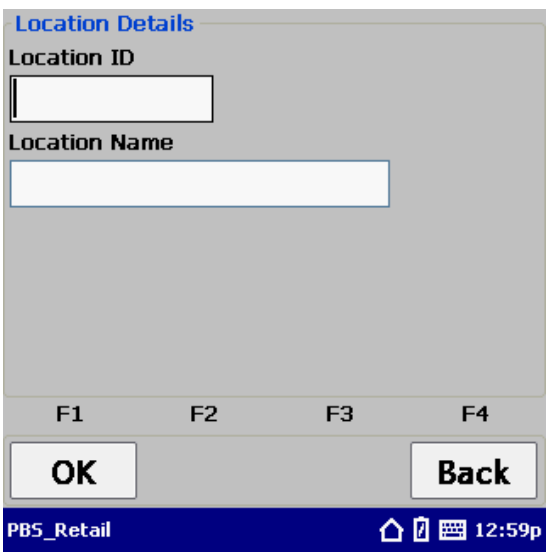
You may filter the list by typing in some characters as shown below. Press F8 to begin the search.

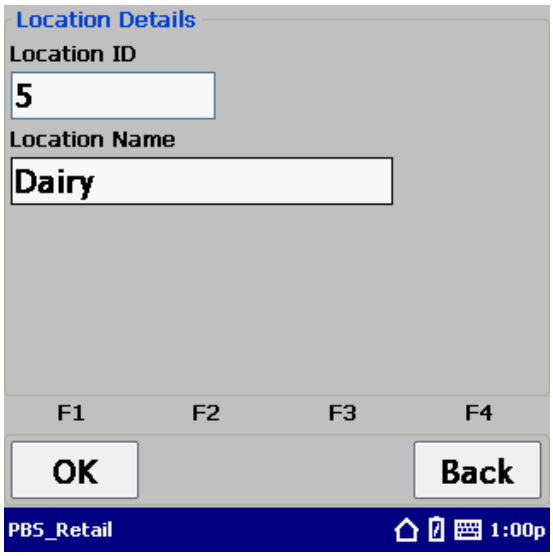




Key	Description
F1	The currently highlighted item in the list will be selected.
F2	No location is selected. If a previous location was active it is removed.
F3	If not greyed out, then you may create a NEW location
F4	Go back and leave current location (if there was one) active.
F6	Adjust Column Widths

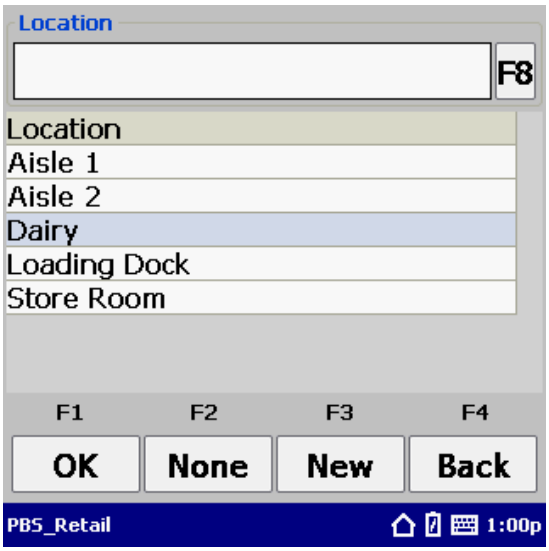
On some occasions you may be permitted to create a new location. Press F3 to create the new location.





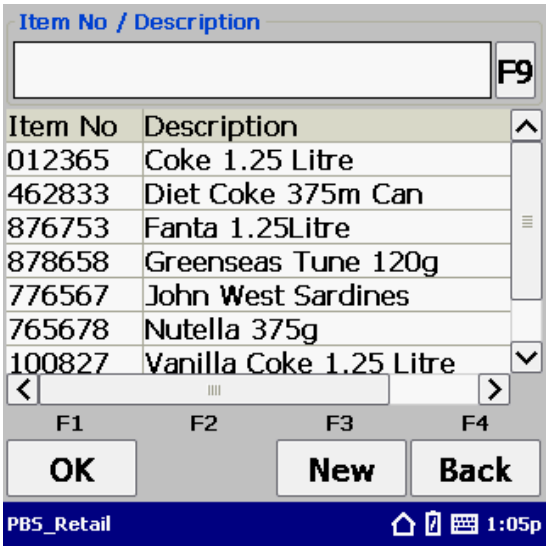
Press F1 to save the new location. Press F4 to discard the new location and return to the location list.

The recently added location is displayed in the list and highlighted for selection. Press F1 to select.

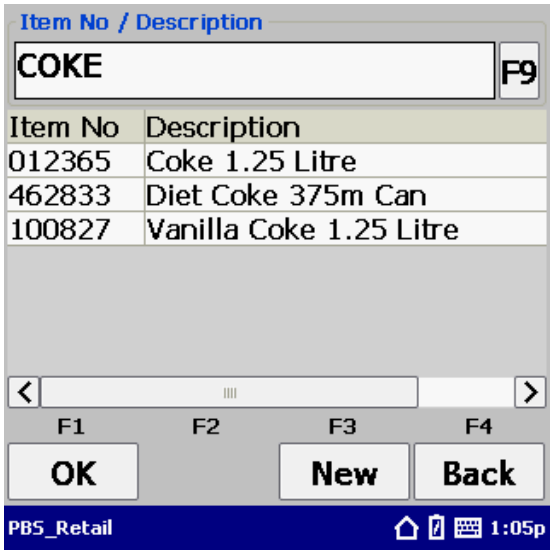


5.2.3 Product Selection

You may scan a product / item. If for some reason, the bar code is missing or unable to be read, then you may select a product / item from a list.



You may filter the list by typing in some characters as shown below. Press F9 to begin the search.



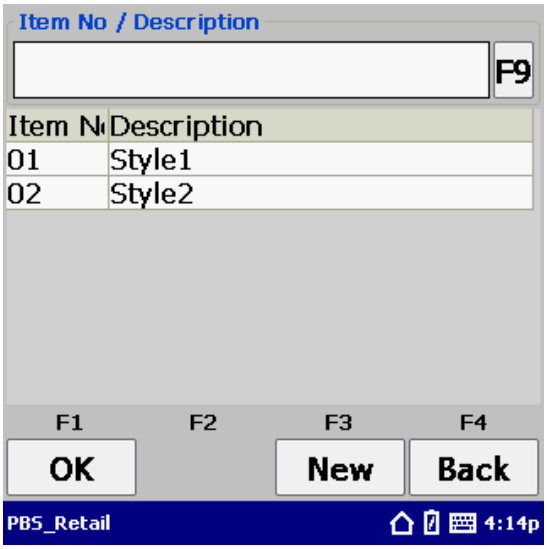
Key	Description
F1	The currently highlighted item in the list will be selected.
F3	If not greyed out, then you may create a NEW product / item
F4	Go back without selecting an item
F6	Adjust Column Widths

If you have fashion extensions enabled, then each item must resolve down to an individual barcode.

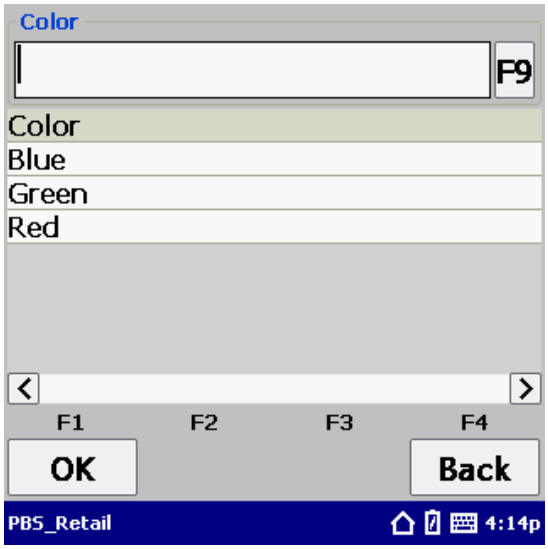
The process is for style, color and size to be requested to enable a barcode or individual SKU to be located.

E.g.

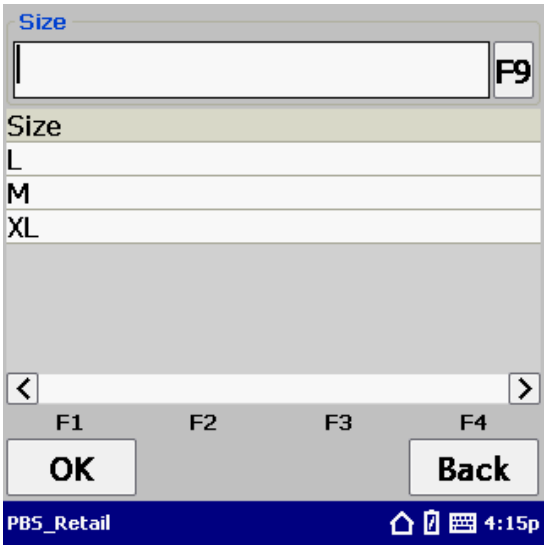
Select Style



Select Color



Select Size

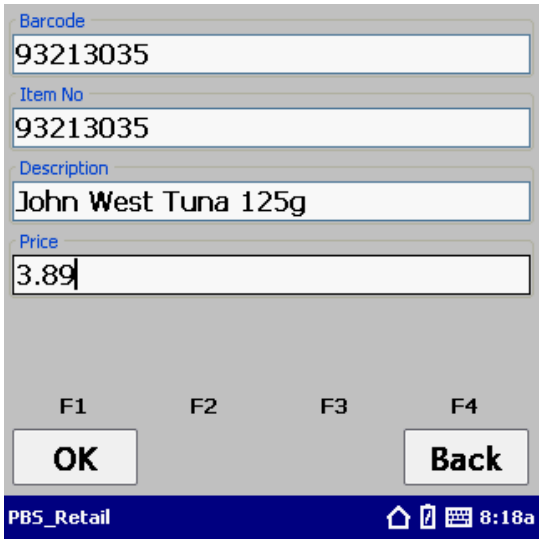


The barcode can now be determined.

New Items

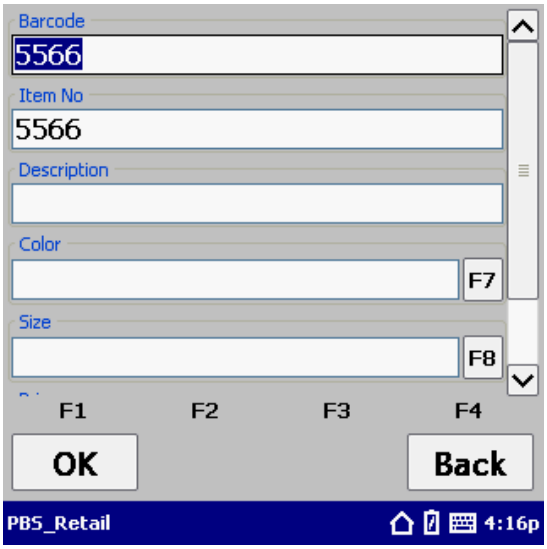
On some occasions you may be permitted to create a new product / item. Press F3 to create the new item.

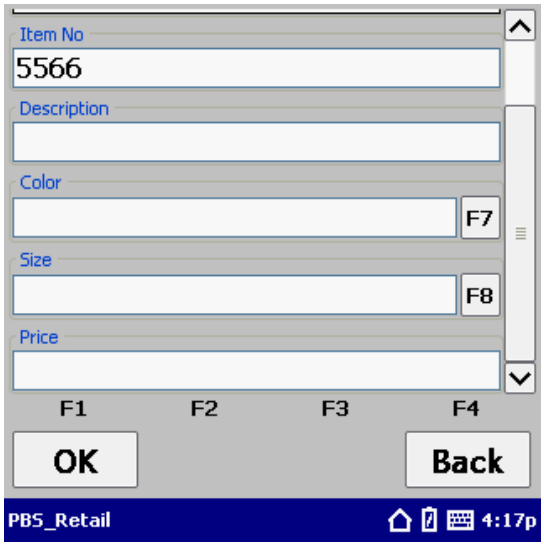
Standard Mode



Fashion Extensions

If Fashion extensions are enabled, then the user must also enter in a color and size.





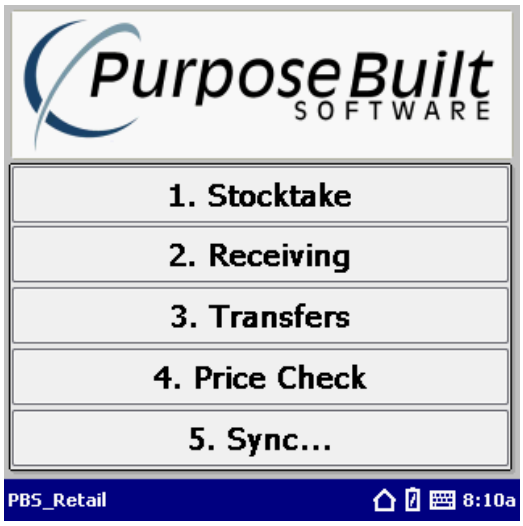
6 PDA Main Menu

When the PDA is booting and PBS Retail is starting up you will be presented with the following screen

Soon after you will be presented with the following menu. You MUST perform at least ONE Sync before you can use your PDA. Select "Get Reference Data" from within the Sync option.

Before Sync

After Sync



You may select from the option by pressing the corresponding option number.
Note: Price Check will be disabled if no item data has been downloaded.

Function Keys available from MAIN MENU

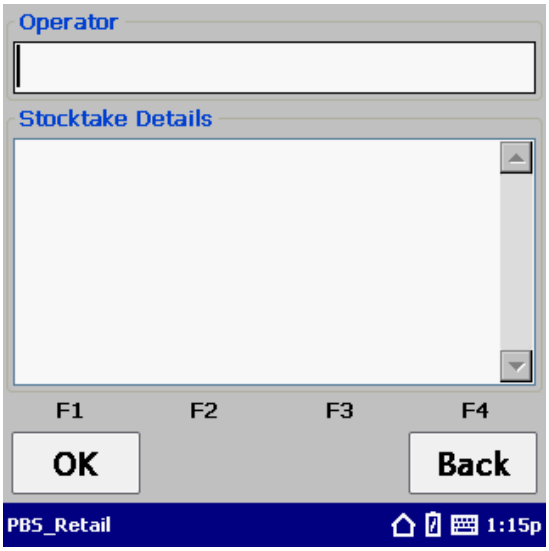
Key	Description
F1	Launch Stocktake Module
F2	Launch Receiving Module
F3	Launch Transfers Module
F4	Launch Price Verify Module
F5	Sync data with Host PC
F6	PDA Settings. See Section 5.1
F7	Server Settings. See Section 5.1.4
F8	Display Version Information
F9	Exit Application
F10	SD Card Backup / Restore Options

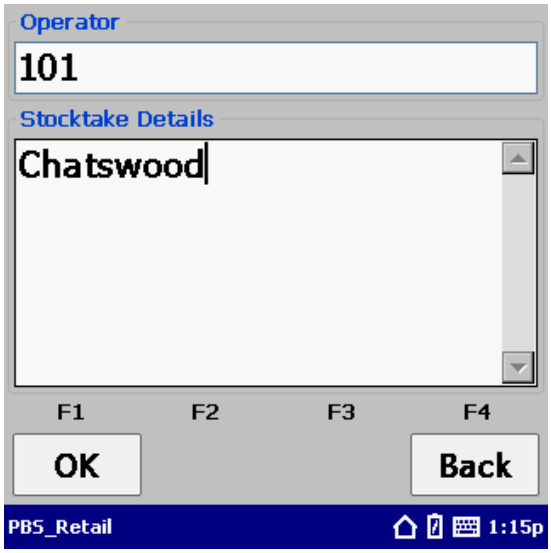
6.1 Stocktake

If existing stocktakes are present on the PDA, then these will be listed here. You may elect to add to an existing stocktake or create a new stocktake. The "Tick" on the left hand side of the screen indicates the stocktake details will be sent to the back office during the next sync.

6.1.1 New Stocktake

Enter in the details for the Stocktake. This includes Operator ID and Stocktake Details.





Press F1 or ENTER after the details have been completed.

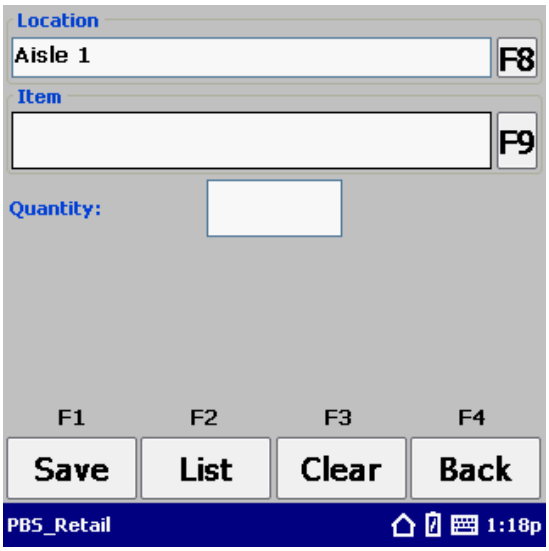
6.1.2 Location Required

The entry of a location is controlled by PBS Retail Connect. The location may or may not be required (or in fact optional).

Pressing F5 will toggle the display of the Location field (Hide / Display) as shown below.

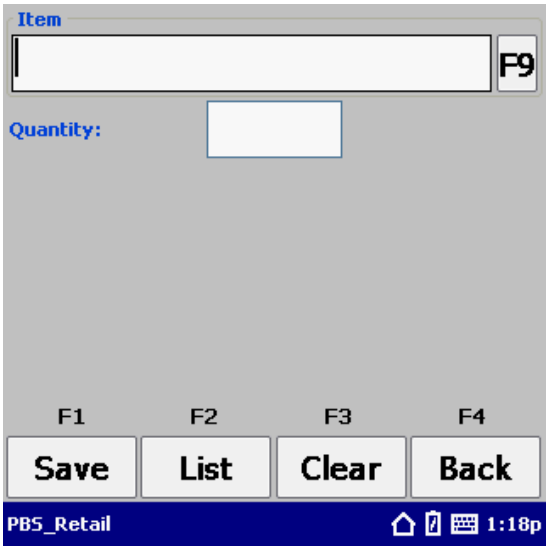
If a location is required, then you must scan or select a location from the list. Selecting a location from the list is described in Section X.X.

In the example below, Aisle 1 has been selected.



To change the location, simply scan a new location or select a new location from the location selection list.

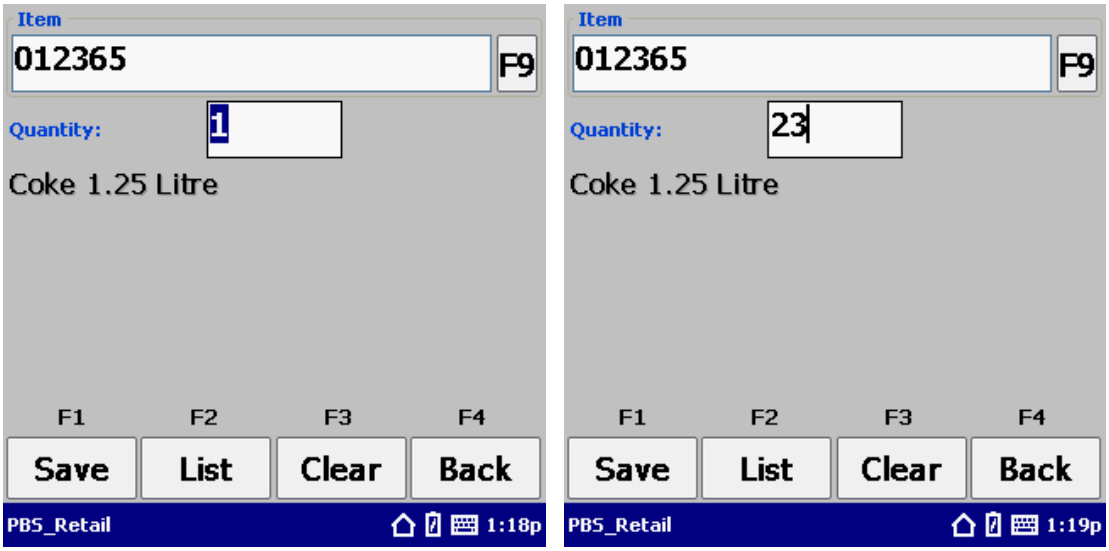
As there is not enough room on the screen to display all fields, Press F5 to hide the location details. The screen will appear as follows. Start Scanning items that are to be included as part of the stocktake.



6.1.3 Scanning Items

Scan an item or press F9 and select an item from the list.

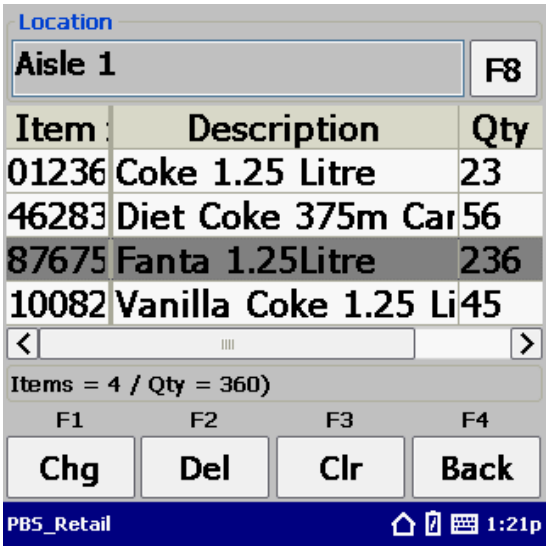
By default the quantity is "1". This quantity may be changed by simply using the PDA keyboard to enter in the correct quantity.

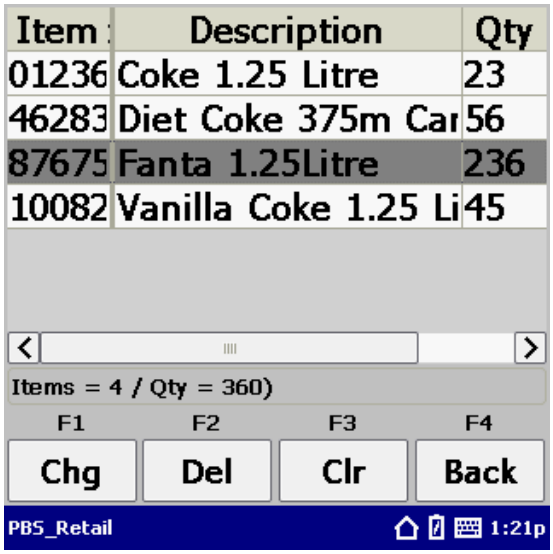


Key	Description
F1	The currently highlighted item is saved. If a valid item is on the screen, then it will be saved anyway, such as when scanning a new barcode, reviewing the scans to date etc.
F2	Review the items that have been scanned to date.
F3	Clear the details that are on the screen. The details are NOT recorded.
F4	Go back to the main menu.
F5	Toggle display of Location Details.
F10	Show help screen.

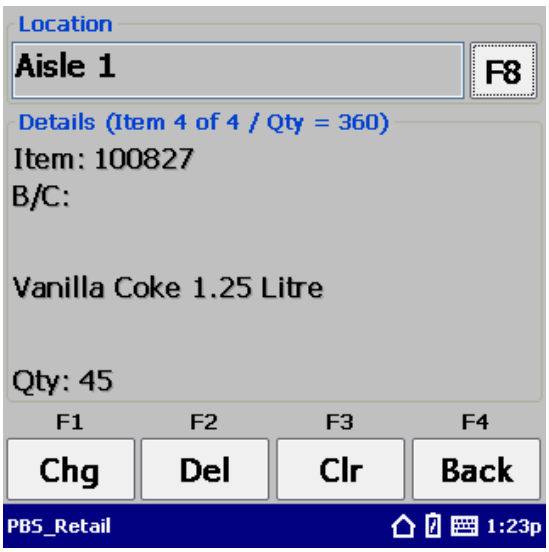
6.1.4 Stocktake Review

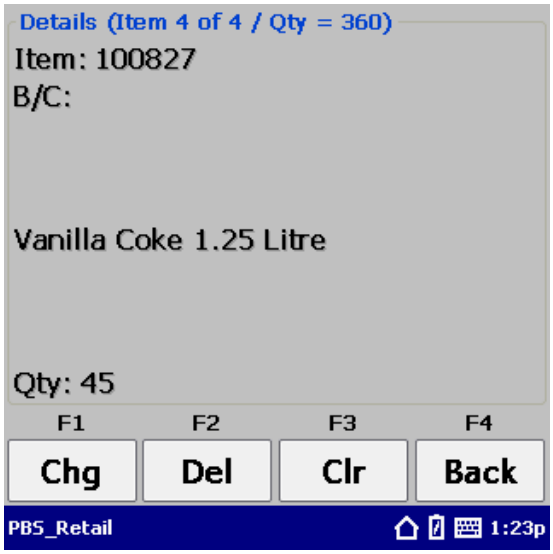
The items scanned to date may be reviewed at any time. Similar to the stocktake scanning screen, the Location details may be hidden by pressing F5 as shown below. This gives a larger display area for the item list.





OR



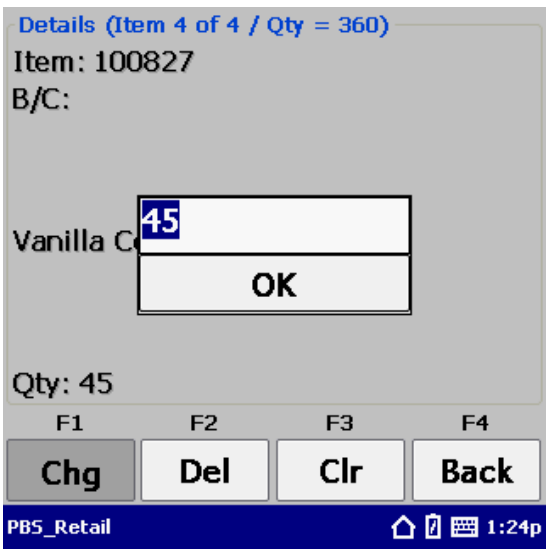


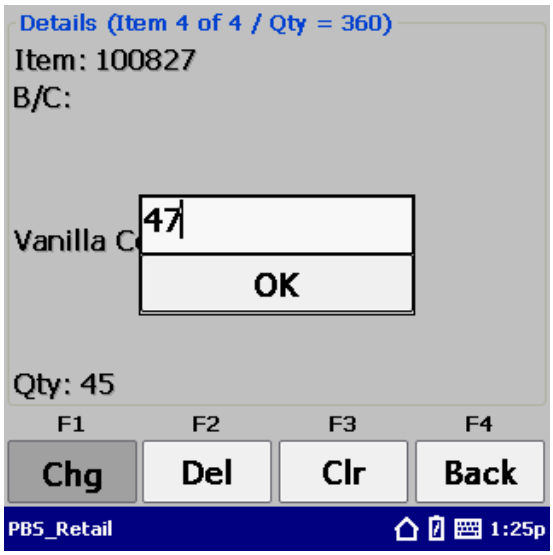
You may also scan the item you are looking for to save having to scroll thru multiple items.

Key	**Description**
F1	Change the quantity of the currently highlighted item
F2	Delete the currently highlighted item.
F3	Clear the stocktake items from the current location (if tracking locations). If location are not being tracked, then the entire stocktake will be deleted.
F4	Go back to the scanning screen.
F5	Toggle display of Location Details.
F6	Adjust Column Widths
F10	Show help screen.

6.1.4.1 Change Quantity

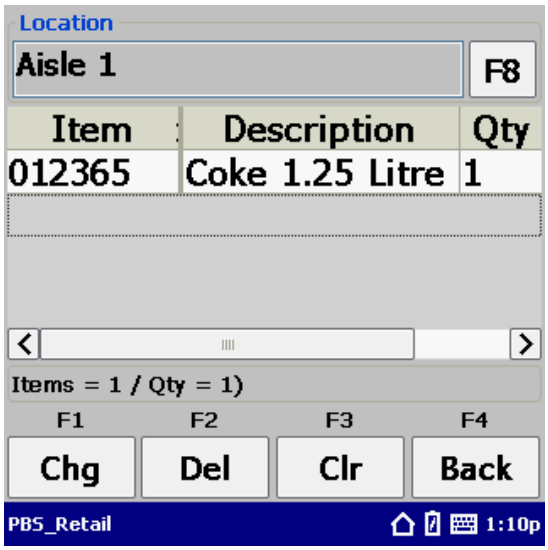
Press the F1 key to change the quantity. Use the PDA keyboard to enter in the new quantity. Press ENTER to save.





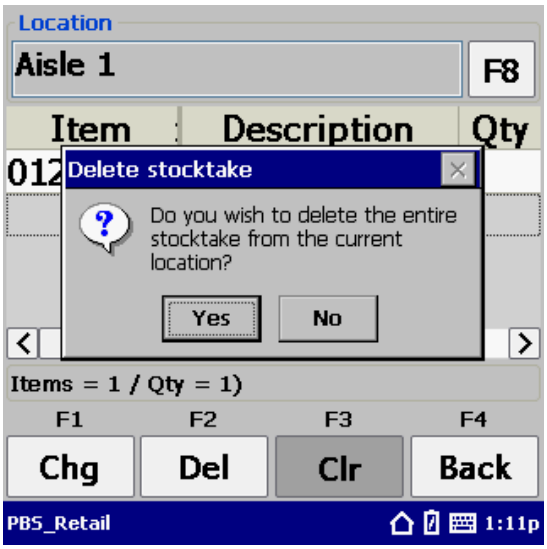
6.1.4.2 Delete the currently highlighted item

Press the F2 key to delete the currently highlighted item. Press ENTER to delete or tab across (so the "No" button is highlighted) and press ENTER.



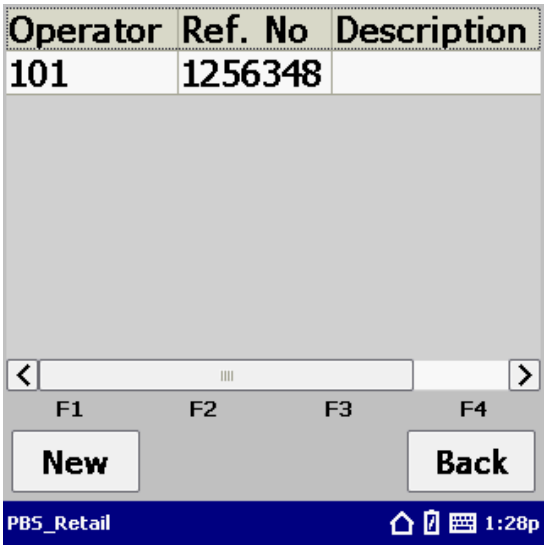
6.1.4.3 Clearing the stocktake

Press F3 to clear the entire stocktake. If a location is selected, then the stocktake details for that location will be deleted. If there is no location, then the ENTIRE stocktake will be deleted.



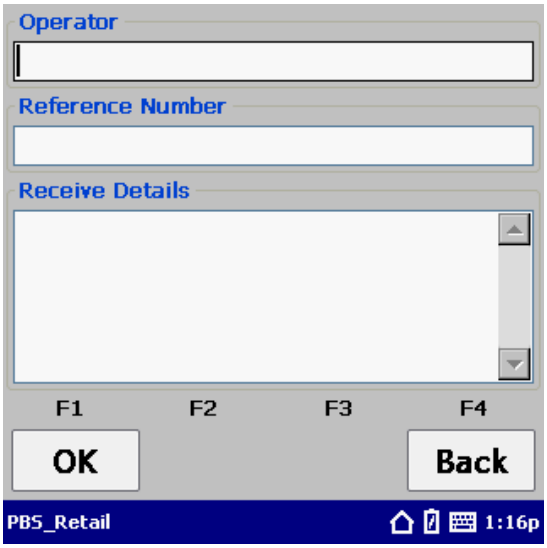
6.2 Receiving

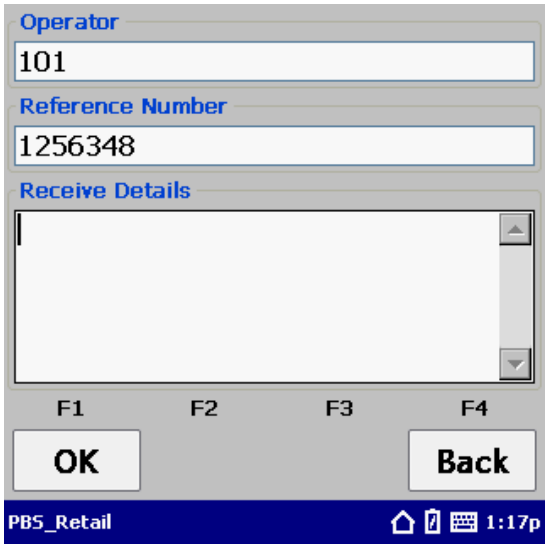
If existing receiving batches are present on the PDA, then these will be listed here. You may elect to add to an existing batch or create a new batch. The "Tick" on the left hand side of the screen indicates the receiving batch details will be sent to the back office during the next sync.



6.2.1 New Receiving Batch

Enter in the details for the receiving batch. This includes Operator ID, Reference Number and any other details.





Press F1 or ENTER after the details have been completed.

6.2.2 Scanning Items

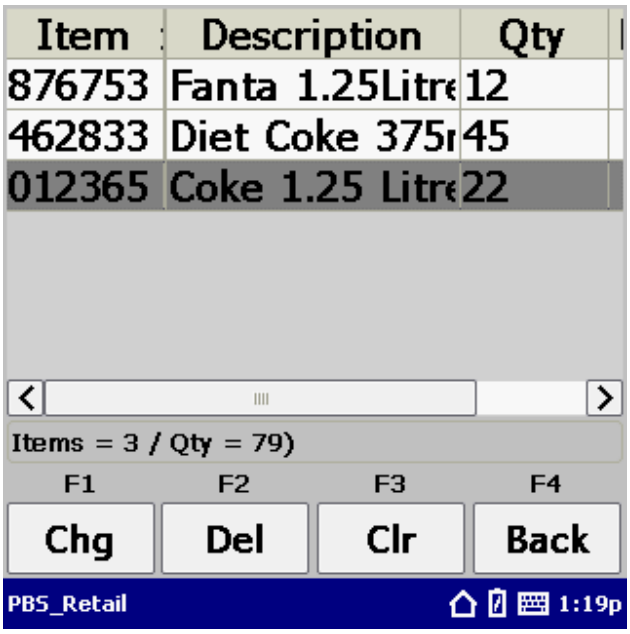
Scan an item or press F9 and select an item from the list.

By default the quantity is "1". This quantity may be changed by simply using the PDA keyboard to enter in the correct quantity.

Key	Description
F1	The currently highlighted item is saved. If a valid item is on the screen, then it will be saved anyway, such as when scanning a new barcode, reviewing the scans to date etc.
F2	Review the items that have been scanned to date.
F3	Clear the details that are on the screen. The details are NOT recorded.
F4	Go back to the main menu.
F10	Show help screen.

6.2.3 Receiving Review

The items scanned to date may be reviewed at any time.

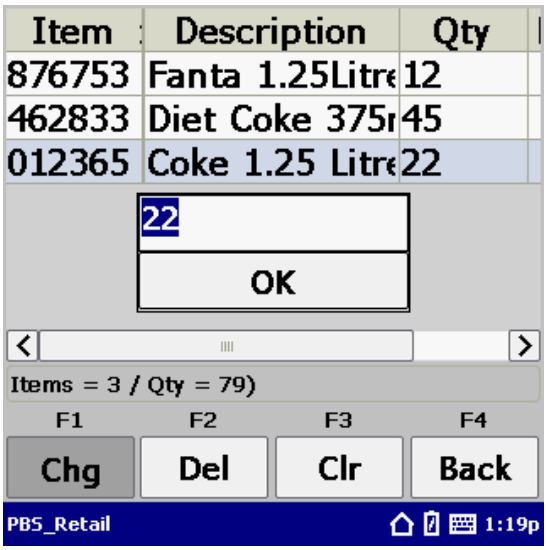


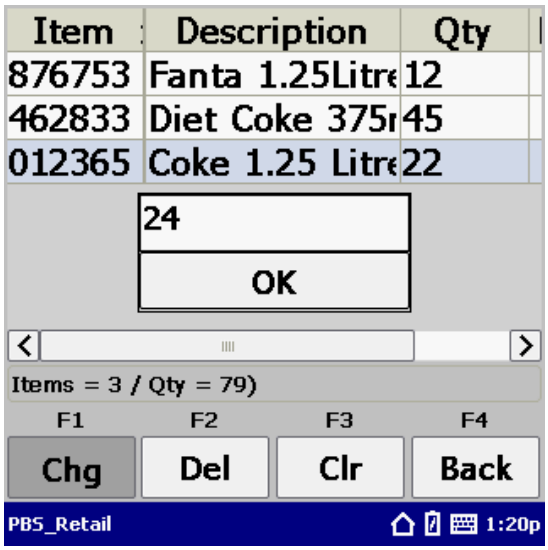
You may also scan the item you are looking for to save having to scroll thru multiple items.

Key	**Description**
F1	Change the quantity of the currently highlighted item
F2	Delete the currently highlighted item.
F3	Clear the receiving items for this batch and start over.
F4	Go back to the scanning screen.
F6	Adjust Column Widths
F10	Show help screen.

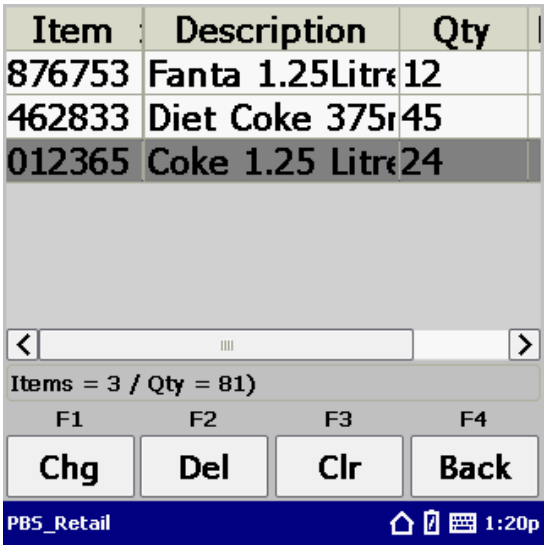
6.2.3.1 Change Quantity

Press the F1 key to change the quantity. Use the PDA keyboard to enter in the new quantity. Press ENTER to save.



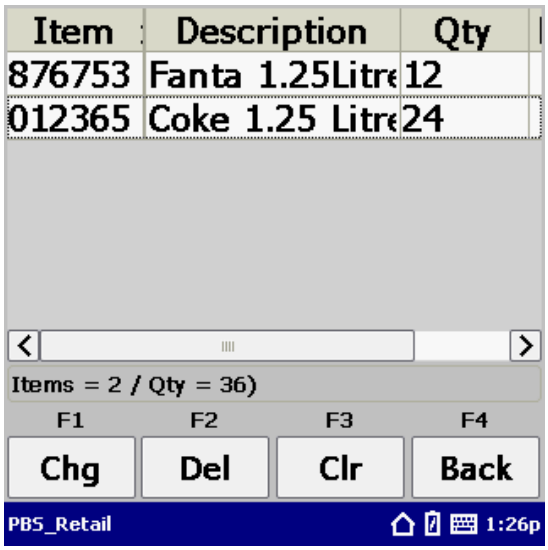


Press ENTER to accept the new quantity.



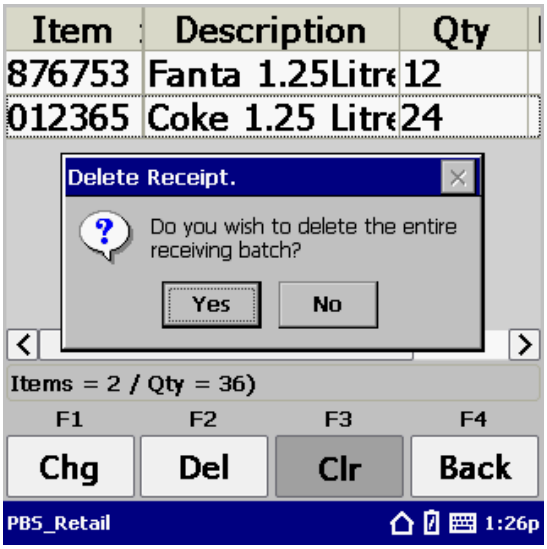
6.2.3.2 Delete the currently highlighted item

Press the F2 key to delete the currently highlighted item. Press ENTER to delete or tab across (so the "No" button is highlighted) and press ENTER.



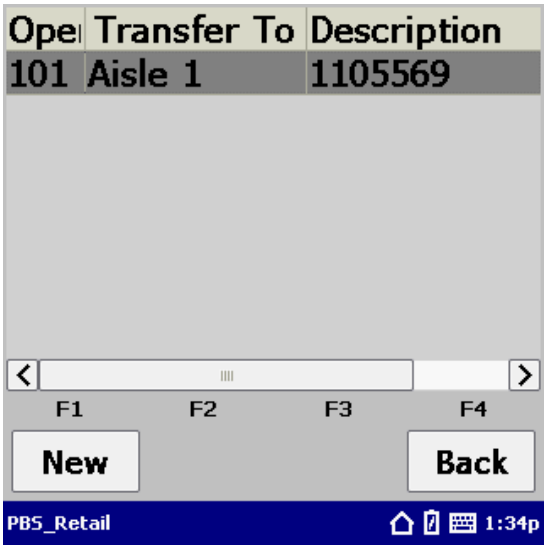
6.2.3.3 Clearing the Receiving batch

Press F3 to clear the entire receiving batch.



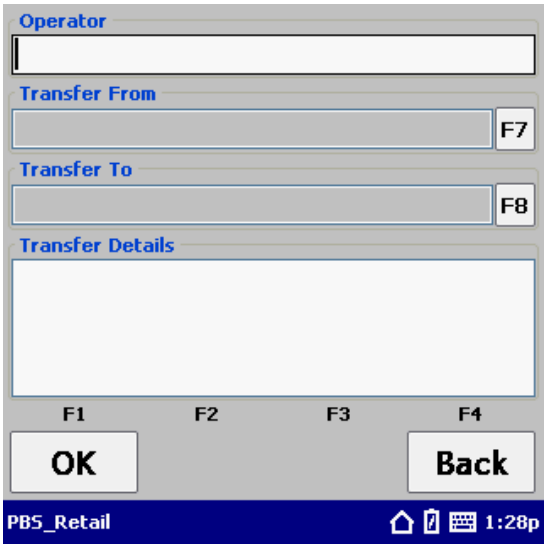
6.3 Transfers

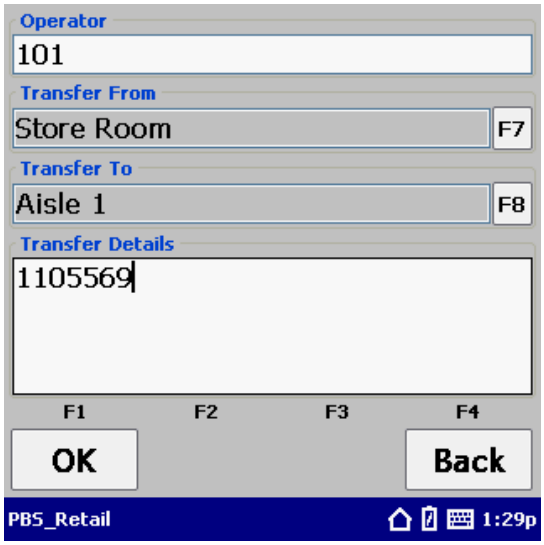
If existing transfer batches are present on the PDA, then these will be listed here. You may elect to add to an existing batch or create a new batch. The "Tick" on the left hand side of the screen indicates the transfer batch details will be sent to the back office during the next sync.



6.3.1 New Transfer Batch

Enter in the details for the transfer batch. This includes Operator ID, Transfer Location and any other details.



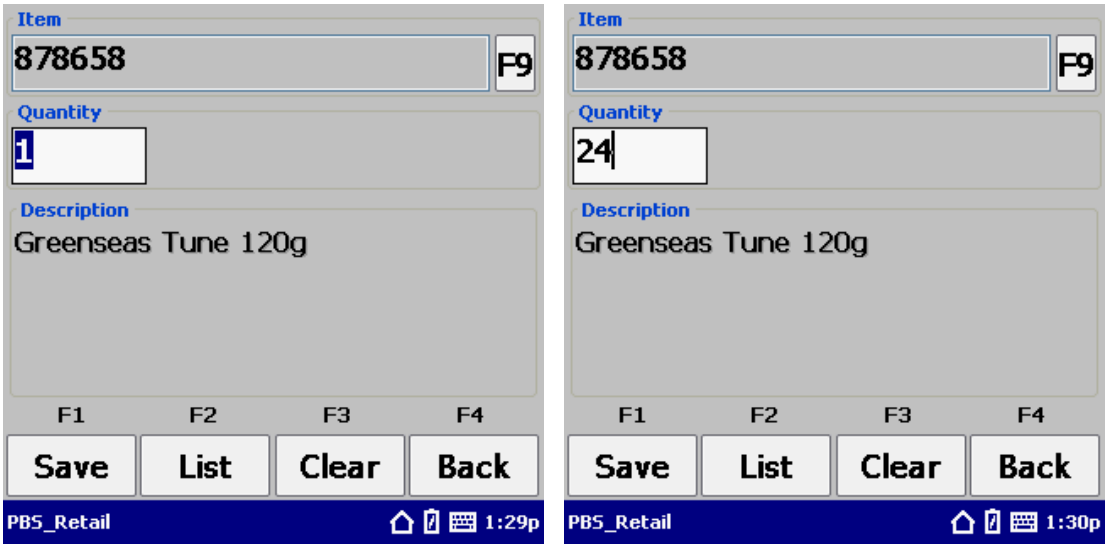


Press F1 or ENTER after the details have been completed.

6.3.2 Scanning Items

Scan an item or press F9 and select an item from the list.

By default the quantity is "1". This quantity may be changed by simply using the PDA keyboard to enter in the correct quantity.



Key	Description
F1	The currently highlighted item is saved. If a valid item is on the screen, then it will be saved anyway, such as when scanning a new barcode, reviewing the scans to date etc.
F2	Review the items that have been scanned to date.
F3	Clear the details that are on the screen. The details are NOT recorded.
F4	Go back to the main menu.
F10	Show help screen.

6.3.3 Transfer Review

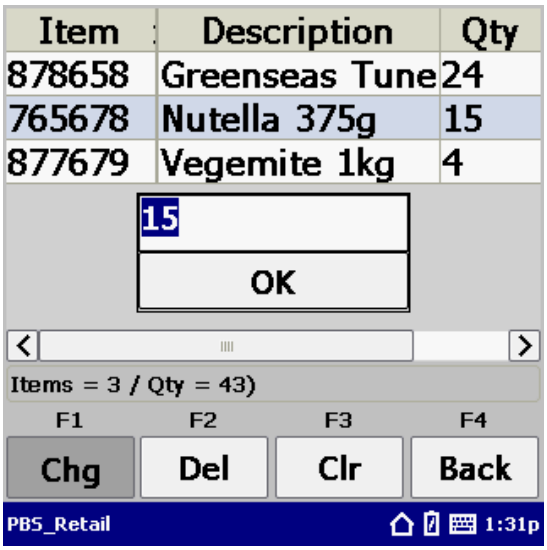
The items scanned to date may be reviewed at any time.

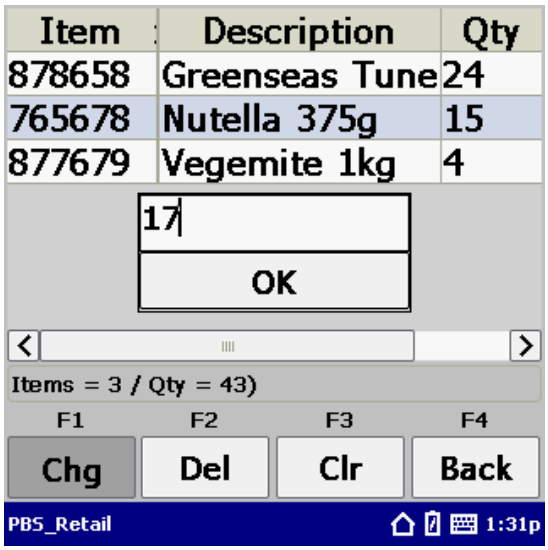
You may also scan the item you are looking for to save having to scroll thru multiple items.

Key	**Description**
F1	Change the quantity of the currently highlighted item
F2	Delete the currently highlighted item.
F3	Clear the items for this batch and start over.
F4	Go back to the scanning screen.
F6	Adjust Column Widths
F10	Show help screen.

6.3.3.1 Change Quantity

Press the F1 key to change the quantity. Use the PDA keyboard to enter in the new quantity. Press ENTER to save.





Press ENTER to accept the new quantity.

6.3.3.2 Delete the currently highlighted item

Press the F2 key to delete the currently highlighted item. Press ENTER to delete or tab across (so the "No" button is highlighted) and press ENTER.

6.3.3.3 Clearing the Transfer batch

Press F3 to clear the entire batch.

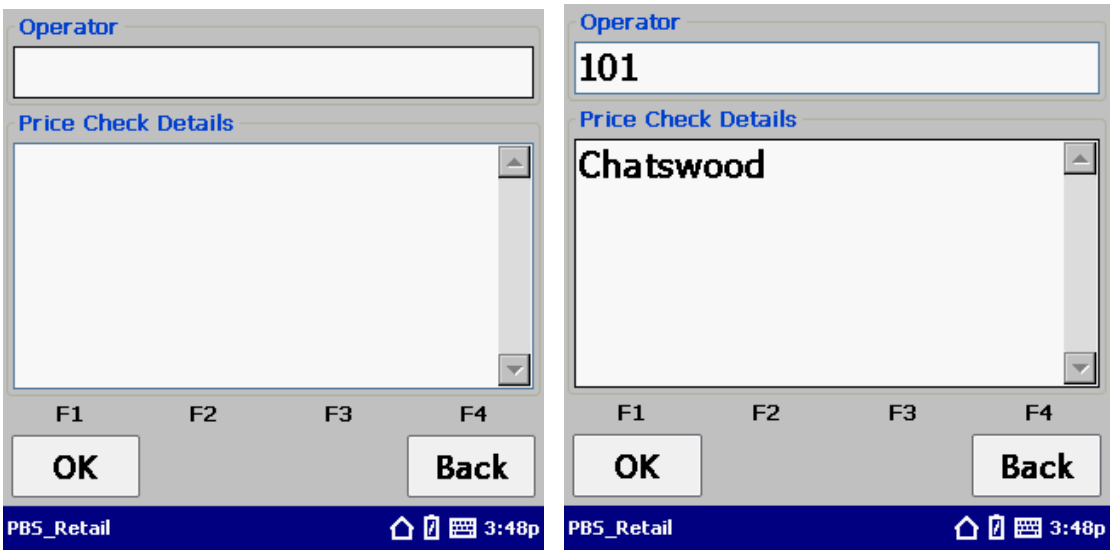
6.4 Price Check

The price check application will only be available if there is an item file downloaded onto the PDA. The item file is required so that the current price can be displayed on the screen.

If existing Price Check batches are present on the PDA, then these will be listed here. You may elect to add to an existing batch or create a new batch. The "Tick" on the left hand side of the screen indicates the price check batch details will be sent to the back office during the next sync.

6.4.1 New Price Check Batch

Enter in the details for the price check batch. This includes Operator ID and any other details.



Press F1 or ENTER after the details have been completed.

6.4.2 Scanning Items

Scan an item or press F9 and select an item from the list.

Key	Description
F1	The currently highlighted item is saved. If a valid item is on the screen, then it will be saved anyway, such as when scanning a new barcode, reviewing the scans to date etc.
F2	Review the items that have been scanned to date.
F3	Clear the details that are on the screen. The details are NOT recorded.
F4	Go back to the main menu.
F7	If Fashion Extensions is enabled, then Additional information will be displayed. i.e. Category, Season, etc…
F10	Show help screen.

Price Check gives you the ability to

1. Request a label be printed
2. Enter in a new Price
3. Keep track of all the items that have had their price checked.

6.4.3 Label Request

If a new label is required, then by simply pressing F5, this will inform PBS Retail that a new label is required for this particular product. Press F5 again to un request the label. F5 will act as a toggle for label request.

You may now scan another product to check its price etc.

6.4.4 New Price

If the price of an item is incorrect, then you may enter in the correct price. This will automatically request a label.

Pressing F6 allows you to enter in the new price. The current price is highlighted and ready to be changed.

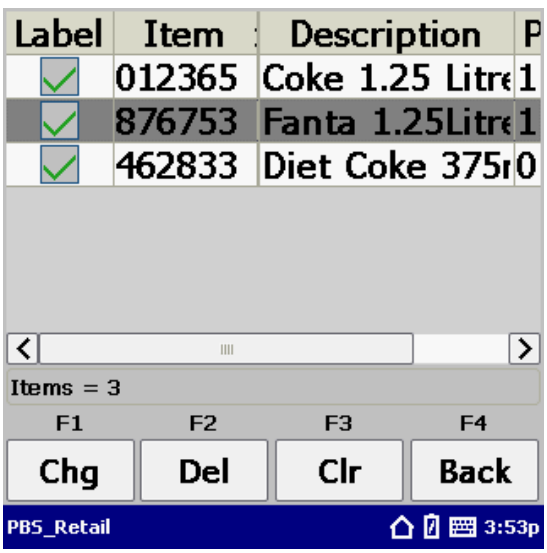
You can always un-request the price change by pressing F6 again.

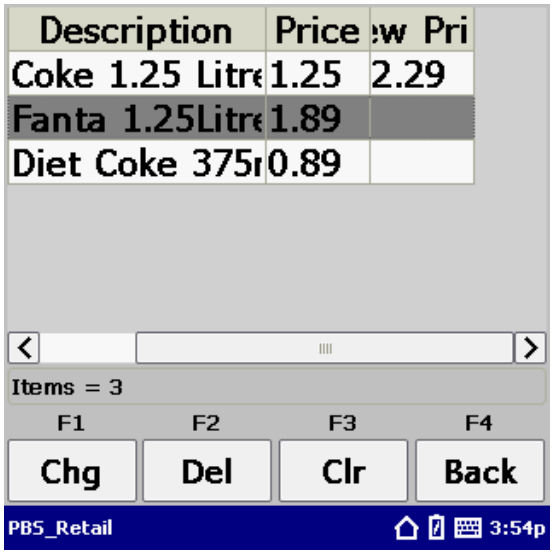
F7

If Fashion Extensions is enabled, then Additional information will be displayed. I.e. Category, Season, etc…

6.4.5 Price Check Review

The items scanned to date may be reviewed at any time. Use the arrow keys to scroll left and right to reveal all the information.



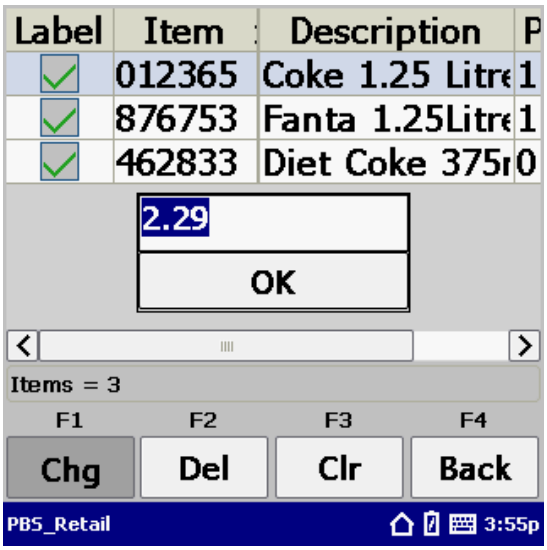


You may also scan the item you are looking for to save having to scroll thru multiple items.

Key	Description
F1	Change the new price of the currently highlighted item
F2	Delete the currently highlighted item.
F3	Clear the items for this batch and start over.
F4	Go back to the scanning screen.
F6	Adjust Column Widths
F10	Show help screen.

6.4.5.1 Change New Price

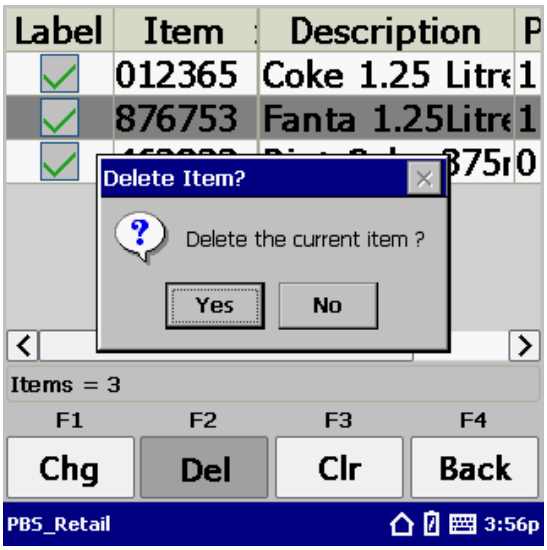
Press the F1 key to change the new price. Use the PDA keyboard to enter in the new price. Press ENTER to save.

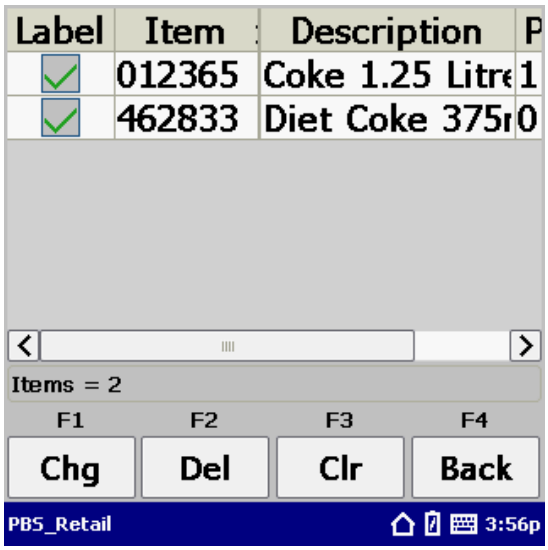


Press ENTER to accept the new price

6.4.5.2 Delete the currently highlighted item

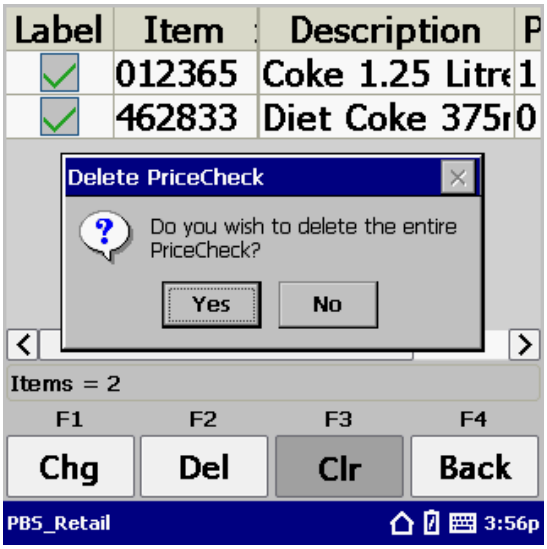
Press the F2 key to delete the currently highlighted item. Press ENTER to delete or tab across (so the "No" button is highlighted) and press ENTER.





6.4.5.3 Clearing the Price Check batch

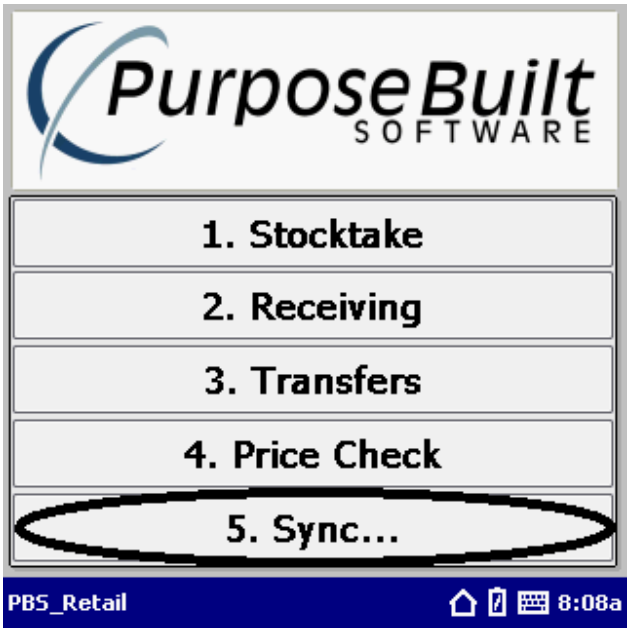
Press F3 to clear the entire batch.



6.5 Sync

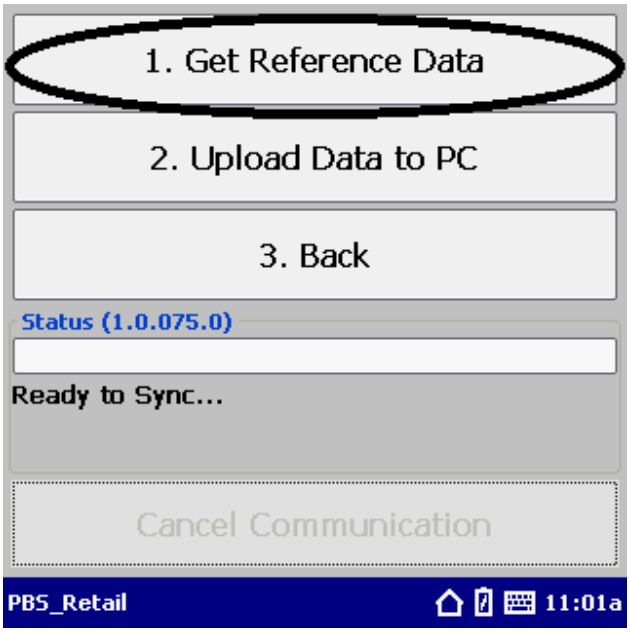
Once you have collected your data, then you need to UPLOAD that data to the host PC.

From the Main Menu select option 5.

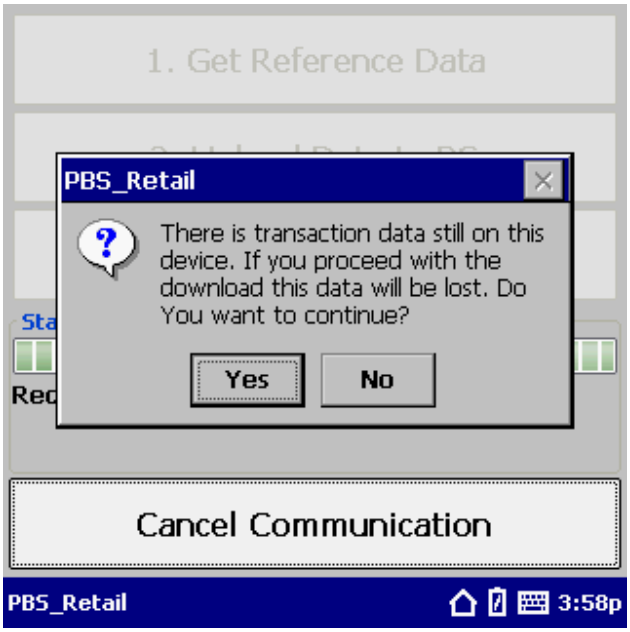


6.5.1 Get Reference Data

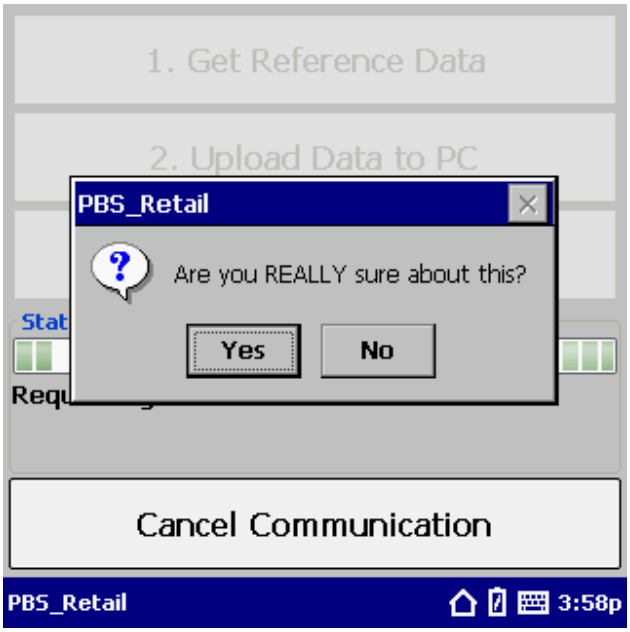
Get reference data will download the item data / location data and PDA configurations as dictated by the PBS Retail Connect Application. Any changes to the PDA conficurations in PBS Retail Connect MUST be downloaded via the Get Reference Data option.



If there is already transaction data on the PDA, you will be warned that getting new reference data will ERASE the existing transactional data.

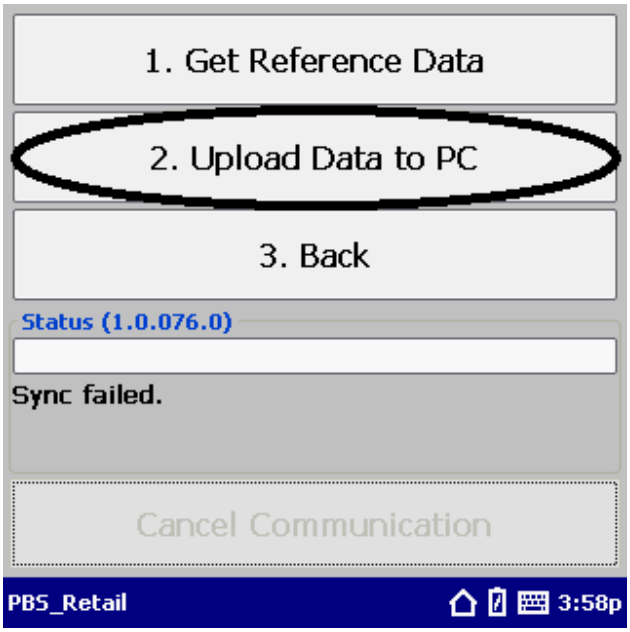


You will be asked to CONFIRM.



6.5.2 Upload Data to PC

Once data has been collected on the PDA, option 2, Upload Data to PC should be used to send the data from the PDA to the PC.



7 Product Notify

Product notify is used to record details about an item does not exist in the PDA's database. It may also be used to associate item numbers and barcodes for new stock items that are received at the back dock for example.

Items can sometimes appear on the shelf however may not be accurately recorded within the POS back office system. Product Notify is an option that enables the accurate recording of

7.1 Standard Mode

Item Number
Barcode
Description
Price

7.2 Fashion Extensions

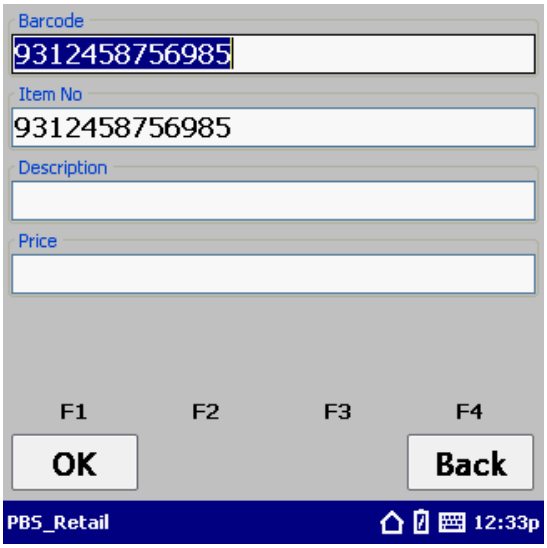
Item Number
Barcode
Style
Color
Size
Price

7.3 Details

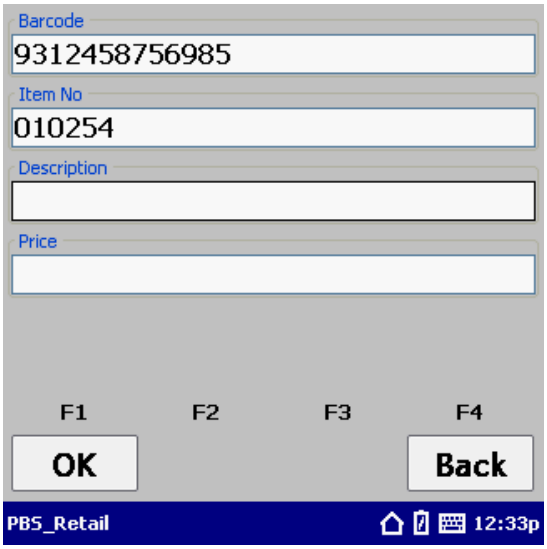
If a barcode is scanned that does NOT exist in the PDA's database, the product Notify screen may be displayed (depending on PDA options).

Assuming the PDA options are configured to allow the product notify screen to display, the user will be confronted with the following screen.

7.3.1 Standard Mode



The item number / barcode scanned is populated into the barcode and item number fields. The Item Number may be scanned again if it is different. When a barcode is scanned on this screen, the field that has FOCUS will accept the barcode. This gives the user flexibility in deciding if the barcode or the item number needs changing.



In this case the user has entered in a six digit item code specific to the users business.

Optionally a Description and Price may be entered into the PDA. These are optional fields and need not be completed.

7.3.2 Fashion Extensions

The item number / barcode scanned is populated into the barcode and item number fields. The Item Number may be scanned again if it is different. When a barcode is scanned on this screen, the field that has FOCUS will accept the barcode. This gives the user flexibility in deciding if the barcode or the item number needs changing.

As we have fashion extensions enabled, the user must select a color and size to COMPLETE the product notify.

Optionally a Description / style and Price may be entered into the PDA. These are optional fields and need not be completed.