

# **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 is a Windows Mobile / CE application and will run on the MC1000 and MC3000 devices from Motorola. These devices are proven in the harsh retail / warehouse environment and ergonomically, are far superior to any other device on the market today.

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:

The screen displays in the PDA section of this user guide feature the MC3000.

# 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 <a href="http://www.microsoft.com">www.microsoft.com</a>.

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.

PBS_RetailServer					
Purpose Built					
Server	PDA				
Import	About				
Export	Exit				

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.

🦉 Server Settings	×			
Server Settings -				
Server Address:	localhost			
Remote Address:				
Server Port:	8568			
🗌 Minimise to System Tray 🔽 Autostart Server				
Server is running Stop Server Close				

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

🧗 Import Files					×	
Import File details Select the item file that is to be downloaded to the PDA Format of file must be Item No, Description, Price (opt), OtyOnHand (opt)						
C:\Projects\PBS_Retai	l\Data\ite	m.csv				
Remove Inclu	ude Fashio	n Extensions				
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Optionally select additional barcode file where multiple barcodes are available for the same item. Format of file must be Barcode, Item Number					
C:\Projects\PBS_Reta	il\Data\ba	rcode.csv				
Remove						
Optionally select a loca Format of file must be		D, Location Description				
Remove						
Item Statistics		Barcode Statistics		CLocation Statistics		
Total Records	0	Total Records	0	Total Records	0	
Records Processed	0	Records Processed	0	Records Processed	0	
Records Discarded	0	Records Discarded	0	Records Discarded	0	
Automatically check for updates every 5 Sec.						
(PBS_Retail will stop polling when this file is present in the item import folder Import All Now Cancel OK						

#### 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...

📔 Import Files					X	
/ Import File details						
Select the item file that is to be downloaded to the PDA Format of file must be Item No, Style, Category(opt), Label(opt), Season(opt)						
C:\Projects\PBS_Retai						
Remove Incl	ude Fashi	on Extensions				
		ode file where multiple ba Item Number, Color, Siz				
C:\Projects\PBS_Reta	il\Data\bata	arcode.csv				
Remove						
Ontinently salest a lase						
Optionally select a loca Format of file must be		ID, Location Description				
	Location					
Remove						
Item Statistics		Barcode Statistics		CLocation Statistics		
Total Records	0	Total Records	0	Total Records	0	
Records Processed	0 Records Processed 0 Records Processed				0	
Records Discarded	arded 0 Records Discarded 0 Records Discarded 0					
Automatically check for updates every 5 Sec.						
(PBS_Retail will stop polling whe	n this file is p	resent in the item import folder	Import	All Now Cancel	ОК	

#### 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.

🧗 Import Files					×		
Import File details							
Select the item file that is Format of file must be Ite			el(opt), Se	ason(opt)			
C:\Projects\PBS_Retail\	Data\item	.CSV					
Remove V Includ	e Fashion	Extensions					
Optionally select addition Format of file must be B							
			e, cost Pric	e(opt), Seir Price(opt), s			
C:\Projects\PBS_Retail	,Data\bard	code.csv					
Remove							
Optionally select a locati	on file.						
Format of file must be Lo	cation ID	, Location Description					
Remove							
Item Statistics		Barcode Statistics		Location Statistics			
Total Records	0	Total Records	0	Total Records	0		
Records Processed	0	Records Processed	0	Records Processed	0		
Records Discarded	0	Records Discarded	0	Records Discarded	0		
Automatically check for updates every 1 Min.							
File Marker Name:							
(PBS_Retail will stop polling when this file is present in the item import folder Import All Now Cancel OK							

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.

🦉 Import Files				×
Import File details				
Select the item file that is to l	e downloaded to the PDA			
Format of file must be Item N	o, Style, Category(opt), La	bel(opt), Se	ason(opt)	
C:\Projects\PBS_Retail\Data	\item.csv			
Remove Include Fa	shion Extensions			
Optionally select additional b	arcode file where multiple b	arcodes are	e available for the same	item.
Format of file must be Barco	le, Item Number, Color, Siz	ze, Cost Prid	e(opt), Sell Price(opt),	SOH(opt)
C:\Projects\PBS_Retail\Data	\barcode.csv			
Remove				
Optionally select a location fi	e.			
Format of file must be Location	on ID, Location Description			
Bamaua				
Remove				
Item Statistics	Barcode Statistics		CLocation Statistics	
Total Records 0	Total Records	0	Total Records	0
Records Processed 0	Records Processed	0	Records Processed	0
Records Discarded 0	Records Discarded	0	Records Discarded	0
Automatically check for updates every 1 Min.				
File Marker Name: STOPPOLL.TXT				
(PBS_Retail will stop polling when this file is present in the item import folder Import All Now Cancel OK				

# 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.

<u>//</u> Export						×
Select Module to configure						
Stocktake Transfers Receiving Price Verify Product Notify						
Export File Path Select the folder locat	ion that the	PDA data is to	o be placed in.			
C:\Projects\PBS_Ret						
Export File Names						
Build up the file name (PDA ID, Date, Time). is performed.						
eg Stocktake_{PDAN/		Note : Curly B	races {} do no	ot makeup	part of the	e file name.)
Stocktake_Export.txt						
Insert Store No.	Inse	rt PDA ID	Insert D	Date	Inse	ert Time
Append (if file nam	e already e	xists)				
Consolidate Totals			Date Format		Time Forn	nat
Create a seperate	file for each	n batch	DDMMYYYY	*	HHMMSS	▼
Header	(0010) (01					
{STORENO}{PDAID}						
	PDA ID	Ins. Op. Id	Ins. Desc.	Ins.	Date	Ins. Time
Detail Records	Order —	width by Fill	Char			
Location ID	N/A 🗸		one	~		
Location Desc	N/A ¥		one	~		
Item No	1 🗸		one	~		
Barcode	N/A V		one	~		
Description	N/A ¥		one	~		
Additional Info	N/A ¥		one	~		
Quantity						
Date Time	2 ¥		one	~		
Store No.			one			
	N/A ¥		one	~		
PDA ID	N/A 🚩		one	<b>~</b>		
Field Separator ♦ None ♦ Comma ♦ TAB ♦ Pipe ( )						
CTrailer						
{RECCOUNT}						
Insert Record Count						
Executable to launch on completion of upload						
C:\Projects\PBS_Ret	ail\Reforma	t.exe				
						ок

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 conf				A = 1 + 1 + 1
Stocktake Orransfers Receiving Price Verify Product Notify				
Export File Path Select the folder locat	tion that the PDA dat	a is to be placed in	ı.	
C:\Projects\PBS_Ret				
Export File Names				
Build up the file name (PDA ID, Date, Time) is performed. eg Stocktake_{PDAN	). This will build up a AME}.csv (Note : Cu	file name that the	PDA will crea	ate next time a sync
Stocktake_Export.tx				
Insert Store No.	Insert PDA ID	D Insert	Date	Insert Time
Append (if file nam				
Consolidate Totals		Date Format		me Format
Create a seperate	file for each batch	DDMMYYYY		HHMMSS ¥
{STORENO}{PDAID	1			]
		TH The Deer	Les D	aba Tao Tima
	PDA ID Ins. Op.	Id Ins. Desc	. Ins. D	ate Ins. Time
Detail Records	Order	Fill Char		
Location ID	N/A 💙	None	~	
Location Desc	1 🗸	None	~	
Item No	2 🗸	None	~	
Barcode	N/A 💙	None	~	
Description	N/A 🗙	None	~	
Additional Info	N/A 💙	None	~	
Quantity	3 🗸	None	~	
Date Time	N/A 🖌	None	~	
Store No.	N/A 🗙	None	~	
PDA ID	N/A 🗸	None	~	
Field Separator				
Trailer				
{RECCOUNT}				
Insert Record Count				
Executable to launch on completion of upload				
				ОК

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					duct Notify		
Export File Path Select the folder locat	tion that	the PDA da	ta is to	be placed in			
C:\Projects\PBS_Ret			10 10 10	be placed in			
Export File Names							
Build up the file name (PDA ID, Date, Time) is performed. eg Stocktake_{PDAN	. This w	rill build up	a file na	ame that the	PDA will c	reate next ti	me a sync
Stocktake_Export.txt	:						
Insert Store No.	I	nsert PDA I	D	Insert (	Date	Inser	t Time
Append (if file nam	ne alread	dy exists)				~ <u></u>	
Consolidate Totals				Date Format		Time Forma	at
Create a seperate	file for e	each batch	(	DDMMYYYY	~	HHMMSS	~
Header							
{STORENO}{PDAID]	}						
	PDA ID	Ins. Op	o. Id	Ins. Desc.	. Ins.	Date	Ins. Time
Detail Records	Order	Width	n c Fill (	Char			
Location ID	N/A	✓	No	ne	~		
Location Desc	N/A	~	No	ne	~		
Item No	1	✔ 20	Sp	ace, Right	~		
Barcode	N/A	~	No	ne	~		
Description	N/A	✓	No	ne	~		
Additional Info	N/A	~	No	ne	~		
Quantity	2	✔ 5	Ze	ro, Left	~		
Date Time	N/A	~	No	ne	~		
Store No.	N/A	~	No	ne	~		
PDA ID	N/A	~	No	ne	~		
Field Separator							
Trailer							
Insert Record Count							
Executable to launch on completion of upload							
							ОК

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.

🜈 PDA Settings			×
Applications Ref. Da	ta 🔍 Stocktake Options 🔍 Receiving Options 🔍 Transfer Options	Price C	heck
Applications			]
Stocktake	Multiple Batches		
Receiving	Multiple Batches		
✓ Transfers	Multiple Batches		
Price Verify	Multiple Batches		
Review			
Allow user to clear data ?			
Allow user to change quantity	y in review mode ?		
Allow user to delete an item			
If the "allow" options as detailed applications without having to en	d above are activated, then the operator may clear, change and delete data in the nter the supervisor password.	various	
Password			
Server Password			
***			
If a password is defined, then it	is used to restrict access to configuration options with PBS_Retail.		
PDA Password			
***			
If a password is defined, then it	is used to restrict access to certain functions on the PDA.		
Sync - Supervisor ONLY			
Supervisor Only ?			
If Supervisor Only is activated,	then the operator will be prompted for a password for any sync related activity.		
		Cancel	ок
		Cancel	UK

### 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

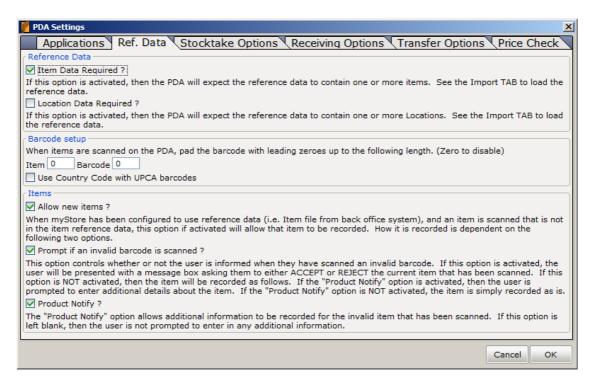
If a password has been entered in here then certain functions on the PDA will require a password to be entered in order to perform them.

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
$\checkmark$	Allow new items
$\checkmark$	Prompt if invalid barcode is scanned
$\checkmark$	Product Notify

User scans / enter an invalid barcode

User is presented with the following screen

Item				
9312458756985				
Qua	Item No	ot found		×
The item you have scanned / entered is not found. Press 'Yes' if you wish to simply record this item. Press 'No' if you wish to record additional information about the item. Press 'Cancel' to discard this item				
Yes No Cancel				
F1 F2 F3 F4				
S	ave	List	Clear	Back
PBS_	Retail			🛙 🥅 12:32p

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

Item			<b>F9</b>
PBS_Ret	tail		ок 🗙
		tion you have s ot found. A val s required.	
F1	F2	F3	F4
Save	List	Clear	Back
PBS_Retail		<u>ن</u>	🛙 🥅 12:53p

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
$\checkmark$	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.

Item 9321114	17		F9
Quantity:	1		
Not Availa	able		
F1	F2	F3	F4
Save	List	Clear	Back
PB5_Retail			🛿 🥅 12:58p

#### 4.5.1.1.7.3.4 Example #4

Setting	Option
$\checkmark$	Allow new items
	Prompt if invalid barcode is scanned
$\checkmark$	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.

r Barcode			
93211147			
Item No			
93211147			
Description			
Price			
F1	F2	F3	F4
ОК			Back
			Dack
PBS_Retail		1	🛆 🛛 🖂 1:04p

### 4.5.1.1.8 Stocktake Tab

🚰 PDA Settings
Applications Ref. Data Stocktake Options Receiving Options Transfer Options Price Check
Stocktake Options
/ Locations
Prompt For Locations ?
☑ Locations Required ?
☑ Allow New Locations ?
/ Duplicate barcodes
Disallow duplicate barcodes (current Location)
Disallow duplicate barcodes (entire batch)
Additional Information
Prompt for Additional information like Serial No, Batch Number etc.
Note: When this option is activated, after a barcode is scanned or manually entered, the cursor will be in the Additional Information Field. You may scan or manually enter details at this point. Pressing Enter will move the cursor to the quantity field.
Quantity option
☑ Allow Quantity to be changed?
Cancel OK

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.

Note: This option will NOT operate on the Symbol MC1000 due to screen size.

#### 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

PDA Settings
Applications Ref. Data Stocktake Options Receiving Options Transfer Options Price Check
Price Option
Request Price in Receiving Module
Receive Price Mandatory
Cancel OK

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

PDA Settings		
Applications Ref. Data Stocktake Options Receiving Options	Transfer Options	Price Check
Options available at this time		
	[	Cancel OK
	L	

No options available at this time...

### 4.5.1.1.15 Price Check Tab

📔 PDA Settings		×
Applications Ref. Data Stocktake Options Receiving Options Transfer Options	Price C	heck
Display Cost Price		
The RRP Price is automatically displayed. This option allows a trusted employee to view the items cost price if available	ilable.	
L		]
	Cancel	ОК
		UIX

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

PDA Settings					
PDA ID:					
Store No:					
Review Options					
F5 to toggle :	selection				
List Vie <del>w</del>					
F1	F2	F3	F4		
Save	BckUp	Date	Back		
PB5_Retail 🏠 🖸 🕅 12:34p					

## 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".

PDA Settings				PDA Settings					
PDA ID:					PDA ID:				
001					001				
Store No:					Store No:				
001					001				
Review Options			Review Options						
F5 to toggle selection				F5 to toggle selection					
Single Item	า				List View				
F1	F2	F3	F4		F1	F2	F3	F4	
Save	BckUp	Date	Back		Save	BckUp	Date	Back	
PBS_Retail		Δ	🛙 🥅 12:35p		PBS_Retail			🛙 🥅 12:36p	

This changes the way the review screen is displayed.

#### Single Item

**List View** 

-Location -				CLocation —			
Aisle 1 F8				Aisle 1	<b>F</b> 8		
-	em 1 of 2 / (	Qty = 26) —		Item	De	scription	ו Qty
Item: 012	2365			012365		1.25 Lit	
B/C:				462833	Diet	Coke 37	5m25
Coke 1.2	5 Litre			<			
Qty: 1				Items = 2 /	Qty = 26)		
F1	F2	F3	F4	F1	F2	F3	F4
Chg	Del	Clr	Back	Chg	Del	Clr	Back
PBS_Retail		2	<u>ት 🛛</u> 🖂 1:07p	PBS_Retail		2	<mark>) 🛛 🖂 1:0</mark> 9p

Single Item key pad control

Кеу	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.

Backup /	/ Restore
1. Backup	to SD Card
2. Restore fr	om SD Card
3. E	3ack
PBS_Retail	<u>∩</u> 🛛 🖽 12:44p

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.

Set Date Time							
Day	Month	Year	Hour	Mins			
1	Jan	2006	3 AM	35			
2	Feb	2007	4 AM	36			
3	Mar	2008	5 AM	37			
4	Apr	2009	6 AM	38			
5	May	2010	7 AM	39			
6	Jun	2011	8 AM	40			
7	Jul	2012	9 AM	41			
8	Aug	2013	10 AM	42			
9	Sep	2014	11 AM	43			
10	Oct	2015	12 Noon	44			
11	Nov	2016	1 PM	45			
40	D	2017	2.04	40			
F1	F2		F3	F4			
Save				Back			
PBS_Retail 🛆 🗹 🖾 12:45p							

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.

Connection	Info		
Port:			
8568			
Address:			
ppp_peer			
F1	F2	F3	F4
	12	.5	
ОК			Back
PBS Retail			◇ ⑦ ㎜ 1・44ヵ

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.

Adjust Column	Widths	Ad	just Col	umn Wi	dths
Label	~	Label			<b>^</b>
Old 20 New 20		Old 20	N	lew 20	
Item No		Item No			
Old 60 New 60		Old 60	N	lew 60	
Barcode		Barcode			
Old 60 New 60		Old 60	N	lew 60	
Description		Description			
Old 150 New 15	)	Old 150	N	lew <mark>150</mark>	
Quantity	~	Quantity			~
F1 F2 F	3 F4	F1	F2	F3	F4
Save	Back	Save			Back
PBS_Retail	🛆 🛿 🥅 12:52p	PBS_Retail			🛆 🛛 🕅 12:53p

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.

Location —			F8
Location			
Aisle 1			
Aisle 2			
Loading D	ock		
Store Roo	m		
F1	F2	F3	F4
ОК	None	New	Back
PBS_Retail		≏	🛿 🧮 12:58p

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

-Location -				Location -			
			F8	Ai			F8
Location				Location			
Aisle 1				Aisle 1			
Aisle 2				Aisle 2			
Loading [	Dock						
Store Roo	m						
F1	F2	F3	F4	F1	F2	F3	F4
ОК	None	New	Back	ОК	None	New	Back
PBS_Retail			🛿 🧱 12:58p	PBS_Retail			🛿 🥅 12:59p

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.

-Location De	etails ———			-Location De	tails			
Location ID				Location ID				
				5				
Location Name				Location Nar	ne			
				Dairy				
F1	F2	F3	F4	F1	F2	F3	F4	
ОК			Back	ОК			Back	
PB5_Retail			🛙 🖽 12:59p	PB5_Retail		ć	<u>ነ 🛛 🖂 1:00</u> p	

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.

Location –			
			F8
Location			
Aisle 1			
Aisle 2			
Dairy			
Loading D	ock 🛛		
Store Roo	m		
F1	F2	F3	F4
ОК	None	New	Back
PBS_Retail		6	) 🛛 🥅 1:00p

### 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.

Item No / Description						
			<b>F9</b>			
Item No	Descriptio	n	^			
012365	Coke 1.25	5 Litre				
462833	Diet Coke	375m Ca	n			
876753	Fanta 1.2	5Litre	≡			
878658	Greenseas	Greenseas Tune 120g				
776567	John Wes	t Sardines	5 <u> </u>			
765678	Nutella 37	75g				
100827	Vanilla Co	ke 1.25 I	_itre 🔄 🗠			
<	1111		>			
F1	F2	F3	F4			
ок		New	Back			
PB5_Retail		ť	<u>ት 🛛 🖂 1:05</u> p			

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

Item No /	Description -				Item No /	Description -		
соке			F	9	COKE			F9
Item No	Descriptio	n	[	~	Item No	Descriptio	n	
012365	Coke 1.25	5 Litre			012365	Coke 1.25	5 Litre	
462833	Diet Coke	375m Ca	n		462833	Diet Coke	375m Ca	n
876753	Fanta 1.2	5Litre		≡	100827	Vanilla Co	oke 1.25 L	itre
878658	Greenseas	s Tune 12	20g					
776567	John Wes	t Sardine	5					
765678	Nutella 37	75g						
100827	Vanilla Co	ke 1.25 I		~				
<	1111		>		<			<b>&gt;</b>
F1	F2	F3	F4		F1	F2	F3	F4
ок		New	Back		ок		New	Back
PBS_Retail		ť	合 🛛 🖂 1:0	)5p	PBS_Retail		Ć	<u>ት 🛙 🥅 1:05</u> p

#### 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

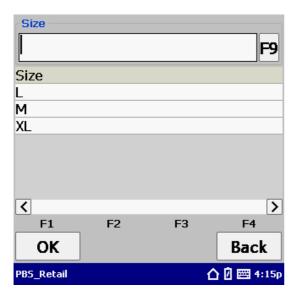
If you have fashion extensions enabled, then each item must resolve down to an individual barcode.

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 Item No / Description Color F9 F9 Color Item No Description 01 Style1 Blue 02 Style2 Green Red < > F1 F2 F3 F4 F1 F2 F3 F4 OK Back OK Back New 🛆 🛛 🖂 4:14p PBS\_Retail 合 🛛 🖽 4:14p PBS\_Retail

#### Select Size



The barcode can now be determined.

Location —			
Aisle 1			F8
Item			
118			F9
Quantity:	1		
Style1 - B	lue - L		
F1	F2	F3	F4
Save	List	Clear	Back
PBS_Retail		<u>ر</u>	) 🛙 🥅 4:15p

#### **New Items**

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

#### **Standard Mode**

Barcode				Barcode			
				93213035			
Item No				Item No			
				93213035			
Description				Description			
				John West	t Tuna 12	:5g	
Price				Price			
				3.89			
F1	F2	F3	F4	F1	F2	F3	F4
	12	15		F1	F2	ГJ	
ОК			Back	ОК			Back
PB5_Retail			🛆 🛛 🖂 8:17a	PBS_Retail			🛆 🛛 🖂 8:18a

#### **Fashion Extensions**

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

Barcode 5566	^	Item No 5566	<u>^</u>
Item No 5566		Description	
C Description	=	Color	
Color		Size	<b>F7</b>
Size	F7	Price	F8
	F8 V		~
F1 F2 F OK	3 F4 Back	F1 F2	F3 F4 Back
PBS_Retail	🛆 🛛 🖂 4:16p	PB5_Retail	

# 6 PDA Main Menu

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

New	Tools	
+####		
PBS_Ret	tail	
	Loading program developed by Purpose Built S O F T W A R E Please Wait	
PBS_Ret	ail 🕜 90% 🖽 9	:15a

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

Purpos	<b>EBUILT</b>	Pu	rpose Built
1. Stockt	ake		1. Stocktake
2. Receiv	ing		2. Receiving
3. Trans	fers		3. Transfers
4. Price C	heck	4	. Price Check
5. Sync			5. Sync
PBS_Retail	合 🛛 🖂 8:15a	PBS_Retail	合 🛙 🖽 8:10a

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
ILC Y	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.

Operator		Descript	ion
101		Chatswo	od
F1	F2	F3	F4
New			Back
PBS_Retail			🛆 🛛 🕅 1:22p

# 6.1.1 New Stocktake

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

Operator -				Operator -			
Stocktake	Details			Stocktake	Details		
			*	Chatsw	ood		
F1	F2	F3	F4	F1	F2	F3	F4
ОК			Back	ОК			Back
PBS_Retail			🛆 🛙 🕅 1:15p	PBS_Retail		1	🛆 🛛 🕅 1:15p

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).

On the MC1000, there is NOT enough room on the screen to display Location, Item, Quantity and Description. Pressing F5 will toggle the display of the Location field (Hide / Display) as shown below.

<ul> <li>Location —</li> </ul>			F8	- Item			F9
Item				Quantity:			
			F9	Quanticy :			
Quantity:							
F1	F2	F3	F4	F1	F2	F3	F4
Save	List	Clear	Back	Save	List	Clear	Back
PBS_Retail		Ć	) 🛙 🖂 1:16p	PBS_Retail		2	) 🛙 🥅 1:17p

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.

Location —			
Aisle 1			F8
Item			
			F9
Quantity:			
F1	F2	F3	F4
Save	List	Clear	Back
PBS_Retail		2	) 🛛 🥅 1:18p

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.

Item			F9
Quantity:			
F1	F2	F3	F4
Save	List	Clear	Back
PBS_Retail		2	) 🖉 🧱 1:18p

## 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.

Item				Item			
012365			F9	012365			F9
Quantity:	1			Quantity:	23		
Coke 1.25	5 Litre			Coke 1.25	5 Litre		
F1	F2	F3	F4	F1	F2	F3	F4
Save	List	Clear	Back	Save	List	Clear	Back
PB5_Retail		Ć	) 🛙 🖂 1:18p	PB5_Retail		2	) 🛛 🥅 1:19p

<b>Key</b> F1	<b>Description</b> 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.

Location				Item	Desc	ription	Qty
Aisle 1			F8	01236	Coke 1.2	5 Litre	23
Item	Desci	ription	Qty	46283 Diet Coke 375m Ca			Car 56
	Coke 1.25		23	87675	Fanta 1.2	5Litre	236
	Diet Coke		Car 56	10082	Vanilla C	oke 1.2	5 Li45
87675 Fanta 1.25Litre 236							
10082	Vanilla Co	oke 1.2!	5 Li 45				
<			<b>&gt;</b>	<			<b>&gt;</b>
Items = 4	4 / Qty = 360)			Items = 4	4 / Qty = 360)		
F1	F2	F3	F4	F1	F2	F3	F4
Chg	Del	Clr	Back	Chg	Del	Clr	Back
PBS_Retail		ć	) 🛛 🥅 1:21p	PBS_Retail		ť	🗅 Ӣ 🥅 1:21p

OR

Aisle 1 F8				Details (Item 4 of 4 / Qty = 360) Item: 100827 B/C:			
Details (Ite	em 4 of 4 / (	Qty = 360)		-,			
Item: 100	827						
B/C:							
				Vanilla Co	oke 1.25 L	itre	
Vanilla Co	oke 1.25 L	.itre					
Qty: 45				Qty: 45			
F1	F2	F3	F4	F1	F2	F3	F4
Chg	Del	Clr	Back	Chg	Del	Clr	Back
PBS_Retail			🛆 🛛 🥅 1:23p	PBS_Retail		1	🛆 🛛 🖾 1:23p

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

Кеу	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.

Details (Item 4 of 4 / Qty = 360) Item: 100827 B/C:				Details (Itr Item: 100 B/C:	em 4 of 4 / ( )827	Qty = 360)	
Vanilla C	45 O	ĸ	]	Vanilla Co	47 0	ĸ	]
Qty: 45				Qty: 45			
F1	F2	F3	F4	F1	F2	F3	F4
Chg	Del	Clr	Back	Chg	Del	Clr	Back
PBS_Retail		2	) 🛛 🖂 1:24p	PB5_Retail		ſ	<u>ት 🛛</u> 🖂 1:25p

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### 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.

CLocation —				Location —				
Aisle 1			F8	Aisle 1			F8	
Item	Des	scription	Qty	Item	De	scription	ı Qty	
0123	ete Item?		$\times$ 1	012365	Coke	1.25 Lit	re 1	
46281	4628: Ves No							
Items = 2 /	Qty = 26)			Items = 1 /	Qty = 1)			
F1	F2	F3	F4	F1	F2	F3	F4	
Chg	Del	Clr	Back	Chg	Del	Clr	Back	
PBS_Retail		۵	🛿 🧱 1:10p	PBS_Retail		Ć	) 🛙 🥅 1:10p	

#### 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.

Operator	Ref. No	Desc	ription
101	125634		
<			>
F1	F2	F3	F4
New			Back
PBS_Retail		6	) 🛙 🥅 1:28p

# 6.2.1 New Receiving Batch

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

Operator -				Operator -			
				101			
Reference	Number			Reference	Number		
				1256348			
Receive De	etails			Receive De	etails		
			<b>A</b>				<b></b>
			~				~
F1	F2	F3	F4	F1	F2	F3	F4
ОК			Back	ОК			Back
PBS_Retail			🛆 🛛 🖂 1:16p	PBS_Retail		1	🛆 🛛 🖂 1:17p

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.

Item    876753    Quantity    1    Description    Fanta 1.25Litre		Item 876753 Quantity 12 Description Fanta 1.2	Quantity 12				
F1 Save	F2	F3 Clear	F4 Back	F1 Save	F2 List	F3 Clear	F4 Back
PB5_Retail		Ć	) 🛙 🥅 1:17p	PBS_Retail	I	Ć	) 🖸 🥅 1:17p

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.

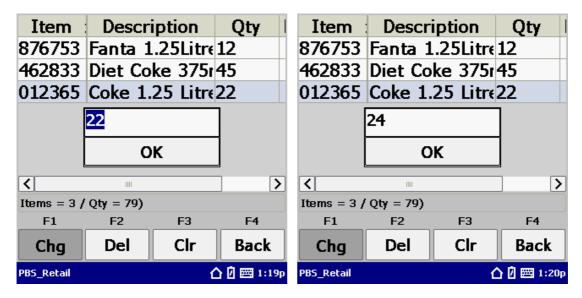
Item	Descr	Qty	
876753	Fanta 1	25Litre	12
462833	Diet Co	ke 375r	45
012365	Coke 1.	25 Litre	22
<			<b>&gt;</b>
Items = 3 /	Qty = 79)		
F1	F2	F3	F4
Chg	Del	Clr	Back
PBS Retail			<b>) 🛛 🖂 1:19</b> p

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

- 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.

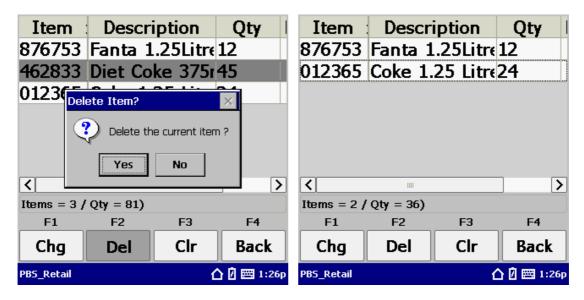


Press ENTER to accept the new quantity.

Item	Descri	Qty	
876753	Fanta 1	25Litre	12
462833	Diet Co	ke 375r	45
012365	Coke 1.	25 Litre	24
<			>
Items = 3 /	Qty = 81)		
F1	F2	F3	F4
Chg	Del	Clr	Back
PBS Retail			↑ 🕅 🖽 1:20p

### 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.

Ope	Trans	sfer	То	Desci	ription
101	Aisle	1		1105	569
<		1111			>
F1		F2		F3	F4
Ne	w				Back
PBS_Ret	ail			1	🛆 🛛 🥅 1:34p

#### 6.3.1 New Transfer Batch

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

Operator —				Operator			
				101			
Transfer Fro	m			Transfer From	n —		
			F7	Store Roo	m		F7
Transfer To				Transfer To -			
			F8	Aisle 1			F8
Transfer Det	ails			Transfer Deta	ails		
				1105569			
F1	F2	F3	F4	F1	F2	F3	F4
ОК			Back	ок			Back
PBS_Retail		ť	🗴 🛿 🖽 1:28p	PBS_Retail		ť	<mark>ት 🛛</mark> 🕅 1:29p

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.

Item 878658 F9			1tem 878658				
Quantity				Quantity 24			
Description Greenseas Tune 120g			Greensea	s Tune 12	Og		
F1	F2	F3	F4	F1	F2	F3	F4
Save	List	Clear	Back	Save	List	Clear	Back
PB5_Retail		2	) 🛿 🖽 1:29p	PBS_Retail		2	ት 🛛 🥅 1:30p

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.

Item	Desc	Qty						
878658	Greens	Greenseas Tune						
765678	Nutella	Nutella 375g 15						
877679	Vegem	Vegemite 1kg 4						
<			>					
Items = 3 /	Qty = 43)							
F1	F2	F3	F4					
Chg	Del	Clr	Back					
PBS_Retail		۵	🛙 🥅 1:31p					

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

Key	Descrip	otion	
	~		

- 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.

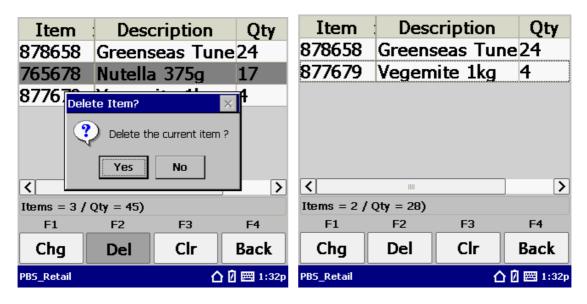
Item	Desc	ription	Qty	Item	Desc	ription	Qty
878658	Greenseas Tune 24		878658	Greens	Greenseas Tur		
765678	Nutella	i 375g	15	765678	Nutella	Nutella 375g	
877679	Vegemite 1kg		4	877679	Vegem	Vegemite 1kg	
E C	.5				17		
	ОК				0	К	
<			>	<			>
Items = 3 /	Qty = 43)			Items = 3 /	Qty = 43)		
F1	F2	F3	F4	F1	F2	F3	F4
Chg	Del	Clr	Back	Chg	Del	Clr	Back
PBS_Retail		Ć	🖸 🥅 1:31p	PBS_Retail		Ć	) 🖸 🖽 1:31p

Press ENTER to accept the new quantity.

Item	Desc	Qty			
878658	Greens	Greenseas Tune 24			
765678	Nutella	a 375g	17		
877679	Vegem	Vegemite 1kg 4			
<	1111		<b>&gt;</b>		
Items = 3 / Qty = 45)					
F1	F2	F3	<b>F4</b>		
Chg	Del	Clr	Back		
PBS Retail		~	<u>ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا </u>		

### 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.

I	tem	Desc	cription	Qty		
878	8658	Greenseas Tune 24				
877	679	Vegem	Vegemite 1kg 4			
	Delete	Transfer		×		
	?	Do you wish Transfer?	Do you wish to delete the entire Transfer?			
		Yes	No			
<				,		
Item	Items = $2 / Qty = 28$ )					
F	=1	F2	F3	F4		
С	hg	Del	Clr	Back		
PBS_F	Retail		Ć	) 🛙 🖽 1:32p		

# 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.

Operator	Desci	ription	
101	Chats	swood	
F1	F2	F3	F4
New			Back
PBS_Retail		6	ک 1 🖾 🖂 3:47p

# 6.4.1 New Price Check Batch

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

- Operator -				Operator -			
Price Chec	k Details			Price Chec	k Details —		
				Chatsw	rood		
F1	F2	F3	F4	F1	F2	F3	F4
ОК			Back	ОК			Back
PBS_Retail			🛆 🛙 🥅 3:48p	PBS_Retail			🛆 🛛 🕅 3:48p

Press F1 or ENTER after the details have been completed.

## 6.4.2 Scanning Items

Item RRP Price Description	]		<b>F9</b> 5 - Label 6 - Price	Item 012365 RRP Price 1.25 Description Coke 1.25	5 Litre		5 - Label 6 - Price
F1 Save	F2 List	F3 Clear	F4 Back	F1 Save	F2 List	F3 Clear	F4 Back
PBS_Retail		Ć	) 🖸 🥅 3:48p	PBS_Retail		4	<b>) 🛛 🖂 3:4</b> 9

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

<b>Key</b> F1	<b>Description</b> 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.
Drice Check a	ives you the shility to

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.

Item					
012365			F9		
RRP Price					
1.25	]		5 - Label		
		□F	6 - Price		
Description -					
Coke 1.25 Litre					
F1	F2	F3	F4		
FI	FZ	F3	F4		
Save	List	Clear	Back		
PBS_Retail		Ć	) 🛛 🖽 3:49p		

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.

1tem 012365			F9			
RRP Price	]		5 - Label 6 - Price			
Description Coke 1.25 Litre						
F1	F2	F3	F4			
Save	List	Clear	Back			
PBS_Retail		2	) 🛙 🖂 3:50p			

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

Item 012365			F9	Item 012365			F9
RRP Price■ F5 - Label■ F5 - Price		RRP Price         2.29         ✓ F5 - Label         ✓ F6 - Price					
Description Coke 1.25 Litre		Coke 1.2	5 Litre				
F1	F2	F3	F4	F1	F2	F3	F4
Save	List	Clear	Back	Save	List	Clear	Back
PBS_Retail		2	) 🛿 🥅 3:50p	PB5_Retail		2	ት 🛙 🖂 3:52p

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.

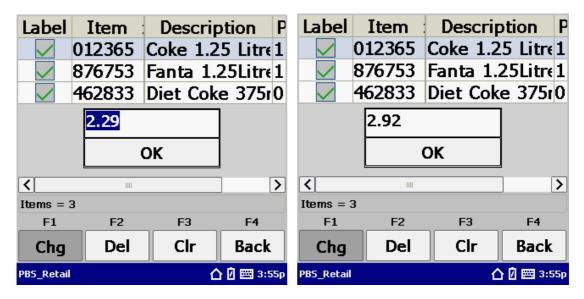
Label	Item	Descri	ption P	Descri	iption	Price	w Pri	
	012365	Coke 1.2	25 Litre1	Coke 1.	25 Litre	1.25	2.29	
	876753	Fanta 1	.25Litre 1	Fanta 1	25Litre	1.89		
$\checkmark$	462833	Diet Col	ce 375r0	Diet Co	ke 375r	0.89		
<			>	<		1111		>
Items = 3	3			Items = 3				
F1	F2	F3	F4	F1	F2	F3	F	-4
Chg	Del	Clr	Back	Chg	Del	Clr	Ba	ack
PBS_Retail		1	🛆 🛛 🥅 3:53p	PBS_Retail			☆∅፼	3:54p

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

<b>Key</b>	<b>Description</b>
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.

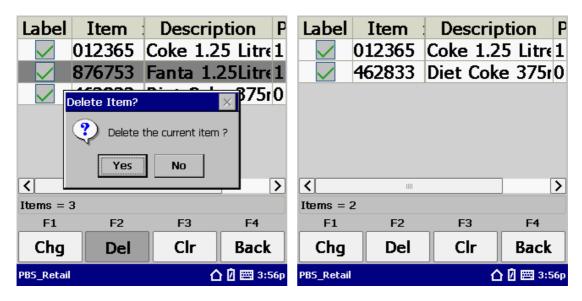


Press ENTER to accept the new price

Descri	ption	Price	New	Price	
Coke 1.	25 Litr∉	1.25	2.92		
Fanta 1	Fanta 1.25Litre 1.89				
Diet Co	ke 375r	0.89			
<				>	
Items = 3					
F1	F2	<b>F3</b>		F4	
Chg	Del	Clr		Back	
PBS_Retail			☆ 0	🖽 3:56p	

### 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.

Label		Item	Descrip	otion P	
		012365	Coke 1.2	5 Litre1	
	/	462833	Diet Cok	e 375r0	
	Dele	te PriceChec	k	×	
	Do you wish to delete the entire PriceCheck?				
		Yes	No		
<				<b>&gt;</b>	
Item	s = 2	2			
I	-1	F2	F3	F4	
С	hg	Del	Clr	Back	
PBS_F	tetail		2	) 🛿 🖽 3:56p	

# 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.

Purpo	SOFTWARE
1. Sto	cktake
2. Rec	eiving
3. Тга	nsfers
4. Price	: Check
5. Sy	nc
PBS_Retail	🛆 🖸 🕅 8:08a

### 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.

1. Get Reference Data			
2. Up	pload Data to PC		
3. Back			
Status (1.0.075.0	Status (1.0.075.0)		
Ready to Sync			
Cance	el Communication		
PBS_Retail	🛆 🛿 🖽 11:01a		

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

1. Get Reference Data	1
Sta Rec Sta	
Cancel Communication	3:58p

You will be asked to CONFIRM.

1. Get Reference Data	
2. Upload Data to PC          PBS_Retail       ×         ?       Are you REALLY sure about this?         Stat       Yes       No         Require	
Cancel Communication	
PB5_Retail 🕜 🗹 🖽 3:	58p

## 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.

1. Get Reference Data			
2. Upload Data to PC			
3. Back			
Status (1.0.076.0)			
Sync failed.			
Cancel Communication			
PB5_Retail 🚹 🔂 🖾 3:58p			

# 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

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# 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.

Barcode						
93124587	9312458756985					
Item No						
93124587	56985					
Description						
Price						
F1	F2	F3	F4			
ОК			Back			
			Duok			
PBS_Retail			🛿 🥅 12:33p			

#### 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.

Barcode 93124587	56985		
Item No			
010254			
Description			
Price			
F1	F2	F3	F4
ОК			Back
PBS_Retail		Ć	🛙 🥅 12:33p

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.

Barcode			~
5566			
Item No			
5566			
Description			=
Long Sleev	ve Shirt		
Color			
			F7
Size			
			F8
<b>F1</b>	F2	F3	F4
ОК			Back
PBS_Retail			🛆 🛛 🥅 8:07a

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

# 8 PDA Configuration hints

Depending on the device you are using, you may want to hide the Windows Task Bar in order to obtain additional screen space.

Proceed as follows

WindowsCE			
<u>File Zoom Tools H</u> elp			
Connection Info			
Store No:			
m Programs			
👷 Favorites 🔹 🕨			
🛅 Documents 🕨			
😼 Sett 🚱 Control Panel			
🖅 Run. 🚳 Network and Dial-up			
🔊 Suspend			
89			

WindowsCE		
<u>File Zoom Tools H</u> elp		
Taskbar and Start Menu 🛛 🛛 🗙		
General Advanced		
🗌 Always on top		
Auto hide		
Show Clock		
💦 🛛 T 🕬 🕸 🐓 🚰 🔁		

On the Symbol MC1000 (Non Touch screen)

Press FUNC CTRL Press FUNC ESC Press Up Arrow 3 times Press Right Arrow Once Press Down Arrow 2 times Press ENTER Press Down Arrow Once Press ALPHA 0 Press ENTER