

MC3090 QuickStart: Creating a Physical Inventory Transaction

1. Fetch the Reference File

- a. Tap **Fetch** > **Site Data** and complete the “Fetch” tab.

*Input a **Starting Dept** and **Ending Dept**. Do not assume two decimal places.*

*Input the **User Name** and **Password** you use to log onto CDBWin.*

*Make sure you are working with the correct **Site #**.*

*Input the **serial number** assigned to you by SSCS.*

- b. Tap the “Connection” tab:

- o *Sunray users* tap the server address **ppt.sscs.com**. Make sure the Port # is **7727**.
- o *Traditional users* tap **PPP_PEER** if HHT-Server resides on the same computer to which the HHT is connected. If HHTServer resides on a *different* machine, input the NETBIOS computer name on which HHT-Server is running; the DNS computer name on which HHTServer is running; or the static IP address of the machine on which HHTServer is running. Make sure the Port # is **7727**.

- c. Tap the “Fetch” tab.
- d. Place the HHT in the cradle and tap **Fetch**. When the fetch is complete, the HHS window looks similar to the following:

Note that the **Messages** part of the window displays **Site <x>'s inv retrieval succeeded** and **Database load succeeded**. This signals a successful fetch. You are now ready to scan items as part of a Physical Inventory session as described in the next section.



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2. Scan Physical Inventory Items

- a. Tap **File > New Inventory**. The New Inventory window appears:

Name the inventory transaction, if desired. The default is *mmddyymm*.

- b. In the Site # box type the site # for which you are recording inventory.
- c. Tap **OK**. The Inventory window appears:

Input the quantity of the item here.

If inputting a U.P.C./PLU manually, type it here.

Input the pack size of the item, if desired.

Count of how many times the currently displayed item has so far been saved to the transaction.

Count of the total scans that have so far taken place.

- d. Scan the item or use the input panel or keypad to enter the U.P.C./PLU.
- e. If an item:
 - o is found in the reference file, proceed to **“Items Found in Inventory.”**
 - o is *not* found in the reference file, proceed to **“Adding a New Item.”**

Items Found in Inventory

- a. If the item is stored in the inventory reference file without a variation in pack size (single- versus multi-pack), skip to **step c**. If the item is found in inventory with a variation in pack size, the following window appears:

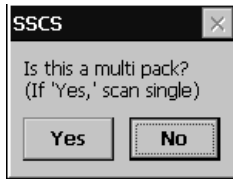
- b. Highlight the pack size of choice by tapping it, and tap **OK**. You can also type the number with the keyboard. The following window appears:

- c. The cursor rests in the **Qty** box. Enter the Quantity of the item and press ENTER.
- d. Tap **Save**. The cursor returns to the top of the window for the next entry.

e. When you are finished making entries, tap **Close**.

Adding a New Item

a. If an item is not found in the inventory reference file, the window at right displays:



b. If the item you scanned is not a multipack, tap **No** and:

- o Type the description of the item and press ENTER.
- o Starting with the **Qty** box, input the information as it pertains to the single.
- o Tap **Save**.
- o Proceed to **step d**.

If the item is a multipack, tap **Yes**. The cursor now blinks in the **ID** box.

If the item you scanned is a single that has the same bar code/SKU as its multi-pack (like a ringlet six-pack), tap **Yes** and proceed to **step c**.

If the item is a multipack with a different bar code than the single (for example, a cigarette carton), tap **Yes** and:

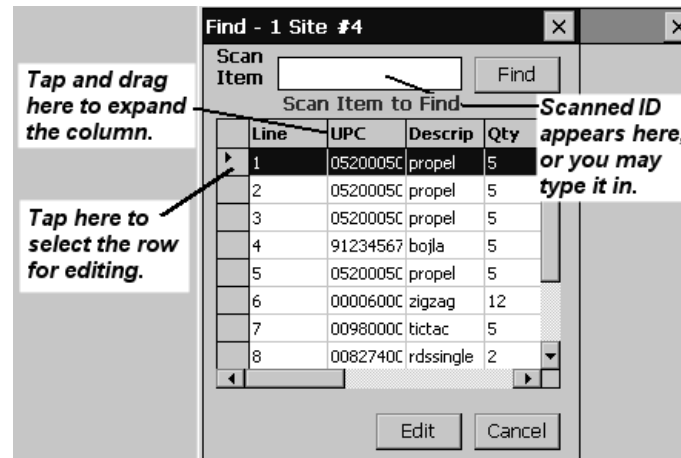
- o The cursor moves to the ID box. Scan the single or input its bar code (without the check digit) and press ENTER.
- o In the **PkSz** box, input the number of singles contained in the multipack (a cigarette carton would be **10**). Press ENTER.
- o Input the description of the *multipack* and press ENTER. Then starting with the **Qty** box, input the rest of the information as it pertains to the multipack and tap **Save**.
- o The cursor returns to the top of the window. Scan or input the bar code/PLU (without the check digit) of the single again. This is for linking.
- o The multipack prompt appears. Tap **No**.
- o Input the information as it pertains to the single. You can input a quantity of **1**, but **0** is fine.
- o Tap **Save** when you are finished and proceed to **step d**.

c. With the cursor in the **ID** box:

- o Scan one of the singles or enter its bar code/SKU (without the check digit) and press ENTER.
 - o Input the number of singles in the multipack. In the case of a ringlet six-pack this would be **6**. Press ENTER.
 - o Input the description of the *multipack* and press ENTER. Then, starting with the **Qty** box, input the information as it pertains to the multipack and tap **Save**.
 - o Scan or input the single again.
 - o When the system device prompts you to input whether this is a multipack, tap **No**.
 - o Input the description of the single and press ENTER, then input the information as it pertains to the single. You can input a quantity of **1**, but **0** is fine.
 - o Tap **Save** when you are finished and proceed to **step d**.
- d. Continue scanning items. When you are finished, click **Close**. You are returned to the Transaction List, where a queue of transactions ready to send to the HDP program displays.

3. Edit Inventory Transactions, if Necessary With the Find Feature

a. With the Inventory window displayed, tap **Find**:



b. This is a list of all items in the transaction.

If the item you want is in clear view, tap on its leftmost (gray) part and tap **Edit**. The record for the item displays. You may now edit it. If desired, edit Qty and Cost, and—if you are enabled to do so—Mgn and List. Tap **Save** when finished.

If the item is *not* in plain view: Scan the item or enter the U.P.C./SKU in the Scan Item box and tap **Find**. The list filters down to those entries containing the U.P.C./SKU. You may now edit as described in the preceding paragraph.

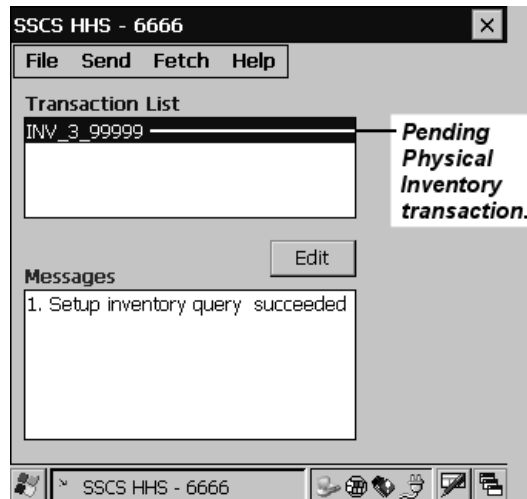
From the Transaction List

- a. Highlight an item in the Transaction List and tap **Edit**.
- b. The Inventory window for the invoice appears. You may now scan or enter additional items to be appended to the invoice or you may access the **Find** feature (as described in the previous section).

4. Send Physical Inventory Data

To send Physical Inventory data to the HDP application:

- a. Make sure the device is in the cradle and the cradle is connected with a USB cable to the host PC's USB port.
- b. Make sure you are viewing the Transaction List. If you are in the Inventory window, click **Close** to display the Transaction List (see illustration at right)
- c. The Transaction List displays all DSDs (delivery invoices) and Physical Inventory adjustment transactions that have been saved but not sent to the HDP



application for processing. Tap **Send > Inventories**. The Log In window appears:



- d. Check that the displayed information is correct and tap **Login**. All transactions for the selected site number will transfer. When all transfers are complete, the transferred transactions appear in the Messages window with the status **Sent**.