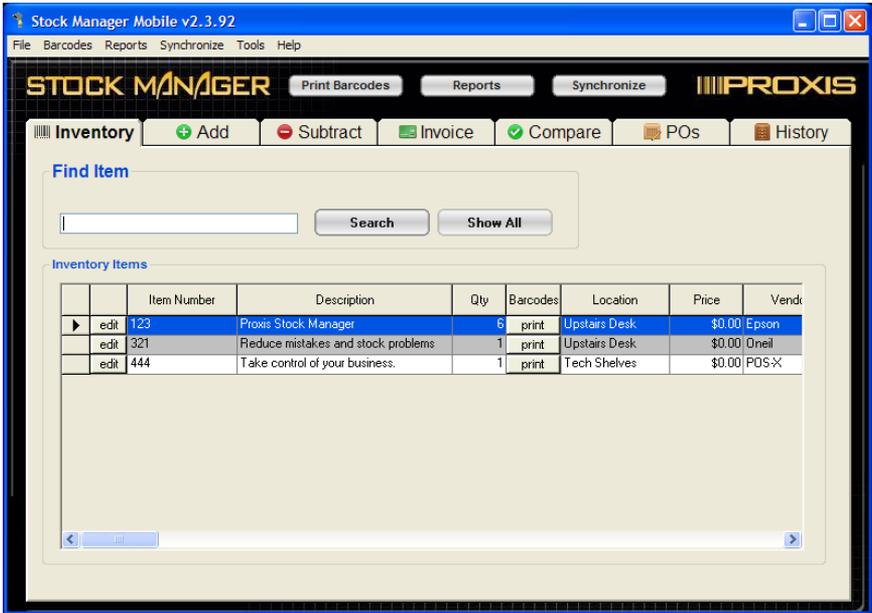


Proxis Stock Manager User's Guide



Version 2.3

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Proxis Stock Manager User's Guide

Stock Manager Version 2.3
Proxis Software

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Proxis Stock Manager User's Guide

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1 Introduction

This user's guide is designed as a learning tool and technical reference for use with the Proxis Stock Manager software. If at any time you require technical support or custom programming please contact our help desk at 1-877-477-6947.

1.1 What is Stock Manager?

Stock Manager is a standard Windows desktop application for tracking inventory items using barcode labels and a barcode scanner.

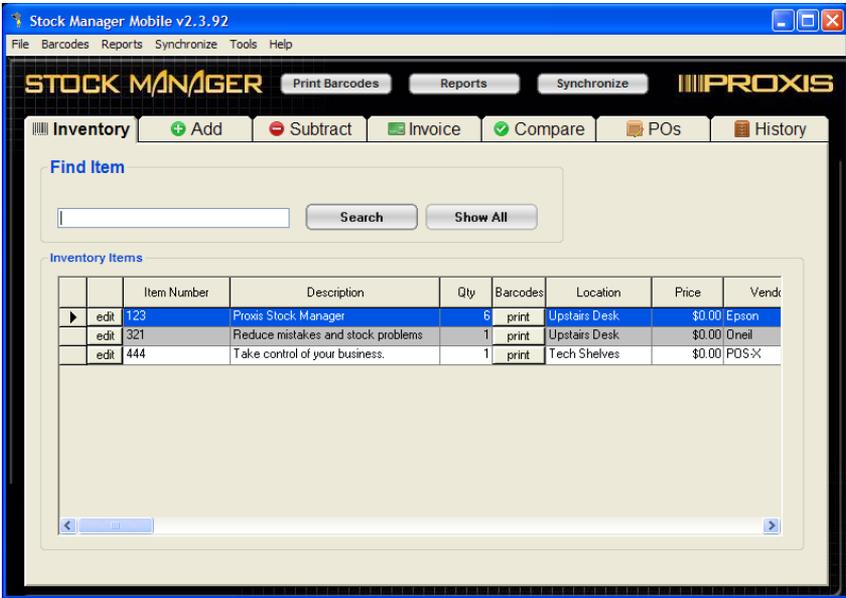


Figure 1. Stock Manager Main Screen

Stock Manager is a simple but powerful inventory management tool designed for use with both keyboard wedge barcode scanners as well as mobile devices like the CIPHERLAB 8000 Series, Janam XP Series, Aceeca Mezura, the Symbol SPT Series. Stock Manager will also work on most Window CE and Windows Mobile barcode scanners.

Stock Manager is very effective for simple inventory tracking like a supply closet or CD collection, but is also designed for more complex inventory functions such as doing physical inventories with a mobile barcode scanner, printing barcode labels with a mobile barcode printer, keeping track of serialized items, creating invoices, creating purchase orders, and keeping track of inventory stored in separate locations.

1.2 Stock Manager Features and Benefits

Stock Manager's features provide the following benefits:

- Improved Inventory Turns
- Improved Cash Flow
- Increased Security
- Reduced Cost of Physical Inventory Process
- Improves Inventory Retrieval Times

Features include:

- Barcode Printing with Mobile Printer Support
- Barcode Scanning
- Physical Inventory Comparison Reporting
- Basic Invoicing
- Automatic Purchase Orders
- Low Inventory Reporting
- Inventory Valuation
- Data Export (CSV – comma separated value) File
- Data Backup
- Mobile Barcode Scanner Integration for remote management
- Keychain Scanner Support

The mobile barcode scanner programs offer the same functionality on a small and portable platform:

- Price Lookup
- Location Lookup
- Receive Items
- Enter New Items
- Edit Item Information
- Physical Inventory Scanning (support for a full range of barcode scanning devices)
- Item Calculator (Cost and Price Palm and Windows CE Only)
- Barcode label printing (Palm and Windows CE only)

Stock Manager Mobile options:

- Integrates with choice of Palm, Windows CE, OPN2001 Keychain Scanner or the Cipher Lab 8001.
- Provides mobile label printing on Epson, Zebra and Datamax-Oneil mobile barcode printers.

1.3 Installation

To install Stock Manager, double click the SetupStockManager.exe icon and follow the installation steps. The application is installed to the c:\Proxis Software\Stock Manager folder by default.

After installation, the Stock Manager application can be purchased and registered to unlock the demo mode. Demo mode is limited to 10 inventory items. Please call us to locate an authorized reseller.

The Stock Manager installer will automatically create a shortcut to the program on the desktop and in the Windows Start Menu.



Figure 2. Stock Manager Welcome Screen

1.3.1 Operating System Compatibility

Stock Manager is compatible with the following operating systems:

- Windows 2000
- Windows XP
- Windows Vista 32
- Windows 7

1.3.2 Registration and Activation

To register and activate the full version of Stock Manager:

1. Copy down the Registration Number found in the Product Registration screen.
2. Purchase a software license from a Proxis reseller. Please contact us for a list of authorized resellers.
3. The Proxis reseller will issue an activation code based on the registration number.
4. Mobile device licenses must also be purchased for using Stock Manager Mobile barcode scanning software.



Figure 3. Product Registration Screen

Stock Manager is registered per machine and can be used in a networked, multiuser environment. It is recommended that the number of networked users is limited to 5-10. For more users please contact us.

1.4 Hardware Setup

Stock Manager works with a variety of different hardware combinations. Most commonly, Stock Manager is loaded on a computer with a tethered keyboard wedge scanner and barcode printer attached.

A mobile barcode scanner can also be used to perform physical inventory and to lookup pricing when the user is away from the main computer.

1.4.1 Keyboard Wedge Barcode Scanner Setup

1. Plug the scanner into the computer per the connection type.

1.4.2 Cipher Lab 8000 Series Mobile Barcode Scanner Setup

1. Plug the Power Supply into a wall outlet.
2. Plug the USB Cable into an available USB port.
3. Plug both Power Supply and USB cable into the Cradle.
4. Windows will prompt for a driver location.
5. Insert the supplied driver disc.
6. Select the drive letter associated with the driver disc.
7. The system will automatically assign a COM port for the device.

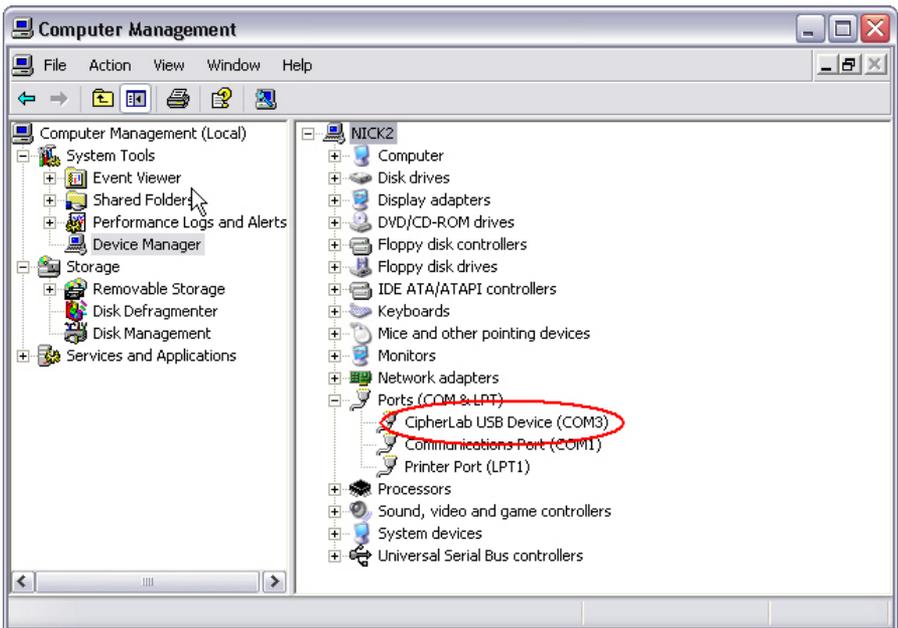


Figure 4. USB Cradle Driver Location with associated COM port (COM3)

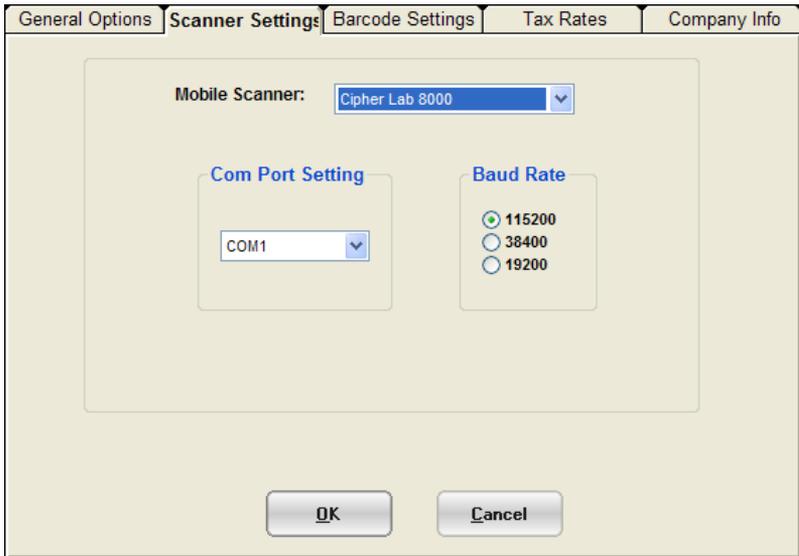


Figure 5. Device Settings

1.4.3 Palm Barcode Scanner Setup

1. Plug the Power Supply into a wall outlet.
2. Plug the USB cable into an available USB port.
3. Plug both Power Supply and USB cable into the Cradle.
4. Install the Palm Desktop Software from one of the following locations: the Stock Manager CD, Palm Website, Proxis Website or Proxis Reseller Website.
5. Setup Palm Hot Sync with a scanner device.
6. Synchronize the Palm device to create a User ID.
7. Purchase and Register the Stock Manager application in Mobile mode.
8. Install Stock Manager Palm software by clicking Synchronize then Install Device Software. Refer to Figure 6.
9. Follow the installation prompts. Hot Sync will be shut down and restarted. If a message appears asking to allow this, click Yes.

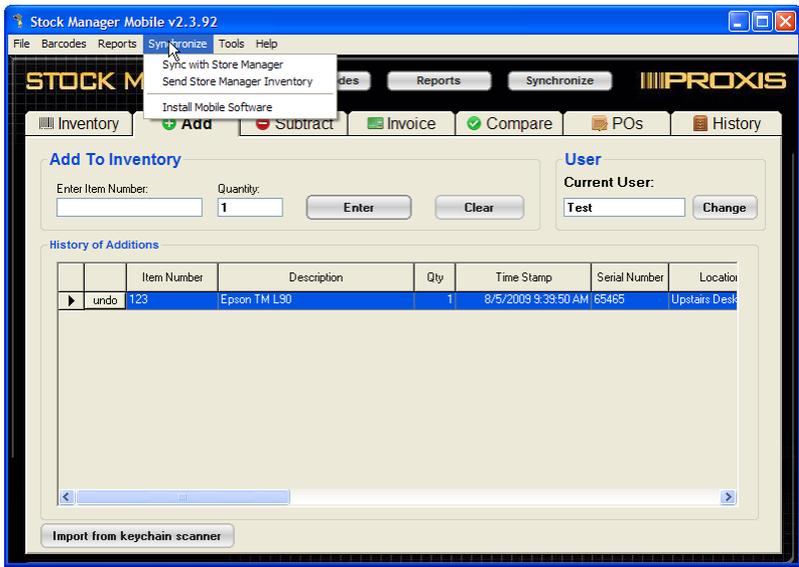


Figure 6. Install Mobile Software from Stock Manager

1.4.4 Windows CE Barcode Scanner Setup

1. Plug the Power Supply into a wall outlet.
2. Plug the USB cable into an available USB port.
3. Plug both Power Supply and USB cable into the Cradle.
4. Install the Microsoft Active Synch software from one of the following locations: the Stock Manager CD, Microsoft Website, Proxis Website or Proxis Reseller Website.
5. Setup Active Sync to sync with the scanner device.
6. The Windows CE device will synchronize with the computer.
7. Purchase and Register the Stock Manager application in Mobile mode.
8. Install Stock Manager Windows CE software by clicking Synchronize > Install Mobile Software. Refer to figure 6.
9. Ensure that Windows CE is select then click OK.
10. Follow the installation prompts.

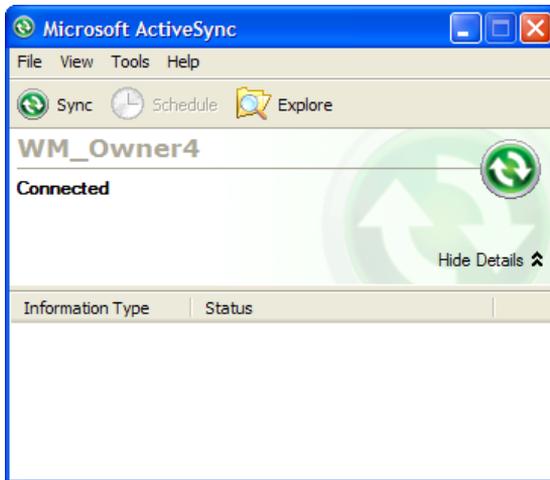


Figure 7. Microsoft ActiveSync

To activate the Stock Manager Mobile software:

1. Scan the barcode on the plastic card received with the purchase of the mobile scanner and mobile software license.

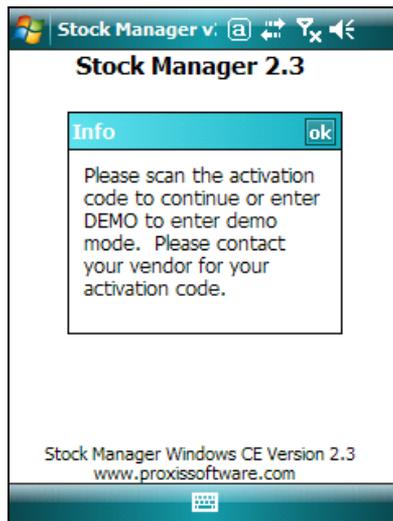


Figure 124a. Splash Screen

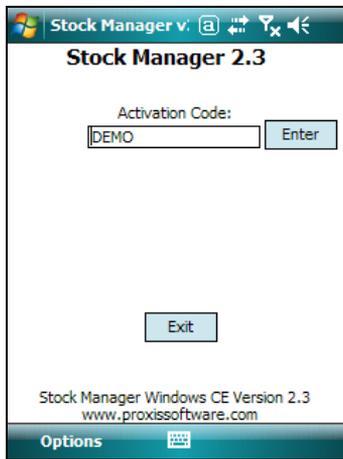


Figure 124b. Scan or Enter the Activation Code

The Stock Manager Mobile Device License is a plastic card with a barcoded activation code. The code is scanned to activate the mobile device software.



Figure 124a. Stock Manager Mobile Device License

1.4.5 Barcode Printer Setup

Please refer to the barcode printer's setup instructions. The barcode printer must be plugged in with its drivers loaded before Stock Manager will work with it.

Compatible Desktop Barcode Label Printers:

- Zebra - all models
- Cognitive – all models
- Epson – TM L90

- Brother – barcode printer models
- Standard Laser Printers – with Avery labels

Most barcode label printers will work with Stock Manager. Please contact us for specific label design.

For assistance, contact the Proxis Help Desk at 1-877-477-6947.

1.4.6 Keychain Scanner Setup

A keychain scanner is an inexpensive barcode scanner similar in size to a key fob. The scanner has no user interface but will store thousands of scans. The scanner can be used with Stock Manager to add inventory, subtract inventory, create invoices, perform physical inventory comparisons, and create purchase orders.

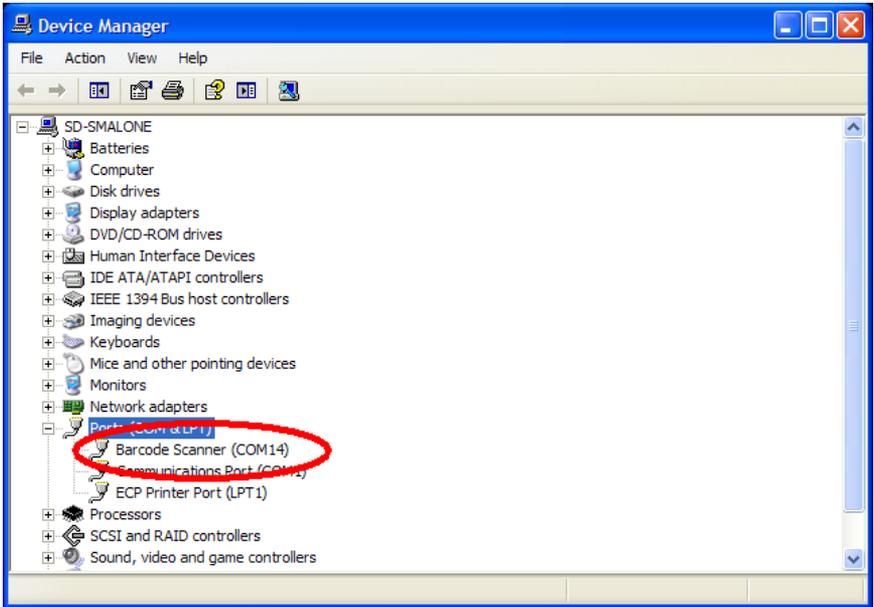


Figure 8. Installing the Keychain Scanner

To install the keychain scanner:

1. Plug the USB Cable into an available USB port.
2. Windows will install a driver automatically (OPN2001 only).
3. The system will automatically assign a COM port for the device.
4. Browse to the Device Manager from the Windows Control Panel.
5. Make note in the Device Manager of the COM port assigned to the device. This will be needed later when syncing the device.

2 Getting Started

Getting started is easy: Double click the desktop icon and start scanning.



Figure 9. Stock Manager Desktop Icon

If the inventory items do not have barcodes enter them in by hand. Later in this manual we'll explain how to print barcode labels for these items.

2.1 Preferences and Settings

The Settings and Preferences screen provides the ability to modify application settings including:

- What barcode printer will be used.
- The barcode label format.
- What reports printer to use.
- Choosing a Mobile Barcode Scanner.
- Selecting a Database Location (for networked multi-user applications).

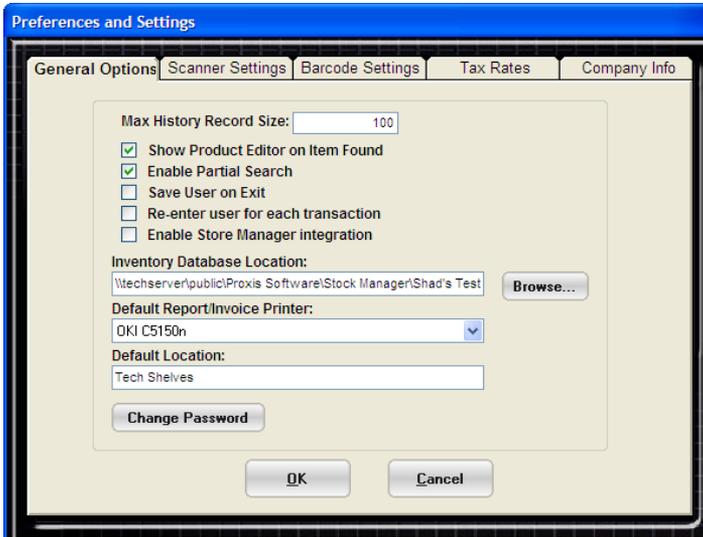


Figure 10. General Options Tab

2.1.1 General Options Tab

Max History Record Size:

This setting specifies the number of history records shown on the History tab.

Show Product Editor on Item Found:

Open the product editor screen when scanning items from the Inventory tab.

Enable Partial Search:

Look up items by search terms that might not be an exact match.

Save User on Exit:

Maintains the same user when exiting the application.

Re-Enter User for Each transaction:

Forces the user to enter their user name after every scan.

Enable Store Manager Integration:

Use Stock manager as a conduit between Proxis Store Manager POS software and a mobile barcode scanner. This feature is useful for uploading product information from the Store Manager database to a mobile barcode scanner to add, subtract or update item information.

Inventory Database Location:

This function allows a large number of users to simultaneously access the same database for inventory control. It is advised that the shared database is placed in a network shared directory for multi-user applications. Please consult our help desk for more information on setting up Stock Manager in a multi-user environment. Stock Manager will use the default inventory database in the installation folder if this field is left blank.

Default Report Printer:

From the list of available printers, select the printer that will be used for printing reports.

A default report printer must be selected to preview reports. If no printer is installed please contact tech support for assistance installing a stand-alone pdf printer driver.

Change Password:

Click this button to modify the administrator password. The original admin password set during the setup wizard must be entered first. Please contact us if you have lost this password.

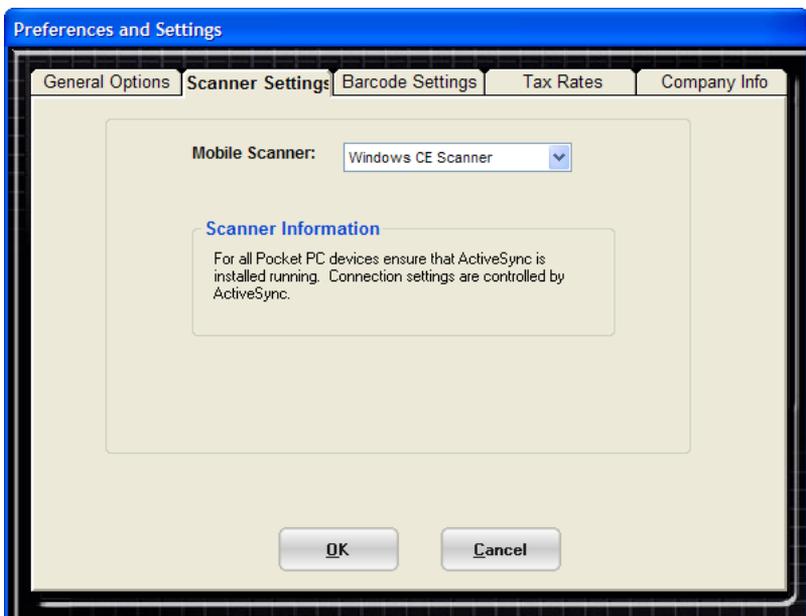


Figure 11. Scanner Settings

2.1.2 Scanner Settings Tab

Use the Scanner Settings tab in Figure 11. to integrate the mobile barcode scanner. Some scanners will display extended communications properties when selected.

Mobile Scanner:

From the Mobile Scanner list, select the barcode scanner to be used.

- Cipher Lab 8000 - All Cipher Lab 8000 series and compatible scanners.
- Palm Scanner – The Janam XP20 and XP30 series and the Aceeca IDVERIFI.
- Windows CE Scanner – Motorola, Honeywell, Datalogic, and Unitech mobile Windows based barcode scanners. Stock Manager will also work with most Windows CE or Windows Mobile PDA without barcode scanner support.

Comm Port Settings:

For use with the 8000 Series barcode scanner only. Select the correct communications port that the scanner's cradle is connected to. Refer to the hardware installation instructions (section 1.4) for further information.

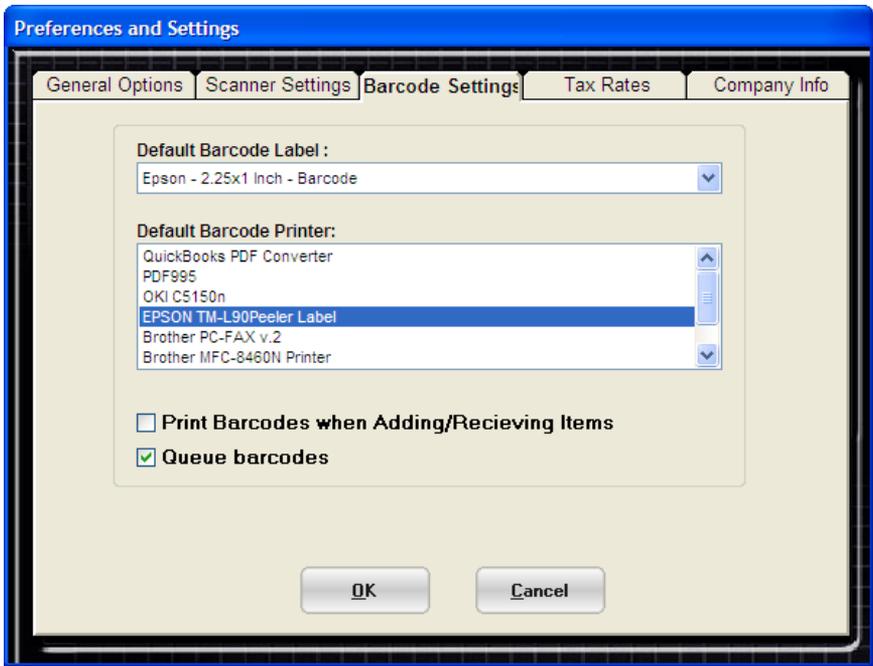


Figure 12. Barcode Settings

2.1.3 Barcode Settings Tab

Barcode Settings sets the barcode printing options for Stock Manager.

Default Barcode Label:

Select from the list of label templates available. If the desired label format isn't found in this list, the Proxis help desk can design a custom label format. Barcode label templates are created with Crystal Reports 8.5.

Default Barcode Printer:

From the list of available printers, select the printer to be used for barcode printing. The selected printer should correspond to the selected barcode label format. Label formats have been developed for the following printers:

1. Avery labels can be used with most laser and inkjet printers.
2. All Zebra printers.
3. Epson TM L90.
4. All Cognitive Printers.

Print Barcodes When Adding/Receiving Items

Enabling this option will automatically print a barcode to the default printer when an item's quantity is increased (using the Add tab and

during Mobile Scanner synchronization). Any new items received on a mobile scanner will automatically have a barcode printed to the default barcode printer.

Queue Barcodes:

The Queue Barcodes feature will create a print job of barcodes to be printed. This feature is useful for printing barcodes on Avery labels sheets. Please refer to section 3.1 for label printing instructions.

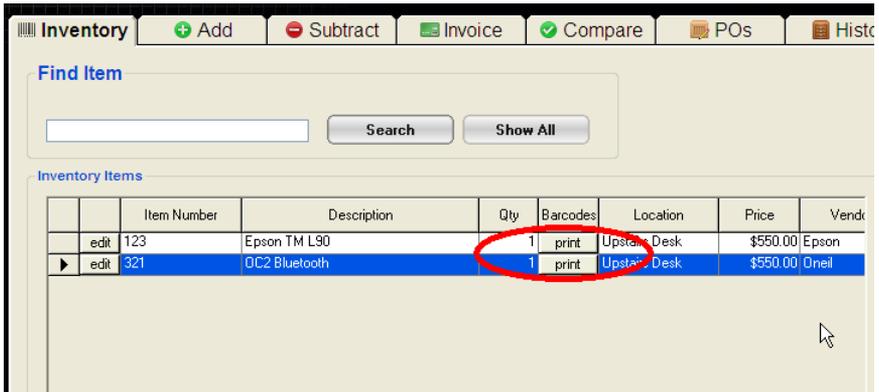


Figure 13. Adding barcodes to the print queue

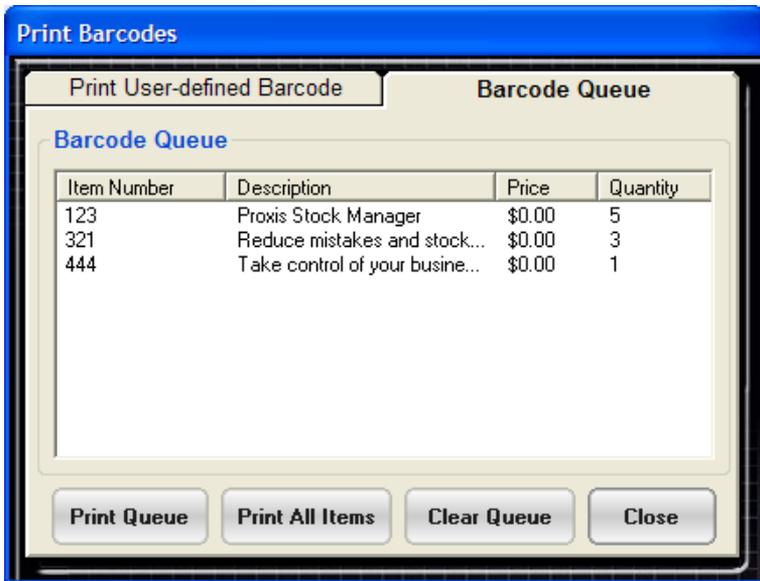


Figure 14. Managing the Barcode Printing Queue

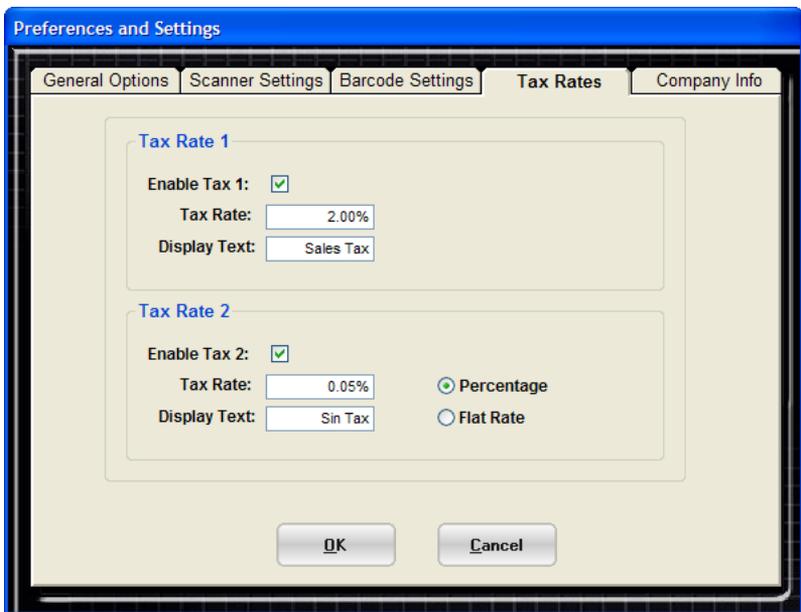


Figure 15. Tax Rates

2.1.4 Tax Rates Tab

Two tax rates can be used when creating Invoices in Stock Manager. Tax 2 can also be a Flat Rate tax.

To enable Tax 1 Rates for Invoicing:

1. Enter the tax rate the Tax Rate field.
2. Modify the Display Text if needed.
3. Check the Enable Tax 1 checkbox.
4. Repeat for Tax 2 if needed.

2.1.5 Company Info Tab

The Company Information setting are used to display company name, street address and contact information on Invoices and Purchase Orders.

Preferences and Settings

General Options | Scanner Settings | Barcode Settings | Tax Rates | **Company Info**

Company Information

Company Name: Proxis Software

Address: 213 Anystreet

City: Anytown

State/Province: Washington

Zip/Postal Code: 98006

Country: United States

Phone: 360-738-3118

Email/Website: www.proxissoftware.com

OK Cancel

Figure 16. Company Information Tab

2.2 Customizing Column Labels and Tabs

Stock Manager can be customized to fit individual and unique business situations by changing the names of tabs and data columns.

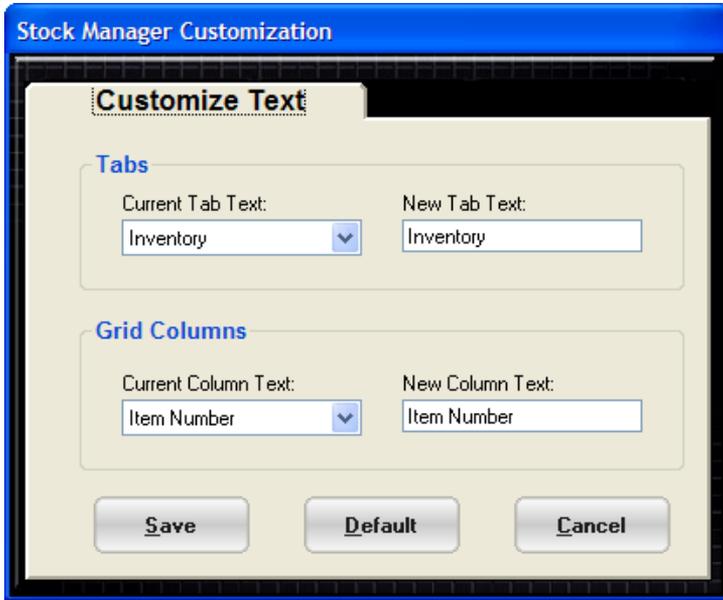


Figure 17. Customize Text Tab

The Customize Text screen is found under the File menu (File > Customize Text) and is used to modify the text shown on both the main screen's tabs as well as the columns in the data field. For example the Add tab could be renamed Receiving and the Subtract tab might be labeled Shipping. A data column could be renamed from Vendor to Building.

Customizations will also appear on Stock Manager reports, however they will only appear on the mobile barcode scanner application when using a Windows CE type scanner.

2.3 Managing Users

The Users setting assigns a user to each scan. This is used to determine who scanned each item over a particular time frame.



Figure 18. Customize Text Tab

To add a new user:

1. Click on New.
2. Enter the user's name in the Username field.
3. Click on Save.

Users are selected from each scanning tab. The Preferences and Settings can be changed to prompt for a user after every scan. Users can be deleted from the list of available users; however their history information will remain in the database.

2.4 Managing Customers

This form manages customer information for use by the Invoice function to print invoices and adjust inventory quantities.

The screenshot shows a software window titled "Customer Management" with a blue header. Inside, there is a "Customer Information" section. It is divided into two main areas: "Select Existing Customer" and "Customer Filter".

- Select Existing Customer:** A dropdown menu showing "Microsoft".
- Customer Filter:** A text input field containing "bill".
- Customer Information:** A form with the following fields:
 - Company:** Microsoft
 - Contact:** Bill Gates
 - Phone:** 23423423
 - Email:** bill@microsoft.com
 - Address 1:** 654 Any Street
 - Address 2:** (empty)
 - City:** Redmond
 - State:** Washington (dropdown menu)
 - Zip:** 98007
 - Notes:** Bill has lots of great ideas.

At the bottom of the form are four buttons: "Close", "New", "Save", and "Delete".

Figure 19. Customer Information Management

To enter a new customer:

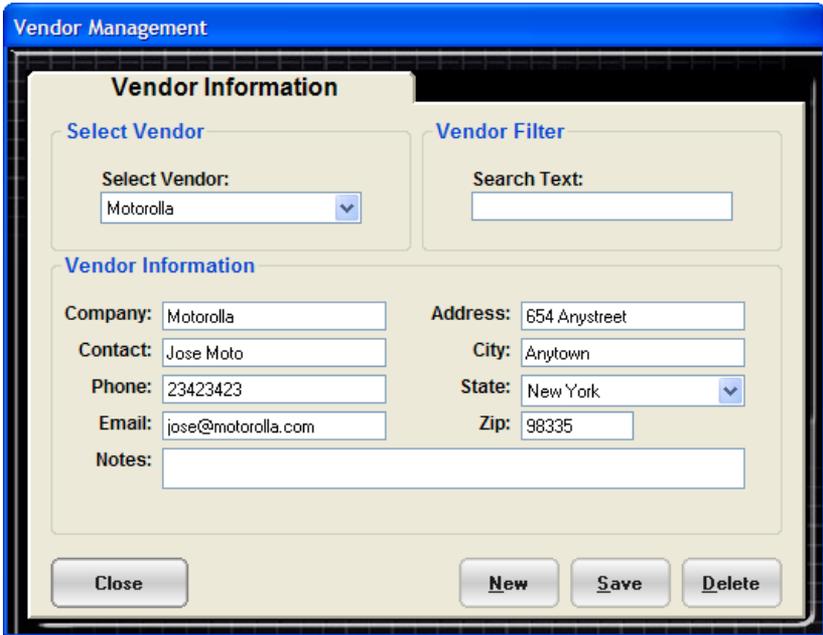
1. Click on the New button.
2. Enter the customer's information.
3. Click on the Save button.

To edit a customer's information:

1. Select a customer or enter their name in the Search Text field.
2. The Search Field will limit the number of customers in the Select Customer list to help find the right customer quickly.
3. Modify the customer's information.
4. Click on Save.

2.5 Managing Vendors

Vendor information is used by the Purchase Order function to add the vendor's name and address to the Purchase Order automatically. The Vendor Management form can be used to add new vendors, edit existing vendors and delete unused vendors for use with the purchase order tab.



The screenshot shows a software window titled "Vendor Management" with a blue border. Inside, there is a "Vendor Information" tab. The form is divided into two main sections: "Select Vendor" and "Vendor Filter".

- Select Vendor:** Contains a "Select Vendor:" label and a dropdown menu with "Motorola" selected.
- Vendor Filter:** Contains a "Search Text:" label and an empty text input field.
- Vendor Information:** A section with several input fields:
 - Company:** Motorola
 - Contact:** Jose Moto
 - Phone:** 23423423
 - Email:** jose@motorola.com
 - Address:** 654 Anystreet
 - City:** Anytown
 - State:** New York (dropdown menu)
 - Zip:** 98335
 - Notes:** An empty text area.

At the bottom of the form, there are four buttons: "Close", "New", "Save", and "Delete".

Figure 20. Vendor Information Management

To enter a new customer:

1. Click on the New button.
2. Enter the customer's information.
3. Click on the Save button.

To edit a customer's information:

1. Select a customer or enter their name in the Search Text field.
2. The Search Field will limit the number of customers in the Select Customer list to help find the right customer quickly.
3. Modify the customer's information by typing over their existing information.
4. Click on Save.

3 Working with Inventory

Stock Manager manages inventory items from a main inventory screen. Use the tabs on this screen to access commonly performed inventory functions.

The main inventory screen is comprised of 7 tabbed function screens:

- Inventory
- Add
- Subtract
- Invoice
- Compare
- Purchase Order
- History

Click on the tab to perform the function it describes. The Add tab will add inventory item quantities; the Subtract tab reduces inventory quantities; the Invoice tab generates invoices for customers; the Compare tab will compare inventory item quantities with the values scanned during a physical inventory; the PO's tab generates purchase orders; the History tab shows a chronological history of operations performed on the inventory.

Each function that modifies inventory levels (Add and Subtract) includes a history grid to display recent scans and undo those scans if necessary.

3.1 Main Inventory Screen

The Inventory tab displays the entire list of inventory items in its grid. This screen provides a search function for finding items in the main inventory grid.

There are also 7 functional tabs:

- Inventory – lists all items in the inventory
- Add – increase an item’s quantity
- Subtract - decrease an item’s quantity
- Invoice – sell items to customers
- Compare – perform physical inventories
- PO’s – create purchase order automatically
- History – view a history of recent inventory transactions

The labels of these tabs can be customized from the File > Customize Text menu.

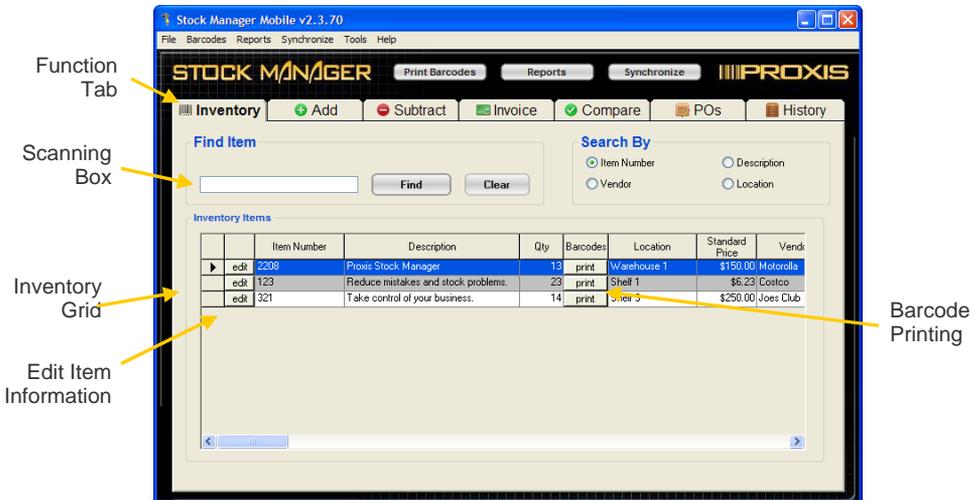


Figure 21. Main Inventory Screen

On most tabs, scanning an item not found in inventory will result in a prompt to add it.

The inventory grid has buttons for editing items and printing barcodes for specific items. Double clicking an item or clicking the item’s Edit button will open the editor screen.

Right clicking on an item will open a menu of typical actions that can be taken on an item such as: Edit, add quantity, subtract quantity and print barcodes. Refer to Figure 22.

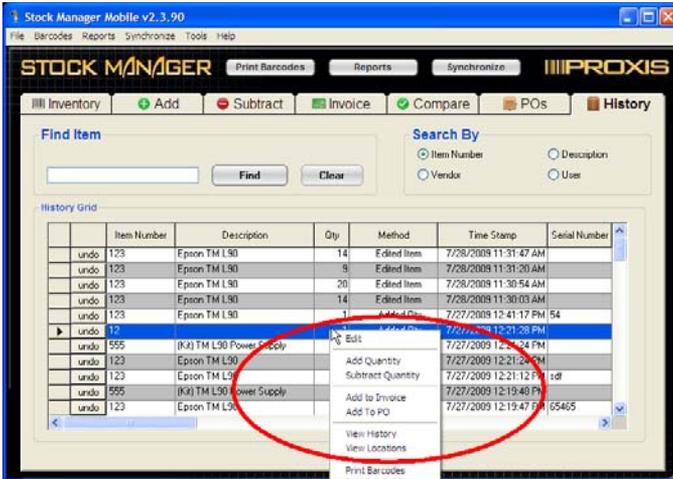
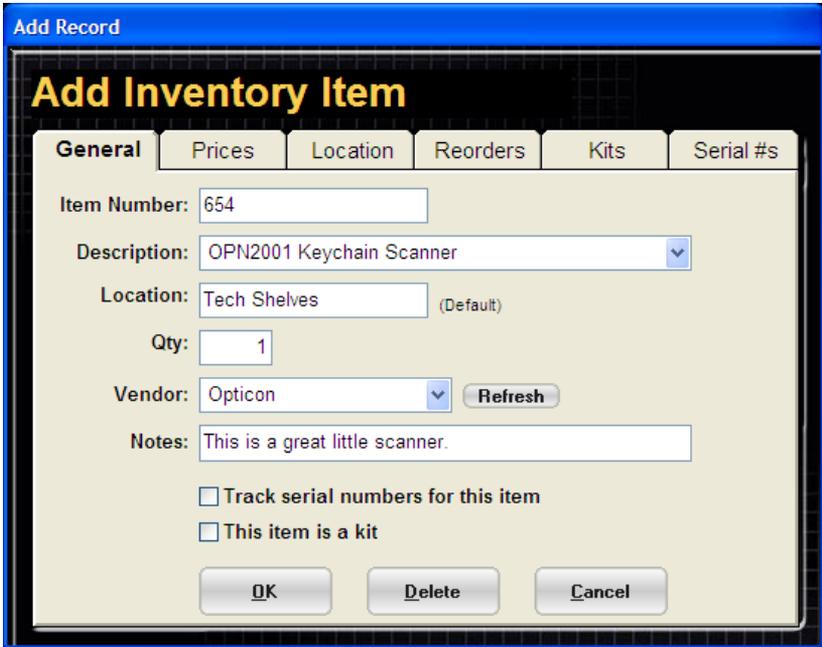


Figure 22. Right clicking on an item

3.1.1 Adding and Editing Items - General Tab

After scanning or clicking an item, the Add Inventory Item or Edit Inventory Item screen will appear. This screen provides access to add inventory, modify item information and print barcode labels.



The screenshot shows a software window titled "Add Record" with a sub-header "Add Inventory Item". Below the sub-header are six tabs: "General", "Prices", "Location", "Reorders", "Kits", and "Serial #s". The "General" tab is active. The form contains the following fields and controls:

- Item Number:** A text input field containing "654".
- Description:** A dropdown menu showing "OPN2001 Keychain Scanner".
- Location:** A text input field containing "Tech Shelves" with "(Default)" to its right.
- Qty:** A text input field containing "1".
- Vendor:** A dropdown menu showing "Opticon" and a "Refresh" button.
- Notes:** A text area containing "This is a great little scanner."
- Track serial numbers for this item
- This item is a kit
- Buttons: "OK", "Delete", and "Cancel".

Figure 23. Add Item Screen General Tab

The General Tab contains standard item information such as:

- Item Number
- Description
- Default Location
- Qty (quantity in stock)
- Vendor
- Notes
- Track serial number for the item
- Show that the item is a kit with sub-items.

Item Number:

This is the item's barcode or stock keeping unit. This field is required.

Description:

The name of the item or product the barcode is assigned to.

Default Location:

The default location is set during the initial start up wizard and is automatically entered in this field. This value can be changed. While other locations can be added for an item, the new value becomes the item's default location. Refer to section 3.1.3 for more information on working with multiple locations.

Qty:

Enter the starting quantity, if known, for an item. Set this value to 0 (zero) if using serial numbers.

Serial Numbers:

When this feature is used the Add, Subtract, Invoice and PO tabs will prompt for a serial number when the item is scanned.

When turning on the serial number feature make sure to enter 0 (zero) for item quantity and use the Add tab to increase starting quantities.

Kits:

Check this box to indicate that the item is a kit. A kit item will have sub-items that accompany it. Please refer to section 3.1.5 for more information on working with items in a kit.

The OK button at the bottom of the screen saves all entries and exits to the main screen.

The editor screen has a Delete button that removes the item and all associated item reporting from the inventory grid.

To un-delete an item, simply scan or enter its item number from any tab. This will prompt the user to re-enable the item with its item information intact.

3.1.2 Adding and Editing Items - Prices Tab

The screenshot shows a software window titled "Add Record" with a sub-header "Add Inventory Item". Below the sub-header are six tabs: "General", "Prices", "Location", "Reorders", "Kits", and "Serial #s". The "Prices" tab is selected. The main area contains a text block explaining pricing terms: "Cost is commonly referred to as wholesale price. Current Price is the standard item price. List Price is also referred to as MSRP." Below this are two sections: "Item Pricing" and "Tax Rate". The "Item Pricing" section has three input fields: "Cost:" with a value of "\$0.00", "Price:" with a value of "\$0.00", and "MSRP:" with a value of "\$0.00". The "Tax Rate" section has two checkboxes: "Apply Tax 1:" and "Apply Tax 2:", both of which are currently unchecked. At the bottom of the dialog are three buttons: "OK", "Delete", and "Cancel".

Figure 24. Prices Tab

Item Pricing:

The Prices tab shows the three pricing levels that can be set for items:

- Cost – the amount that was paid for an item.
- Price – what the item will sell for. Also called retail price.
- MSRP – the manufacturers suggested retail price.

Tax Rate:

Two tax rates can be applied to every item. Tax rates are typically only used with the Invoicing function. These tax rates are defined in the Preferences and Settings. Tax 1 is a percentage tax. Tax 2 can be a percentage rate or a flat (or fixed) amount.

A typical use of Tax 2 is for taxes like GST, VAT, or adding a specific shipping charge for an item.

3.1.3 Adding and Editing Items – Location Tab

The Location feature tracks an item's quantity at separate locations. When adding and subtracting inventory or generating invoices and purchase orders, Stock Manager will check to see if there are multiple locations to pull from. If there are and the "Prompt for Location" setting is selected, then, Stock Manager will prompt the user to choose the location from which inventory is coming from or going to.

The location tab is used to show how many items are at each location, set the preference for prompting location, add a new location, set a location as a default, transfer inventory from one location to another, and remove locations.

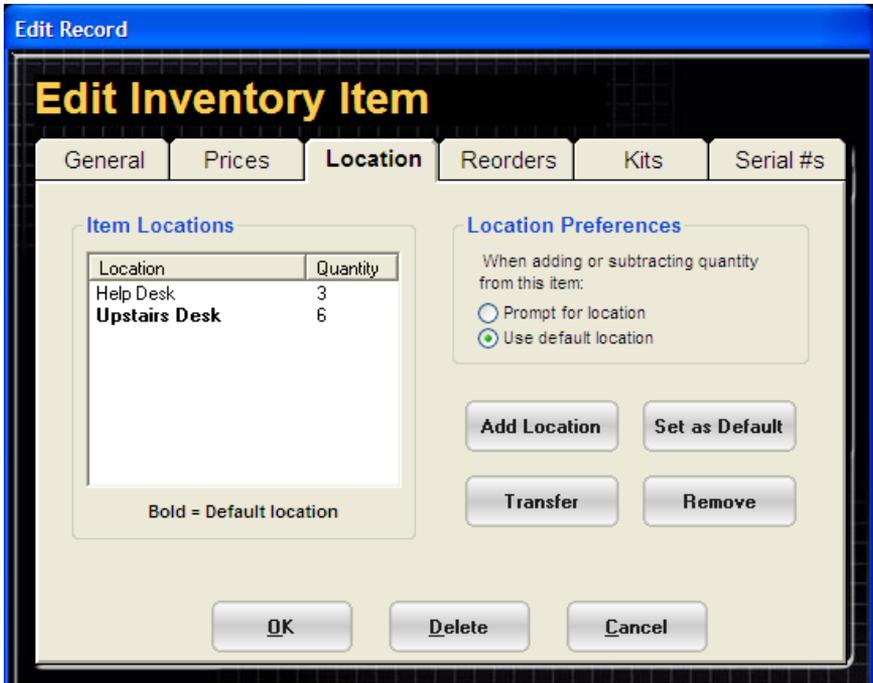


Figure 25. Location Tab

To add a new location for an item:

1. Click the Add Location button.
2. Enter the new location name.
3. Transfer inventory into the new location if needed.

Setting a default location:

1. Click on the location to be the default.
2. Click on the Set as Default button.

To transfer Inventory from one location to another:

1. Select the location to transfer from.
2. Click on the Transfer button.
3. On the Transfer Inventory form, enter the quantity to transfer.
4. On the Transfer Inventory form, select the location to transfer to.
5. Click Transfer.

To remove a location:

1. Select the location to delete.
2. Click on Remove.
3. Click OK to permanently delete a location.
4. A prompt to transfer inventory will appear if there is inventory showing at that location.



Figure 26. Transferring Inventory

When scanning items in and out a prompt will appear if the “Prompt for Location” setting is enabled. This prompt allows the user to either scan a location or select the location from a list.

The default location will be used if the location isn't changed.

The items location will be chosen when the user scans an item in or out of inventory using the Add, Subtract, Inventory, or PO functions.

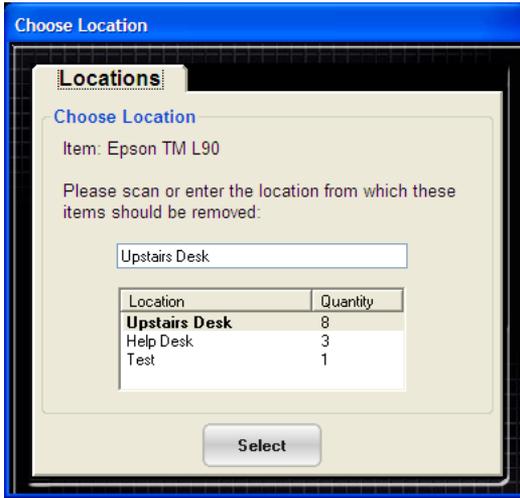


Figure 27. Entering the Location when scanning items out

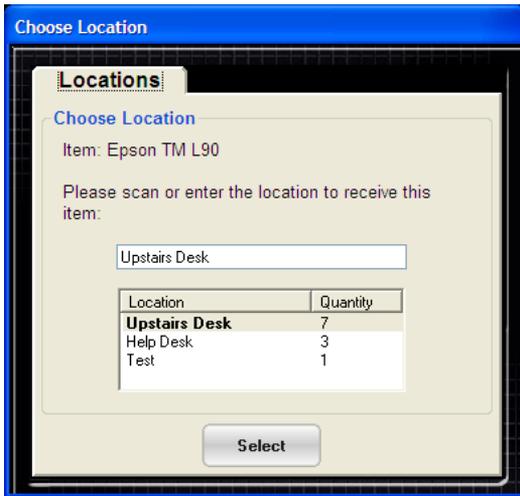


Figure 28. Entering the location while receiving

3.1.4 Adding and Editing Items – Limits Tab

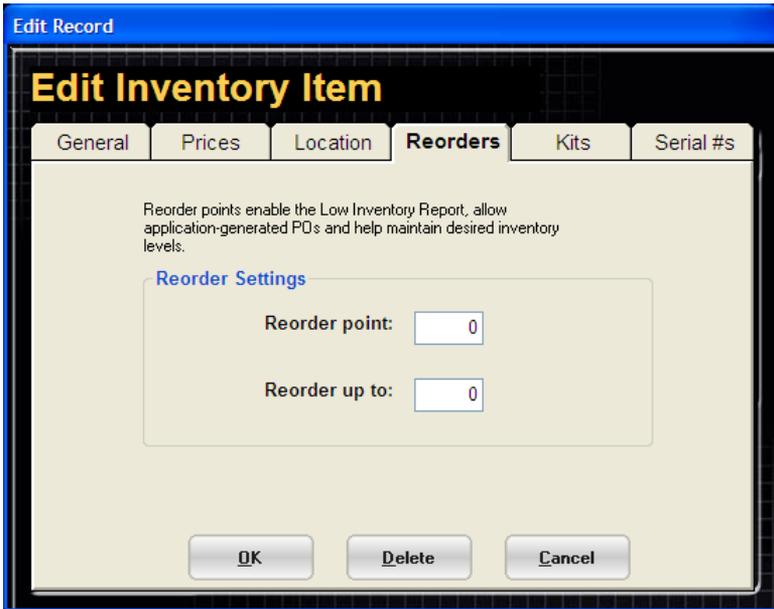


Figure 29. Reorder Tab

The Reorder point field sets the re-order point for an item. The Low Inventory report will show all items that have reached their Reorder Point thresholds and need reordering.

These values are also important for the Purchase Order feature in Stock Manager. On the PO tab there is a button that's labeled Reorder. When this button is clicked for a particular vendor or for All Vendors, Stock Manager adds items that have gone below their reorder point and adds enough quantity to the purchase order to bring the item's stock level to the "Reorder up to" amount.

3.1.5 Adding and Editing Items – Kits Tab

Enabling an item to be a kit allows other inventory items to be associated with it as sub-items. The Subtract preferences on the bottom of the form will determine whether a component of the kit will have its inventory quantity reduced when the kit is built or when it is shipped.

The Kit checkbox must be selected on the General tab to enable the kit features for a particular item.

Edit Record

Edit Inventory Item

General | Prices | Location | Reorders | **Kits** | Serial #s

Kit Components

Item Number: Qty:

Add this item to PO when reordering this kit

| Item Number | Description | Qty | Vendor | Add To PO |
|-------------|---------------------|-----|--------|-----------|
| 555 | TM L90 Power Supply | 1 | Epson | False |

Components are available to make 1 of this kit.

Subtract component quantities when

Building the kit Selling/shipping the kit

Component quantities will be subtracted whenever the kit quantity is decreased via the Subtract form or a submitted invoice.

Figure 30. Managing a Kit

To add a component to a kit:

1. Scan or enter the barcode in the Item Number field.
2. Enter the quantity of components for the kit.
3. Check the “Add this item to PO” when reordering checkbox if desired.
4. Click Save.

To edit a component in a kit:

1. Select the component from the list.
2. Click on Edit.
3. Modify the barcode or quantity.

To remove a component in a kit:

1. Select the component.
2. Click Remove.

To select the subtraction method for the components when the kit is removed from inventory:

1. Click on “Building the kit” to subtract component parts when adding a kit inventory quantity to inventory.
2. Click on “Selling/Shipping the kit” to subtract component parts from inventory when selling or shipping the parent kit.

Note: Kits can be subcomponents of larger kits.

3.1.6 Adding and Editing Items – Serial Number Tab

To track serial numbers for a particular item first select “Track Serial Numbers for this item” on the General Tab.

The “Enter serial number” prompt will pop up when adding or removing items that have serial number tracking enabled.

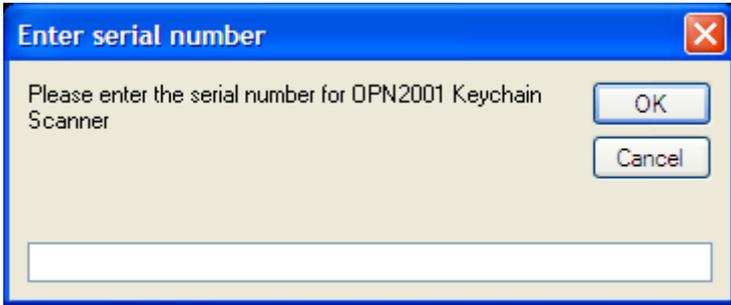


Figure 31. Enter serial number

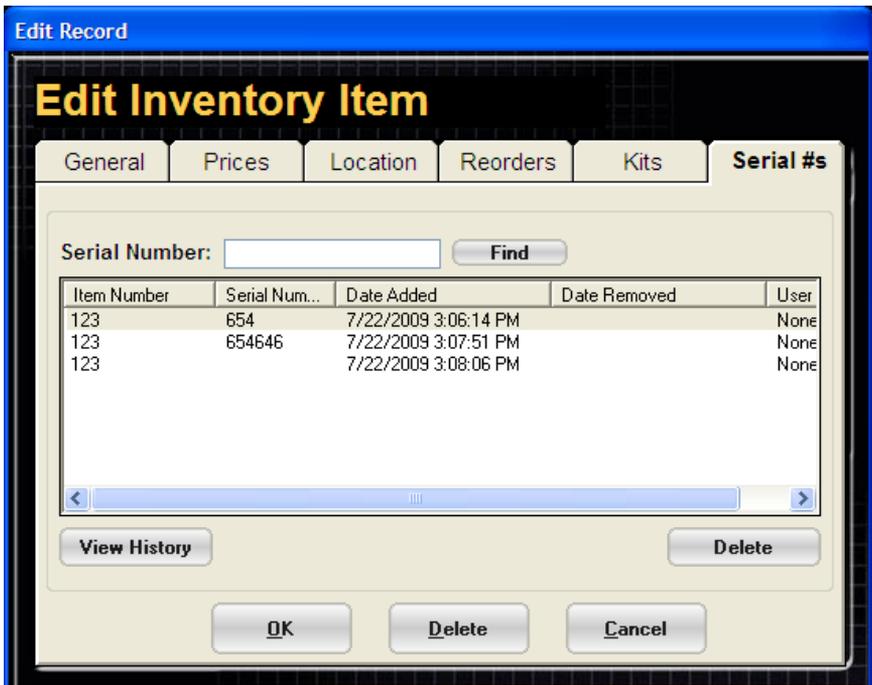


Figure 32. Serial Number Tab

Serial numbers are tracked when scanning items in and out of inventory. The Date Added shows the date and time a serialized item was added. The Date Removed fields show when it was scanned out of the system.

To view the item's serial number history:

1. Double click on the Serial Number row on the grid on the Serial Numbers tab.
2. The View History button will also open the Serial Number History form for a highlighted serial number.

Serial Number History

Serial Number Info

Item Number: Last Added On:

Description: Last Removed On:

Serial Number: Last Action By:

Notes:

Transactions with this serial number

| Transaction | Status | Date | User | Customer |
|-------------|--------|----------------------|------|----------|
| Added | | 7/22/2009 3:07:51 PM | None | |
| Subtracted | | 7/23/2009 9:40:05 AM | None | |

Figure 33. Serial Number History

Figure 33. shows the Serial Number History form. The form lists the item's description, serial number, last added date, last removed date, the last user to scan the serial number and the item's notes. The Serial Number History form shows a list of transactions, both in and out, for that particular serial number.

3.2 Add Screen

The Add tab adds/receives the quantity specified (in the Quantity field) for the scanned item, increasing the stock quantity. The History of Additions grid shows a historical list of scans.



Figure 34. Add Screen

The Clear button will reset the Enter Item Number field and set the Quantity field to 1 (one). The Quantity field must be changed before an item is scanned.

To Receive a Large Number of a Certain Item:

1. In the Quantity field, enter the number of items to add.
2. Scan one of the items in the lot.
3. The scan will appear in the History of Additions grid.

To Undo a Scan (Caution clicking the undo button is not reversible):

1. Locate the scan to be deleted in the History of Additions grid.
2. Click the Undo button for that scan.
3. The quantity addition will be undone and the quantity increase reversed.

3.2.1 Importing from a Keychain Scanner

A Keychain Scanner is a small barcode scanner called the Opticon OPN-2001. This scanner has two buttons one for scanning barcodes and the other for deleting the last scanned barcode.

Keychain scanner data can be imported to the Add, the Subtract, Invoice, Compare and PO's tabs. All of the data on the scanner will import into a single tab function. Stock Manager then clears all data from the scanner if the Clear Data After Import option is checked.

If an item on the scanner is not found in the inventory database, a prompt will appear asking the user to add the item.

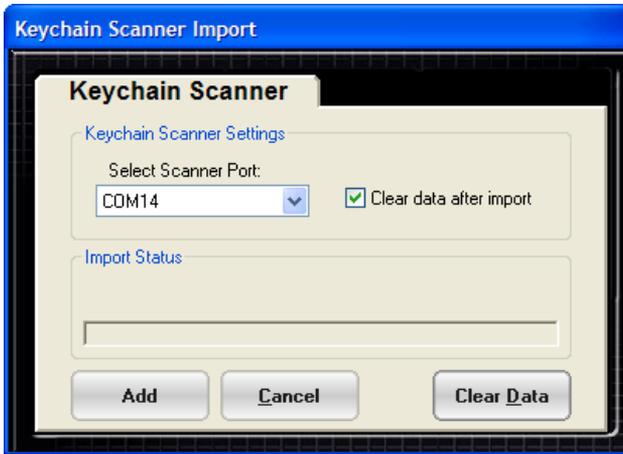


Figure 35. Keychain Scanner Import

To add inventory quantities using a keychain scanner:

1. Scan each item you wish to add. All items must be scanned. There is no function for entering a quantity number.
2. Connect the scanner to the USB port. Note what Com port has been assigned to the scanner. This setting will be saved.
3. Click on the Import from Keychain Scanner button.
4. Select the Scanner Port from the drop down box.
5. Click the Add button to import data.

3.2.2 Setting the Current User

The Current User field is used to track who is working with Stock Manager at a given time. The Current user is typically set and changed after a shift. A setting is available to prompt for a user after every scan.



Figure 36. User Management

To Add and Select and new user:

1. Click the New button.
2. Enter their name in the Username field.
3. Click on Select.

To select a previously added user:

1. Select the user from the Select User drop down box.
2. Click on the Select button.

3.2.3 Setting a Location When Adding Items

To set a location for an item when adding it the Prompt for Location setting must be selected on the Location tab in the Edit Item screen. When using multiple locations for an item a prompt will appear that lists each location and how many items should be at that location.

Locations can either be scanned into the location field or selected from the list.

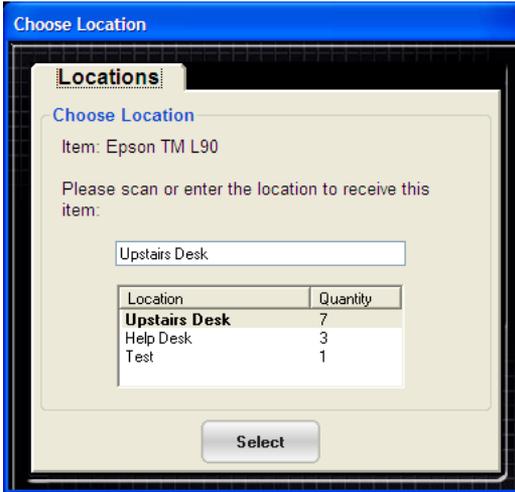


Figure 37. Entering the location while receiving

To set a new location to add to:

1. Scan the item to add.
2. Scan the item's location or enter it with the keyboard. The Choose Location form opens with the default location highlighted.

3.3 Subtract Screen

The Subtract tab subtracts/ships the quantity specified (in the Quantity field) for the scanned item, decreasing the stock quantity. The History of Subtractions grid shows a historical list of previous scans.

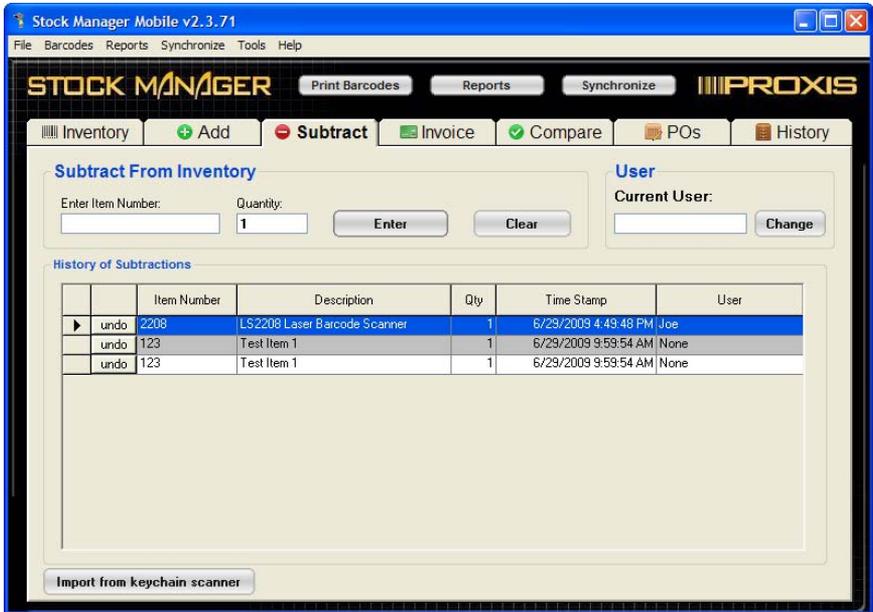


Figure 38. Subtract Screen

The Clear button will reset the Enter Item Number field and set the Quantity field to 1 (one). The Quantity field must be changed before an item is scanned.

To Ship/Subtract a Large Number of a Certain Item:

1. In the Quantity field, enter the number of items to subtract.
2. Scan the item.
3. The scan will appear in the History of Subtractions grid.

To Undo a Scan (Caution clicking the undo button is not reversible):

1. Locate the scan to be deleted in the History of Subtractions grid.
2. Click the Undo button for that scan.
3. The quantity subtraction will be undone and the quantity decrease reversed.

3.3.1 Setting a Location When Subtracting Items

If the Prompt for Location setting has been selected for the item being subtracted, a Choose Location form will open prompting for a location to subtract from. The Location can be left to the default location, scanned into the location field or selected from the list.

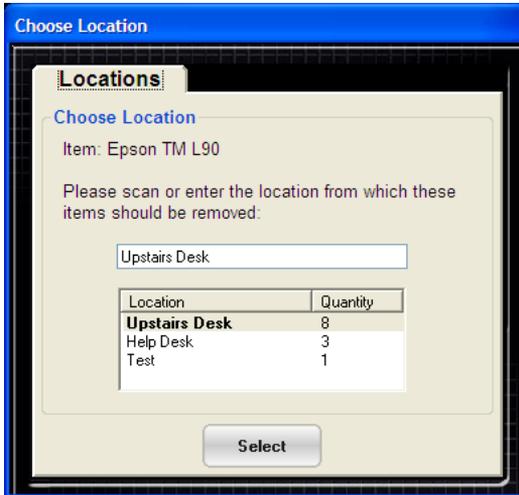


Figure 39. Entering the Location when scanning items out.

To select the item's default location to remove from:

1. Click the Select button. The form opens with the default location selected.

To set a new location to subtract from:

1. Scan the item to subtract.
2. Scan the item's location or enter it with the keyboard. The Choose Location form opens with the default location highlighted.

3.3.2 Subtracting Items in a Kit

When scanning kits out of inventory there is an option to reduce component quantities when the kit is removed from inventory through the Subtract tab or the Invoice tab.

To subtract component quantities when selling or shipping a kit:

1. Open the item editor by double clicking an item
2. Ensure the item is enabled as a kit.
3. Click on the Kits tab.
4. Select Selling/shipping the kit as the preferred time to reduce the component items' inventory quantities.

Edit Record

Edit Inventory Item

General | Prices | Location | Reorders | **Kits** | Serial #s

Kit Components

Item Number: Qty:

Add this item to PO when reordering this kit

| Item Number | Description | Qty | Vendor | Add To PO |
|-------------|---------------------|-----|--------|-----------|
| 555 | TM L90 Power Supply | 1 | Epson | False |

Components are available to make 1 of this kit.

Subtract component quantities when

Building the kit Selling/shipping the kit

Component quantities will be subtracted whenever the kit quantity is decreased via the Subtract form or a submitted invoice.

Figure 40. Subtracting Kits

To subtract component quantities when building a kit:

1. Open the item editor, ensuring the item is enabled as a kit.
2. Click on the Kits tab.
3. Select Building the kit as the preferred time to reduce the component items' inventory quantities.

If "Building the kit" is selected, Stock Manager will subtract a kit's components out of inventory when the kit is added to inventory.

3.4 Invoice Screen

The Invoice function is a simple way to scan items out of inventory and print a simple receipt/invoice to give to customers for payment. Taxes are applied according to the default rates, but can be excluded for a particular invoice.

Invoices can be created and saved for later. Selecting an invoice from the Select Invoice drop down opens pending invoices.

The invoicing function is customizable by Proxis programmers. Please call us for customization requests 1-877-477-6947.

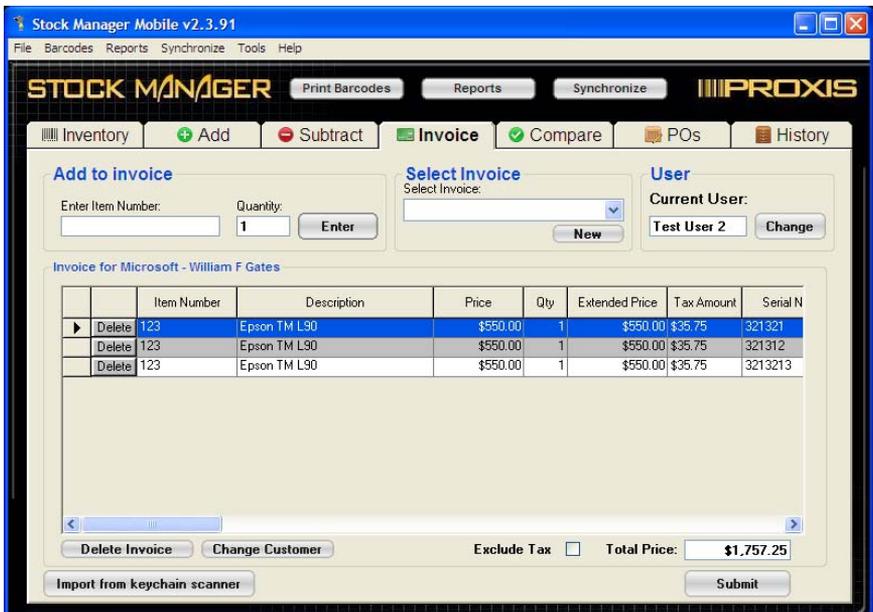


Figure 41. Invoice Screen

The Invoice tab in Stock Manager provides an Add to Invoice field where an item number barcode can be scanned or typed to add items to an invoice. Use the Select Customer area for creating a new invoice and assigning a customer to it. Use the User area for setting the current user.

Using the buttons on the invoice form invoices can be deleted, have taxes applied to them and can also be generated by importing barcode scans from a keychain scanner.

The Submit button will show the invoice to be printed and subsequently reduces inventory by the quantities of items on the invoice.

To create a new invoice:

1. Click on the New button.
2. Either select a customer from the drop down box, search for an existing customer or click on the New button to create a new customer.
3. Click Select to select the current customer for the new invoice.

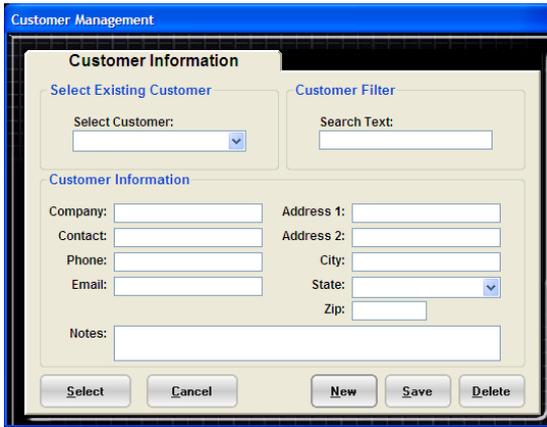


Figure 42. Customer Management

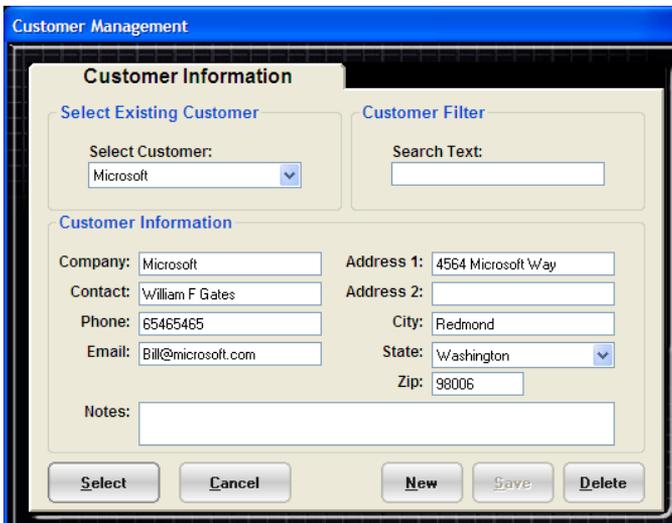


Figure 43. Entering Customer Information

To print an invoice:

1. Click on the Submit button.
2. The invoice will open in print preview mode.
3. Click the Printer icon at the top of the screen (see Figure 45) to print to the report printer designated in preferences and settings.
4. After closing the Invoice a prompt will ask whether to adjust inventory quantities for the items on the invoice.

| Invoice 100001 | | | | | | | |
|--|-----------------------------------|---------------------------------------|------|---|-----------|------------------------|-----------------|
| Proxis Software 213 Anystreet Anytown, Washington 98006 United States | | 360-738-3118 www.proxisoftware.com | | Microsoft 654 Any Street Redmond Washington 98007 bill@microsoft.com | | Bill Gates 23423423 | |
| Item Number | Description | Price | Qty | Ext. Price | Sales Tax | Sin Tax | Total |
| 123 | Reduce mistakes and stock problem | \$6.23 | 1.00 | \$6.23 | \$0.00 | \$0.00 | \$6.23 |
| 2208 | Proxis Stock Manager | \$195.00 | 1.00 | \$195.00 | \$3.90 | \$0.00 | \$198.90 |
| 321 | Take control of your business. | \$250.00 | 1.00 | \$250.00 | \$0.00 | \$0.00 | \$250.00 |
| | | | | | | Subtotal: | \$451.23 |
| | | | | | | Sales Tax: | \$3.90 |
| | | | | | | Sin Tax: | \$0.00 |
| | | | | | | Total Price: | \$455.13 |

Figure 44. Pre-viewing an Invoice

Invoices can also be exported to pdf or a number of other popular formats.

To Export to PDF:

1. Click Submit to view the invoice in print preview mode.
2. Click on the envelope icon shown in Figure 45.
3. Click OK.
4. Select a location and filename to save the invoice pdf.
5. Click Save.



Figure 45. Exporting an Invoice

3.5 Compare Screen – Physical Inventory Count

The Compare tab is used to conduct a physical inventory comparison. This function provides reporting to compare the actual stock scanned during a physical inventory count against item quantities listed in the Stock Manager database. Comparison scanning from mobile barcode scanners may also be “staged” in this area from multiple devices before the comparison reports are run.

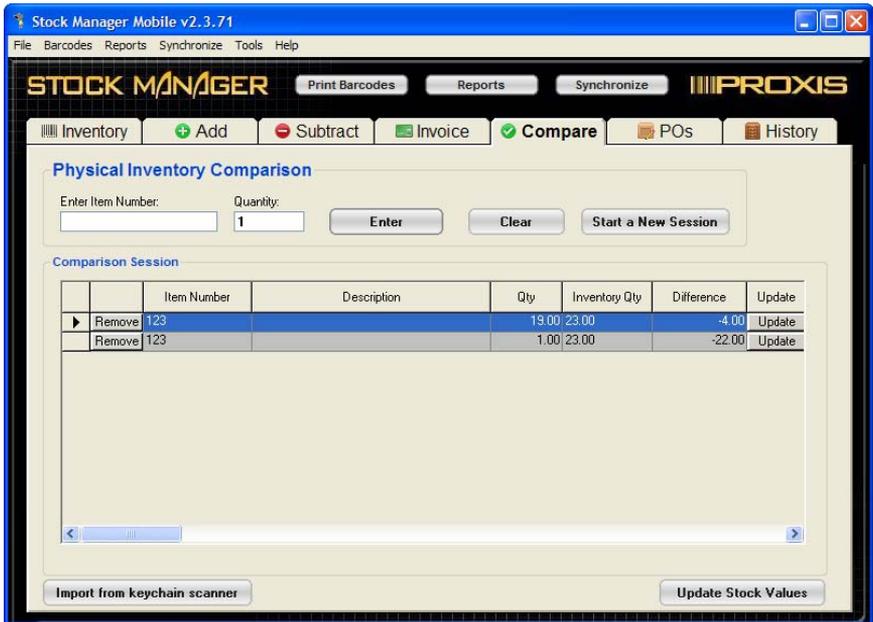


Figure 46. Compare Screen

The Comparison Session must have scanned items listed in the Comparison Session grid to enable the comparison reports. These scans can come from a wireless barcode scanner or imported from a mobile Palm, Windows CE or Cipher Lab barcode scanner.

After running comparison reports for physical inventory counts, click the Update Stock Values to update the Stock Manager to the current physical count.

To start a new physical count, click the Start a New Session button. Be aware that starting a new session will delete all comparison scans.

The Remove button will remove a scan from the Comparison Session grid.

3.6 PO Screen

The Purchase Order function in stock manager allows for easy re-ordering of items and streamlines inventory management by using an item's Reorder Point and Order Up To quantity.

Stock manager can also re-order components to kits when a kit is added to a purchase order.

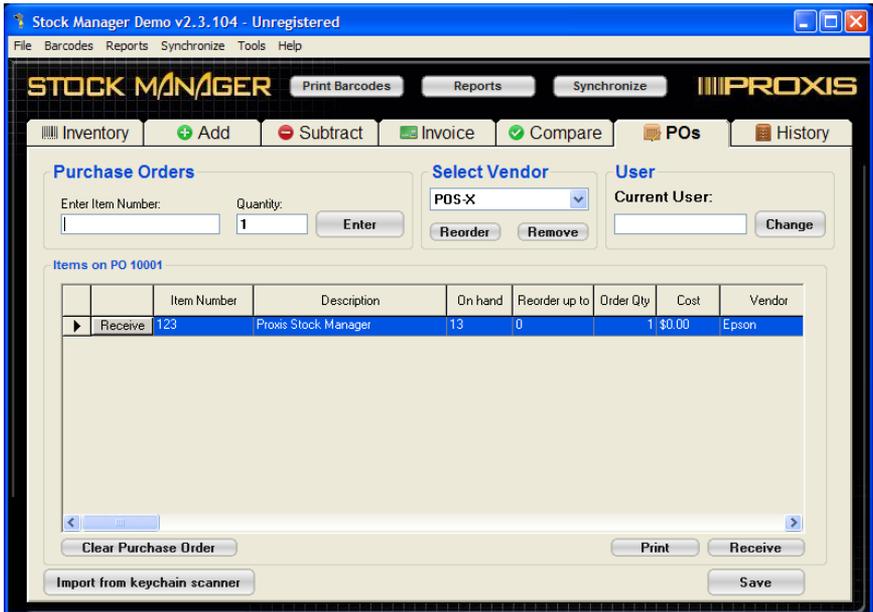


Figure 47. PO Screen

To create purchase orders for all items that have fallen below their inventory Reorder Points:

1. Select All Vendors from the Select Vendor drop down.
2. Click on the Reorder button.
3. All items that have fallen below their reorder point are added to the PO.

To print a purchase order:

1. Add items to a purchase order.
2. Click the Print button.
3. A printable purchase order will be created for each vendor.

To save a purchase order for receiving later:

1. Click the Submit button.
2. The PO may be recalled at a later date.

To Recall a previous PO:

1. Click the Recall button.
2. Select a Purchase order from the list.

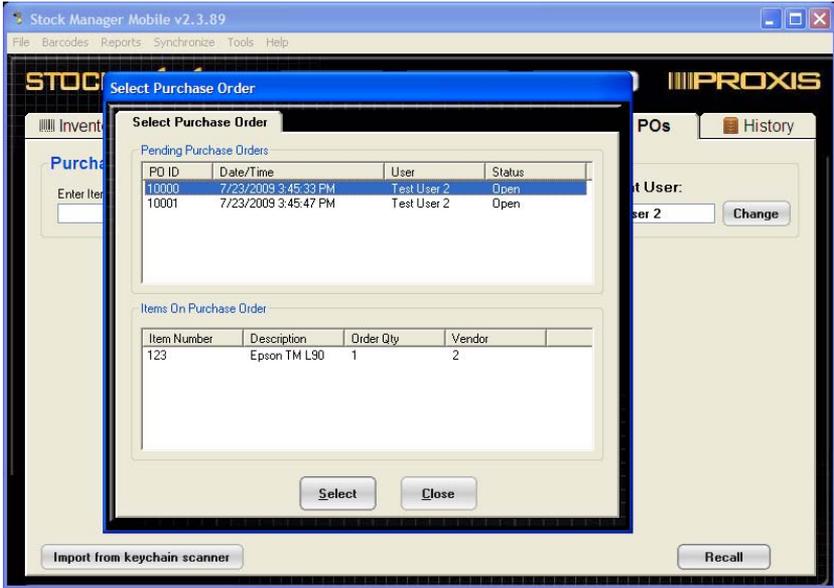


Figure 48. Select Purchase Orders

To receive all items on a recalled purchase order:

1. Click the Receive button on the bottom right hand corner of the PO form.
2. Click Yes on the prompt.
3. Stock Manager will automatically adjust inventory quantities for the items received.

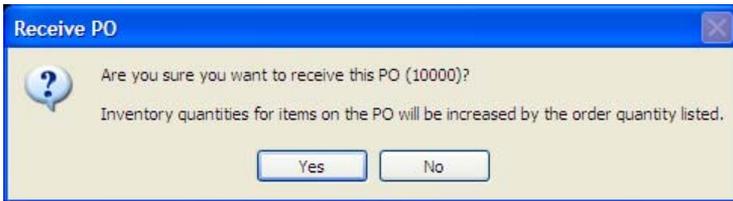


Figure 49. Receiving a Purchase Order

To receive only certain items on a recalled purchase order:

1. Click the Receive button to the left of the Item.
2. Enter the amount to be received
3. Click OK.
4. Click Save to keep the PO available for receiving the rest of the items.

Proxis Software
123456789
www.proxissoftware.com

| Vendor | Ship To | Purchase Order |
|---|---|---|
| Epson 123 Any street Allingtown, Washington 98224 | Proxis Software 123 Main Street Anytown, New York 10026 | Purchase Order #: 10003 Pages: 1 Tuesday, July 28, 2009 |

| Line | Item Number | Description | Cost | Qty | Total |
|---------------|-------------|--------------|----------|------|-------------------|
| 1 | 123 | Epson TM L90 | \$500.00 | 6.00 | \$3,000.00 |
| Total: | | | | | \$3,000.00 |

Figure 50. A sample purchase order

Please contact Proxis Software for custom barcode programming, modifications and report design – 1-877-477-6947.

3.7 History Screen

The History tab will show a list of previous quantity changes, product additions and product deletions. This list is ordered by a Time Stamp showing when the action occurred. This list is limited to the Max History Record Size setting found in the Preferences and Setting screen.

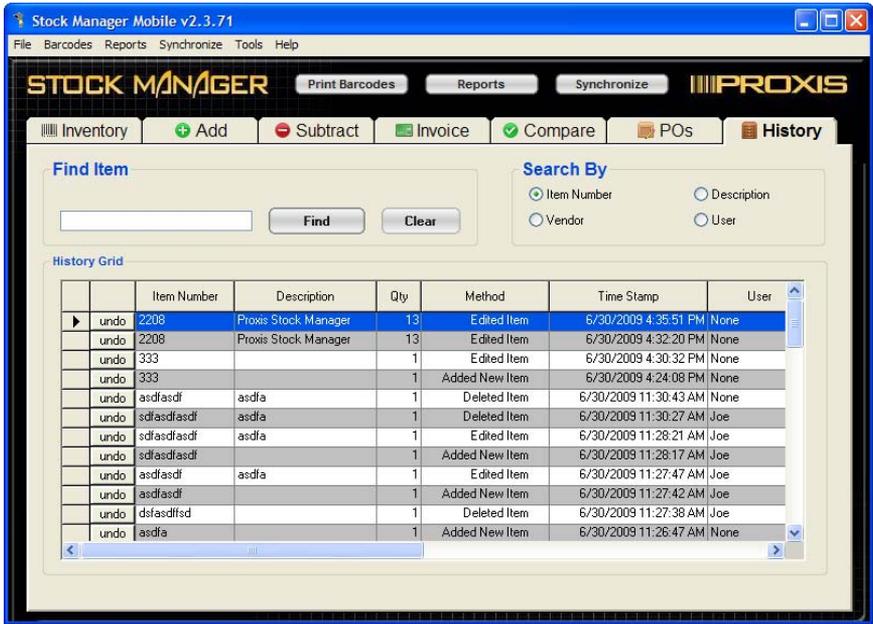


Figure 51. History Screen

The History Screen is searchable by Item Number, Vendor, or Description. The History Grid can be ordered by any field by clicking on the column header for that field.

The Undo button on the left side of each row will reverse the action shown in the Method column.

Be careful! Clicking the Undo button is not reversible.

A detailed History Report is available from the Reports menu. The History report displays a list of transactions for a specific date range.

4 Barcode Label Printing



Figure 52. Common Barcode Printers

Stock Manager prints barcode labels using common barcode and laser printers. There are a number of predefined label formats to choose from including sheets of Avery-style mailing labels. Label templates are created in Crystal Reports 8.5 and can be modified by our programmers free of charge. Please call 1-877-477-6947 for assistance.

Before printing barcodes, ensure that a barcode printer is connected and its drivers installed. Also ensure that a Default Label Format and a Default Label Printer have been selected in the Preferences and Settings section.

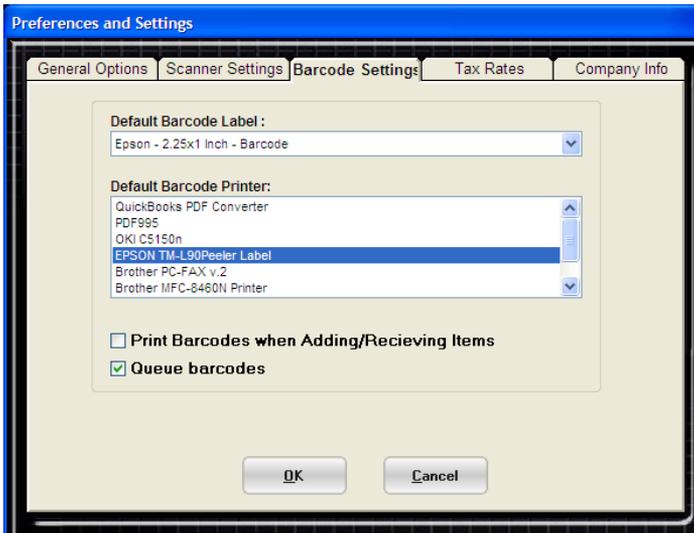


Figure 53. Barcode Label Settings

4.1 Barcode Label Part Numbers

A number of different label types and sizes can be used when printing labels from Stock Manager. Here is a list of some popular label with their part numbers:

Cognitive Labels:

Direct Thermal 2.25" x 1", Part Number: 03-02-1519

Zebra Labels:

Direct Thermal 1.25" x 1", Part Number: 10010038

Direct Thermal 2.25" x 1.25", Part Number: 800262-125

Epson Labels:

Direct Thermal 2.2"x1", Part Number: 111197200

Barcode label formats can be customized for free by our staff. Please contact us for label formatting.

4.2 Printing Using the Barcode Label Queue

The Barcode Label Queue is simply a way to create a barcode print job by selecting items to print and then executing the print job so all barcode labels print at once. Queuing labels makes barcode label print jobs quicker and more efficient.

Warning: the Barcode Label Queue will be erased when exiting the application. The queue is only saved while Stock Manager is running.

Selecting Items for the Queue:

1. Ensure that Queue Barcodes is checked in the Barcode Settings tab in Preferences and Settings.
2. Click on the print button for the desired item from the Inventory tab.
3. A prompt will appear asking how many barcodes should be printed for the item. It will default to the current quantity in stock.
4. Click OK to add the quantity to print to the queue.

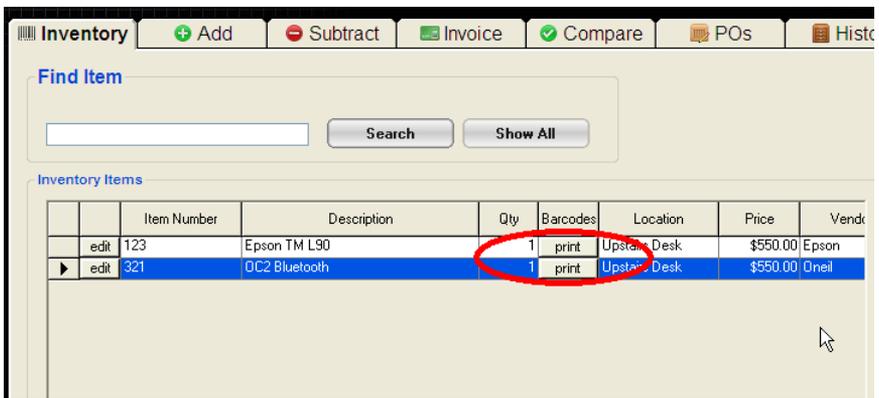


Figure 54. Adding barcodes to the print queue

To Send a Label Queue to the Barcode Printer:

1. Click on the Print Barcodes button from the Main Screen.
2. The Barcode Queue will display.
3. Click on Print Queue to print labels for the items in the Queue.

To Print A Barcode Label for Every Item:

1. Click on the Print All Items button. This function will use the current inventory quantities. For example, if there are 54 widgets with Item Number 123, Stock Manager will print 54 labels for this item.

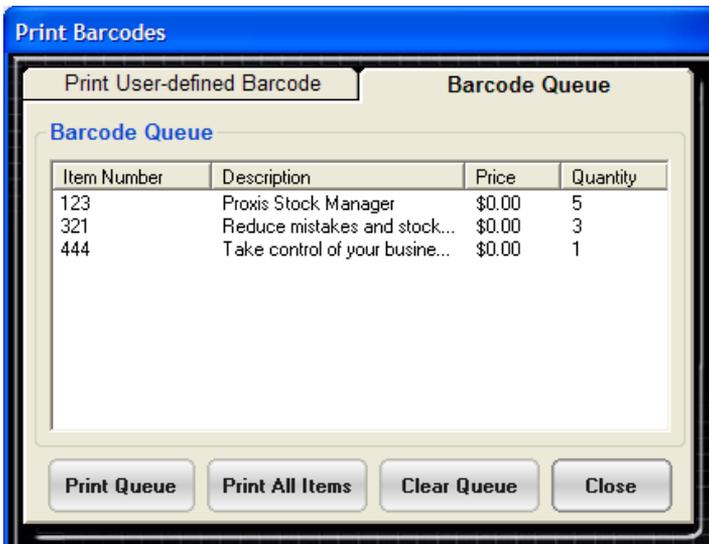


Figure 55. Printing Labels from the Queue

The Print Random Barcode tab is a function designed to print barcodes that may not be in the inventory such as shelf labels, user names, rack labels, and anything that might need to be encoded.

To Print a User Defined Barcode:

1. Click on Print Barcodes and select the Print User-Defined Barcode tab.
2. Scan or type the Barcode data into the Barcode Data field.
3. Enter a Quantity of labels to print.
4. Click Print. A label will print to the default label printer.

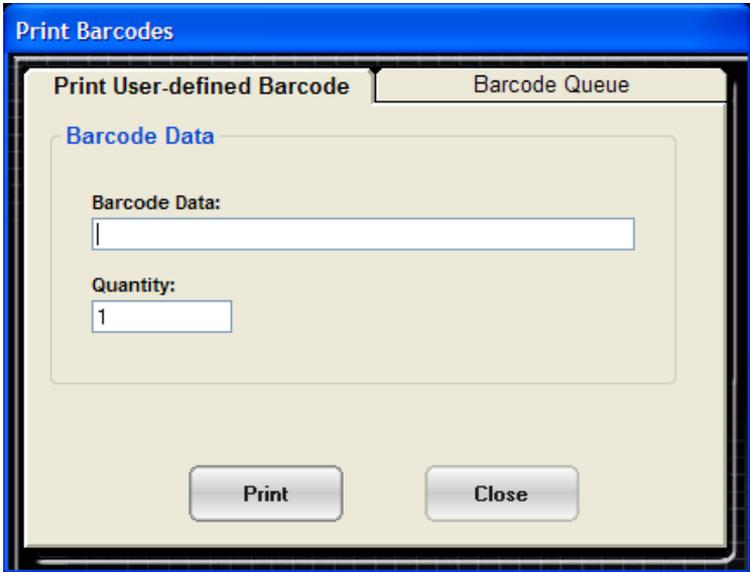


Figure 56. Printing User-Defined Barcodes

4.3 Individual Item Barcode Label Printing

With the Queue Barcodes feature turned off barcodes are printed straight from the Inventory Tab and from the Print Barcodes button on the main screen.

There are three methods for printing barcodes for individual items:

- From the Main Screen's Print Barcodes button. With Queuing turned off this will print a barcode for every item in inventory.
- From the Main Screen Inventory tab's Barcodes column.
- When synchronizing inventory values with a mobile device.

On the Main Inventory screen, clicking the Print button for any inventory item will generate the prompt shown in Figure 56. Enter the number of labels to print and click OK to print them to the default barcode printer.

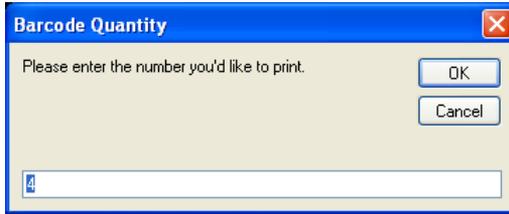


Figure 57. Printing Labels for Individual Items

4.4 Mobile Barcode Label Printing

Barcode Label printing is also available using a mobile barcode scanner and a mobile barcode printer. Both Bluetooth and cabled serial connections are supported.

The following printers are supported:

1. Epson Mobilink TM-P6
2. Zebra QL220, RW220 and MZ220 series printers
3. Datamax-Oneil OC2
4. Most Epson Compatible Mobile Printers

The following 2"x1" Label Stock is supported:

1. Epson – BSC009313A
2. Zebra - LD-R7BL5B
3. Datamax-Oneil - 740525-911

Please refer to Section 12.11 for more information on setting up Mobile Barcode Label Printing.

5 Inventory Reporting

Stock Manager includes 6 basic inventory reports:

- Full Inventory Report
- Low Inventory Report
- Three Physical Comparison Reports
- History Report



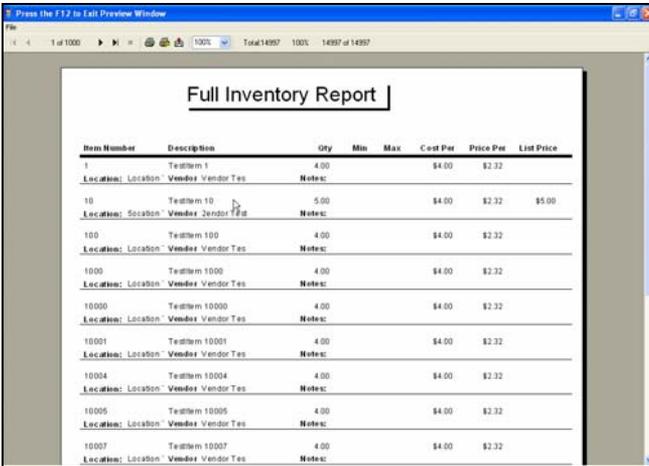
Figure 58. Selecting an Inventory Report

Comparison reports are available once comparison scans are entered into the Compare Grid from either the Keyboard Wedge scanner or from a Wireless Barcode Scanner.

All reports can be printed to the Default Report Printer. Make sure the Default Report Printer in the Preferences and Settings Screen has been selected before printing a report.

5.1 Full Inventory Reporting

The Full Inventory Report shows all information for every item. This report also lists the Total Inventory Value at the bottom of the report.



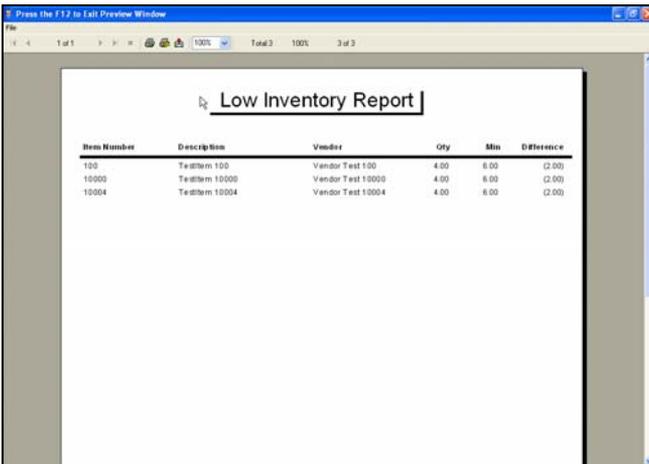
The screenshot shows a software window titled "Full Inventory Report" with a table of inventory items. The table has columns for Item Number, Description, Qty, Min, Max, Cost Per, Price Per, and List Price. The data is as follows:

| Item Number | Description | Qty | Min | Max | Cost Per | Price Per | List Price |
|---|----------------|------|-----|-----|----------|-----------|------------|
| 1 | TestItem 1 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 10 | TestItem 10 | 5.00 | | | \$4.00 | \$2.32 | \$5.00 |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 100 | TestItem 100 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 1000 | TestItem 1000 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 10000 | TestItem 10000 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 10001 | TestItem 10001 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 10004 | TestItem 10004 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 10005 | TestItem 10005 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |
| 10007 | TestItem 10007 | 4.00 | | | \$4.00 | \$2.32 | |
| Location: Location Vendor Vendor Tes Notes: | | | | | | | |

Figure 59. Full Inventory Report

5.2 Low Inventory Reporting

The Low Inventory Report lists items whose Low Inventory threshold has been reached. This report is helpful for reordering and increasing inventory turns.



The screenshot shows a software window titled "Low Inventory Report" with a table of items. The table has columns for Item Number, Description, Vendor, Qty, Min, and Difference. The data is as follows:

| Item Number | Description | Vendor | Qty | Min | Difference |
|-------------|----------------|-------------------|------|------|------------|
| 100 | TestItem 100 | Vendor Test 100 | 4.00 | 6.00 | (2.00) |
| 10000 | TestItem 10000 | Vendor Test 10000 | 4.00 | 6.00 | (2.00) |
| 10004 | TestItem 10004 | Vendor Test 10004 | 4.00 | 6.00 | (2.00) |

Figure 60. Low Inventory Report

5.3 Comparison of Physical Inventory Reporting

There are three Comparison reports. These reports are used when conducting a Physical Inventory to determine the accuracy of inventory values listed in the database as compared to the actual physical inventory values.

A typical Comparison session involves one or more mobile barcode scanners scanning and recording current quantities for every item in the inventory.

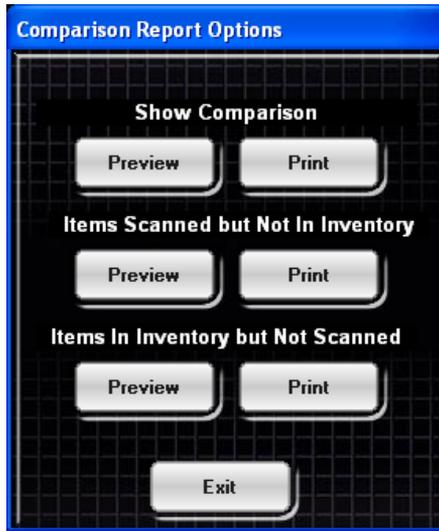
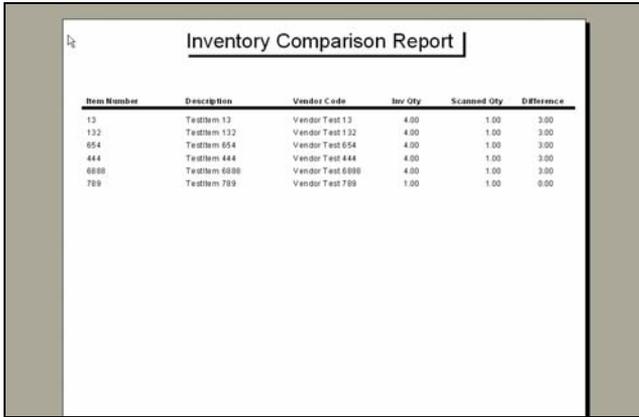


Figure 61. Selecting a Comparison Report

5.3.1 Items Scanned Compared to Stock Manager Levels

The Comparison report shows the difference between the quantities scanned and the values held in the inventory database.



| Item Number | Description | Vendor Code | Inv Qty | Scanned Qty | Difference |
|-------------|---------------|------------------|---------|-------------|------------|
| 13 | TestItem 13 | Vendor Test 13 | 4.00 | 1.00 | 3.00 |
| 132 | TestItem 132 | Vendor Test 132 | 4.00 | 1.00 | 3.00 |
| 654 | TestItem 654 | Vendor Test 654 | 4.00 | 1.00 | 3.00 |
| 444 | TestItem 444 | Vendor Test 444 | 4.00 | 1.00 | 3.00 |
| 6888 | TestItem 6888 | Vendor Test 6888 | 4.00 | 1.00 | 3.00 |
| 789 | TestItem 789 | Vendor Test 789 | 1.00 | 1.00 | 0.00 |

Figure 62. Inventory Comparison Report

5.3.2 Items Scanned but Not in Stock Manager

The Items Scanned but Not In Inventory Report shows the items present in the physical inventory but missing from the Stock Manager database.

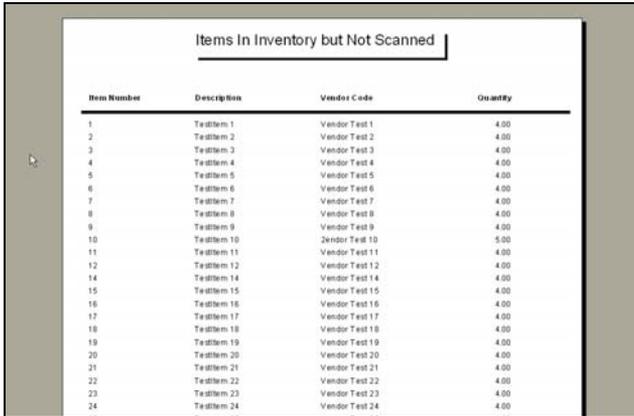


| Item Number | Description | Vendor Code | Quantity |
|-------------|-------------|-------------|----------|
| 54654 | | | 1.00 |
| dnf | | | 1.00 |
| aofg3343 | | | 1.00 |

Figure 63. Items Not Found Report

5.3.3 Items in Stock Manager but Not Scanned

This report shows all the items existing in the Stock Manager database but not scanned during the Physical Inventory process.



| Item Number | Description | Vendor Code | Quantity |
|-------------|-------------|----------------|----------|
| 1 | TestItem 1 | Vendor Test 1 | 4.00 |
| 2 | TestItem 2 | Vendor Test 2 | 4.00 |
| 3 | TestItem 3 | Vendor Test 3 | 4.00 |
| 4 | TestItem 4 | Vendor Test 4 | 4.00 |
| 5 | TestItem 5 | Vendor Test 5 | 4.00 |
| 6 | TestItem 6 | Vendor Test 6 | 4.00 |
| 7 | TestItem 7 | Vendor Test 7 | 4.00 |
| 8 | TestItem 8 | Vendor Test 8 | 4.00 |
| 9 | TestItem 9 | Vendor Test 9 | 4.00 |
| 10 | TestItem 10 | Vendor Test 10 | 5.00 |
| 11 | TestItem 11 | Vendor Test 11 | 4.00 |
| 12 | TestItem 12 | Vendor Test 12 | 4.00 |
| 14 | TestItem 14 | Vendor Test 14 | 4.00 |
| 15 | TestItem 15 | Vendor Test 15 | 4.00 |
| 16 | TestItem 16 | Vendor Test 16 | 4.00 |
| 17 | TestItem 17 | Vendor Test 17 | 4.00 |
| 18 | TestItem 18 | Vendor Test 18 | 4.00 |
| 19 | TestItem 19 | Vendor Test 19 | 4.00 |
| 20 | TestItem 20 | Vendor Test 20 | 4.00 |
| 21 | TestItem 21 | Vendor Test 21 | 4.00 |
| 22 | TestItem 22 | Vendor Test 22 | 4.00 |
| 23 | TestItem 23 | Vendor Test 23 | 4.00 |
| 24 | TestItem 24 | Vendor Test 24 | 4.00 |

Figure 64. Items Not Scanned Report

5.4 Item History Reporting

The history report displays all inventory activity for a specific date range.

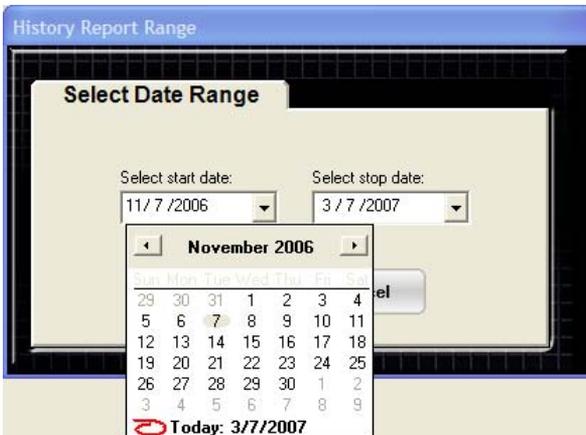


Figure 65. Selecting a Date Range

All inventory functions are recorded in a history list and can be viewed for a date range or a single day.

5.5 User History Reporting



Figure 66. Selecting a Date Range

5.6 Invoice History Reports

Reports can be generated for past invoices by user or by customer.

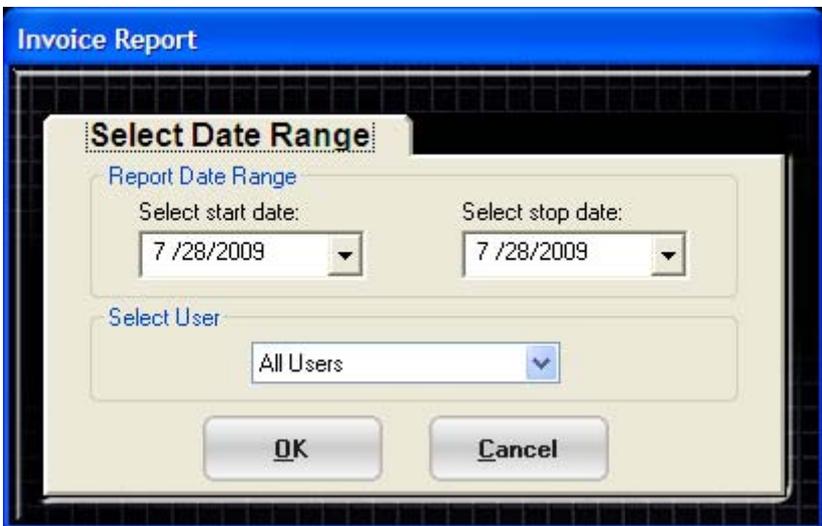


Figure 67. Select an Invoice report by User.

The invoice report shows all of the invoices run by a user for a given date range and a grand total of the invoice price.

| User Invoice Report | | | | |
|---|------------|--|-------------------|--|
| Report is from 07/28/2009 to 07/28/2009 | | | | |
| User: Test User 2 | | | | |
| Customer Information | | | | |
| Microsoft - William F Gates 65485485 Bill@microsoft.com | | 4564 Microsoft Way Redmond Washington 98006 | | |
| Invoice # | Item Price | Tax | Total | |
| 100000 | \$1,650.00 | \$107.25 | \$1,757.25 | |
| Customer total: | | | \$1,757.25 | |
| User total: | | | \$1,757.25 | |

Figure 68. User Invoice Report

The Invoice Report by customer is similar to the User Invoice Report except that the Invoices and totals are grouped by customer.

Please contact Proxis Software for custom modifications to any report.

6 Inventory Tools

The Inventory tools menu option offers functions such as Manage Users, Manage Customers, and Manage Vendors. These functions are explained in detail in the Getting Started section.

Four other functions will clear data from the database and are protected by an Administrative password. These functions will delete data and are not reversible.

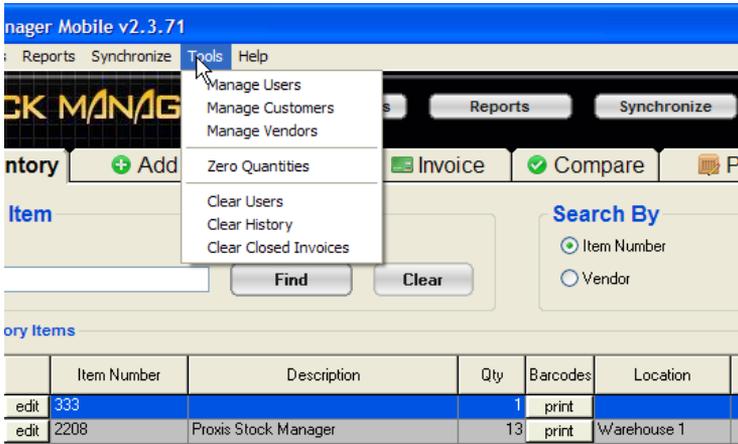


Figure 69. Inventory Tools

6.1 Administrative Password

The Admin Password helps protect data from being deleted accidentally. This password is set initially in the Stock Manager Setup Wizard. The password can also be changed from the login prompt in Figure 70.

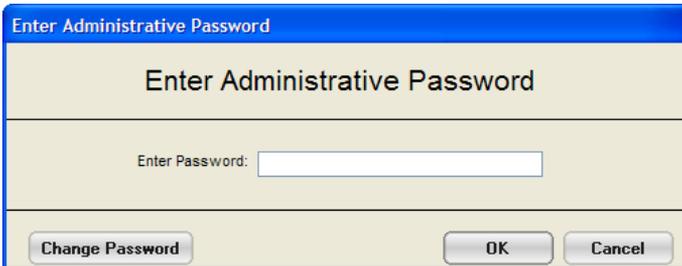


Figure 70. Administrative Password Protection

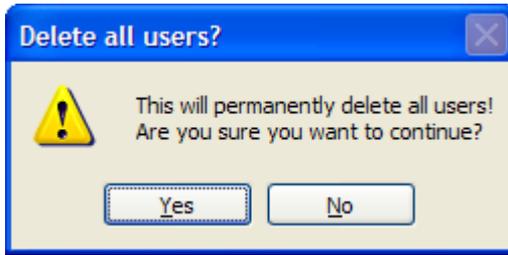


Figure 71. Delete Confirmation

To Zero Inventory Quantities:

1. Click on Tools > Zero Quantities
2. Enter the Administrative Password
3. Click Ok
4. Click Yes when the Delete Confirmation prompt appears.

To Clear Users:

1. Click on Tools > Clear Users
2. Enter the Administrative Password
3. Click Ok
4. Click Yes when the Delete Confirmation prompt appears.

To Clear the History:

1. Click on Tools > Clear History
2. Enter the Administrative Password
3. Click Ok
4. Click Yes when the Delete Confirmation prompt appears.

To Clear Closed Invoices:

1. Click on Tools > Clear Closed Invoices
2. Enter the Administrative Password
3. Click Ok
4. Click Yes when the Delete Confirmation prompt appears.



Figure 72. Changing the Administrative Password

To Change the Administrative Password:

1. Click on File > Preferences and Settings
2. Click on Change Password on the General Options tab.
3. Enter the old password. Leave this field blank if nothing was entered during the Setup Wizard.
4. Enter the new password.
5. Retype the new password for confirmation.
6. Click OK.

7 Backing up Data

Frequent Inventory Database backups are recommended when using Stock Manager. The Backup Inventory screen simply saves a copy of the Inventory database to a different location.

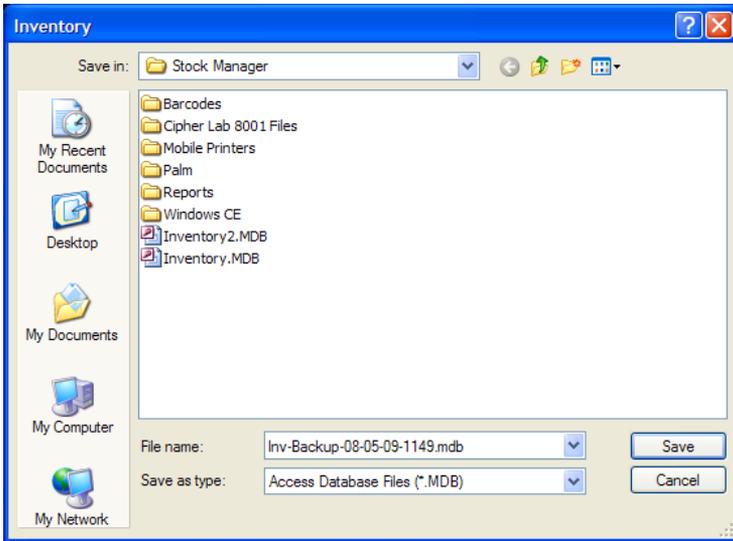


Figure 73. Selecting a Backup Location

It is important to back up the database periodically. It is also important to back up the database to a different location ie separate computer, jump drive or external hard drive.

When using Stock Manager in a networked configuration, with a single database and numerous clients connected to that database, it is important to back up the database when client computers are not using it otherwise data might be lost.

To restore a backup:

1. Copy the backup file to the inventory database location. The inventory database location is typically: C:\Proxis Software\Stock Manager.
2. Rename the backup file to "Inventory".
3. Open Stock Manager normally.

Please call the Proxis help desk at 1-877-477-6947 if a problem is encountered restoring the database from a backup.

8 Importing Data

Stock Manager can import a Comma Separated Value (CSV) text file of item or product information into the inventory database. This type of file is sometimes called a flat file or comma delimited data file.

The file is typically a standard text file with a .csv or .txt extension and must have a specific format to import properly.

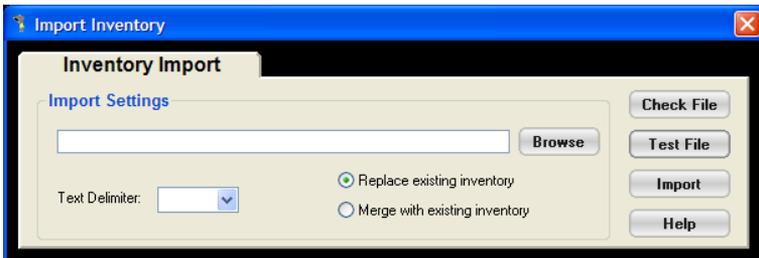
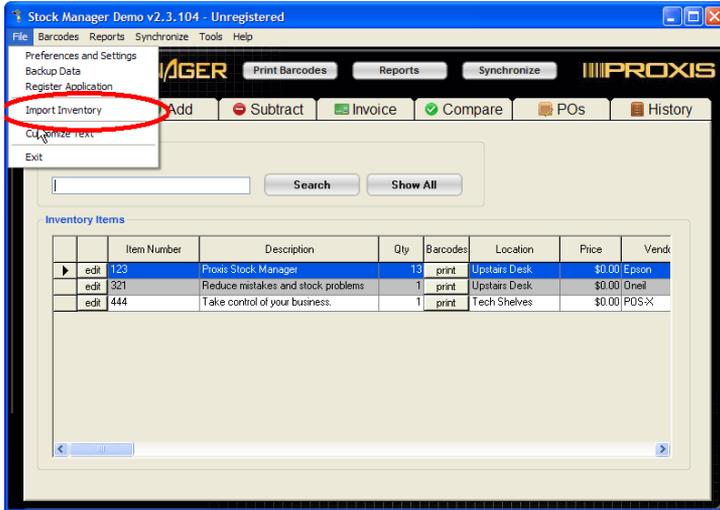


Figure 74. Import Inventory

File Format:

- Each column must be separated by a comma
- The first line must exactly match the field name in the inventory table where the data will be imported. See Figure 76 for a list of valid field names.

- Each line after the first must contain a value for each of the field names specified in the first line, and the values must appear in the same order.
- Text information in the file must be enclosed in double-quotes (“), single-quotes (‘) or nothing.
- The field Item_Number is required, and cannot contain any double-quotes (“).

To see an example of a valid import file, export the inventory using the Export to File function. Click Reports > Export to File > Full File. Open the file it creates in Notepad or Wordpad, and use this as an example for creating your own import file.

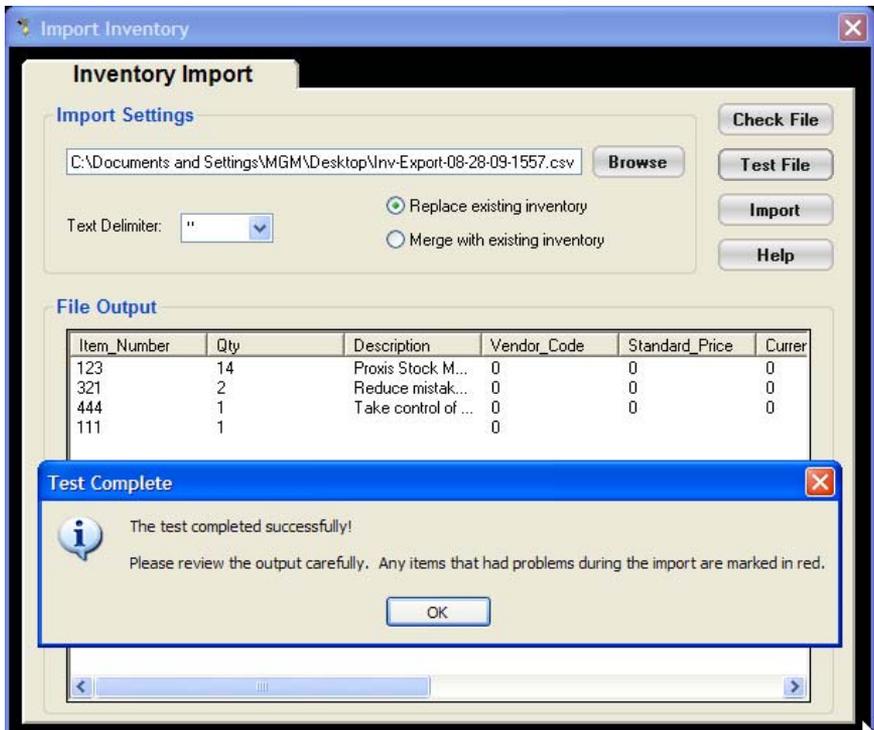


Figure 74a. Importing the CSV file

To import an inventory file:

1. Open the import window: File->Import Inventory
2. Click Browse, then locate and click the (.CSV) file to import.

3. Choose your text delimiter. This is the character that encloses the text information in the import file. Valid choices are single-quote ('), double-quote (") or nothing.
4. Choose whether to replace all the items in the inventory with the items in your file, or merge the import file with the existing items. Items are matched by Item_number. **WARNING:** Replacing your existing inventory will permanently delete all the items in the database. This cannot be reversed!
5. Click Check File. This verifies that field names were included at the top of the file. It also checks that all of those fields are valid field names, and that the Item_Number field is present.
6. (Optional) Click Test File. This will simulate an import without making any modifications to the inventory database. The result of the output is shown on a grid on the import window. Verify that everything was imported correctly before clicking import and altering the database.
7. Click Import. Depending on the number of items in the CSV file, this can take several minutes. A window will appear to show the progress of the import. When the import is completed, a summary will display with the results of the import.



Figure 75. Sample CSV File

Field Names for Inventory Import:

| | |
|----------------|--|
| Item_number | Unique identifier for the item, usually the barcode |
| Qty | The quantity in inventory |
| Description | Description of the item |
| Vendor_code | Name of the vendor for this item |
| Current_cost | The cost of the item |
| Standard_price | The sell price of the item |
| List_Price | The list price of the item |
| Location | The item's location (Aisle 6, Shelf 3C, Warehouse 2, etc) |
| Min | The minimum amount you want to have in stock (the reorder point) |
| Max | The max qty you want to have in stock (reorder up to) |
| Notes | Notes for this item |
| Tax_rate1 | Set to 1 to enable Tax1 for this item, 0 to disable |
| Tax_rate2 | Set to 1 to enable Tax2 for this item, 0 to disable |

Figure 76. Import Text File Specification

9 Exporting Data

Exporting the contents of the Stock Manager database to an external application is simple. The Export CSV File screen will export the entire Stock Manager database as a comma separated file (CSV) to the location specified when clicking the Select button.

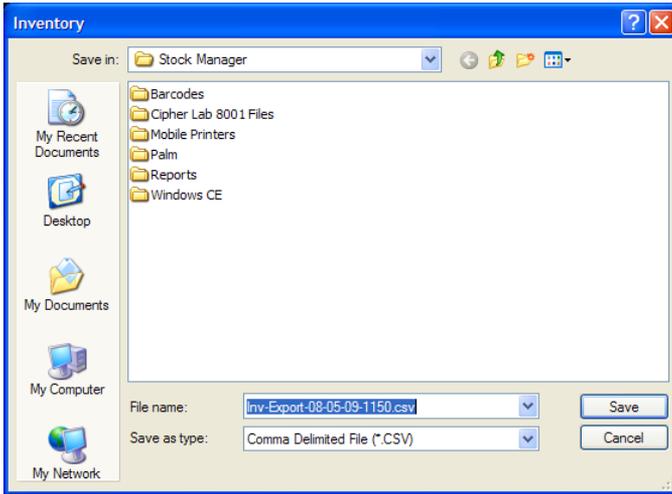


Figure 77. Selecting an Export Location

There is also the option to export a file containing a specific Item Number and Quantity only. This can be handy for updating inventory quantities in other applications.

10 Syncing with Store Manager

Stock Manager will act as a conduit from Proxis Store Manager to a mobile barcode scanner. Stock Manager will send items to the mobile device where they can be scanned for price lookup, label printing, location changes, receiving items, and shipping items.



Figure 78. Sync with Store Manager

Note: Store Manager is typically installed to the following directory: C:\WinPOS40\posdata\products.mdb. If Stock Manager does not find the Store Manager database in this directory, on the local computer, a prompt will appear for its location.

11 Error Handling

If Stock Manager encounters errors it will display a brief message indicating that there was an error. Stock Manager also records the error in a file named ErrorLog.txt that will be created in the c:\Proxis Software\Stock Manager\ folder.

Typical errors might include:

1. Network connection failure (multi-user mode).
2. Drive connection failure.
3. File missing errors.
4. Security and Permission Issues.

If an error occurs please contact us at 1-877-477-6947.

12 Using the Cipher Lab 8000 Barcode Scanner

Proxis Stock Manager is typically preloaded as the default application on the scanner. To turn on the scanner, hold down the power button for one second. Stock Manager will then initialize.

12.1 Scanner Functions

Stock Manager has the following scanner functions:

1. Add To Inventory
2. Subtract/Remove From Inventory
3. Compare Inventory
4. Replace Inventory
5. Lookup Item Information
6. Synchronize the Device
7. File Clearing Utility
8. Device Memory Status
9. Scanner Settings

To access a function, press the corresponding number on the keypad.



Figure 79. Scanner Main Menu

- The Blue button functions as the Enter key for most scanner functions.
- The Up and Down arrows are used on the scanner's main screen to scroll through the menu.
- The Up and Down arrows are used in scanning screens to scroll through the records of scanned data.

The Battery Level Indicator in the lower right hand side of the screen shows the current charge of the battery.

12.2 Advanced Scanner Settings

The 8000 Series Barcode Scanner has an Advanced Settings screen that controls functions such as:

- Loading New Versions of the scanner application.
- Changing the scanner “beep” settings.
- Initializing the scanner memory.
- Running diagnostic tests.

To Enter the Advanced Setting mode:

1. Ensure the scanner is powered off.
2. Hold the 7 and 9 buttons down while powering the scanner on.
3. The 7 and 9 buttons must be pressed and held while the power button is activated to enter the advanced screen.

For more information on the 8000 Series Advanced settings please contact the Proxis help desk at 1-877-477-6947.

12.3 Add Inventory

The Add Inventory function is used to increase the stock quantities of inventory items by scanning their barcodes or manually entering an item number. If the item isn't found in the scanner database, a prompt will ask if it should be added to the database.



Figure 80. Add To Inventory

To add a single quantity to an existing item:

1. Scan each item (scanner will beep).
2. The stock quantity will be increased by one for each item scanned.

To add a large quantity to an existing item:

1. Scan the item for which the quantity will be added.
2. The scanner will beep and advance to the next record.
3. Press the Up Arrow key to return to the previous record.
4. Press the Blue key.
5. Enter in the quantity to be added.
6. Press the Blue key again.

To manually key in an item without a barcode:

1. Key in the number with the keypad. (Refer to Appendix A for instructions on using the Alpha keypad).
2. Press the Blue button.
3. Enter the quantity to be added.
4. Press the Blue button.
5. The scanner will beep confirming a quantity increase for the designated item.

If an item scanned is not in the scanner's inventory list, a prompt will appear asking the user whether to add the item to the Master DB (aka Item List). This action adds the item but does not set any of its properties such as description, cost, price, etc.

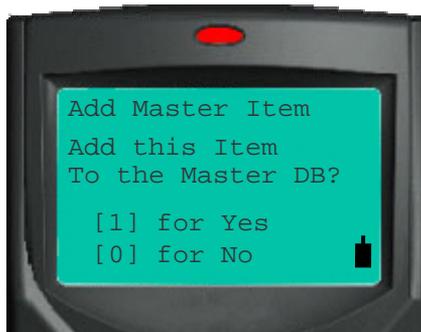


Figure 81. Add New Items

After adding an item to the Item List, use function 5 – Lookup Inventory – from the Main Menu to modify the item's properties.

When finished, press the ESC button to exit to the Main Menu.

12.4 Remove From Inventory

Use the Remove from Inventory function to remove items from inventory. This function won't remove the item completely; it simply subtracts the item's quantity in the inventory database. The default quantity is 1 (one). If the item is not found in the scanner's item list, a prompt will ask whether it should be added to the inventory list.



Figure 82. Subtract From Inventory

This function works just like the Add to Inventory function in section 12.3

To subtract a single unit from inventory:

1. Scan each barcode for items you wish to deduct from inventory (scanner will beep).
2. The stock quantity will be decreased by one for each item scanned.

To subtract a large quantity from an existing item:

1. Scan the item for which the quantity will be subtracted.
2. The scanner will beep and advance to the next record.
3. Press the Up Arrow key to return to the previous record.
4. Press the Blue key.
5. Enter in the quantity to be subtracted.
6. Press the Blue key again.

To manually key in an item without a barcode:

1. Key in the number with the keypad. (Refer to Appendix A for instructions on using the Alpha keypad).
2. Press the Blue button.
3. Enter the quantity to be subtracted.
4. Press the Blue button.

When finished, press the ESC button to exit to the Main Menu.

12.5 Compare Inventory Quantities

Use this function to scan physical inventory and compare the scanned information to the item quantity levels in the Stock Manager inventory database.



Figure 83. Compare Inventory Quantities

This function works like Add Inventory and Remove Inventory. Please refer to section 12.3 for scanning instructions.

Scan each item or scan one and then change that item's quantity. After synchronizing, the scanned data is sent to the desktop for comparison.

When finished, press the ESC button to exit to the Main Menu.

12.6 Replace Inventory Quantities



Figure 84. Replace Inventory Quantities

This function is similar to the Add Inventory and Remove Inventory functions. Please refer to section 12.3 for scanning instructions.

After synchronizing, the inventory values in Stock Manager will be replaced by the quantities assigned to each item using the Replace Inventory function.

When finished, press the ESC button to exit to the Main Menu.

12.7 Lookup Inventory

This function allows the user to perform lookup and editing tasks for inventory information with the mobile barcode scanner. Lookup times should be less than one second, even with thousands of items.



Figure 85. Lookup Items

Edit description, price, cost, list price, quantity, location and vendor for each item in the Item List. Changes and additions are sent back to Stock Manager.

To change the value of an item:

1. Scan the item.
2. Use the Up and Down arrows to scroll to the field to be changed.
3. Enter the item information using the keypad.
4. Press the Blue button to save your changes.

Be sure to press the Blue button prior to exiting. Changes are not saved unless a Blue button is pressed. Make sure to turn off the Alpha Keyboard function before exiting.

Refer to Appendix A for instructions on using the Alpha keypad.

When finished, press the ESC button to exit to the Main Menu.

12.8 Synchronize

The Synchronize function is used to send scanned data to the Stock Manager database. This function will also transfer inventory levels and item information to the device.



Figure 86. Synchronize the Device

To synchronize the device:

1. Make sure the cradle has power and is connected to the computer's USB port.
2. Place the scanner in the cradle.
3. From the Main Menu, Press 6.
4. Press the Blue button.
5. Click the Synchronize option on the Stock Manager desktop application.
6. Click Ok when prompted.

If synchronization does not occur immediately, click the Abort button on the desktop and perform steps 5 and 6 again.

When finished, press the ESC button to exit to the Main Menu.

12.9 Utility

The Utility function allows the user to delete the scanned data from one or all of the data tables on the barcode scanner.



Figure 87. Clear Data Utility

Caution: The Clear Data functions are not reversible. These functions will erase all collected information.

When finished, press the ESC button to exit to the Main Menu.

12.10 Status

The Status screen displays the amount of memory each function is using and the amount of memory left on the device.

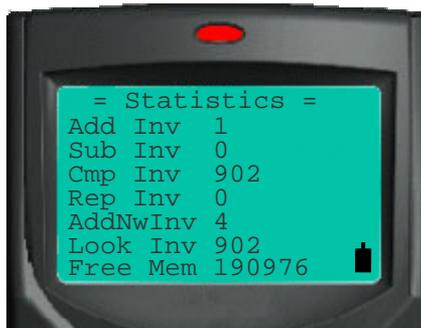


Figure 88. Memory Status

Typically, a 2MB scanner will scan over 15,000 items before running out of memory.

When finished, press the ESC button to exit to the Main Menu.

12.11 Scanner Advanced Settings

The Scanner Table configures the 8000 Series barcode scanner for specific scanner settings. Support for ISBN barcodes can be turned on or off. Lead digits can be enabled or disabled. The scanner can even be restricted to only scan a certain barcode type.



Figure 89. Scanner Table

Please call your vendor or the Proxis tech support department for assistance when configuring Advanced scanner settings.

When finished, press the ESC button to exit to the Main Menu and save any changes.

13 Using Palm Barcode Scanners



Figure 90. A Palm Barcode Scanner

Stock Manager Palm offers a mobile inventory management application for standard Symbol Palm barcode scanners like the Janam XP series and the Aceeca IDVERIFI.

13.1 Sending Inventory Data to the Scanner

To load inventory items onto the device:

1. Place Scanner in synch cradle.
2. Start the Stock Manager program on the PC.
3. Ensure that the Palm device is set as the default scanner in the preference menu.
4. Click Synchronize in the menu bar of Stock Manager Desktop.
5. Press the synchronize button on the cradle.

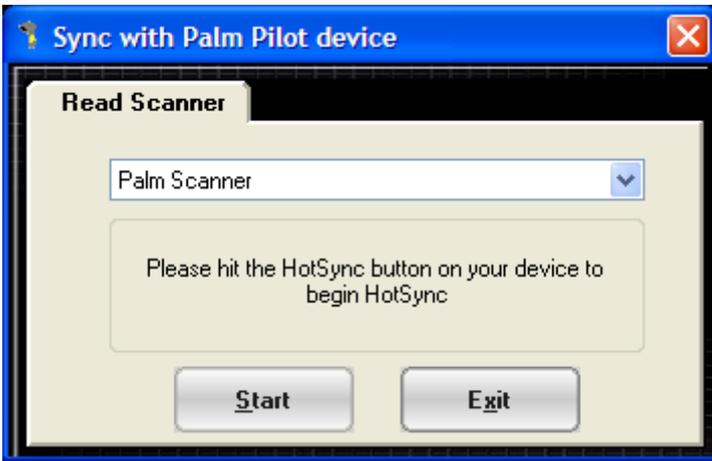


Figure 91. Device Synchronization

When synchronizing information with the Palm pilot, the current user is associated with the scans from the device.

To set the current user when synchronizing:

1. Click on Change User in the upper right hand corner of any tab.
2. Select the correct user.
3. Synchronize the device.
4. The current user will be associated with all of the scans on the device.

13.2 Scanner Functions

The Palm version has the following basic scanner functions:

1. Add To Inventory
2. Subtract/Remove From Inventory
3. Compare Inventory
4. Replace Inventory
5. Lookup Item Information
6. Edit Item Information
7. File Clearing Utility

The Palm version also features more advanced user input screens and increased memory.

Main Menu:

To access a function, tap on the corresponding icon on the touch screen.



Figure 92. Scanner Main Menu

13.3 Add Inventory

The Add Inventory function offers the ability to increase stock quantities by scanning their barcodes or manually entering a number.



Figure 93. Add To Inventory

To increase inventory quantities by a single unit:

1. Scan each item (scanner will beep).
2. The stock quantity is increased by one for each item scanned.
3. The barcode scan is entered into the list.

To increase an item by a number larger than one:

1. Enter the total quantity in the Quantity field.
2. Scan the item.
3. The scanner will beep confirming a quantity increase for the designated item.
4. The scan is entered into the list.

To manually key in an item without a barcode:

1. Tap the Barcode field.

2. Tap the numbers or letters that make up the barcode number.
3. Tap on the Done button.
4. Tap the Enter button.



Figure 94. Adding a New Item to Inventory

If an item's barcode is not found in the current database, the scanner will prompt to add it. If the item is not added to the product database, the quantity increase will be ignored.

To exit to the Main Menu, press the Return button.

13.4 Subtract From Inventory

Use the Subtract Inventory function to remove items from inventory. This function will not remove the whole item; it simply deducts an item's quantity from your inventory records.

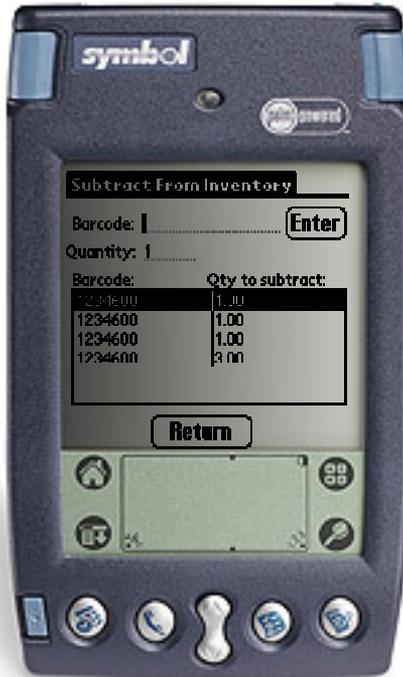


Figure 95. Subtract From Inventory

To decrease inventory quantities by a single unit:

1. Scan each item (scanner will beep).
2. The stock quantity is decreased by one for each item scanned.
3. The scan is entered into the list.

To decrease an item by a number larger than one:

1. Enter the quantity in the Quantity field.
2. Scan the item's barcode.
3. The scanner will beep confirming a quantity decrease for the scanned item.
4. The scan is entered into the list.

To manually key in an item without a barcode:

1. Tap the Barcode field.
2. Tap the numbers or letters that make up the barcode number.
3. Tap on the Done button.
4. Tap the Enter button.

To exit to the Main Menu, press the Return button.

13.5 Compare Inventory Quantities

Use this function to scan physical inventory and then compare the scanned information to item quantity levels in the Stock Manager inventory database.



Figure 96. Compare Inventory Quantities

This function works like the Add To Inventory and Subtract from Inventory functions. Please refer to section 13.4 for scanning instructions.

Scan each item or scan one and then change that item's quantity. After synchronizing, the scanned data is sent to the desktop for comparison. Refer to section 3.5 for Comparison Report options.

To exit to the Main Menu, press the Return button.

13.6 Replace Inventory Quantities



Figure 97. Replace Inventory Quantities

This function is similar to the Add To Inventory and Subtract Inventory functions. Please refer to section 13.4 for scanning instructions.

After synchronizing, the inventory values in Stock Manager will be replaced by the quantities from the Replace Inventory function.

To exit to the Main Menu, press the Return button.

13.7 Add New Inventory Item

The Add New Inventory function will add new items (items not currently existing) in the Stock Manager database.



Figure 98. Add New Inventory Items

To add a new item:

1. Press the New Item button on the Scanner's main screen.
2. Scan or key in the barcode number. The scanner will check to see if it is already in the system.
3. Key in information using the keypad
4. Press Save to add the new item.

To exit without saving:

1. Press the Return button.

The Palm soft Keypad provides an easy method for entering and editing product information. Access the soft keypad by tapping inside each field. Numeric fields will show the number keypad and text fields will show the text keypad.



Figure 99. Palm Soft Numeric and Text Keypads

13.8 Lookup Products

This function performs a lookup on item information with your Stock Manager barcode scanner. Lookup times should be less than one second, even with thousands of items.



Figure 100. Lookup Inventory Items

Lookup Quantity and Location:

1. Scan or enter the item's barcode.
2. If found, the item will be highlighted in the Item List.

Lookup All Item Information:

1. Ensure the Show On Find box is checked (see example in Figure 100.).
2. Scan or enter the item's barcode.



Figure 101. Show Scanned Item Information

To exit to the Main Menu, press the Return button.

13.9 Edit Inventory Information

Scan an item to edit any of the following fields: Description, Quantity, Cost, Price, MSRP or List Price, Location and Vendor. Changes are automatically sent from the Barcode Scanner to Stock Manager during the synchronization process.



Figure 102. Lookup Inventory Quantities



Figure 103. Lookup Inventory Quantities

13.10 Palm Mobile Barcode Printing

The Printer Setup screen is used to set up a Mobile printer for printing barcodes via a serial cable connection.

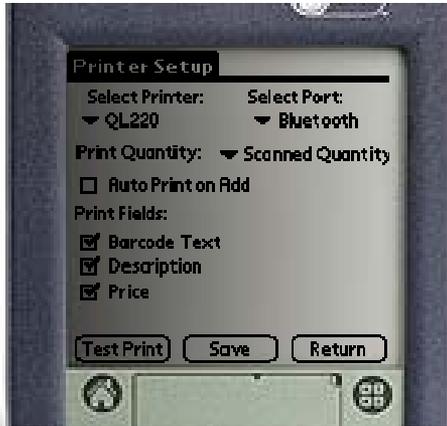


Figure 104. Mobile Printing Setup

To set up a mobile label printer to print barcodes:

1. Ensure that the label printer is connected to the scanner.
2. Select the printer from the Select Printer list.
3. Select the Port assigned to the printer. Serial cabled printers usually use Com Port 1. Bluetooth printers are not supported on the Palm version but are supported on the Window CE version.
4. Select a default Print Quantity.
 - One Barcode
 - Scanned Quantity - will print the number of items based on the Qty field.
 - Total Quantity - will print barcodes for the total number of items in inventory.
5. Select the Auto Print on Add Qty. This will automatically send a label print command when adding inventory quantities from the Add screen.
6. Select any additional information to print on the barcode label.
 - Barcode Text – prints the barcode number under the barcode.
 - Description – prints the item description above the barcode.
 - Price – prints the item price to the right of description.

The following printers are supported:

1. Epson Mobilink TM-P6
2. Zebra QL220, RW220 and MZ220 series printers
3. Datamax-Oneil OC2

4. Most Epson Compatibles

The following 2"x1" Label Stock is supported:

1. Epson - BSC009313A
2. Zebra - LD-R7BL5B
3. Datamax-Oneil - 740525-911

13.11 Synchronize the Palm Scanner

The Synchronize function is used to send scanned data to the Stock Manager database. This function will also transfer the inventory levels and item information to the device.



Figure 105. Synchronize the Device

To synchronize the device:

1. Make sure the cradle has power and is connected to the computer's USB or serial port.
2. Place the scanner in the cradle.
3. Press the Synchronize button.
4. Press the Synchronize button on the Stock Manager desktop application.

13.12 Data Utility

The Utility function allows deletion of scanned data from one or all of the data tables on the barcode scanner.



Figure 106. Main Menu Drop Down



Figure 107. Clear Data Utility

Caution: The Clear Data functions are not reversible. These functions will erase all collected information.

To exit to the Main Menu, press the Return button.

13.13 Palm Device Status

The Status screen displays the number of records each function is using.

Typically, an 8MB scanner will scan well over 20,000 items before running out of memory.

To exit to the Main Menu, press the Return button.



Figure 108. Clear Data Utility

13.14 Calculator Function

The Item Calculator tallies both the Total Price and Total Cost for items scanned from this screen. Items must be entered into the product database and must have either a Price or a Cost respectively to add the item to the running total.

The Item Calculator does not add sales tax or perform any point-of-sale functions.

To exit to the Main Menu, press the Return button.



Figure 109. Item Calculator

14 Using Windows CE Barcode Scanners

Stock Manager Mobile version will work on a number of standard Windows Mobile and Windows CE wireless barcode scanning devices (also termed Mobile Scanners or Mobile Computers).



Figure 110. Stock Manager CE

Windows Mobile is based on a Windows CE platform but has a different look, is designed for mobile phones and wireless devices, and usually comes with additional applications like Word and Excel. Stock Manager is compatible with Windows CE 5.0 and Windows Mobile 5 and 6.

14.1 Device Compatibility

Supported Windows Mobile and Windows CE devices by manufacturer include but are not limited to:

Honeywell:

- Dolphin 7000 Series
- Dolphin 9000 Series

Motorola:

- MC3000 Pro
- MC55
- MC70
- MC9000 Series

Janam:

- XM60
- XM65
- XG100

Unitech:

- All unitech Windows CE based scanners

Datalogic:

- Falcon series
- Pegasso series
- Memor (by request)
- Skorpion (by request)

Please contact our Customer Service desk for additional assistance at 1-877-477-6747.

14.2 Sending Inventory Data to the Scanner

To load inventory items onto the device:

1. Place Scanner in synch cradle.
2. Exit Stock Manager on the device.
3. Start the Stock Manager program on the PC.
4. Ensure that the scanning device is set as the default scanner in the preference menu.
5. Click Synchronize in the menu bar of Stock Manager Desktop.
6. Click Start to import data from the scanner.



Figure 111. Device Synchronization

When synchronizing information with the Windows CE barcode scanner, the current user is associated with the scans from the device.

To set the current user when synchronizing:

1. Click on Change User in the upper right hand corner of any tab.
2. Select the correct user.
3. Synchronize the device.

The current user will be associated with all of the scans on the device.

14.3 Scanner Functions

The Windows CE version has the following basic scanner functions:

1. Add To Inventory
2. Subtract/Remove From Inventory
3. Compare Inventory
4. Edit Item Information
5. Lookup Item Information
6. Calculate Prices
7. Setup Mobile Printers

Main Menu:

To access a function, tap on the corresponding icon on the touch screen.

Figure 112. Scanner Main Menu



14.4 Add To Inventory

The Add Inventory function will increase stock quantities. Simply scan barcodes or manually enter the item number. Default quantity is one.



Figure 113. Add To Inventory

To increase inventory quantities by a single unit:

1. Scan each item (scanner will beep).
2. The stock quantity is increased by one for each item scanned.
3. The scan is entered into the list.

To increase an item by a number larger than one:

1. Enter the total quantity in the Quantity field.
2. Scan the item.
3. The scanner will beep confirming a quantity increase for the designated item.
4. The scan is entered into the list.

To manually key in an item without a barcode:

1. Tap the Barcode field.
2. Tap the numbers or letters that make up the barcode number.
3. Tap on the Done button.
4. Tap the Enter button.



Figure 114. Adding a New Item to Inventory

If an item's barcode is not found in the current database, the scanner will prompt to add it. If the item is not added to the product database, the quantity increase will be ignored.

To print a barcode of the last item scanned:

1. Ensure that the mobile printer is connected or via a serial cable or the Bluetooth connection manager.
2. Ensure that the Printer Settings are set up for the mobile printer.
3. Tap on the item to print.
4. Tap on the Print button.

The Mobile Printer Settings can be set to automatically print a barcode when the inventory quantity is increased.

To exit to the Main Menu, press the Close button.

14.5 Subtract From Inventory

Use the Subtract Inventory function to remove items from inventory. This function will not remove the whole item; it simply deducts an item's quantity from your inventory records.



Figure 115. Subtract From Inventory

To decrease inventory quantities by a single unit:

1. Scan each item (scanner will beep).
2. The stock quantity is decreased by one for each item scanned.
3. The scan is entered into the list.

To decrease an item by a number larger than one:

1. Enter the quantity in the Quantity field.
2. Scan the item's barcode.
3. The scanner will beep confirming a quantity decrease for the scanned item.
4. The scan is entered into the list.

To manually key in an item without a barcode:

1. Tap the Barcode field.
2. Tap the numbers or letters that make up the barcode number.
3. Tap on the Done button.
4. Tap the Enter button.

To print a barcode of the last item scanned:

1. Ensure that the mobile printer is connected or via a serial cable or the Bluetooth connection manager.
2. Ensure that the Printer Settings are set up for the mobile printer.
3. Tap on the item to print.
4. Tap on the Print button.

To exit to the Main Menu, press the Close button.

14.6 Add New Inventory Item

The Add New Inventory function will add new items (items not currently existing) in the Stock Manager database.



Figure 116. Add New Inventory Items

To add a new item:

1. Press the New Item button on the scanner's main screen.
2. Scan or key in the barcode number. The scanner will check to see if it is already in the system.
3. Key in information using the keypad
4. Press Save to add the new item.

To exit without saving:

2. Press the Close button.

The Windows CE software Keypad provides an easy method for entering and editing product information. Access the soft keypad by tapping the keyboard icon at the bottom of the screen.



Figure 117. Software Keypads

14.7 Compare Inventory Quantities

Use this function to scan physical inventory then compare the scanned information to item quantity levels in the Stock Manager inventory database.



Figure 118. Compare Inventory Quantities

This function works like the Add Inventory and Subtract Inventory functions. Please refer to section 8.4 for scanning instructions.

Scan each item or enter a Compare quantity before scanning the item for entering multiple items at a time. After synchronizing, the scanned data is sent to the desktop for comparison. Refer to section 4.5 for Comparison Report options.

To exit to the Main Menu, press the Close button.

14.8 Edit Inventory Information

Scan an item to edit any of the following fields: Description, Quantity, Cost, Price, MSRP or List Price, Location and Vendor. Changes are automatically sent from the Barcode Scanner to Stock Manager during the synchronization process.



Figure 119. Lookup Inventory Quantities

Tap on the item in the list to open the Edit screen.



Figure 120. Lookup Inventory Quantities

Change any of the items features in the Edit Item screen. Barcodes can be printed for an item by pressing the Print button.

14.9 Lookup Products

This function performs a lookup on item information with your Stock Manager barcode scanner. Lookup times should be less than one second, even with thousands of items.



Figure 121. Lookup Inventory Items

Lookup Quantity and Location:

1. Scan or enter the item's barcode.
2. If found, the item will be highlighted in the Item List.
3. Check the Show On Find checkbox to open the Item Information screen automatically after a scan.

Lookup All Item Information:

1. Ensure the Show On Find box is checked (see example in Figure 121).
2. Scan or enter the item's barcode.



Figure 122. Show Scanned Item Information

To exit to the Main Menu, press the Close button.

14.10 Calculator Function

The Item Calculator tallies both the Total Price and Total Cost for items scanned from this screen. Items must be entered into the product database and must have either a Price or a Cost entered to add the item to the running total.

The Item Calculator does not add sales tax or perform any point-of-sale functions.

To exit to the Main Menu, press the Close button.



Figure 123. Item Calculator

14.11 Mobile Printer Setup

The Printer Setup screen is used to set up a Mobile printer for printing barcodes via a Bluetooth or serial cable connection.

Supported Mobile Printers:

- Epson Mobilink Label Version
- Oneil MF2Te
- Oneil OC2
- Zebra QL220
- Zebra RW220



Figure 124. Mobile Printer Setup

To set up a mobile label printer to print barcodes:

1. Ensure that the label printer is connected to the scanner. If Bluetooth is used the printer must be assigned a serial port through the device's Bluetooth manager.
2. Select the printer from the Select Printer list.
3. Select the Port assigned to the printer. Serial cabled printers usually use Com Port 1. Bluetooth printer ports are typically assigned manually in the device Bluetooth configuration manager. Bluetooth connections will typically use Com 7.
4. Select a default Print Quantity. Choose from:
 - One Barcode
 - Scanned Quantity will print the number of items based on the Qty field.

- Total Quantity will print barcodes for the total number of items in inventory.
5. Select the Auto Print on Add Qty. This will automatically send a label print command when adding inventory quantities from the Add screen.
 6. Select any additional information to print on the barcode label.
 - Barcode Text – prints the barcode number under the barcode.
 - Description – prints the item description above the barcode.
 - Price – prints the item price to the right of description.

The following printers are supported:

- Epson Mobilink TM-P6
- Zebra QL220, RW220 and MZ220 series printers
- Datamax-Oneil OC2
- Most Epson Compatibles.

The following 2"x1" Label Stock is supported:

- Epson - BSC009313A
- Zebra - LD-R7BL5B
- Datamax-Oneil - 740525-911

14.12 Data Utility

The Utility function allows deletion of scanned data from one or all of the data tables on the barcode scanner.



Figure 125. Clear Data Utility



Figure 126. Clear Data Utility

Caution: The Clear Data functions are not reversible. These functions will erase all collected information.

To exit to the Main Menu, press the Close button.

14.13 Scanner Database Status

The Status screen displays the number of records each function is using.

To exit to the Main Menu, press the Close button.



Figure 127. Database Status

15 Appendix and Supplemental Information

15.1 Appendix A: The 8000 Series Alpha Keyboard

The Alpha Keyboard feature on the 8000 Series barcode scanner allows the user to key in letters using the numeric keypad. The Alpha Keyboard works much like a standard cell phone's texting function.

To enter an Upper case letter using the keypad:

1. Press the "ALPHA" key.
 - a. An "A" will appear above the battery indicator.
2. Press the key that has the desired letter.
 - a. Example1: for the letter "A" press the 2 key once.
 - b. Example2: for the letter "B" press the 2 key twice.

To enter a Lower case letter:

1. Press the "ALPHA" key twice.
 - a. A small "a" will appear above the battery indicator.
2. Press the key that has the desired letter.
 - a. Example1: for the letter "a" press the 2 key once.
 - b. Example2: for the letter "b" press the 2 key twice.

Pressing the "ALPHA" key three times will bring up the function characters. This mode is indicated by a "F" above the battery indicator. The function characters set is an extension that is rarely used.

To return to numeric input, press the "ALPHA" key until the letter function indicator ("A", "a" or "F") disappears.

15.2 Appendix B: Device Registration

The 8000 Series barcode scanner has a simple registration screen. Scanners are typically activated before being shipped. Please contact a Proxis Stock Manager reseller to purchase and register a mobile barcode scanner.



Figure 128. 8000 Series Registration Screen

Palm and Windows CE devices will come with a Mobile Device License card. This card will have a barcode that is scanned to unlock the demo mode on the device.

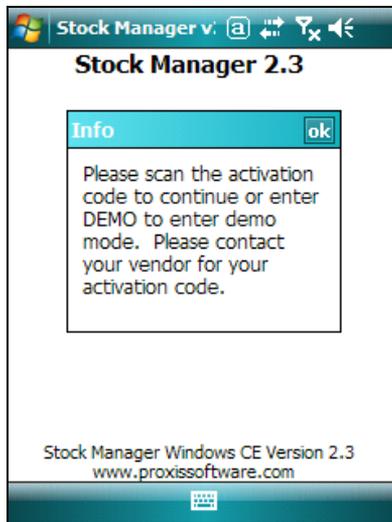


Figure 129. Splash Screen

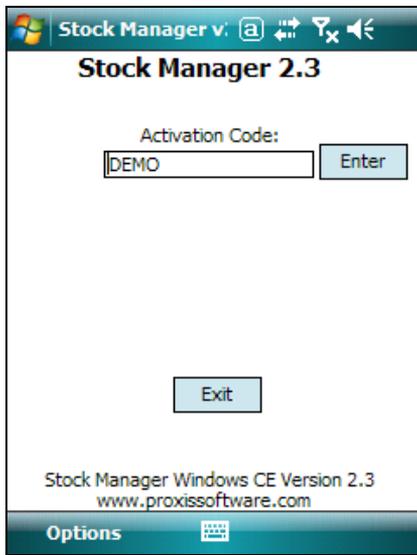


Figure 130. Scan or Enter the Activation Code

The Stock Manager Mobile Device License is a plastic card with a barcoded activation code. The code is scanned to activate the mobile device software.



Figure 131. Stock Manager Mobile Device License

15.3 Appendix C: Installing Palm Files

Palm files are installed to the device via the Palm HotSync Manager. The HotSync Manager is part of the Palm Desktop. The Palm Desktop software must be installed and configured prior to installing the device software. The latest Palm Desktop software can be found at www.palm.com.

The HotSync manager will appear in the system tray when installed properly.



Figure 132. HotSync Icon in System Tray

Right click on the HotSync Manager Icon to configure the HotSync Manager. The HotSync Manager must be correctly set up and synchronizing with your device to install program files.

To Install Palm Program Files:

1. Browse to the C:\WinPOS40\Palm Support Files\ directory.
2. Double click the Install_Palm_Files.exe application.
3. If the prompt in Figure 133 is displayed, follow the first time installation directions below.
4. Wait a few moments for the HotSync Manager to restart.
5. Press the hot synch button on the cradle.



Figure 133. First Installation Prompt

First Time Installation:

1. Check the box on the prompt shown in Figure 133.
2. Click Yes.
3. Click Cancel on the prompt in Figure 134.
4. Restart the installation process.



Figure 134. Select Palm User Name



Figure 135. HotSync Status