



Retail Mobile Suite Product Manual

v2.0 Rev D

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About This Manual

This document is the Retail Mobile Suite product manual and contains information for software:

- Installation
- Configuration
- Usage
- Troubleshooting

If you have questions, comments, or wish to report errors in this manual or in the software, please contact us at support@foundrylogic.com.

The software described herein is furnished under a license agreement.

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1 Getting Started

Retail Mobile Suite enables you to use Windows Mobile and Windows CE scanners and printers to perform the following tasks un-tethered from your POS workstations:

- Physical Inventory
- Receiving
- Transfer In and Out
- Line Buster
- Inventory Check

2 System Requirements

This section describes the Retail Mobile Suite system requirements for the workstation and mobile devices.

2.1 Workstation Requirements

- Windows 7 (32-bit or 64-bit) or Windows XP Service Pack 3
- Windows Mobile Device Center 6.1 (or later) or ActiveSync 4.5 (or later)
- 1GB Ram

2.2 Mobile Device Requirements

- Windows CE 5.0 (or later) or Windows Mobile 5.0 (or later)
- 64MB Ram

3 Installation and Setup

Follow the steps below to install and setup Retail Mobile Suite. Please note that all installation steps must be performed by a user with Administrator rights.

3.1 Install ActiveSync or Windows Mobile Device Center on a Workstation

ActiveSync (Win XP) or Windows Mobile Device Center (Win 7) is used by Retail Mobile Suite on the workstation to communicate with mobile devices that are connected to the workstation through a physical docking station or cradle.

Please also note that ActiveSync or Windows Mobile Device Center software is required to install Retail Mobile Suite software on your mobile devices.

Microsoft ActiveSync and Windows Mobile Device Center software is available for download on the Microsoft website at <http://www.microsoft.com>. Install ActiveSync or Windows Mobile Device Center on each workstation that you will use to dock your mobile devices.

3.2 Install Retail Mobile Services (Optional)

If you have a wireless network at your location and you want to connect your mobile devices wirelessly to Retail Mobile Suite, then install Retail Mobile Services on one (or more) systems in your network.

Retail Mobile Services acts as a “server” on your network to provide a “destination” for both the Desktop Component software and the Mobile Device software to send and receive data.

Double-click the Setup.exe executable in the RetailMobileServices installation folder and follow the on-screen instructions to install Retail Mobile Services.

Windows 7 users must also perform the following steps to enable IIS features:

1. Go to **Control Panel > Programs and Features**, and on the left-hand side of the window, click **Turn Windows features on or off**.
2. Expand the features list to the following location: **Internet Information Services > World Wide Web Services > Application Development Features**
3. Check the box next to the following features: **.NET Extensibility** and **ASP.NET**. When you check these boxes, some other features will also automatically enable themselves.
4. Click OK.

The installer creates a new Windows Service called **RetailMobileServices** and sets it to start automatically on workstation startup.

To start the service after installation is complete, either reboot your system or start the service manually using the **Services Control Panel**:

1. Go to **Start > Control Panel > Administrative Tools > Services**
2. In the Services window, scroll down and right-click **RetailMobileServices**, click **Properties**, then **Start**.

3.3 Install Retail Mobile Suite Desktop on a Workstation

Install the Retail Mobile Suite desktop component on each workstation you will use to interface Retail Mobile Suite with Retail Pro. Be sure to include all the workstations where you plan to process mobile transactions such as: Physical Inventory, Receiving Vouchers, Transfers, and Line Buster Sales Receipts.

Double-click the Setup.exe executable in the RetailMobileSuite installation folder and follow the on-screen instructions.

3.4 Start and Configure Retail Mobile Suite Desktop

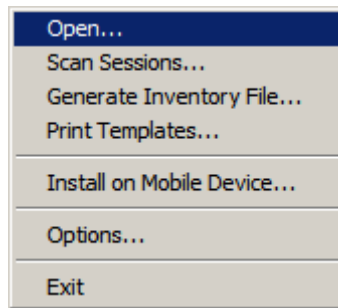
The installer automatically places a shortcut to launch Retail Mobile Suite in your **Start Menu** and **Startup** folder so that Retail Mobile Suite launches automatically on the workstation when you login.

To launch Retail Mobile Suite, go to **Start > Programs > Retail Mobile Suite** and double-click the **Retail Mobile Suite** shortcut.

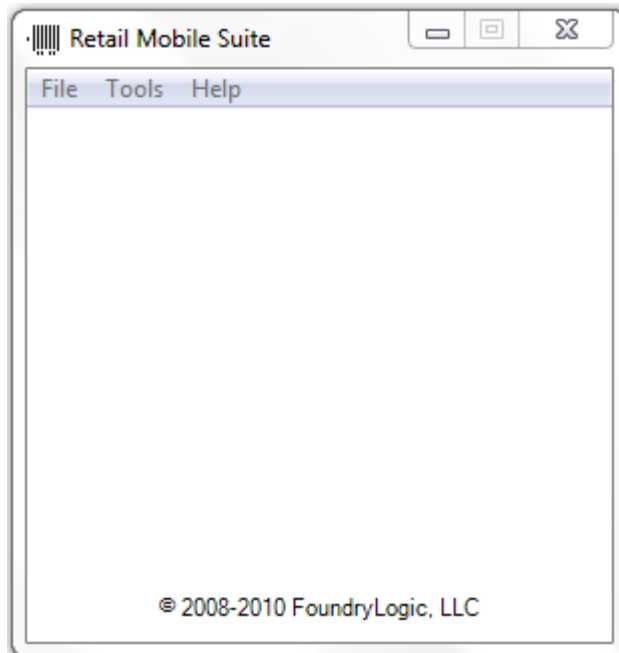
Once launched, you can access Retail Mobile Suite by either right-clicking or double-clicking the Retail Mobile Suite icon in the System Tray.



Right-click the System Tray icon to display the Retail Mobile Suite menu directly:



Double-click the Retail Mobile Suite icon to display the Retail Mobile Suite application window:



3.5 Stop Retail Mobile Suite Desktop

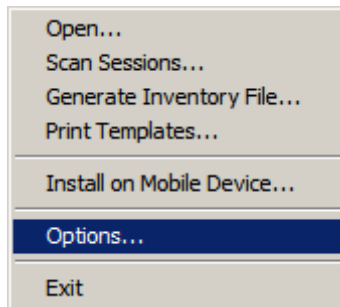
If you want to stop the Retail Mobile Suite Desktop Component, you can either right-click the System Tray icon and select Exit, or from the application window, select **File > Exit**.

Please note that just closing the application window does not stop the Retail Mobile Desktop Component. If you close the application window, you will still see the Retail Mobile Suite icon in the System Tray.

3.6 Set Retail Mobile Suite Desktop Options

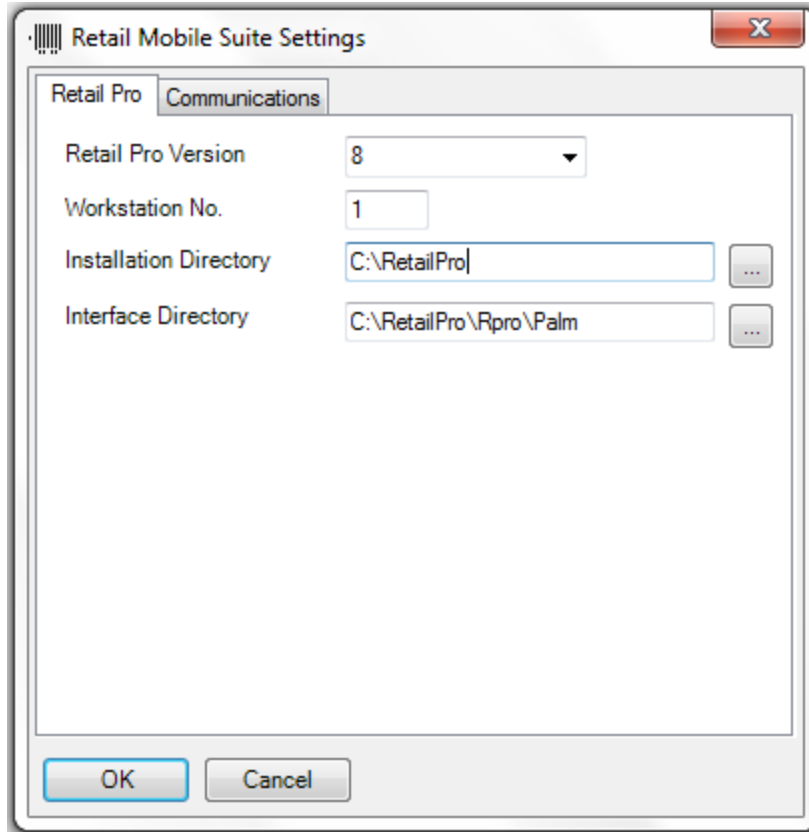
Restart the Retail Mobile Suite Desktop Component if you stopped it in the previous step.

To set Retail Mobile Suite Desktop options, right-click on the System Tray icon and select **Options...** or select **Tools > Options...** from the application window.



Retail Pro Options

Use the **Retail Pro** tab to select the Retail Pro version, workstation and installation directory.



Option	Description	Default Value
Retail Pro Version	Indicates which version of Retail Pro you wish to use with Retail Mobile Suite.	Version 8
Workstation No.	Indicates the Retail Pro Workstation to use with Retail Mobile Suite	1
Installation Directory	The Retail Pro installation directory. For Retail Pro Version 9, the installation directory is typically: C:\RetailPro9	C:\RetailPro
Interface Directory	This is the directory used to interface with Retail Pro. This value is set automatically based on the Retail Pro Version and Installation Directory settings above.	C:\RetailPro\Rpro\Palm

Communications Options

Retail Mobile Suite Settings

Retail Pro Communications

ActiveSync Settings

Use ActiveSync

Force Guest Partnerships

Retail Mobile Web Service Settings

Use Retail Mobile Services

Host
localhost

Port
6131

Channel
< enter channel name here >

Test

OK Cancel

Option Name	Description	Default Value
ActiveSync Settings	The ActiveSync settings only affect mobile devices physically connected to the workstation.	
Use ActiveSync	If checked, Retail Mobile Suite uses ActiveSync to communicate with the mobile device.	Checked
Force Guest Partnerships	Forces ActiveSync to connect using Guest Partnerships only. This speeds up connections to ActiveSync when you are using several devices and don't need the features included with the ActiveSync's Standard Partnerships. Note: This option requires Administrator privileges to take effect.	Checked

Retail Mobile Web Service Settings	The Retail Mobile Services settings allow a workstation to communicate with any mobile device configured with the same host, port and channel.	
Use Retail Mobile Services	If checked, Retail Mobile Suite uses Retail Mobile Services to communicate with devices.	Unchecked
Host	The Retail Mobile Services hostname or IP Address.	
Port	The Retail Mobile Services port number.	6131
Channel	The Retail Mobile Services channel. Use this setting to segregate the traffic between mobile devices using the same Retail Mobile Services host and port. Typical settings for this include: PI, Receiving, and Line Buster.	

3.7 Install Retail Mobile Suite on a Mobile Device

Connect Your Mobile Device

Connect your mobile device to the workstation per the manufacturer's instructions. Be sure all cables are connected and that the mobile device is powered on. Confirm that ActiveSync or Windows Mobile Device Center is successfully connected to the mobile device before proceeding.

Note for Windows 7 users: In order to enable non-privileged users to install Retail Mobile Suite on a mobile device, you must configure the file **c:\Windows\WindowsMobile\ceappmgr.exe** to **Run as Administrator** for all users by performing the following:

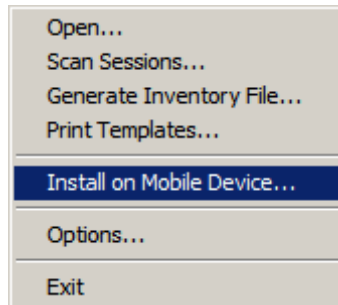
1. As an Administrator, use File Explorer and right-click on c:\Windows\WindowsMobile\ceappmgr.exe.
2. Select **Properties > Compatibility > Change setting for all users**
3. Check **Run this program as an Administrator**
4. Click OK twice.

If you do not perform this step, non-privileged users will receive the following error when trying to install Retail Mobile Suite on a mobile device:
"Application Manager cannot install this application on your mobile device due to an invalid setup file."

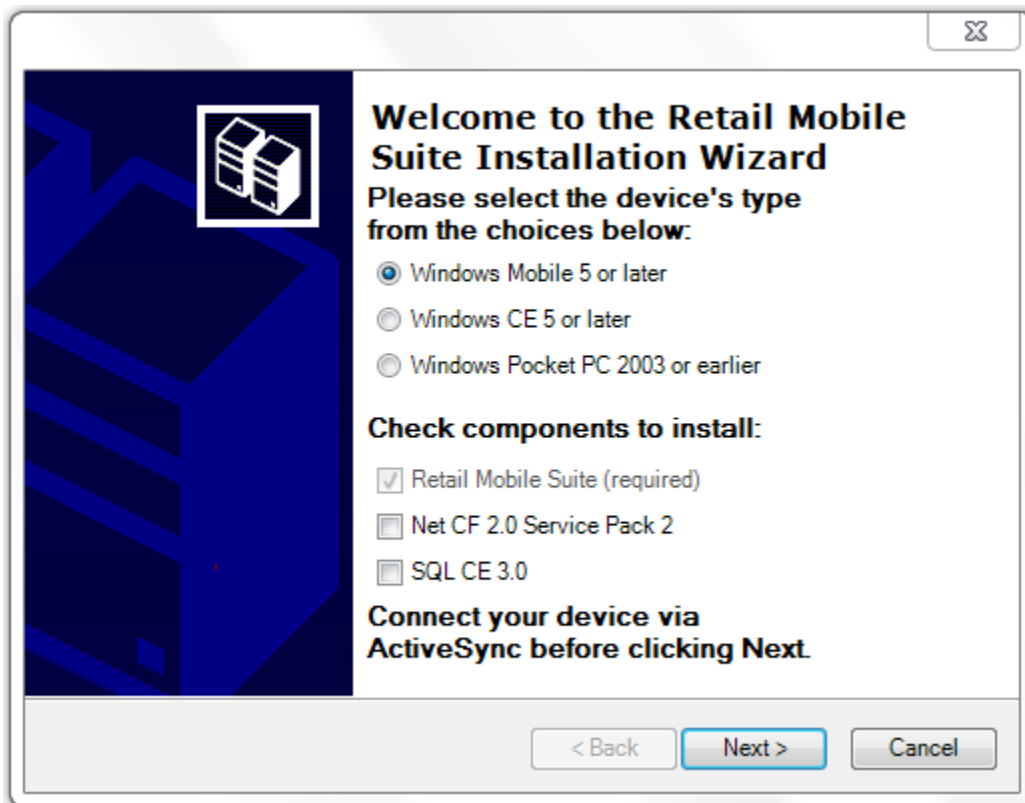
Install Retail Mobile Suite on the Mobile Device

With Retail Mobile Suite running on your workstation and with your mobile device connected, you are now ready to install Retail Mobile Suite on the mobile device.

1. Right-click on the Retail Mobile Suite icon in the System Tray and select **Install on Mobile Device...**. This launches an Installation Wizard to lead you through the installation process:



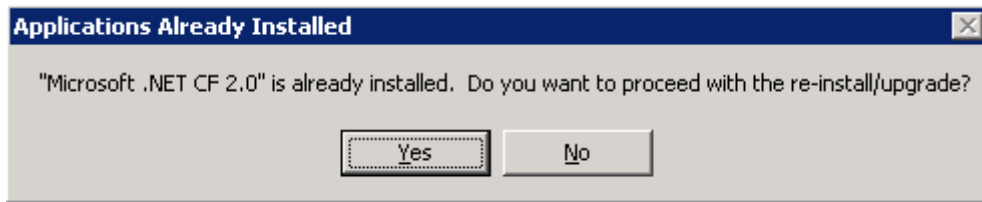
2. On the following screen, select the type of device and the software components to install. If you make a mistake or forget a component, click Cancel and then restart the Installation Wizard.



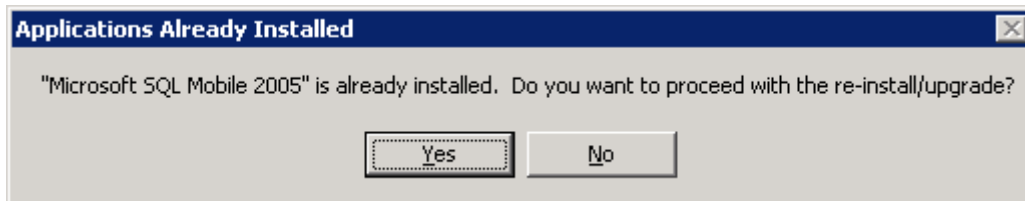
Important Notes

- Please follow the instructions in the Installation Wizard completely.

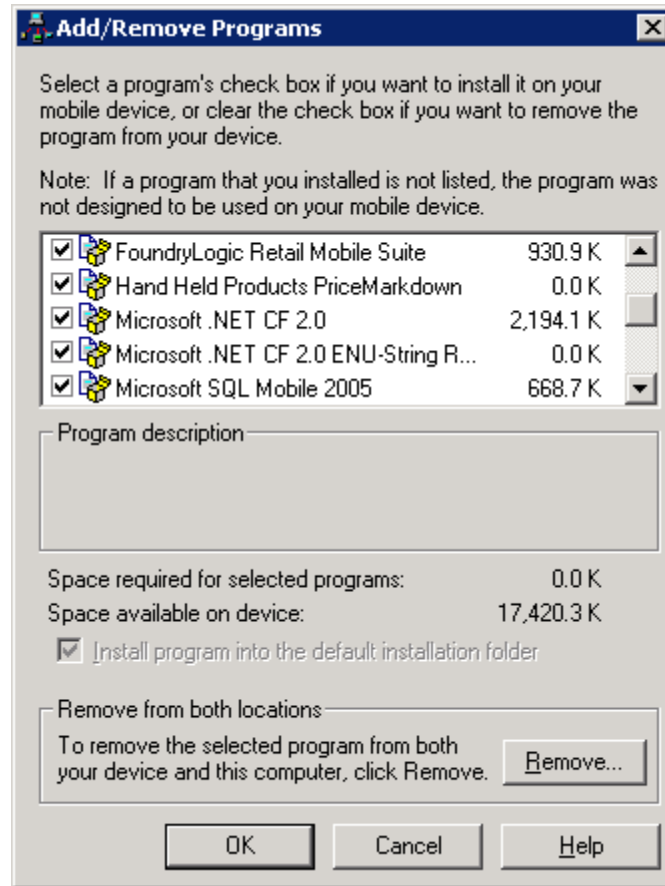
- If something does go wrong, click Cancel and restart the installation process.
- If your mobile device asks “where to install application components,” select the default, which is usually called ‘Device.’ Installing to other locations (such as storage cards) can lead to unpredictable results.
- Most new mobile devices come pre-installed with .Net CF 2.0 Service Pack 2 and SQL CE 3.0 or later. If these components are already installed on your device, you do not need to install them again.
- If the “Applications Already Installed” message appears for either Microsoft .NET CF2.0:



Or Microsoft SQL Mobile 2005:

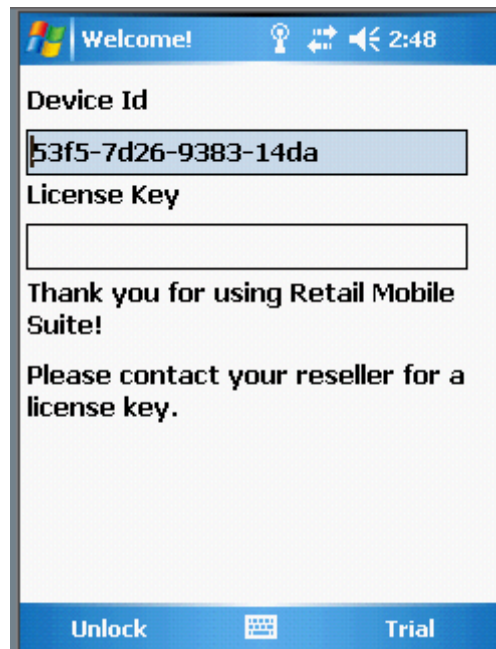


Then click ‘No’ and then click ‘Cancel’ in the Add/Remove Programs dialog before clicking ‘Next’ in the Wizard:



3.8 Start Retail Mobile Suite on the Mobile Device

On the mobile device, start Retail Mobile Suite by going to **Start > Programs > Retail Mobile Suite**. You will be presented with a **Welcome Screen**:



Touch **Trial** to proceed in Trial Mode, or if you have purchased a License Key to unlock the software, enter the License Key and touch **Unlock**.

Trial Mode

Trial Mode allows you to evaluate the functionality of Retail Mobile Suite. You can scan as many items as you wish, but in Trial Mode, Retail Mobile Suite is limited to uploading a maximum of 10 scans per session into Retail Pro.

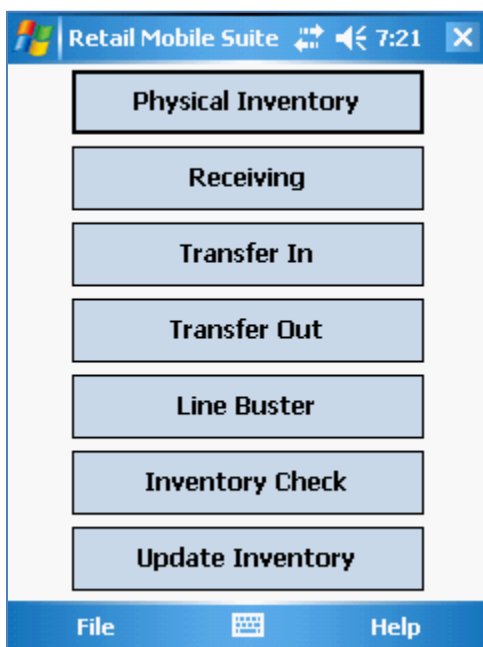
Note: the Retail Mobile Suite Desktop Component has no Trial Mode limitations and may be installed on any number of workstations.

Unlocking your Mobile Device

To purchase a **License Key**, contact your Retail Pro reseller or contact FoundryLogic (email: info@foundrylogic.com). For each License Key, you will need to provide the unique **Device Id** displayed on the Welcome screen. License Keys are issued specifically for each mobile device. When you receive your License Key, enter it in the field provided and touch **Unlock**.

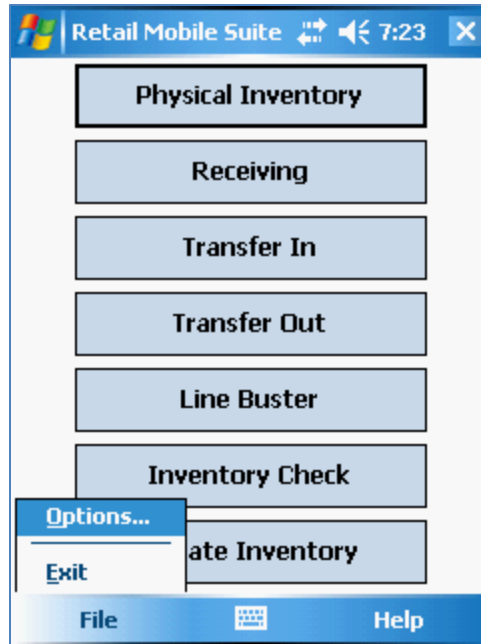
Main Menu

After you touch **Trial** or **Unlock**, the **Main Menu** is displayed:



3.9 Set Mobile Device Options

From the **Main Menu**, click on **File > Options** to adjust or review important settings that control the behavior of Retail Mobile Suite on your mobile device.

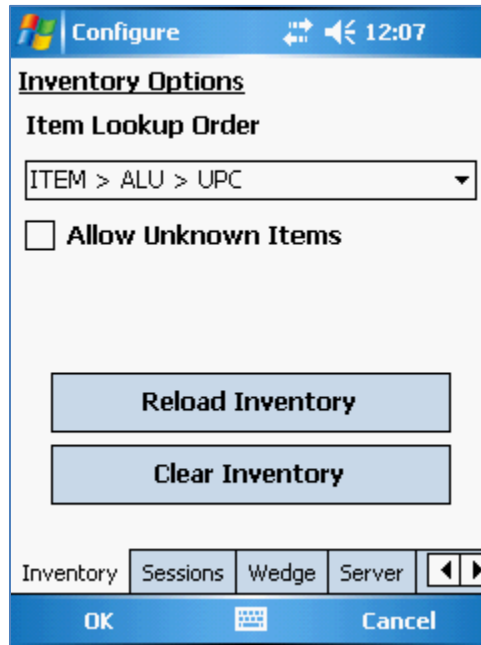


Settings are divided into the following categories:

- Inventory
- Sessions
- Wedge
- Server
- Language

At the bottom of the screen, select the tab corresponding to the desired category to review or adjust those settings. Be sure to click OK to save your changes.

Inventory



Item Lookup Order

Use the Item Lookup Order dropdown box to set the order in which Retail Mobile Suite tries to lookup items.

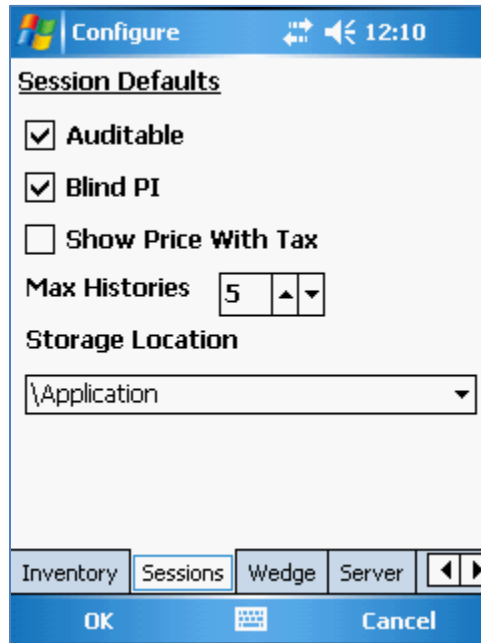
Reload Inventory

Click on **Reload Inventory** to manually reload an inventory file whose previous load was interrupted.

Clear Inventory

Click on **Clear Inventory** to remove the current inventory file from the device. (This functionality is provided in the event that the mobile device has insufficient memory to process a new inventory without first removing the existing inventory file.)

Sessions



Auditable

Check or uncheck the **Auditable** flag as desired. This flag controls whether or not the order of scans is preserved (auditable) or consolidated. Consolidated scans result in smaller files, but most users prefer to check the auditable flag in order to preserve the scan order in the results.

Blind PI

This setting controls whether or not to display the store's on-hand quantity for a given item. Note that store quantities can only be shown if the inventory file has been generated with store quantities.

Show Price With Tax

When checked, prices are shown with tax, where applicable.

Max Histories

This setting is used to determine how many sent or deleted sessions to store on the device. When the limit is reached, the oldest session is permanently purged from the device.

Storage Location

The Storage Location setting allows you to choose where session data is stored. You may choose any top-level directory on your device, including those for storage cards, if available.

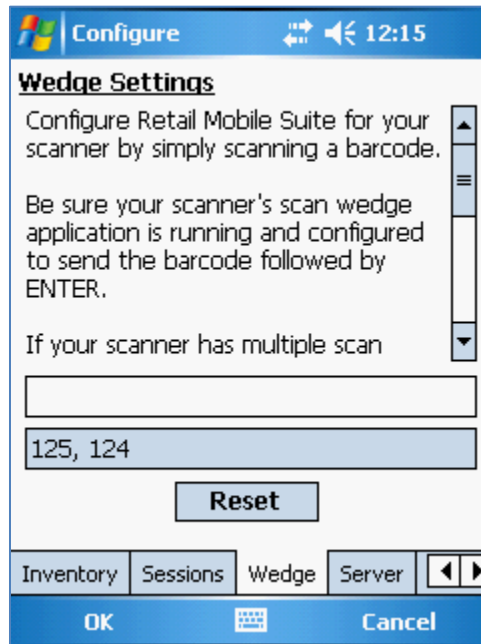
When you change the Storage Location, you will be asked whether or not to copy the old session data to the new Storage Location and whether or not to delete the old session data from the old Storage Location.

Wedge

'Wedge', 'Wedge Mode', 'ScanWedge' are all terms that describe the mode wherein the mobile device's scanner sends scanned data to an application as a series of key strokes. Generally, mobile devices with scanners include an application, sometimes called 'scan wedge' or 'data wedge' to support this function.

Tips for configuring specific hardware to work with Retail Mobile Suite can be found at <http://foundrylogic.com>. You may need to consult your mobile device manufacturer's documentation on how to start and configure the scanner application to send barcode data followed by the ENTER key.

After you have configured the hardware, you usually only have to perform a test scan of an item using this screen. Verify that the scan is correct by comparing the barcode with the number shown on the screen. If different, click **Reset**, check your mobile device's scan wedge application settings and try again.



Notes:

- If your scanner has multiple scan buttons, scan once with each button. Do not click **Reset** between each scan.
- Some scanners need to be configured to send a prefix character. If so, use a non-alphanumeric character, such as form feed (ASCII 12), if possible. Do not use characters such as tab, enter or carriage return.

- If you change your hardware settings, always retrain Retail Mobile Suite by clicking **Reset** and performing a test scan on the **Wedge** configuration screen to ensure that your scanner is correctly configured. To properly train Retail Mobile Suite, make sure to test all the scan buttons on the device.
- **When scanning, if the initial scan is correct, but subsequent scans appear in the “Count” field, then the scanner is not configured correctly!**

Server

The screenshot shows a configuration window titled "Configure" with a status bar at the top right showing "7:32". The main content area is titled "Server Settings" and contains the following elements:

- A checked checkbox labeled "Use Retail Mobile Services".
- A "Host" label followed by a text input field containing "192.168.0.93".
- A "Port" label followed by a text input field containing "6131".
- A "Channel" label followed by a text input field containing "<enter channel name here>".
- A "Test" button located below the Channel input field.

At the bottom of the window, there is a navigation bar with tabs for "Inventory", "Sessions", "Wedge", and "Server". The "Server" tab is currently selected. Below the tabs is a blue bar with "OK", a keyboard icon, and "Cancel" buttons.

Use Retail Mobile Services

Check this box if you plan to connect your mobile device wirelessly to the Retail Mobile Web Service.

Host

Enter the hostname or IP address of the Retail Mobile Web Service

Port

Enter the port number for the Retail Mobile Web Service. The default port number is 6131.

Channel

Enter a Channel name to match the same Channel name you set at the Desktop. This feature allows different transaction types to be segregated by channel. For example, Line Buster transactions may be sent to a “Line Buster” channel, which then is the same channel to set at your Checkout workstations to process Line Buster transactions.

Language



Use the language setting to override the regional settings on the device and choose a language appropriate for your needs.

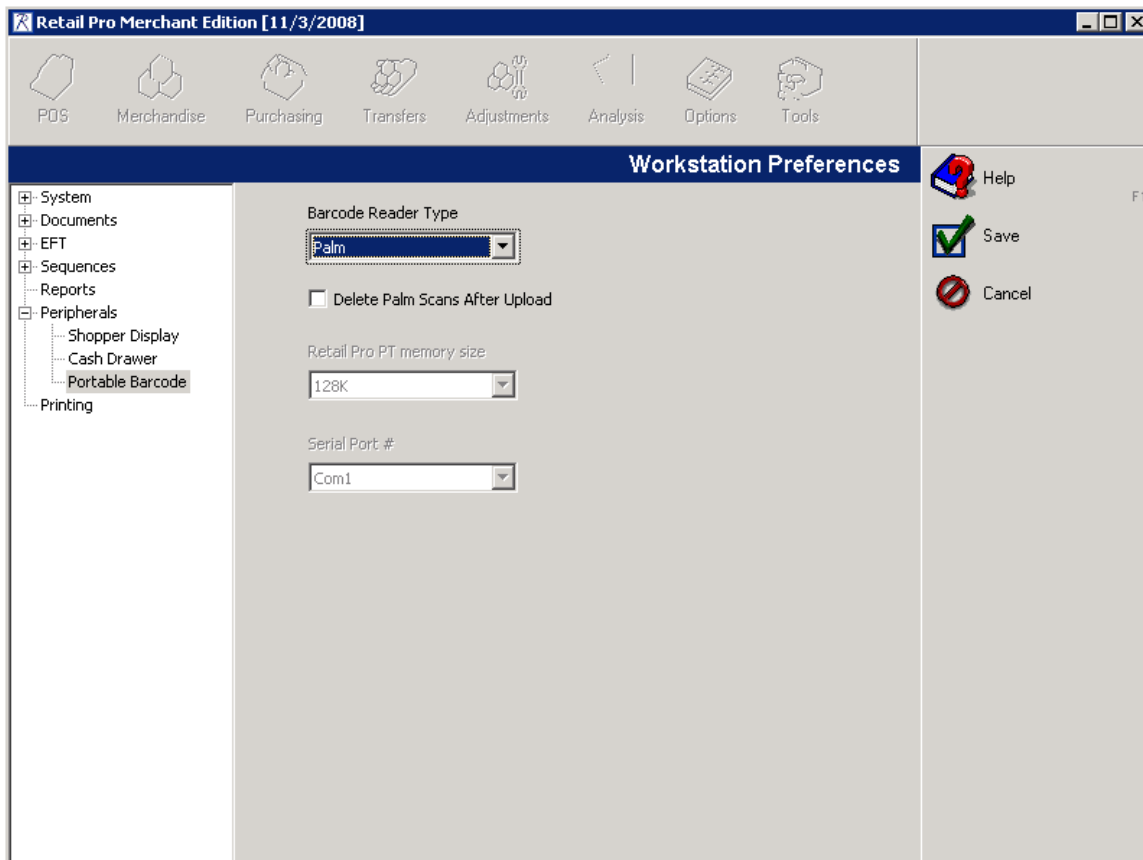
Note: many languages and dialects displayed may not be specifically supported.

3.10 Retail Pro Configuration

Retail Pro V8

Workstation Preferences

In order to use Retail Mobile Suite with a Retail Pro V8 workstation, the workstation must be configured to work with a portable barcode reader. In Retail Pro, go to **Workstation Preferences > Peripherals > Portable Barcode** and select 'Palm' from the Barcode Reader Type.



Barcode Button

On Retail Pro screens, use the Menu Designer to add the Barcode button to import items into documents:



The Barcode button may be added to any of the following Retail Pro documents:

1. POS
 - a. Receipts
 - b. Sales Orders
 - i. Customer Order
 - ii. Special Order
 - iii. Store Registry
 - iv. Company Registry
2. Purchasing
 - a. Vouchers
 - b. Purchase Orders

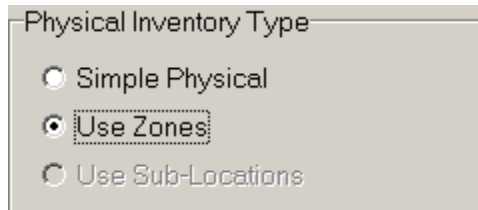
- 3. Transfers
 - a. Slips
 - b. Transfer Orders (add Items Menu, which includes Barcode)
- 4. Adjustments
 - a. Memos

Enable Portable Terminal, Smart Scan, and Zones in RproPI

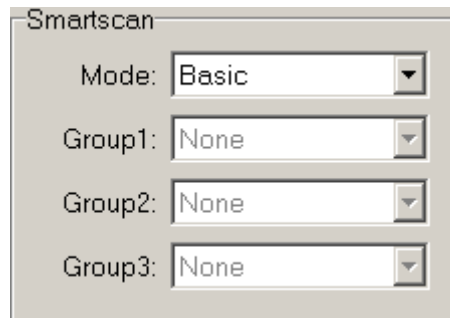
In Retail Pro’s PI tool, go to **Options > WS Prefs > Options**, check **Use Portable Terminal** and click OK:



Next, go to **Options > System Prefs > System**, select **Use Zones**, and click OK:



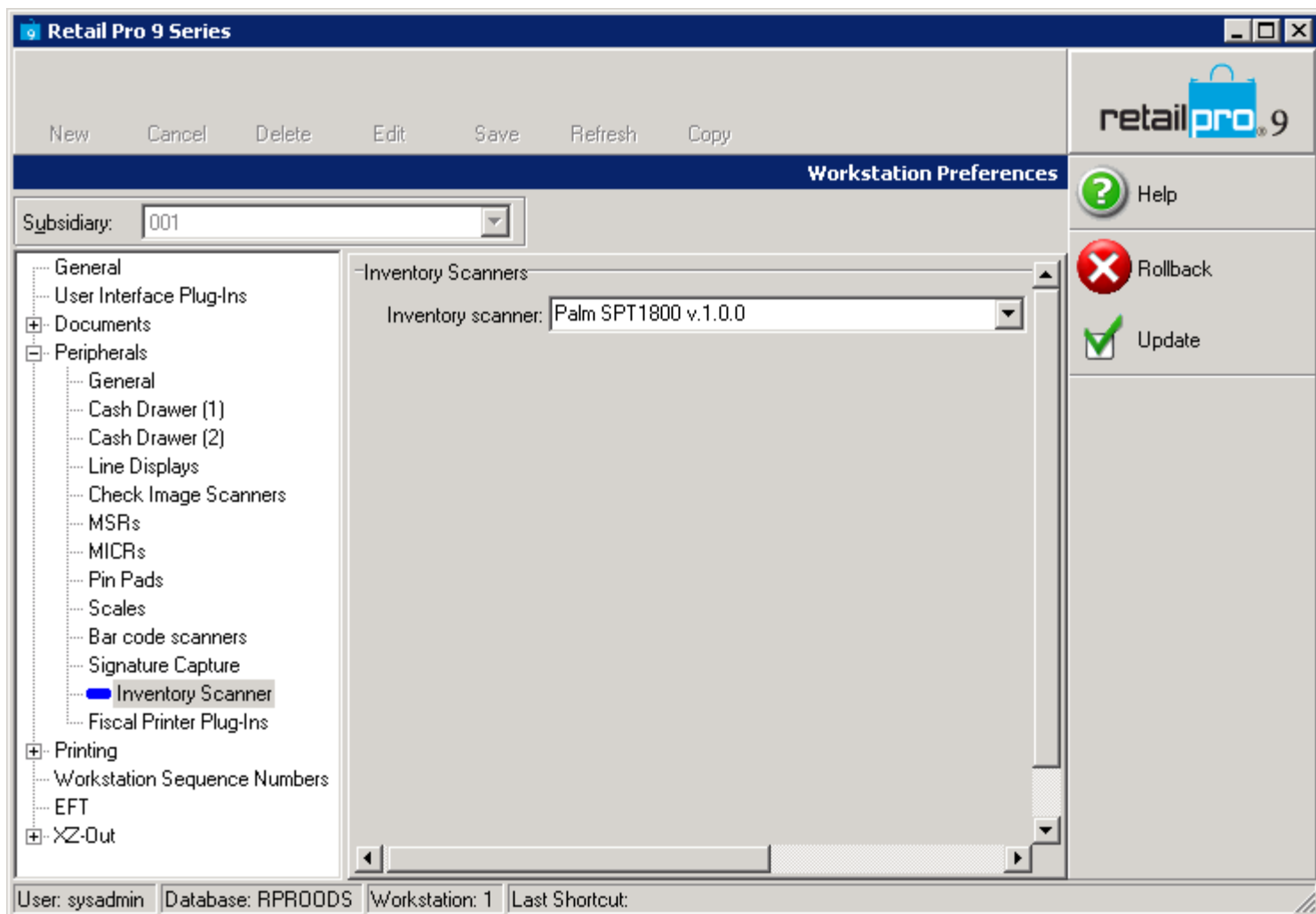
Finally, go to **Options > System Prefs > SmartScan** and set the **Mode** to **Basic**: and click OK:



Retail Pro V9

Workstation Preferences

In order to use Retail Mobile Suite with a Retail Pro V9 workstation, the workstation must be configured to work with a portable barcode reader. Go to **Workstation Preferences > Peripherals > Inventory Scanner** and select ‘Palm SPT1800 v.1.0.0’ from the list of supported inventory scanners, then click Update.



Barcode Button

On Retail Pro screens, use the Menu Designer to add the **Upload Items** button to import items into documents:



The **Upload Items** button may be added to any of the following Retail Pro documents:

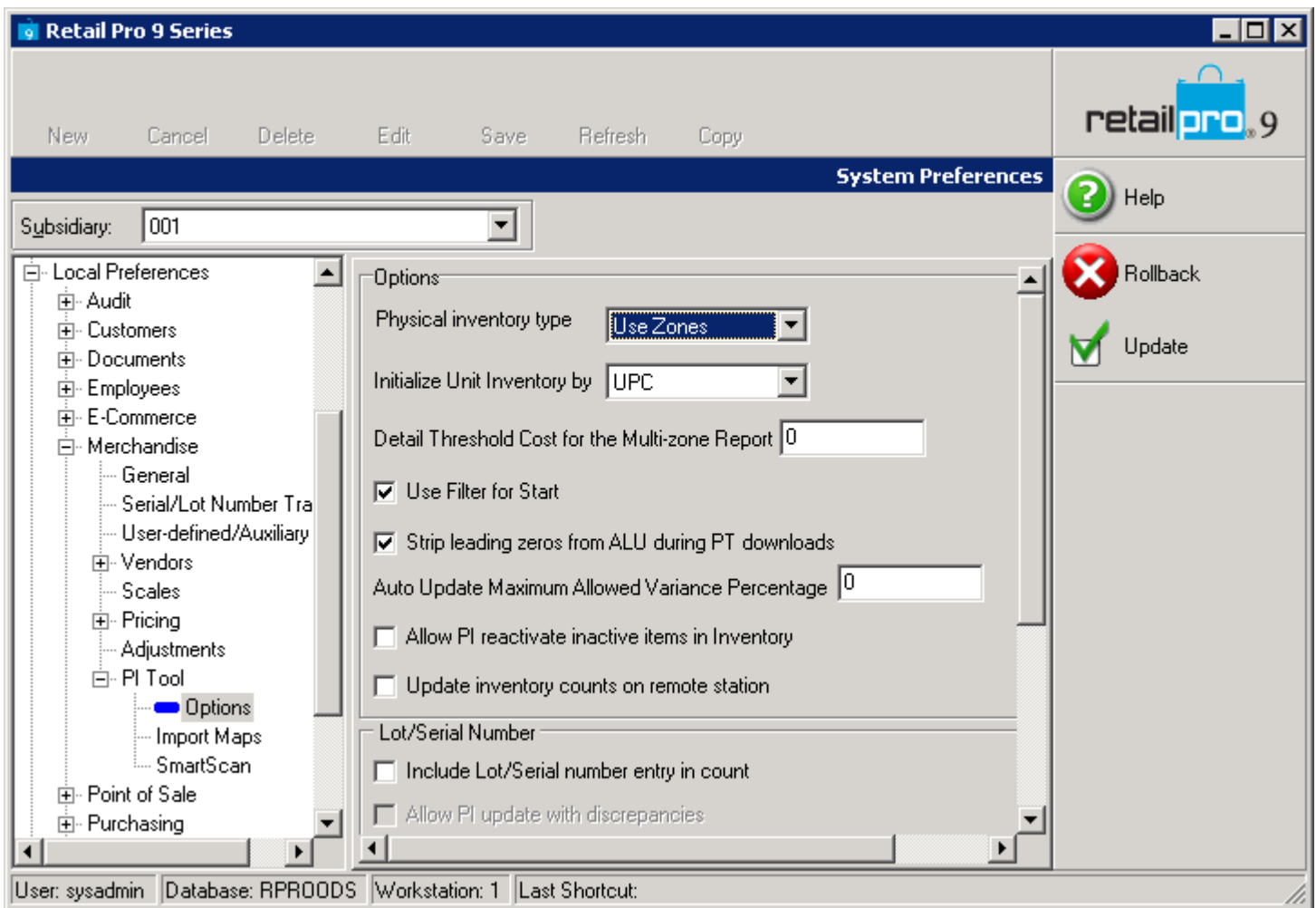
1. Sales
 - a. Receipts
 - b. Sales Orders
 - i. Customer Order
 - ii. Special Order
 - iii. Store Registry

iv. Company Registry

2. Purchasing
 - a. Vouchers
 - b. Purchase Orders
3. Transfers
 - a. Slips
 - c. Transfer Orders
4. Merchandise
 - a. Adjustments

Enable Zones

Go to **System Preferences > Local Preferences > Merchandise > PI Tool > Options** and select **Use Zones** from the **Physical inventory type** dropdown box:



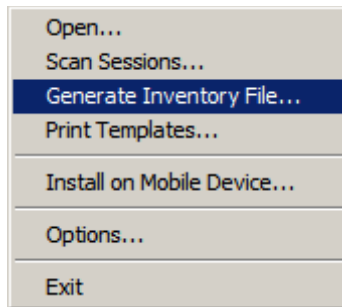
4 Using Retail Mobile Suite

4.1 Generate an Inventory File

An inventory file is used to load inventory information on the mobile device. This file is generated from your Retail Pro database.

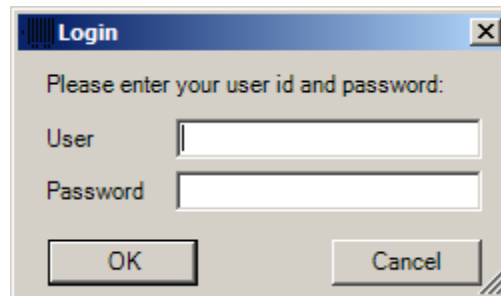
To generate the inventory file:

Right-click on the Retail Mobile Suite System Tray icon and select **Generate Inventory File**:



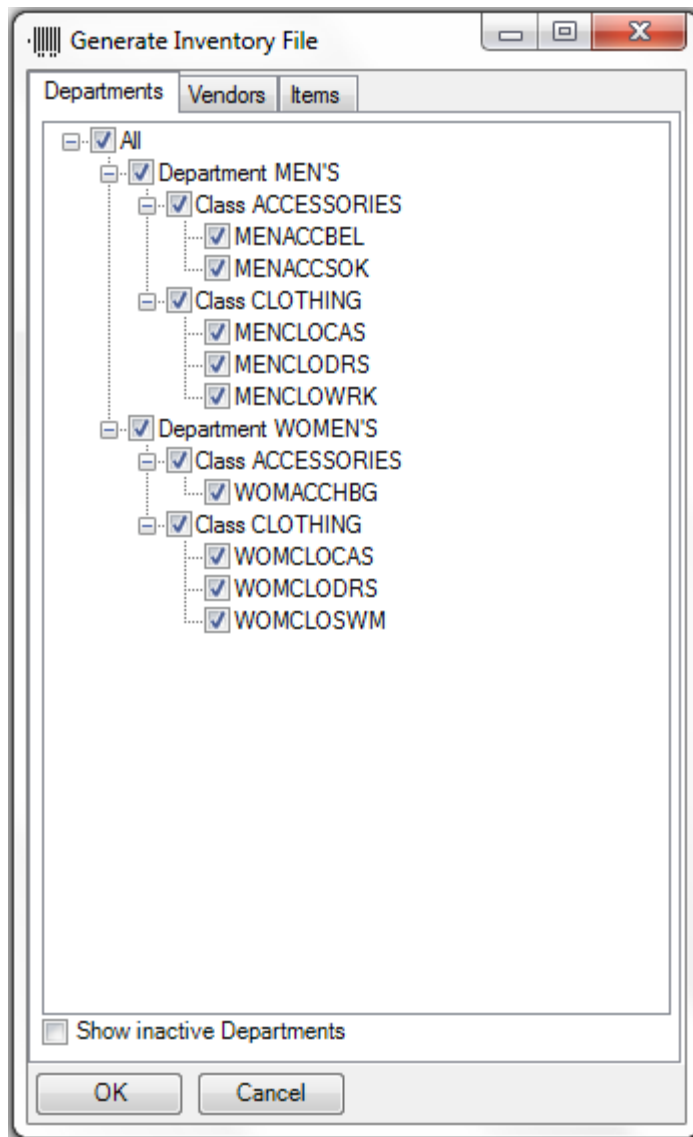
Login to Retail Pro

If your security configuration requires it, you may be asked to provide a user name and password with which to log into the Retail Pro database:



Configure the Inventory File

Use the following windows to configure the inventory file:



Departments

Check the box next to each Department, Class or Subclass that you want to include in the generated inventory file.

Click the + or - symbols to expand or collapse each element as desired.

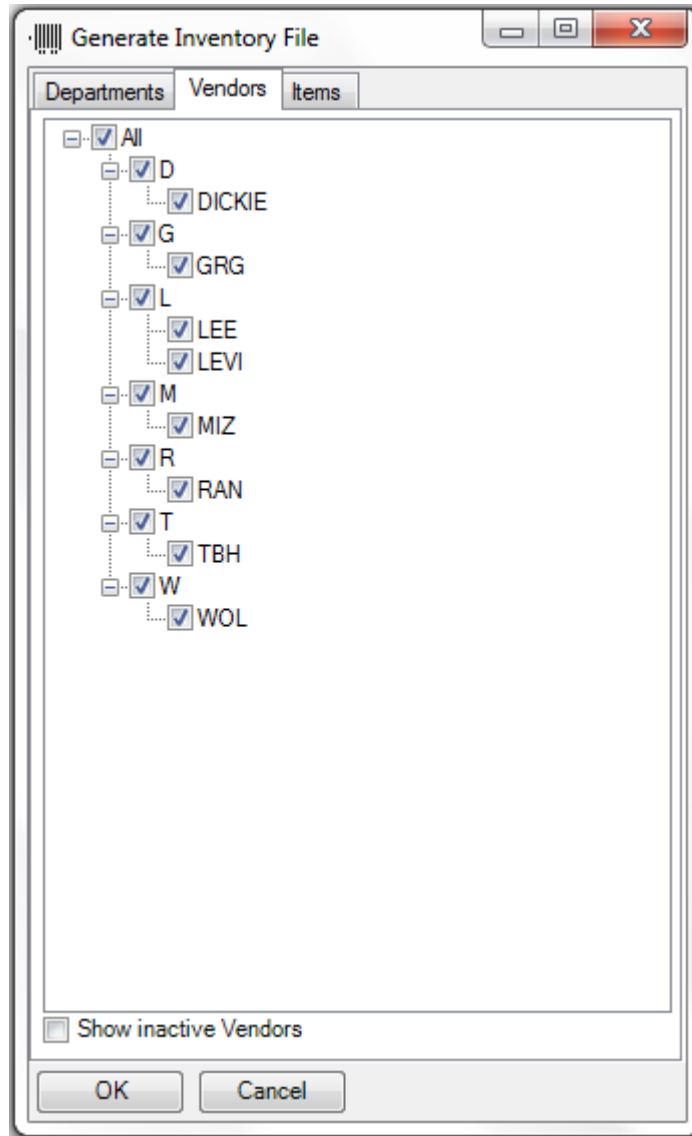
Note that checking the top-level box named 'All' checks all Departments, Classes and Subclasses. Similarly, unchecking 'All' unchecks all Department, Classes and Subclasses.

Also, you may uncheck or check a Department to uncheck or check all of the Classes and Subclasses within that Department and uncheck or check a Class to uncheck or check all of the Subclasses within that Class.

Retail Pro V9 users may also choose to display inactive Departments by checking the Show inactive Departments setting. Note that this setting is not displayed when using Retail Pro V8.

Vendors

Use the Vendors tab to select items by Vendor for the inventory file (just like Departments above).



Retail Pro V9 users may also choose to display inactive Vendors by checking the Show inactive Vendors setting. Note that this setting is not displayed when using Retail Pro V8.

Items

Use the Items tab to select the following options:

Option	Description
Subsidiary	Allows you to choose the subsidiary from which inventory is queried.
Store	Allows you to choose the store from which inventory is queried.
Include inactive Items	Check to include inactive items in the inventory file. (Retail Pro V9 only)
Item No Min Size	The minimum size of item numbers printed on labels. Item numbers smaller than this size are left padded with zeros. Item numbers longer than this size are left as-is.
ALU	If checked, each item's primary ALU is included in the inventory file.

ALU Min Size	The minimum size of primary ALUs printed on labels. Primary ALUs smaller than this size are left padded with zeros. Primary ALUs longer than this size are left as-is.
UPC	If checked, each item's primary UPC is included in the inventory file.
Vendor ALU	If checked, each item's alternate vendor ALUs are included in the inventory file.
Vendor ALU Min Size	The minimum size of alternate vendor ALUs printed on labels. Alternate ALUs smaller than this size are left padded with zeros. Alternate ALUs longer than this size are left as-is.
Vendor UPC	If checked, each item's Vendor UPCs are included in the inventory file.
Description 1	If checked, each item's Description 1 text is included in the inventory file.
Description 2	If checked, each item's Description 2 text is included in the inventory file.
Attribute	If checked, each item's Attribute text is included in the inventory file.
Size	If checked, each item's Size text is included in the inventory file.
Price Level	Identifies the Price Level used to determine item prices in the inventory file.
Cost	If checked, each item's Cost is included in the inventory file.
Price/Cost Decimals	Determines the number of decimals to display with prices.
Store Quantity	If checked, each item's on-hand store quantity is included in the inventory file.

Generate the Inventory File

Press **OK** to generate the inventory file after reviewing and making any changes to the settings above.

Update the Inventory File on Mobile Devices using ActiveSync

When configured to use ActiveSync, Retail Mobile Suite automatically checks the inventory file when a mobile device is connected. If the inventory file on the mobile device is older than the desktop's inventory file, the file on the mobile device is updated.

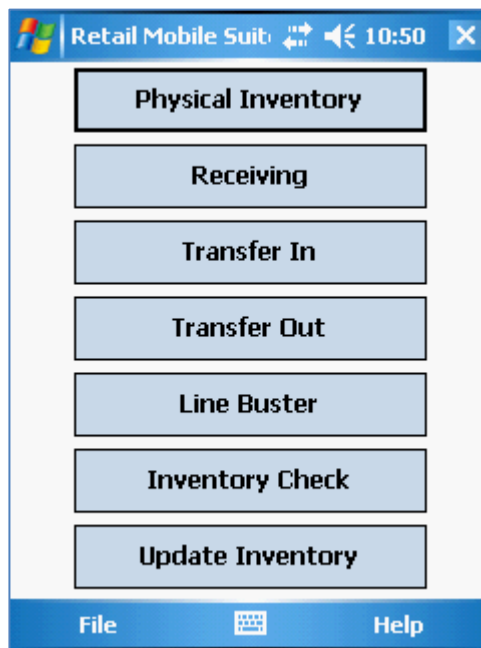
Update the Inventory File on Mobile Devices using Retail Mobile Services

If the mobile device is configured to use Retail Mobile Services, the Desktop Component will automatically send the most recent Inventory File to Retail Mobile Services.

Mobile devices configured to use Retail Mobile Services may then update their Inventory File by touching **Update Inventory** on the Main Menu.

4.2 Manage Sessions

Retail Mobile Suite’s Main Menu on the mobile device appears as follows and lets you choose a task to perform:



Managing Sessions

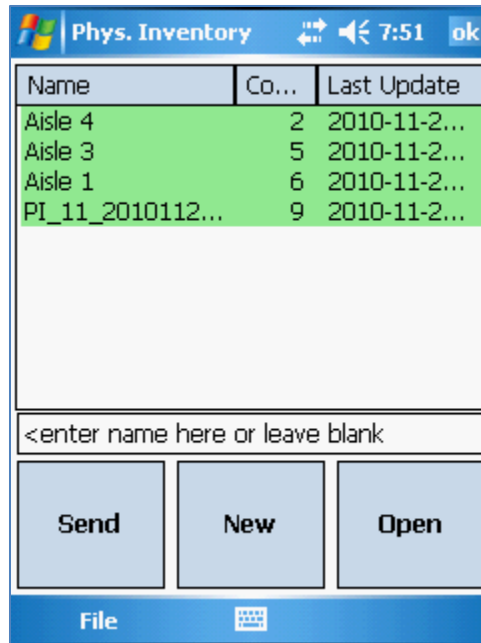
A session is a collection of items and counts that can be managed like a file, allowing you to save your progress and switch between tasks. Selecting any of the following tasks from the Main Menu allows you to manage the corresponding sessions for that task.

- Physical Inventory
- Receiving
- Transfer In
- Transfer Out
- Line Buster

Creating a New Session

Before you can enter transactions, or scan and count items for Physical Inventory, you must create a session to organize the transactions.

Clicking on any of the scan and count tasks on the main menu will display the session manager screen for the task:



Create a new session by first entering a name in the text field and then click **New**. Or, leave the name blank and click **New** to have Retail Mobile Suite generate a uniquely named session for you.

Opening a Session

Once a session has been created, it can be opened at any time by selecting the session and clicking the **Open** button or double-click the session.

Deleting a Session

To delete a session, select the session and then click **Delete** on the **File Menu**.

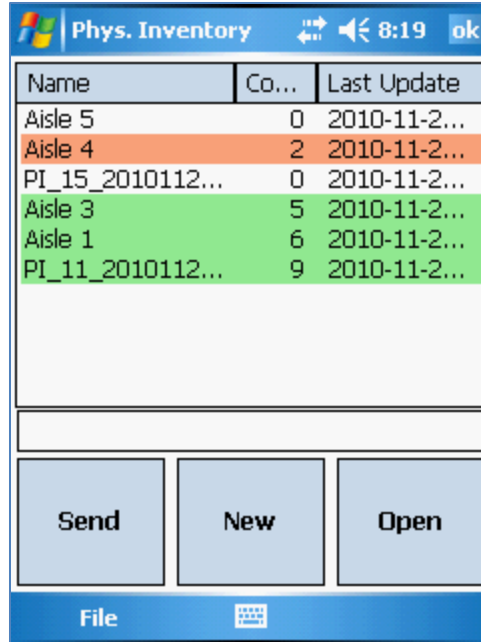


Send a Session

To **Send** a session to the Retail Mobile Suite Desktop, select the session and click **Send**. The next time the mobile device is connected wirelessly to the Retail Mobile Web Service, or physically connected with ActiveSync, the session will be uploaded to Retail Mobile Suite Desktop and made available for use in Retail Pro.

White, Red, and Green Session Status

Sessions in progress that have not yet been sent appear in White. Sessions that have successfully been sent to the Desktop appear in Green, and sessions that have not yet been received by the Desktop appear in Red as shown below:



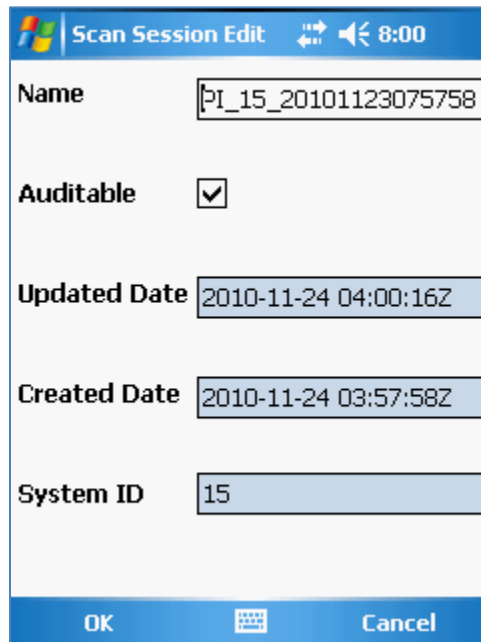
Name	Co...	Last Update
Aisle 5	0	2010-11-2...
Aisle 4	2	2010-11-2...
PI_15_2010112...	0	2010-11-2...
Aisle 3	5	2010-11-2...
Aisle 1	6	2010-11-2...
PI_11_2010112...	9	2010-11-2...

Buttons: Send, New, Open

File

Editing a Session's Details

To edit a session's details, select it and click **Edit**. This displays the following screen where you can edit some of the information about the session:



Scan Session Edit 8:00

Name: PI_15_20101123075758

Auditable:

Updated Date: 2010-11-24 04:00:16Z

Created Date: 2010-11-24 03:57:58Z

System ID: 15

Buttons: OK, Cancel

4.3 Scan Items

Once you have created a session, press **Open** (or **New**) to display a screen for the type of transaction where you can begin scanning items. The following screen shot is a picture of the Physical Inventory screen:

Scanning Procedure

To scan an item, aim the barcode scanner at a barcode and press the scan button on the mobile device. If the scanner and Retail Mobile Suite have been configured correctly, any information known about the item will immediately display upon scanning:

Manual Entry

If a barcode is not readable, you can manually enter the barcode value in the any of the 3 identifier fields (Item #, ALU or UPC). Press **ENTER** on the device to cause Retail Mobile Suite to lookup the item before setting the count.

Adding Counts

By default, cursor input focus is directed to the **Count** field to accept the count of items. Entering a number here and scanning a new item automatically adds the new scan to a previous item's quantity and looks up the next item. This enables very rapid scanning since there are no extra steps involved.

After scanning an item, you may also enter a count and push the **ENTER** key on your mobile device to add your count to the item's quantity without changing focus.

Setting the Quantity

To set an item's quantity with addition to previous scans, enter the count and press the **Qty** button.

Deleting a Scan from the Session

To delete the current scan from the session, use the scroll bar to display the scan and then press the **Del** button.

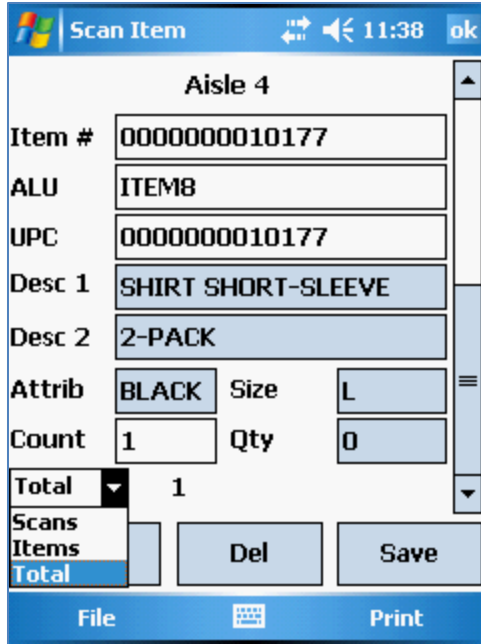
Summary Totals

Retail Mobile Suite keeps 3 summary totals while you are scanning which you can view:

- **Scans** – The total number of scans in the session
- **Items** – The total number of different items in the session
- **Total** – The total quantity of all items in the session.

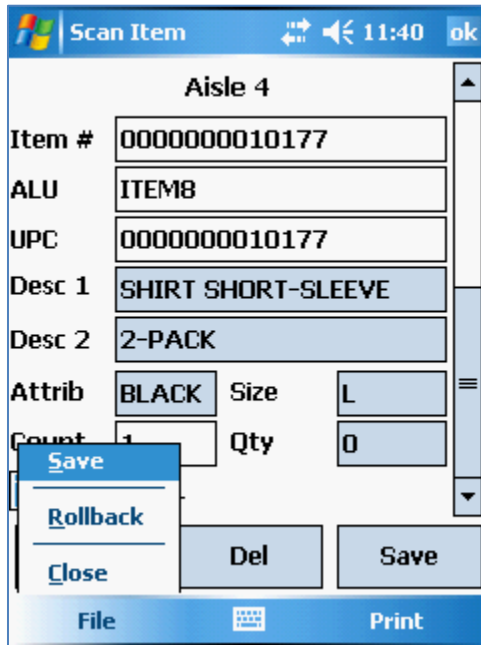
Items and Total are particularly useful for comparing results with any pre-count totals.

To choose which summary to display, select the combo box just above the **Qty** button and choose the summary total you wish to see:



File Menu

The File menu lets you Save, Rollback and Close your session:



Save

You may save your progress at any time by either pressing the **Save** button or by clicking **File > Save**.

Rollback

At any time, you may choose to rollback any changes made to the session since the last save. Simply click **File > Rollback**. You will be asked to confirm this action.

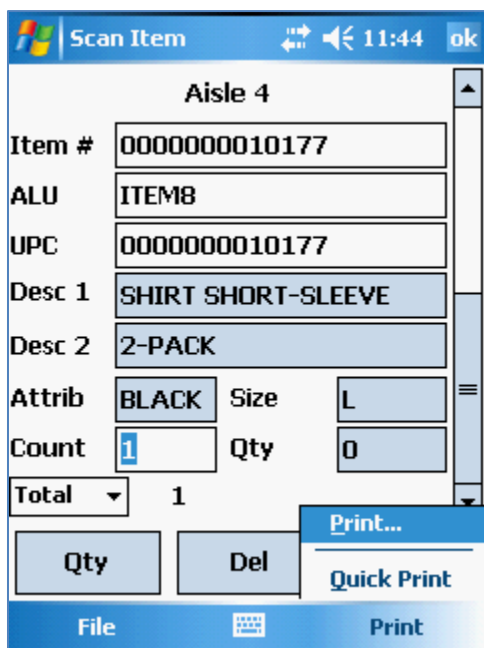
Close

You may close the session by clicking **ok** at the top right corner of the screen, by pressing your mobile device's **ESC** key, or by clicking **File > Close**.

If you attempt to close the session without first saving, you will be warned and given a chance to save the session before closing it. Please note that unsaved changes are lost.

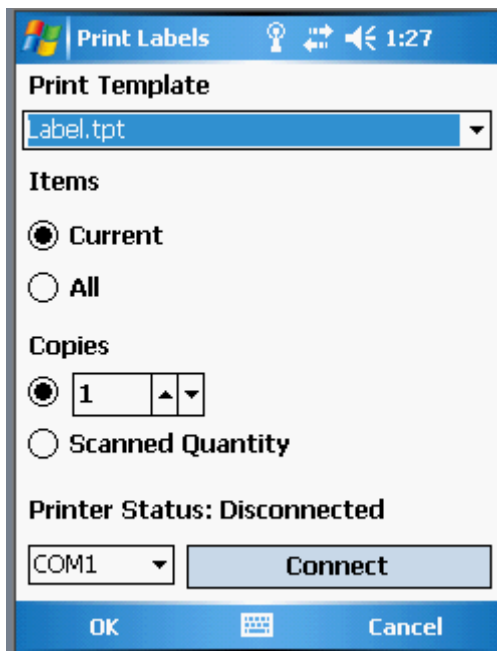
Print Menu

The Print menu lets you print labels for the current item or an entire list. You can also enable Quick Print mode, which prints a label everytime you scan an item. See **Section 5 Printer Setup** for more information on configuring a serial or Bluetooth-enabled printer to work with Retail Mobile Suite on your mobile device.



Print...

Select this menu item to show the Print Label dialog:



Steps to print a label:

- Choose a **Print Template**.
- Select **Current** to print a label for only the currently displayed item or **All** to print labels for each item in the session.
- Select the number of **Copies**. You can choose to print a specific number of copies or print the actual **Scanned Quantity**. (“Scanned Quantity” is very useful in conjunction with **All** above to print a label for each item in the session.)
- If the **Printer Status** displays as disconnected, adjust the serial port as needed and press **Connect**.
- Press **OK** to print or **Cancel** to abort the operation.

Quick Print

Quick Print mode simplifies printing by automatically printing labels as you scan. As above, you can choose to print a fixed number of labels for each scan or print labels for the scanned quantity. Note that in Quick Print mode, you will not be able to select printing for **All** items.

Turn on **Quick Print** mode by clicking on the menu item. The Print Label dialog will display as above. Make your selections and click **OK** to enable **Quick Print** mode or **Cancel** to leave it off.

Turn off **Quick Print** mode by clicking on the menu item again. The following screen shows **Quick Print** mode enabled:

Scan Item		1:11	ok
PI_41_20030118125957			
Item #	135085		
ALU	496580		
UPC	0049000006582		
Desc 1	BEVERAGE		
Desc 2	DIET COKE		
Attrib	DIET	Size	12 FLOZ
Count		Qty	7
Total	28		
Qty	Del	Print...	Quick Print
File		Print	

4.4 Inventory Check

Use the Inventory Check task from the Main Menu to quickly scan and lookup information from the inventory file for an item:

Inventory Check		11:48	ok
Item #	0000000010177		
ALU	ITEM8		
UPC	0000000010177		
Desc 1	SHIRT SHORT-SLEEVE PERFORMANCE		
Desc 2	2-PACK		
Attrib	BLACK	Size	L
Price	16.88	Qty	39
File		Print	

File Menu

Close

You can close the session by clicking **ok** at the top right corner of the screen, pressing your mobile device's **ESC** key, or by clicking **File > Close**.

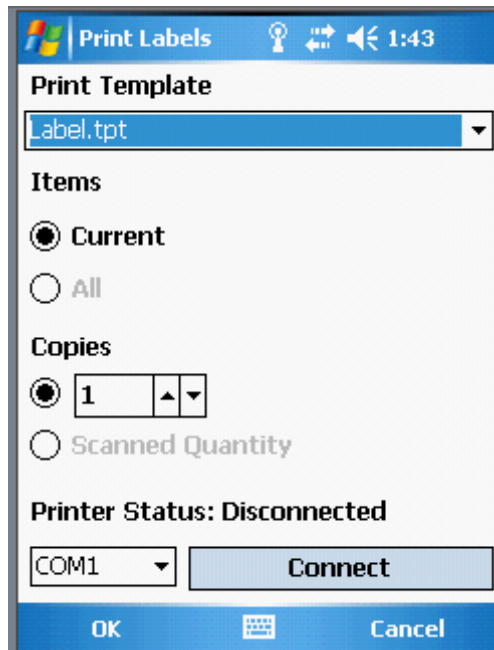
Print Menu

The Print menu lets you print labels for the current item and also lets you enable Quick Print mode, which prints a label everytime you scan. See **Section 5 Printer Setup** for more information on configuring a serial or Bluetooth-enabled printer to work with Retail Mobile Suite on your mobile device.



Print...

Select this menu item to show the Print Label dialog:



Steps to print a label:

- Choose a **Print Template**.
- When performing Inventory Check, you may only print labels for the currently displayed item.
- Select the number of **Copies**.
- If the **Printer Status** displays as disconnected, adjust the serial port as needed and press **Connect**.
- Press **OK** to print or **Cancel** to abort the operation.

Quick Print

Quick Print mode simplifies printing by automatically printing labels as you scan. As before, you can choose to print a certain number of labels for each scan, but when performing Inventory Check, you will not be able to select **Scanned Quantity** or **All**.

Turn on **Quick Print** mode by clicking on the menu item. The Print Label dialog will display as shown above. Make your selections and click **OK** to enable **Quick Print** mode or **Cancel** to leave it off.

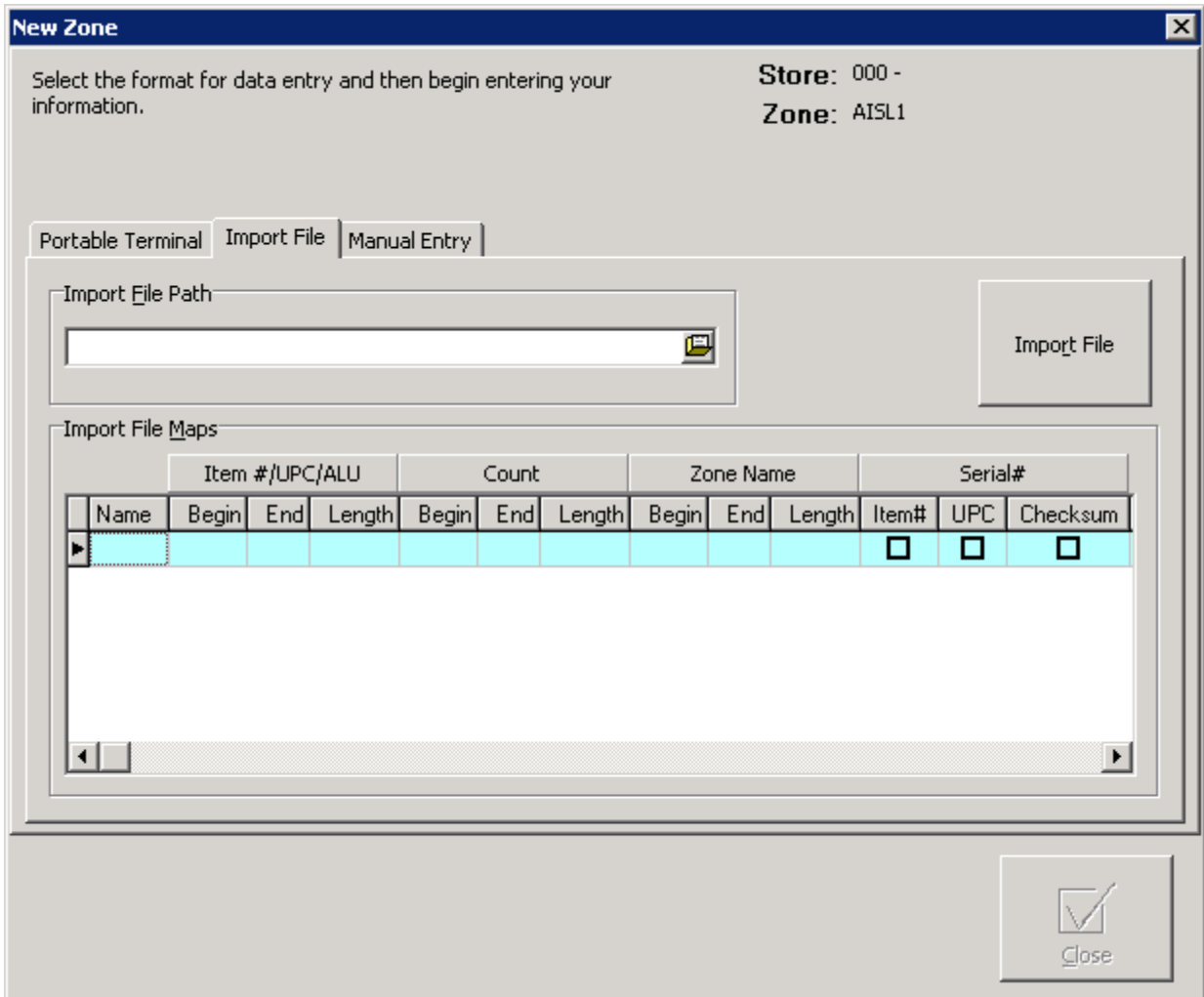
Turn off **Quick Print** mode by clicking on the menu item again.

4.5 Add Counts to a Physical Inventory Zone in Retail Pro

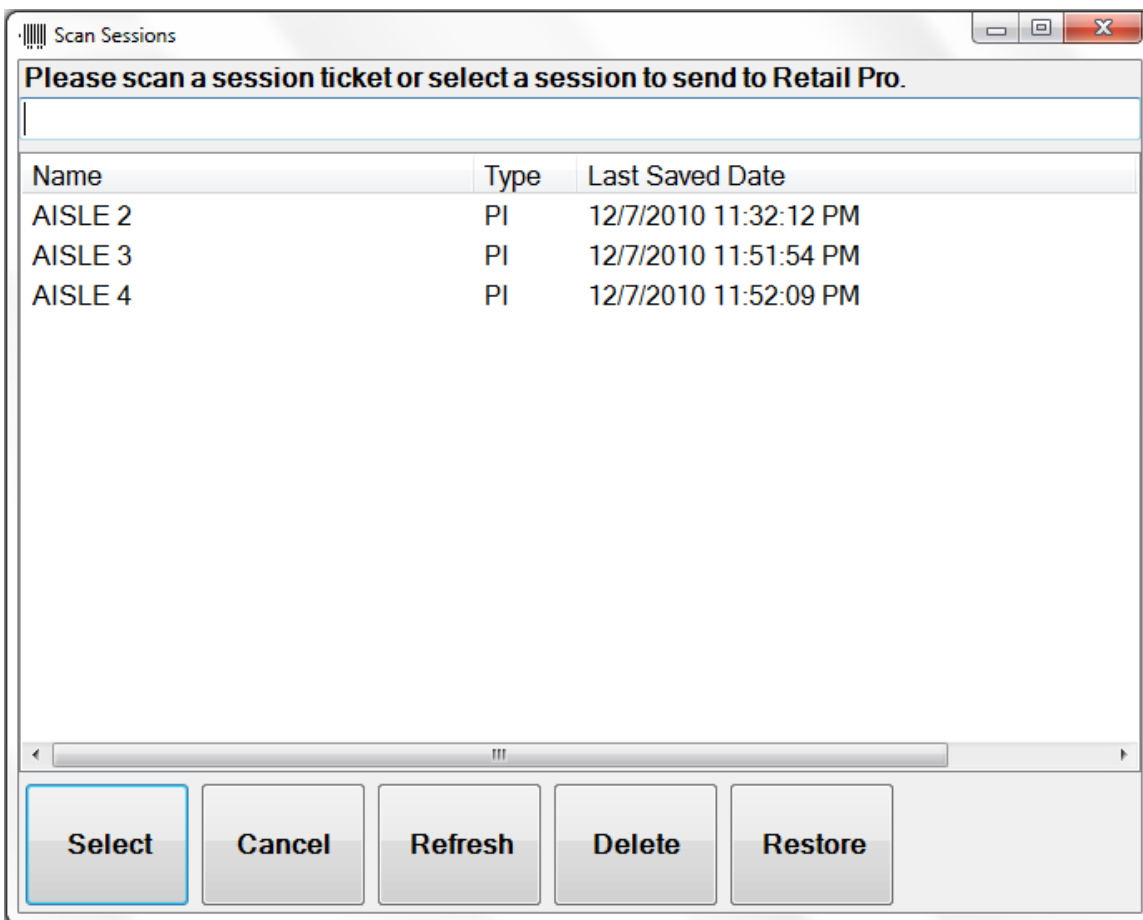
Retail Pro V8

To download counts collected on your mobile device into a zone in Retail Pro V8:

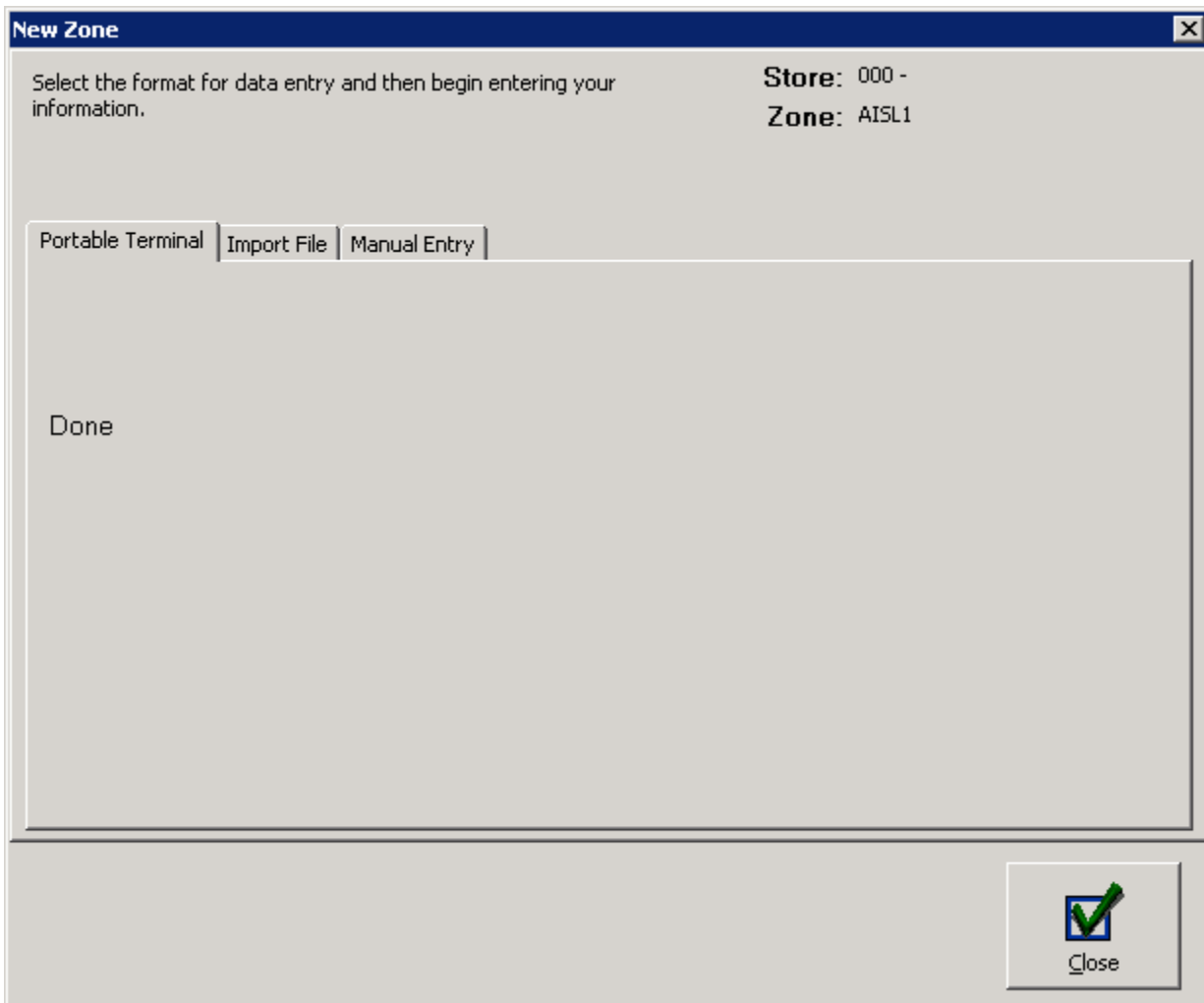
1. If needed, generate a new inventory file for your mobile device.
2. Create a new Physical Inventory session for the zone you want to count.
Tip: The session name is not imported into Retail Pro, but it is useful to give meaningful names to your sessions. For example, naming the session with the same name as its corresponding zone makes it easier to remember what activity the session includes.
3. On the mobile device, **Open** the session, scan and count the items in the zone, then **Save** and **Send** the session to Retail Mobile Suite Desktop.
4. If you are wirelessly connected to the Retail Mobile Web Service, your session should send immediately and show a Green status. If you physically dock your device, then connect the device to your workstation. (Check that ActiveSync is connected with the device.)
5. Start Retail Pro's PI Tool and create a new zone. The following screen shows what would happen if you created a new zone with the name **AISL1**:



6. Click **Portable Terminal** to download data from Retail Mobile Suite. This causes Retail Mobile Suite to popup a **Scan Sessions** window:



7. If your session is not displayed, check that the session has a Green status on the mobile device (indicating the session has been successfully sent) and click **Refresh**.
8. Highlight the session you wish to download into the zone and click **Select**. Please note that all sessions ready for download are displayed when the Scan Sessions window is opened. Choose the session carefully.
9. Click Close to review and edit the new Zone:



Retail Pro V9

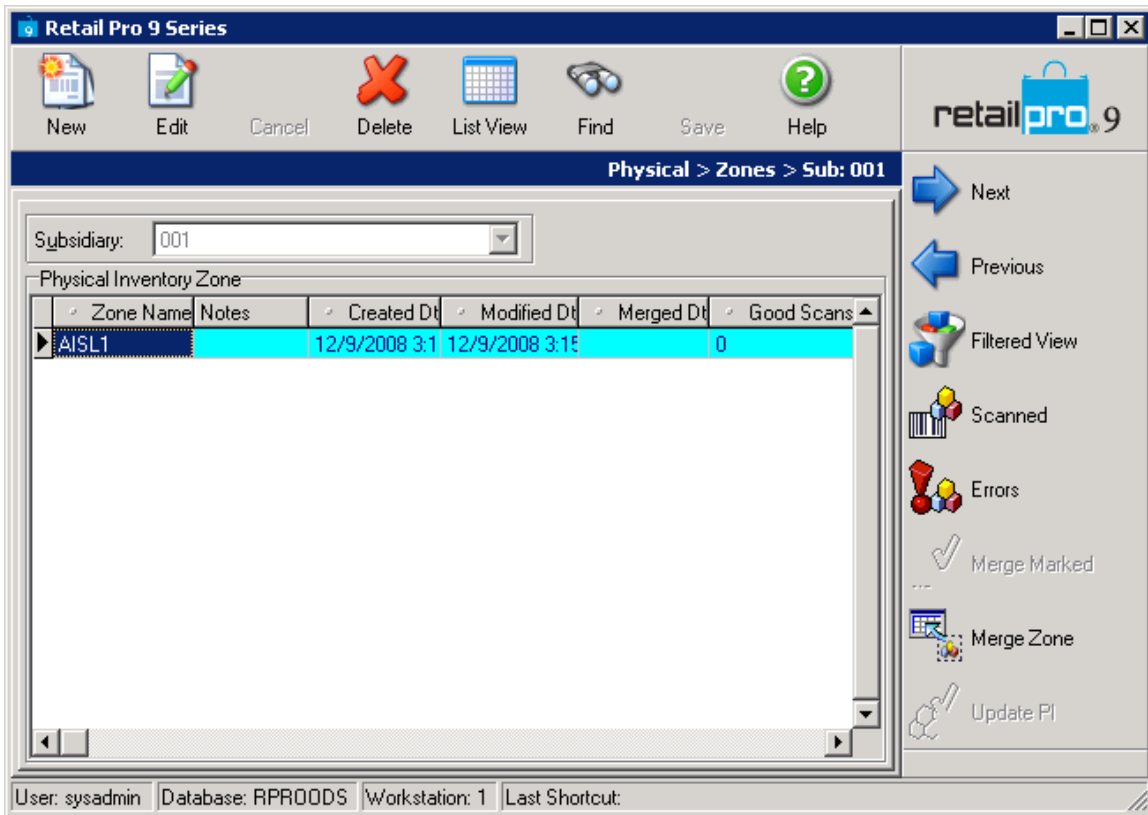
To download counts collected on your mobile device into a zone in Retail Pro V9:

1. If needed, generate a new inventory file for your mobile device.
2. On the mobile device, create a new Physical Inventory session for the zone you want to count.

Tip: The session name is not imported into Retail Pro, but it is useful to give sessions meaningful names. For example, naming the session with the same name as its corresponding zone makes it easier to remember what activity the session includes.

3. Open the session, scan and count the items in the zone, then **Save** and **Send**.
4. If you are wirelessly connected to the Retail Mobile Web Service, your session should send immediately and show a Green status. If you physically dock your device, then connect the device to your workstation and check that ActiveSync is connected with the device.

5. In Retail Pro, go to **Merchandise > Inventory > Physical Inventory > Zones** and create a new Zone. The following screen shows what would happen if you created a new Zone with the name **aisl1**:



10. Push the **Scanned** button and then **Add Counts** to bring up **Add Counts** dialog:

Add Counts

Subsidiary: 001. Store: RDP - Return Department. Zone: AISL1

Select the format for data entry and then begin entering your information:

Portable Device | Import | Manual

Lookup:

Quantity:

After item entry, go to:

Next Item Lot/Serial Number

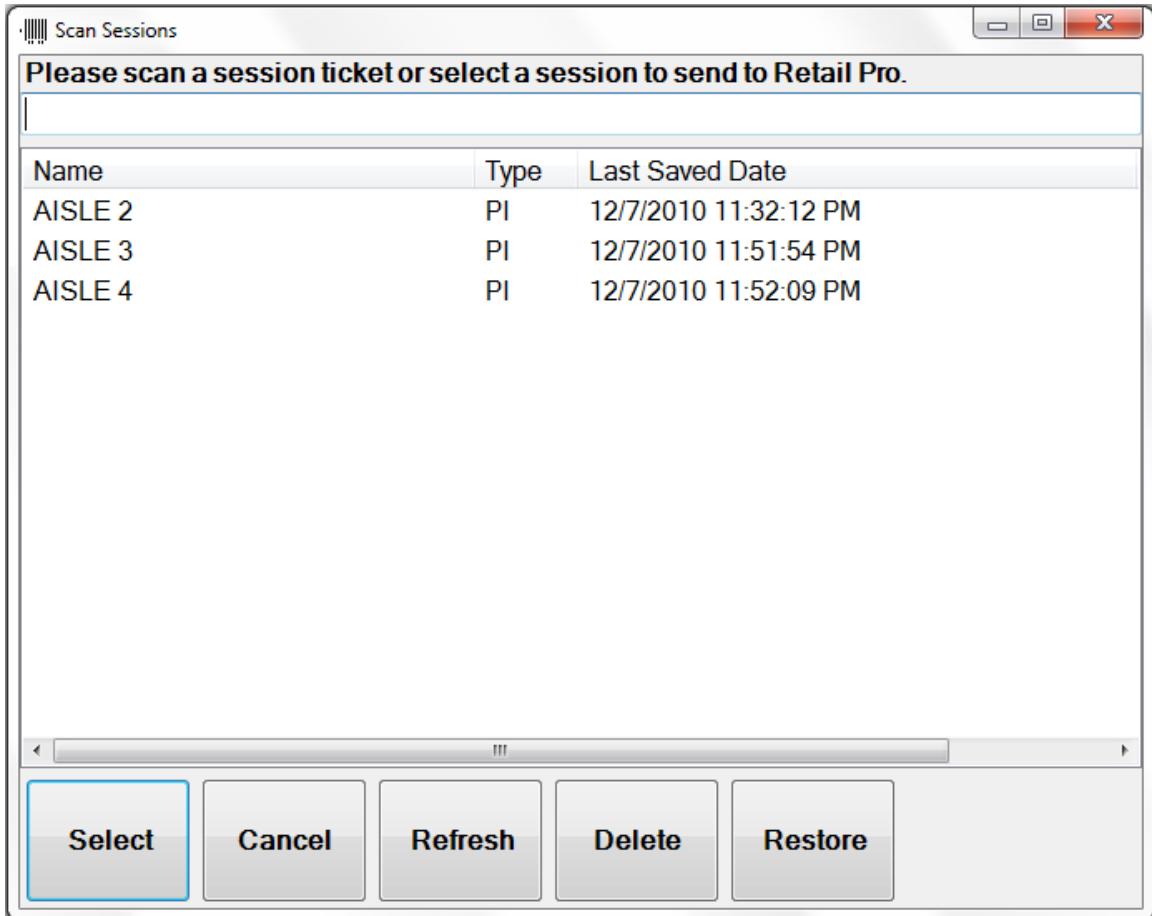
Quantity for current item

PI SCAN Entry

SHEET_ID	ZONE_NO	ImportID	Scan Qty	Vend Name

Close Cancel

11. Make sure you have connected your mobile device and then click **Portable Device**, which will then allow you to choose a scan session for import:

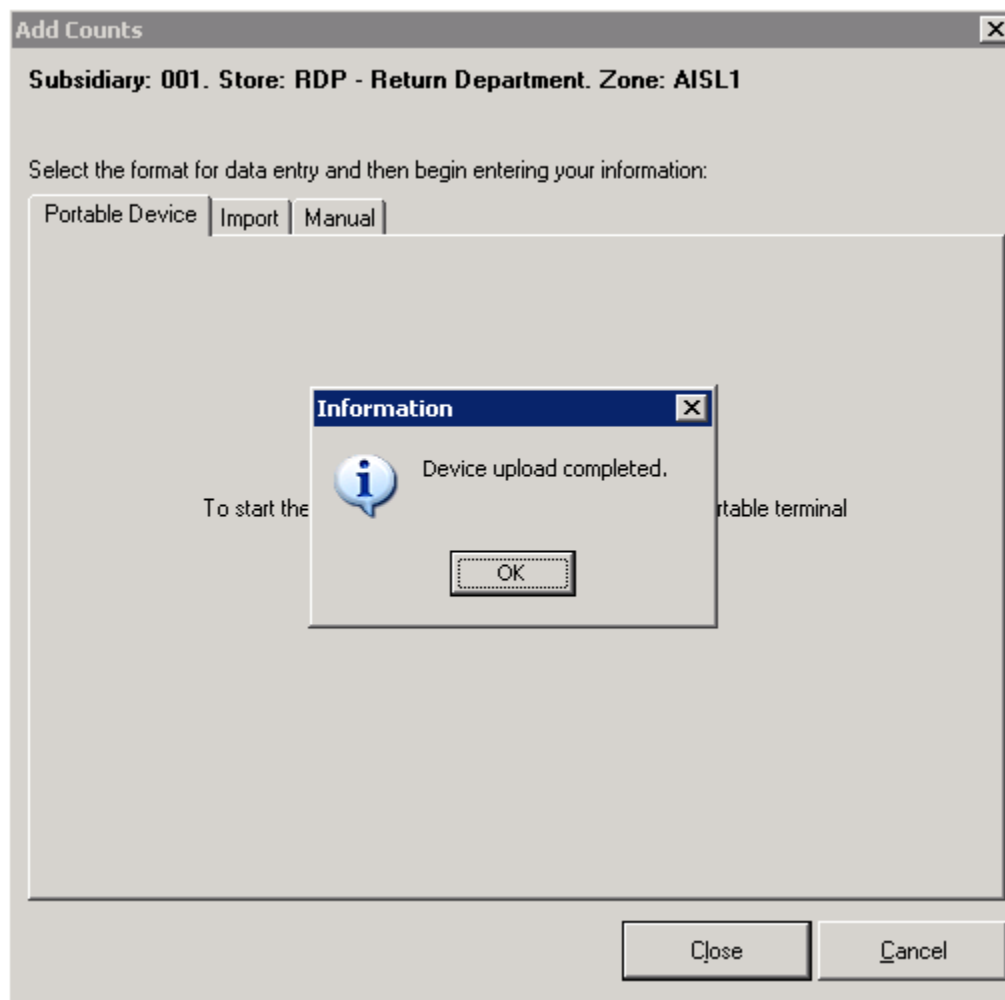


12. Select the session you wish to download into the zone.

Please note that all sessions ready for download are displayed when the Scan Sessions window is opened. Choose the session carefully.

Also note that if too much time is taken to select a session, Retail Pro V9 may timeout. If this happens, repeat the procedure.

13. Click **OK** and then **Close** to review and edit the counts:



4.6 Import Counts into a Transfer, Voucher, or Sales Receipt

To download counts into Retail Pro documents, make sure you have added the **Barcode** (V8) or **Upload Items** (V9) button to the document form and follow the steps below:

Retail Pro V8 and V9

1. Connect your mobile device to the workstation and send the document sessions you wish to download into Retail Pro.
2. Create a document in Retail Pro as normal and click the **Barcode** or **Upload Items** button when ready.
3. Select the desired session from the **Scan Sessions** popup.

4.7 Line Buster

Use **Line Buster** to speed-up checkout by pre-scanning a Customers' shopping basket.

Preparation

1. Before line busting, you must obtain a set of “tickets” that will be exchanged between Customers and Cashiers. Each ticket should also have a barcode that is unique such that two different Customers could never present the same barcode to two different Cashiers at the same time. Any simple sequence of barcode values is sufficient provided there are no duplicates.
2. To perform line busting, you must use Retail Mobile Services and a wireless network to connect your mobile devices.
3. On the mobile devices and Retail Pro POS workstations that will be used for line busting, configure the Server & Communication **Options** for Retail Mobile Services to use the same Channel name (such as “Line Buster”):

Mobile Server Settings

Configure 11:53

Server Settings

Use Retail Mobile Services

Host
192.168.0.95

Port
6131

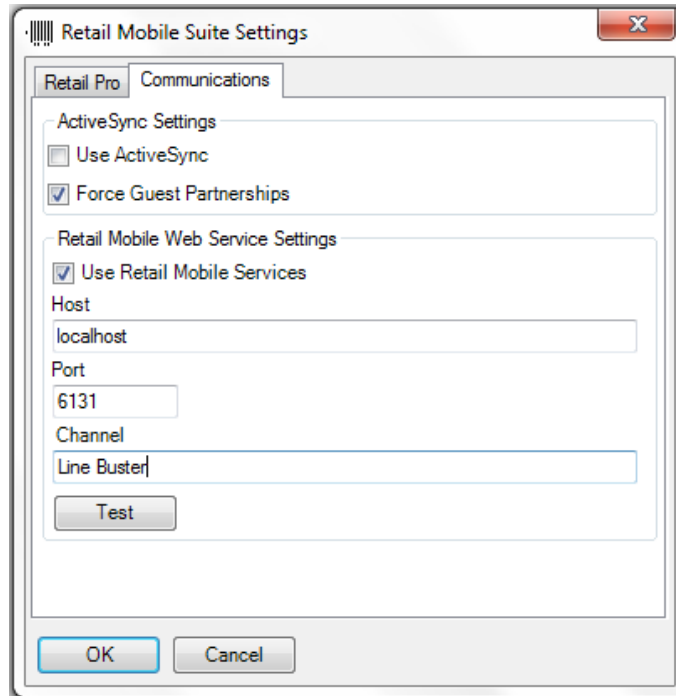
Channel
Line Buster

Test

Inventory Sessions Wedge Server

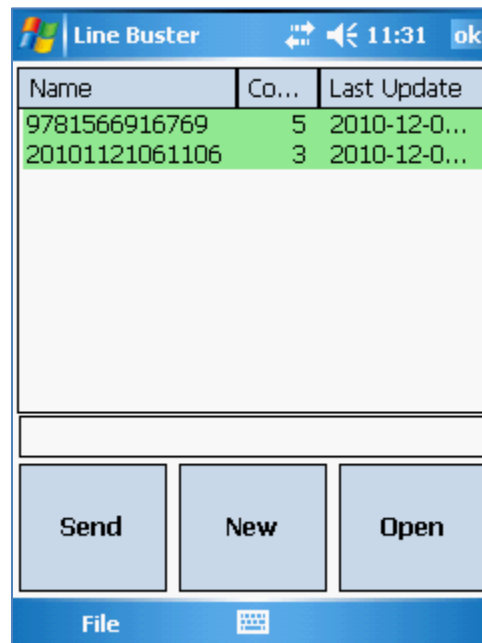
OK Cancel

Desktop Communications Settings

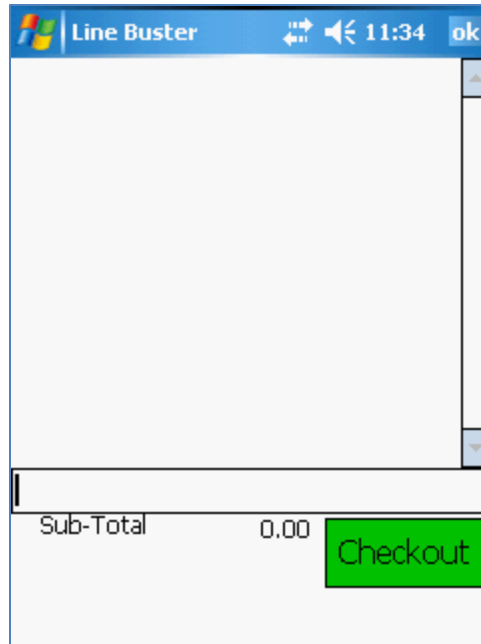


Procedure

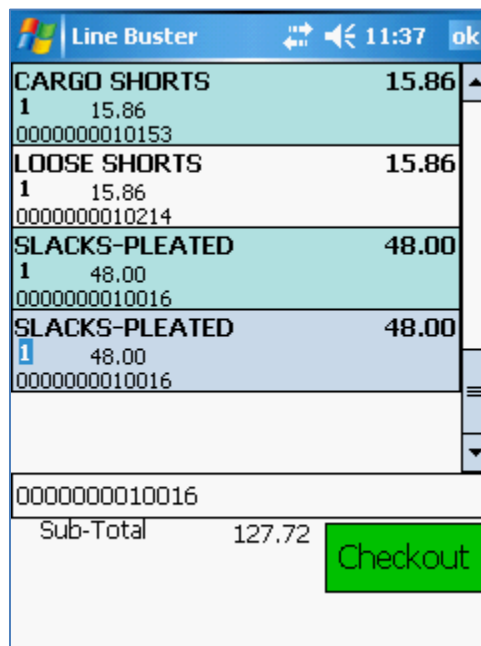
1. A Sales Associate clicks the Line Buster button in the main menu of Retail Mobile Suite on the mobile device. The Line Buster session manager is displayed.



2. The Sales Associate takes out a ticket, scans it, and then hands the ticket to a Customer waiting in line. A Line Buster session for the ticket is displayed on the mobile device:

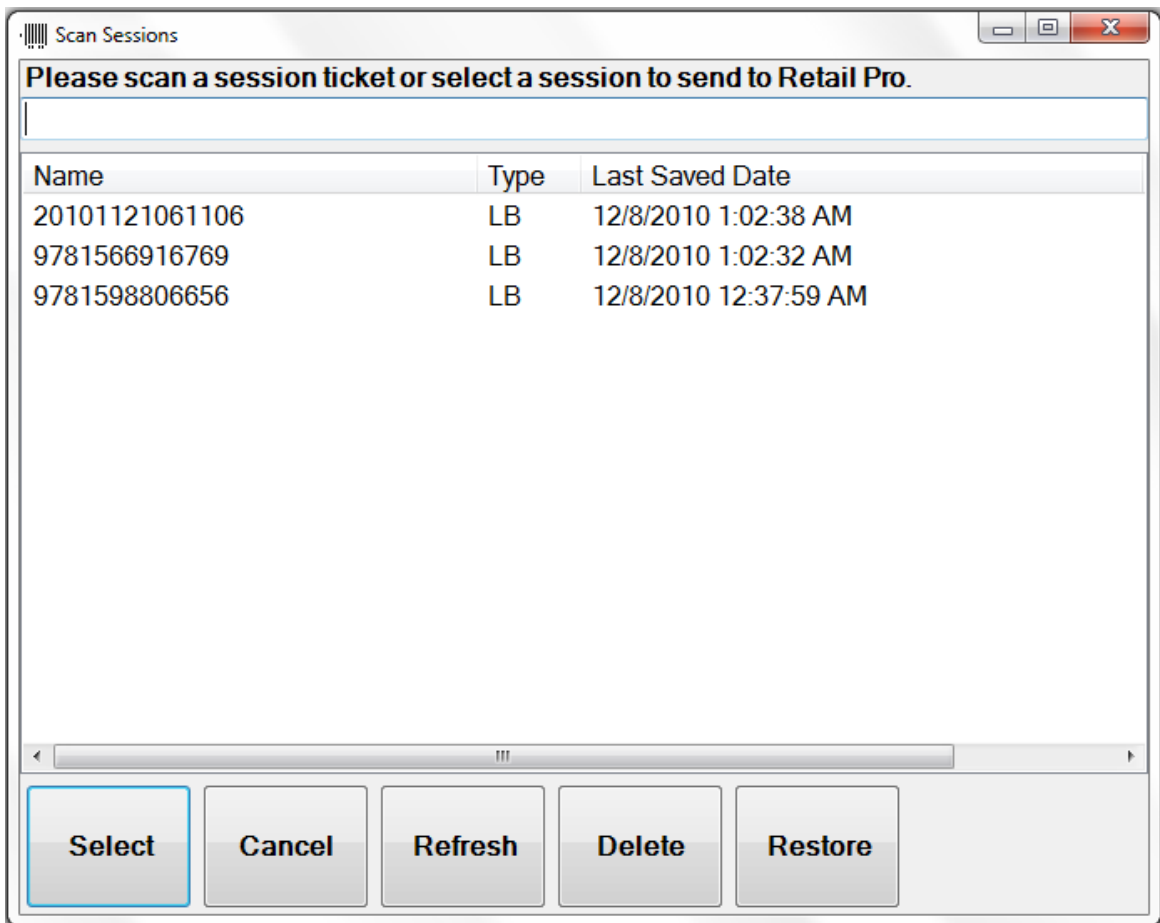


3. The Sales Associate then scans each of the items in the Customer's basket.



4. When finished, the Sales Associate presses **Checkout** and then repeats the process with the next customer. Retail Mobile Suite will automatically save and send the session to the Desktop (wirelessly through Retail Mobile Services).
5. The Customer proceeds to the Cashier and presents a Line Buster ticket.

6. In Retail Pro, the Cashier creates a new Receipt and then presses either the **Barcode** (V8) or **Upload Items** (V9) button to pop-up the **Scan Sessions** window:



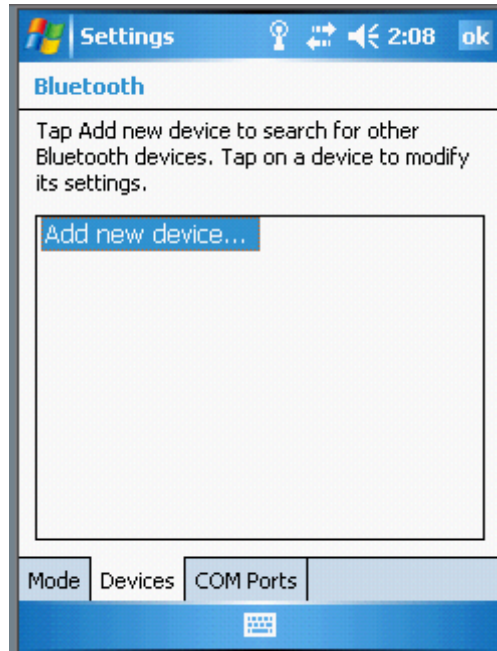
7. The Cashier scans the barcode on the ticket. The Line Buster session corresponding to the ticket is automatically selected and imported into the Receipt. The Cashier then completes the sale as normal.

5 Printer Setup

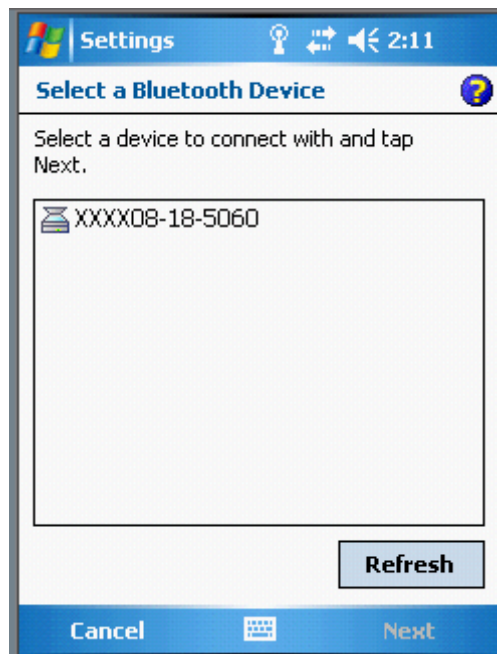
5.1 Connecting a Mobile Printer

Please consult your mobile printer manufacturer's instructions. What follows here are general directions for connecting a Bluetooth mobile printer to your mobile device:

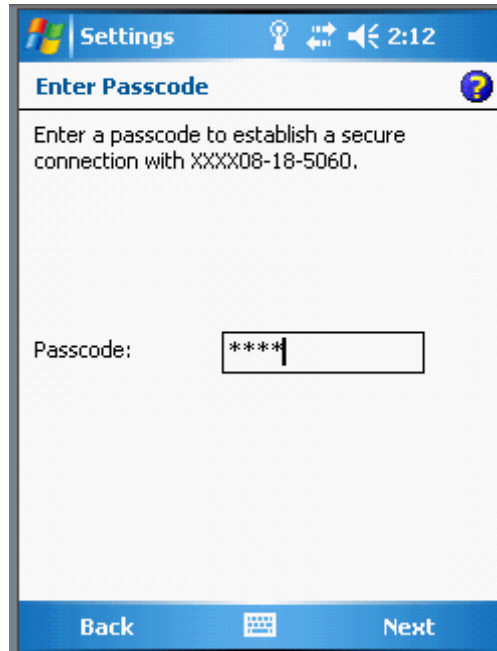
1. Turn on your mobile printer.
2. Go to **Start > Settings > Bluetooth > Devices**:



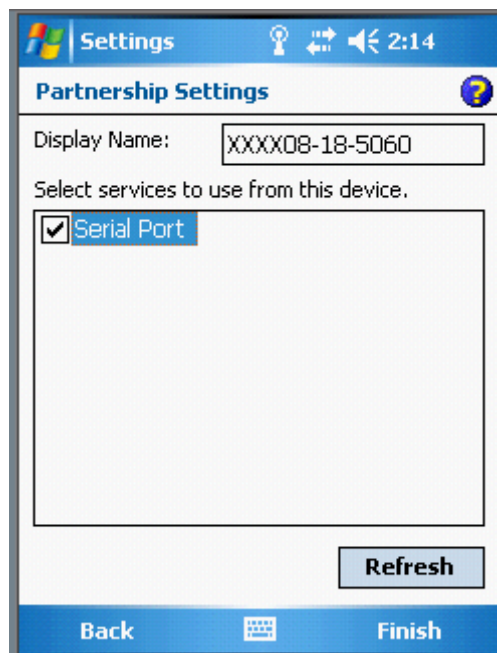
3. Click **Add new device...** Windows Mobile will search for nearby devices.
4. Select your mobile printer and click **Next**:



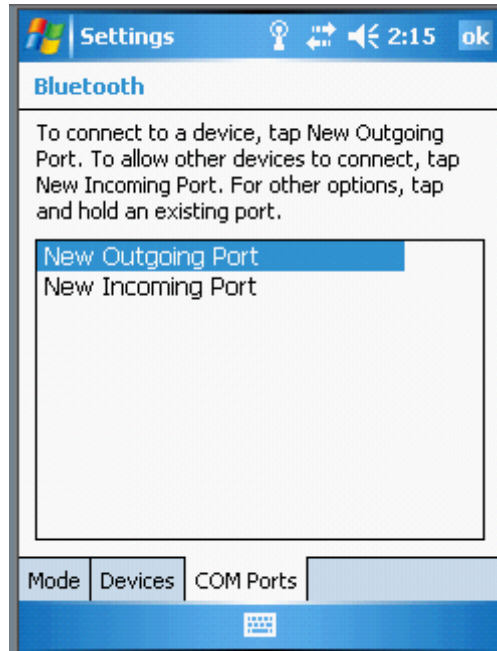
5. Enter the passcode and click **Next**, if requested:



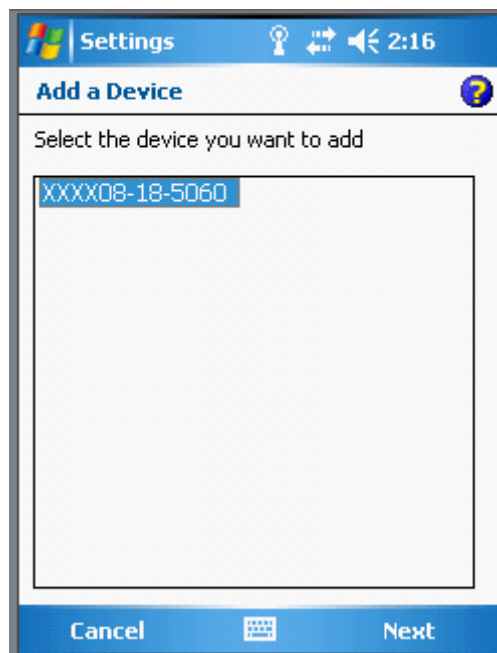
6. Select **Serial Port** and click **Finish**:



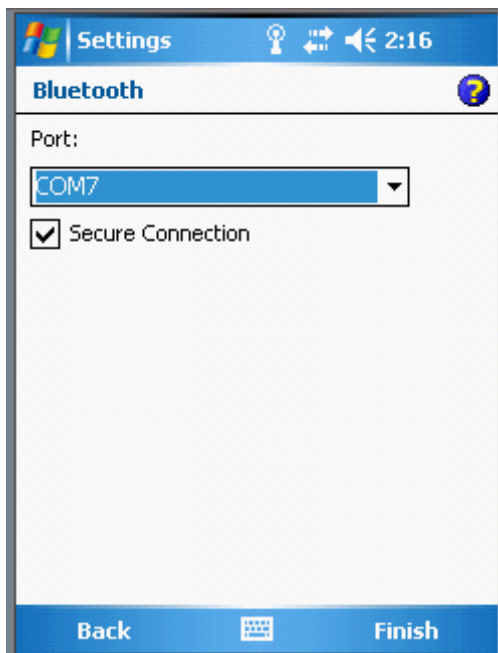
7. Select **COM Ports**:



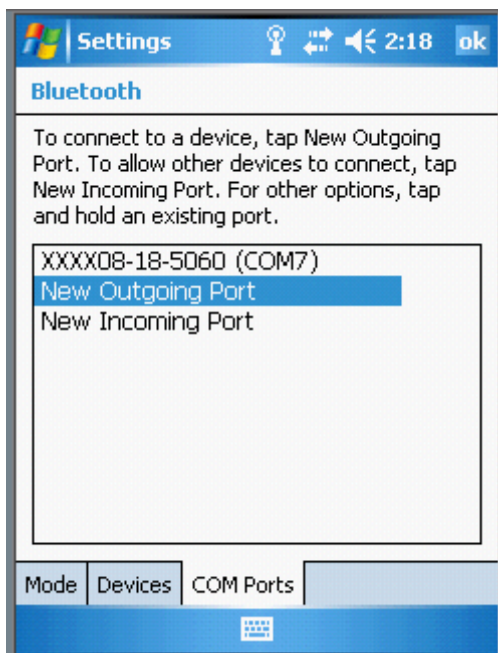
8. Select **New Outgoing Port**, then select your device and click **Next**:



9. Select **COM7** and click **Finish**:



10. When completed, your Bluetooth settings screen should look like:

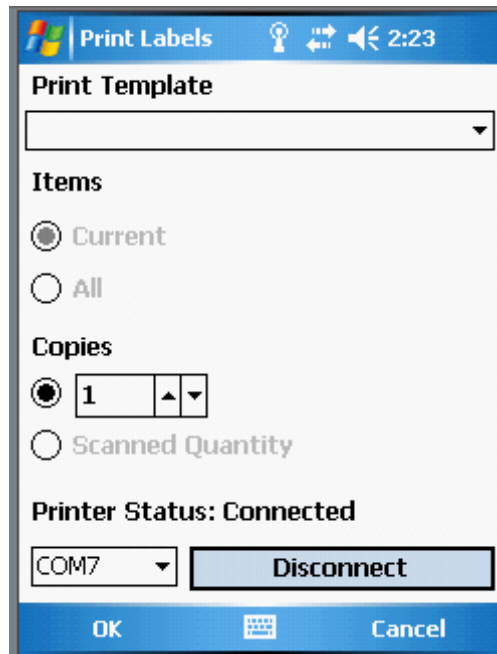


5.2 Testing the Connection

To test the connection to your printer, simply follow these directions:

1. Launch Retail Mobile Suite on the mobile device.
2. Click on **Inventory Check**.
3. Click **Print > Print...**
4. Set the COM port to **COM7** and click **Connect**.

5. Check the printer status displayed:



5.3 Creating Print Templates

Retail Mobile Suite uses simple text file-based templates for printing labels. Here is an example template:

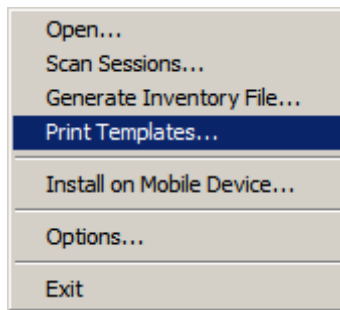
```
! 0 200 200 280 1
LABEL
CONTRAST 0
TONE 0
SPEED 5
PAGE-WIDTH 380
BAR-SENSE
;// PAGE 0000000003800240
CENTER
T 4 0 0 9 Retail Mobile Suite
T 7 0 0 54 http://foundrylogic.com
T 7 0 0 78 +1 (858) 243-1822
T 7 0 0 123 $DESC2
BT 7 0 5
B EAN13 2 1 30 0 159 $UPC
T 7 0 0 230 $$PRICE
FORM
PRINT
```

Please consult your mobile printer’s documentation for specific print commands. Note that Retail Mobile Suite will make the following substitutions automatically:

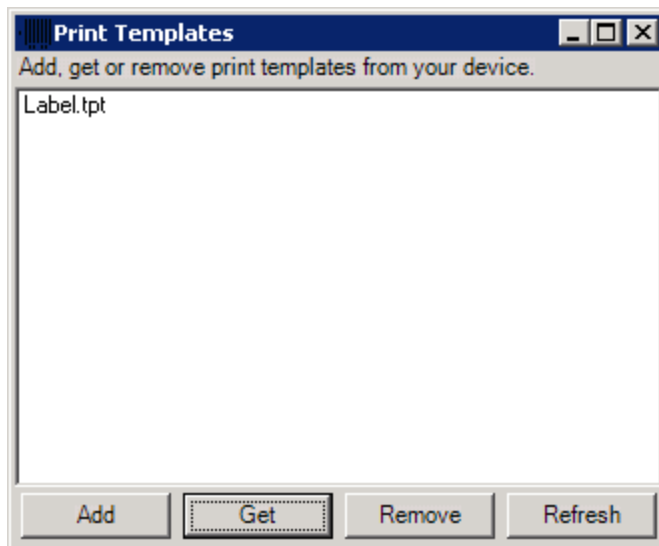
Variable	Value
\$DESC1	Desc1
\$DESC2	Desc2
\$ITEM_NO	Item No.
\$UPC	UPC
\$ALU	ALU
\$SIZE	Size
\$ATTRIB	Attrib
\$PRICE	Price
\$PWT	Price with tax
\$QTY	Quantity

5.4 Managing Print Templates

You can add, get, or remove printer label templates from your mobile device by connecting your mobile device to your workstation and selecting the **Print Templates...** menu item:



The following screen displays the currently loaded print templates on your device:



Add

Clicking the **Add** button brings up a standard file chooser with which you can select templates on your workstation for use on your mobile device.

Get

Clicking the **Get** button allows you to retrieve print templates on the device. A standard Save As... dialog allows you to store the print template anywhere you want locally.

Remove

Click **Remove** to permanently remove a print template from the device.

Refresh

Click **Refresh** to refresh the display of templates on the mobile device.

6 Uninstalling Retail Mobile Suite

6.1 Uninstall Workstation

To uninstall Retail Mobile Suite from a workstation:

1. On the workstation, go to **Start Menu > Settings > Control Panel > Add or Remove Programs**.
8. Find Retail Mobile Suite and Retail Mobile Services in the list and click **Remove**.

6.2 Uninstall Mobile Device

To uninstall Retail Mobile Suite from a mobile device:

1. On the mobile device, go to **Start Menu > Settings > System > Remove Programs**.
2. Select the entry **FoundryLogic Retail Mobile Suite** and click **Remove**.

7 Troubleshooting

Issue	Solutions
Windows does not recognize my device or ActiveSync does not connect my device.	<ol style="list-style-type: none"> 1. Check your mobile device's USB cable connection to your workstation. 2. Check that the mobile device is fully seated in its cradle, and power off/on the device. 3. Perform a 'warm boot' on your mobile device.
The Scan Sessions window does not appear when the Barcode button, Upload Items button, or Portable Terminal tab is clicked in Retail Pro.	<ol style="list-style-type: none"> 1. Check that the Scan Sessions window isn't just minimized or behind another window. 2. Verify that ActiveSync is running and shows your device is connected to the correct workstation. 3. Verify that the Retail Mobile Suite workstation component is running. 4. Verify that the Retail Mobile Suite workstation component is configured for the correct Retail Pro workstation number. 5. Verify that the Retail Mobile Suite workstation component is configured with the correct Retail Pro installation directory. In V8, this directory contains RPro8.exe. In V9, this directory contains RPro9.exe. 6. (Retail Pro V8) Verify that Workstation Preferences > Peripherals > Barcode Reader > Barcode Reader Type is set to Palm. You may need to restart PI Tool for this change to take effect. 7. (Retail Pro V9) Verify that Workstation Preferences > Peripherals > Inventory Scanner is set to Palm SPT1800 v.1.0.0.
The Scan Session window appears, but does not display my session.	<ol style="list-style-type: none"> 1. Press the Refresh button. 2. Verify that your session has successfully been sent from the mobile device and shows a Green status. 3. For Retail Mobile Services: verify that Retail

	<p>Mobile Services is running on a network workstation, and that the Desktop and Mobile software options have both been configured to send & receive sessions to the correct Hostname, Port, and Channel.</p> <p>4. For ActiveSync: verify that ActiveSync is running and shows your device is connected to the correct workstation.</p>
My mobile device is running out of memory.	<ol style="list-style-type: none"> 1. Remove unnecessary applications and data from your mobile device. 2. Reduce the number of historical sessions stored on the device. 3. Manually purge large session files when they are no longer needed. 4. Reduce the generated inventory file size by turning off unnecessary data.
My mobile device runs out of memory when uploading a new inventory file.	<ol style="list-style-type: none"> 1. Please see the steps regarding <i>My mobile device is running out of memory</i>. 2. On the device, go to Device Configuration > Inventory and select Clear Inventory, then reconnect the device to reload the inventory file.
The barcode scanner isn't working at all.	<ol style="list-style-type: none"> 1. Check that your mobile device's scanner configuration is enabled and configured correctly for the types of barcodes and surfaces that you are trying to scan. Note that some scanners have very different performance characteristics with regard to barcode types and surfaces.
The first barcode is scanned correctly, but the second is entered into the qty field.	<ol style="list-style-type: none"> 1. Go to http://foundrylogic.com and verify that you have configured the scanner for your specific device. 2. Go to Device Configuration > Wedge on your mobile device and follow the on-screen directions to configure Retail Mobile Suite. Be sure that you test scanning with each scan button on your device.
Scanned barcodes are read, but not correctly.	<ol style="list-style-type: none"> 1. Check that your mobile device's scanner configuration is configured correctly with regard to prefixes and suffixes, and that the ENTER key is sent with the barcode data.

	<ol style="list-style-type: none"> Go to Device Configuration > Wedge on your mobile device and follow the on-screen directions to configure Retail Mobile Suite. Be sure that you test scanning with each scan button on your device. Check that the Device Configuration > Inventory > Item Lookup Order is the correct order.
Retail Mobile Suite tells me that a scanned item was not found.	<ol style="list-style-type: none"> Verify that your scanner is working correctly. Check that the item is actually in your Retail Pro inventory. Regenerate the inventory file and be sure that the item was not excluded. Verify the inventory file was generated with the minimum size lengths used on labels. If scanning UPCs and/or ALUs, be sure that UPCs and/or ALUs are included in the inventory file. If the label uses a vendor's UPC or ALU, be sure that vendor UPCs and/or ALUs are enabled when generating the inventory file.
Retail Mobile Suite found the item I scanned, but field XXX is not shown.	<ol style="list-style-type: none"> Check that field XXX is included in the inventory file when generated. Check that the item actually has data in field XXX in Retail Pro.
When importing items for PI in V9, Retail Pro does not recognize the items and places valid identifiers in the Import Id column of the Errors screen.	<ol style="list-style-type: none"> (Retail Pro V9) Check that System Preferences > Local Preferences > Documents > General Item Lookup By includes UPC, ALU, and/or Item # as required to identify your items. Be sure the identifiers are valid and not duplicated.
Not all of my items are generated in the inventory file.	<ol style="list-style-type: none"> Verify the DCS codes are included in the Generate Inventory File form. (RPro V8) Verify the missing items have a DCS code.