

EXECU/TECH

Portable Data Collection (Palm) Inventory

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Section 1: Palm Installation

The document contains instruction and information on using the Palm “Barcode Software” with the Execu/Tech Import Utility.

Prior to following these instructions you will need to install the Handspring software with the supplied CD.

Also write down the following information:

Palm username: _____ (asked in handspring software, recommend using PALM1 or PALM1 - make each device the same name)



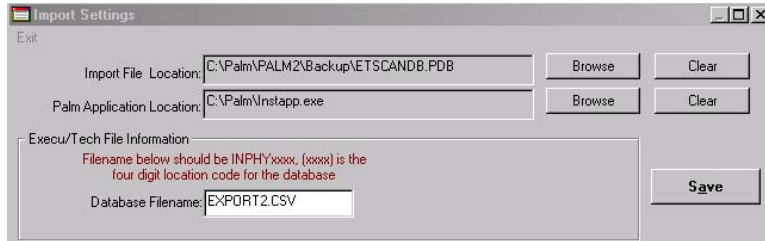
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Section 2: Execu/Tech Import Program Setup

Setting up the Import:

This is the screen you will see the first time you attempt to import the data into the Execu/Tech system.

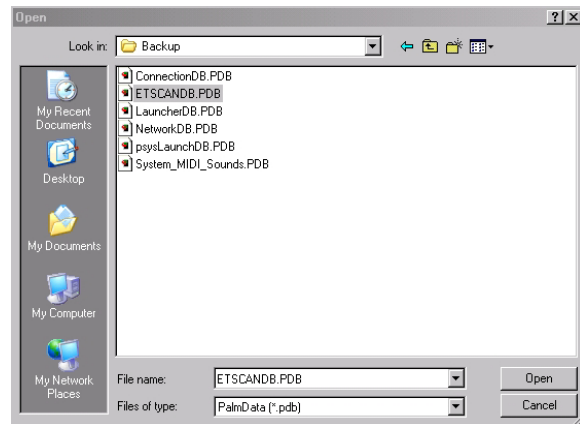
After you have synced the Palm device you may configure the import utility.



Click the browse button on the right to select the Palm database to import; it should be the same name as the database that was shown on the palm devices (ie. ETSCANDB.PDB). This file should be located in the (C:\palm\{palmname}\backup) directory. The {palmname} is the name of the palm device given when you installed the palm software.

Next enter a filename for the database; this is the name that Execu/Tech will use the import in the data.

The filename should be **INVPHY.CSV**.



Once you have set this up click save and you are ready to import.

Section 3: Using the Scanner

Introducing the Palm:

The Handspring Visor with the Palm OS is a versatile tool that you can use everyday in your business. The user interface is a touch screen that responds to your fingertip as well as a built in stylus (*do not use a pen or pencil on the palm; it will scratch the face of the palm device*).

Each Icon on the screen represents an application installed on the unit. Notice the Top Right corner of the Palm, in the image to the right, the word (All) is displayed. If you ever think you've lost a program on the palm, click in the top right corner and choose (All). This will display all the applications on the unit.



For inventory purposed we are using the application "ETscan". Click on the icon of the 'E' with the word "ETscan" to start this application.

The application will take you to this screen..

Execu/Tech's Import has a simple user interface, select "Scan New Item" to add records to the database or select "View Scans" to browse the scans and/or delete selected records.

All scans are stored in a single database, for multiple "Location"

inventory locations you should scan one inventory location at a time. The import program will sync to a specified location for you.

Scanning Items:

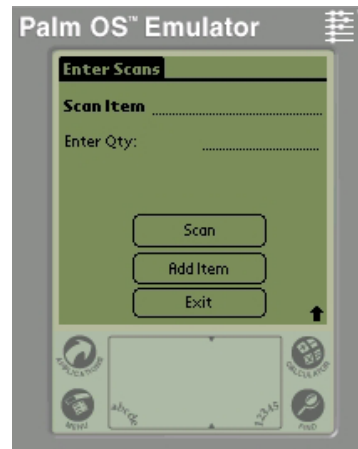
As you can see in this picture the palm will track all the scans you make on the unit. The application will keep a detailed



listing of the items scanned until you import and then delete the data from the device.

Once you have selected "Scan New Item" you are going to populate with database.

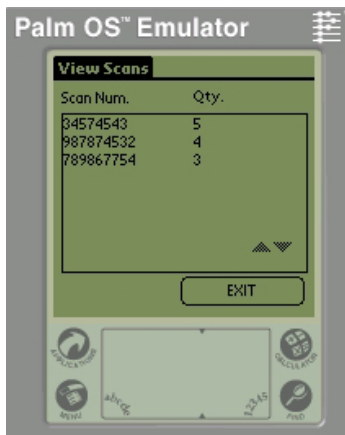
When adding a new record, you have (2) prompts: Scan Item and Enter Quantity. The first is "Scan Item": Click on the blank beside the word "Scan Item", this will allow you



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to enter information into that blank. To scan the Item you may click on the “Scan” button or by holding down the right button on the bottom of the Palm Device your barcode reader will fill in the Scan Item Blank with the correct SKU number. If you were to accidentally move to the next field, just click back on the Blank Beside the words “Scan Item” and hold the button down again to scan the item. If the blank contains data that you do not want, drag your Stylus across the blank and it will highlight the data in the blank, and then make a Right to Left horizontal line on the writing pad at the bottom of the palm display. This will delete the information in the blank.

You could also delete data in a field by clicking on the field, and then clicking on the top of the screen. This will display the Edit Menu. From the Edit Menu you can select “Select All” to highlight the entire data field and then select “Cut” to delete the data from the blank.



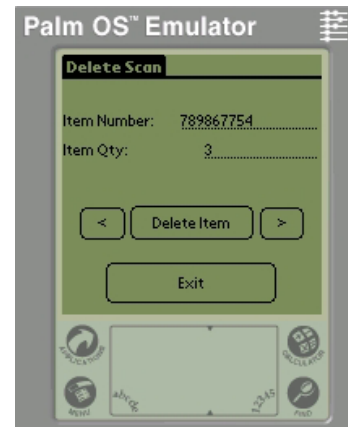
Once you have scanned the item, click on the blank beside the “Enter Quantity” field. From this blank you can either write the quantity of the items using the scratchpad on the bottom half of the palm screen or click under the “12345” with will bring up a number pad to enter in the quantity.

To add another Item just click the words “Add Item” and add repeat the above procedure. When you are finished you can click “OK” and turn the unit off or prepare to import the data into Execu/Tech. All data scanned is saved in the unit until the unit is synced

with the Execu/Tech system.

Viewing Scans

From the “Welcome” menu of the software you can Also view the scans that you have done, as seen on the right. By clicking on one of the items the system will allow you to browse back and forth in the database to choose records you want to delete before syncing with the Execu/Tech system.

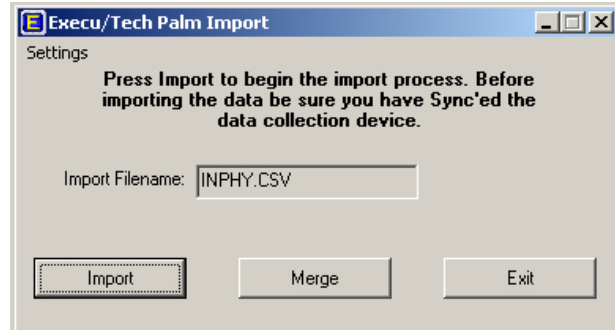


Section 4: Importing/Merging Data

Importing the Data:

To import the data into the Execu/Tech system all you will need to do is click the import button **after you have synced your Palm device in the cradle.**

When you press the import button it may warn you that a file exists of the same size. This is a warning to stop you from overwriting data that is already in the directory. Select “Yes” to continue and import the new data, selecting “No” will stop the import process.



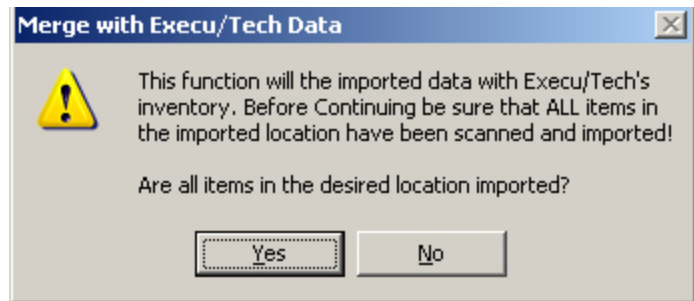
Once all the records have been imported, you will receive a confirmation message that all items were imported correctly. Press Ok to return to the Palm Import Screen

If you are using multiple Palm Devices you need to continue the import process for all of the palm devices “before continuing” to the Merge Data section.

Merging the Data:

Once each palm devices data has been synced and imported it is now time to merge the inventory data into Execu-tech.

Select the Merge Button from the Palm Import Screen. You will receive the message on the left of this page.



This message another reminder that all palm devices will all the inventory that needs to be counted has been imported before merging the data into inventory.

Answering “Yes” will continue the Merge Process, “No” will stop the process.

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Merging Options

Option 1 and 2 are not used in this feature:

Option 3: Enter Physical Inventory - Overwrites the current inventory values with the “scanned” quantities.

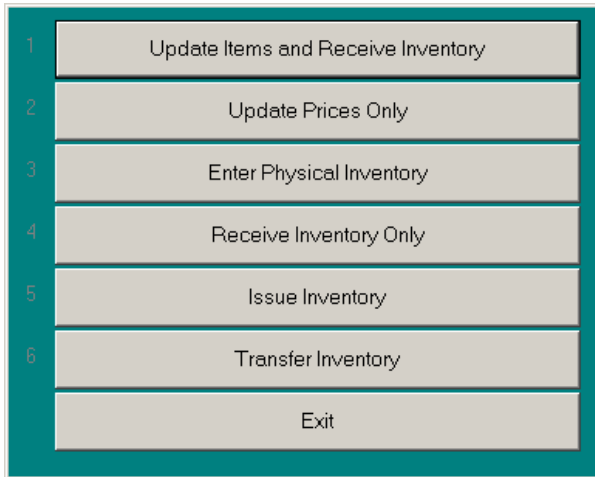
Option 4: Receive Inventory Only – Adds to the existing inventory quantities on-hand

Option 5: Issue Inventory – Subtracts from the current on-hand inventory balance

Option 6: includes an additional “location prompt” to allow you to moved the scanned items from the scanned inventory location to a new inventory location

Below is a description of the steps for using Option 3, all options on the screen work in the same way, for that reason only option 3 is described below, with the individual result of each listed above.

From this menu you will need to select number “3” “Enter Physical Inventory”.



You will be asked to enter the inventory location that you wish to update; type in the correct inventory location for the items that you have scanned in.

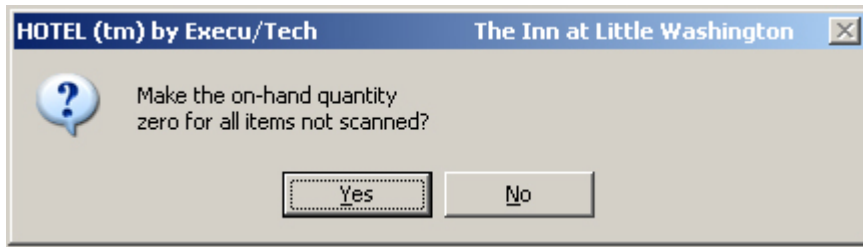
The system will then ask for the DATE that this inventory is being taken. The system will then verify that the date entered is correct and remind that this merge should be run ONLY after all items from a specified location have been counted.

After your selection you should see the following prompt, since the barcode scanners are configured to scan by inventory location this prompt is asking for the inventory location code that is referenced in the system for the item category you just imported.



The next prompt that will show is the one below. “Make the on-hand quantity zero...” Answering “Yes” to this question will ZERO the inventory on-hand of any item not scanned for the Inventory location that you are doing a physical count for.

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For customers that only do partial count should answer “No” to this question so that inventory items that were not scanned are not touched.

Any invalid codes in that location that you selected will be printed at this time. These codes printed were not updated in inventory.

Once you have completed these steps you can update your inventory batch, in-turn updating your inventory.

Section 5: Resetting the Palm Data

Resetting the Database:

Once you have completed the Execu/Tech Import you will want to delete all the scanned information off of the palm so that the database will be empty on the next use of the device.

Select the program “ETdelete” from the palm menu.

The next screen will be a confirmation of the data that will be overwritten.

Select “Clear Database” and you are finished with clearing the database on the palm.

