Oracle® Retail Store Inventory Management

Handheld Terminal Quick Reference Guide
Release 13.0

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Oracle® Store Inventory Management Handheld Terminal Quick Reference Guide, Release 13.0

Value-Added Reseller (VAR) Language

(i) the software component known as **<u>ACUMATE</u>** developed and licensed by Lucent Technologies Inc. of Murray Hill, New Jersey, to Oracle and imbedded in the Oracle Retail Predictive Application Server – Enterprise Engine, Oracle Retail Category Management, Oracle Retail Item Planning, Oracle Retail Merchandise Financial Planning, Oracle Retail Advanced Inventory Planning and Oracle Retail Demand Forecasting applications.

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Preface

This guide is a quick reference to the functions available on handheld devices with Oracle Retail Store Inventory Management (SIM). It is designed so that you can print copies of the following pages and fold or laminate the copies.

Audience

This guide is for SIM users of handheld mobile terminals.

Related Documents

For more information about using Oracle Retail Store Inventory Management, see the Oracle Store Inventory Management User Guide.

Customer Support

https://metalink.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received

Use the SIM Handheld Terminal

Options and Permissions

Not all functions described in this document may be available to you. Whether a function is available may depend on your security permissions or on the SIM system options used at your company.

Scan an Item More Than Once

You may need to scan an item more than once when you perform the following procedures:

Procedure	Page
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When you scan the same item more than once, the quantity increases by an increment of one unit of measure (UOM). The unit of measure must be the same for each scan of the same item.

To accept the scanned quantity, press **Enter** or scan a different item.

> **Note:** When you adjust inventory, you must accept the quantity of the current item before you scan another item.

Change Quantities

Any time that you can enter or change a quantity, you can also change the unit of measure. You may also need to change the number of units in a pack.

Multiple Users in SIM

SIM contains activity locking functionality. This allows one user to update a transaction at a time. Depending on the functional area, if another user is processing a transaction that you want to begin, you may receive a prompt to take over the transaction. If you take over the transaction, the original user receives a message when they try to save that they no longer have the lock. This is to ensure that the transaction can be updated only by the user who currently owns the lock on the transaction.

Keys on the Handheld Terminal

Key	Function
Esc or **Clear**	Returns you to the previous window without saving any information. SIM allows you to use **Esc** or **Clear** only where appropriate. If the handheld terminal has a Clear key, use **Clear**. If the handheld terminal does not have a Clear key, use **Esc**.
Enter	Submits the information to SIM.
@ (Shift-2)	Toggles the unit of measure between cases and the standard unit of measure.
((Shift-9)	<next> There is additional information that you can view.
& (Shift-7)	<prev> Returns you to the previous window if you used <next> to view additional information.
* (Shift-8)	<total> Brings you to a Summary window.
! (Shift-1)	Search (within Related Items)

> **Note:** Handheld devices may have different buttons used to send the characters above.

Error Messages

If you scan information that SIM does not recognize, you receive an "Invalid" message. To continue, press **Enter** and scan the next item.

If you enter an alphanumeric or negative quantity or value, you receive an "Invalid" message. To continue, press **Enter** and enter the correct quantity.

Select an Item from a List

All list objects are given a corresponding number that you must enter to select that object.

Example:

> 1–1000 Minneapolis
>
> 2–1012 St Paul
>
> 3–1007 Eden Prairie

To select Eden Prairie from the list, press **3**.

Shipping/Receiving

Direct Delivery
Receive a Direct Delivery

Navigate: Main Menu > **1** – Shipping/Receiving >
1 – Direct Delivery

1. Identify supplier and enter the invoice information.

   a. Scan the item. A message is displayed: "Does this item belong to a pack?"

> **Note:** This is an optional function. If your company does not use it, you will not see this message. Continue with step b.

      If the item does not belong to a pack, select **2** (No).

      If the item belongs to a pack:

      i. Select **1** (Yes). If more than one pack types exist, a list displays.

      ii. Select the pack type from the list.

   b. Perform one or more of the following actions:

- Select a supplier.
- Select an existing purchase order.
- Press **1** (Yes) to create a new purchase order.
- Press a number that is **2** or greater to access existing purchase orders.

   c. In the Invc No field, enter the invoice number.

   d. Press **Enter**.

   e. In the Invc Date field, enter the date of the invoice.

   f. Press **Enter**.

2. Enter item information for every item:

   a. Scan the item.

   b. For all items on new purchase orders and unexpected items on existing purchase orders, change the unit cost in the Unit Cost field.

   c. Press **Enter**.

   d. In the Qty field, enter the number of cases or standard units of measure.

   e. Press **Enter**.

3. Press ***** to view a summary. When you press **Esc** from the Summary window, you can:

- Save the delivery:
     a. Press **1** (Save Delivery).
     b. Select **Yes**.
- Cancel the delivery:
     a. Press **2** (Delete Delivery).
     b. Press **Enter**.
- Press **3** (Return to Summary) to return to the summary window to continue receiving items on the delivery.

4. If necessary, record damages or make changes to the order.

   a. To record damages, press **2**. To make changes, press **3**.

   b. Scan the item.

   c. Press **Enter**.

   d. In the Qty field, enter the number of cases or standard units of measure.

   e. Press **Enter**.

5. Press **1** (Complete Order).

6. If you are receiving against a purchase order and there are discrepancies:

   a. In the Qty field, enter the number of cases or standard units of measure accepted.

   b. Press **Enter**.

7. If you want to print a direct delivery receipt, press **1** (Yes). If you do not want to print a direct delivery receipt, press **2** (No).

8. Press **Enter** to return to the Shipping/Receiving menu.

Receive a Direct Delivery with an Advanced Shipment Notice (ASN)

Navigate: Main Menu > **1** – Shipping/Receiving >
1 – Direct Delivery

1. Identify the supplier and enter the invoice information:
   a. Scan the item.
   b. Select a supplier.
   c. Select an existing purchase order. If the order has an ASN, a message is displayed: "An open ASN exists for the purchase order. Would you like to apply the ASN?"
   d. If you do not want to receive by ASN, select **2** – No and continue with step 1.c of "Receive a Direct Delivery."

   To receive by ASN, select **1** – Yes. The Summary window opens.

   When you press **Esc** from the Summary window, you can:

   - Save the delivery:
     i. Press 1 (Save Delivery).
     ii. Select **Yes**.
   - Cancel the delivery:
     i. Press **2** (Delete Delivery).
     ii. Press **Enter**.
   - Press **3** (Return to Summary) to return to the Summary window to continue receiving items on the delivery.

2. If necessary, record damages or make changes to the order.
   a. To record damages, press **2**. To make changes, press **3**.
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or standard units of measurement.
   e. Press **Enter**.
3. Press **1** (Complete Order).
4. If you are receiving against a purchase order and there are discrepancies:
   a. In the Qty field, enter the number of cases or standard units of measurement accepted.
   b. Press **Enter**.
5. If you want to print a direct delivery receipt, press **1** (Yes). If you do not want to print a direct delivery receipt, press **2** (No).
6. Press **Enter** to return to the Shipping/Receiving menu.

Warehouse Delivery
Receive Shipments, Containers, or Cases from a Warehouse

Navigate: Main Menu > **1** – Shipping/Receiving > **2** – Warehouse Delivery

1. Identify the delivery.
    a. Scan the container.
    b. Press **Enter**.
2. Receive part or all of the delivery:
    - To receive all of the container contents, press 2 (Receive All).
    - To receive the container contents individually or receive part of the container contents, press **1** (Receive Container).
3. Identify the container:
    a. Scan the container.
    b. Press **Enter**.
4. Receive items or record damages. Perform one or more of the following actions:
    Receive at the Case Level
    a. Press **1** (Receive Case Level).
    b. Scan the case.
    c. Press **1** (Yes).
    d. In the Rec Qty field, enter the number of cases or standard units of measure.
    e. Press **Enter**.
    f. Press ***** to view a summary.
    Record Damages
    a. Press **2** (Record Damages).
    b. Scan the damaged item.
    c. In the Qty field, enter the number of cases or standard units of measurement.
    d. Press **Enter**.
    Receive the Container
    a. Press **3** (Receive Container).
    b. Scan the container.
    c. Press **Enter**.
5. Press ***** to view a summary. When you press **Esc** from the Summary window, you can:
    - Save the delivery:
        a. Press **1** (Save Delivery).
        b. Select **Yes**.
    - Cancel the delivery:
        a. Press **2** (Cancel Delivery).
        b. Press **Enter**.
    - Press **3** (Return to Summary) to return to the summary window to continue receiving items on the delivery.
6. If any containers were not scanned when receiving at container level, you must resolve the discrepancies. Perform one or both of the following actions:
    - Press **1** (Add Container) to add a container to the delivery.
    - Press **2** (Record Missing) to record missing containers.
7. If necessary, amend the delivery by performing the following actions:
    a. Press **2** (Amend Delivery).
    b. Press **Enter**.
    c. Repeat steps 3–7.
8. If necessary, repeat step 5 (view a summary).
9. Confirm receipt of the shipment.

    > **Note:** To save the information that you entered, you must confirm that you received the shipment.

    a. Press **1** (Confirm Delivery).

        > **Note:** If the received quantity does not equal expected quantity, each discrepant item is displayed. Continue with step b. If there are no discrepancies, continue with step 12.

    b. In the Qty Accepted field, enter the number of cases or standard units of measurement.
10. If you want to print a warehouse delivery report, press **1** (Yes). Then select a printer. If you do not want to print a warehouse delivery report, press **2** (No).
11. Press **Enter** twice to return to the Shipping/ Receiving menu.
12. Save, cancel, or continue receiving the shipment.

Quick Receiving of Warehouse Items

Navigate: Main Menu > **1** – Shipping/Receiving >
5 – Warehouse Quick Receiving

1. Scan the containers one after another. Each container will be fully received.

2. When finished scanning containers, select **Total**. The Summary screen is displayed.

3. Press **Enter** to complete the transaction.

> **Note:** For details on the received containers, follow the warehouse delivery process. The ASN may be fully received, and changes can only be made on the PC.

Transfers

Navigate: Main Menu > **1** – Shipping/Receiving >
3 – Transfers

Create a Transfer

1. Press **1** (Create Transfer).
2. Select a store from the list or look up a store:
   Look Up by Store ID
   a. Press **1** (Store ID).
   b. Enter Store ID number.
   c. Press **Enter**.
   Look Up by Store Name
   a. Press **2** (Store Name).
   b. Enter full or partial name.
   c. Press **Enter**.
   d. If more than one store displays, select the store from the list.
3. For each item to be transferred:
   a. Scan the item.
   b. In the Qty field, enter the number of cases or standard units of measurement.
   c. Press **Enter.**
   d. Press ***** to view a summary of the transfer.
4. View or edit the transfer:
   Add/Edit Item
   a. Press **1** (Add/Edit Item).
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or standard units of measurement.
   e. Press **Enter**.
   Delete Item
   a. Press **2** (Delete Item).
   b. Scan the item.
   c. To delete the item, press **1** (Yes).
   View Details
   a. Press **3** (View Details).
   b. Press **Esc**.

5. Dispatch the transfer:

   Note: To save a transfer, you must select Dispatch Now or Dispatch Later.

   Dispatch Now
   a. Press **4** (Dispatch Now).
   b. Press **Enter** to return to the Transfer menu.
   Dispatch Later
   a. Press **5** (Dispatch Later).
   b. Press **Enter** to return to the Transfer menu.

Receive a Transfer

1. Press **5** (Receive Transfer).
2. Select the transfer.
3. Receive all or part of the transfer:
   - To receive the entire transfer, press **1** (Receive All).
   - To receive one or more items on the transfer:
     a. Press **2** (Receive Item).
     b. Scan the item.
     c. Press **1** (Yes).
     d. In the Qty field, enter the number of cases or standard units of measurement.
     e. Press **Enter**.
     f. Press ***** to view a summary.

     When you press **Esc** from the Summary window, you can:
     - Save the delivery.
       a. Press **1** (Save Delivery).
       b. Select **Yes**.
     - Cancel the delivery.
       a. Press **2** (Cancel Delivery).
       b. Press **Enter**.
     - Press **3** (Return to Summary) to return to the summary window to continue receiving items on the delivery.
4. If necessary, record damages or amend the transfer.

   Note: You must record damages or amend the transfer, or both, before you complete the transfer.

   a. To record damages, press **2**.
      To amend the transfer, press **3**.
   b. Scan the item.
   c. In the Qty Accepted field, enter the number of cases or standard units of measurement.
   d. Press **Enter**.

5. Receive the transfer:
   a. Press **1** (Complete Transfer).

      Note: If the received quantity does not equal the expected quantity, each discrepant item is displayed. Continue with step b. If there are no discrepancies, continue with step 7.

   b. In the Qty field, enter the number of cases or standard units of measurement.
   c. Press **Enter**.
   d. Repeat steps b - c for each discrepant item.
6. If you want to print a warehouse delivery report, press **1** (Yes). Then select a printer.
   If you do not want to print a warehouse delivery report, press **2** (No).
7. Press **Enter** to return to the Transfer menu.

Modify a Transfer

1. Press **2** (Edit Transfer).
2. Select the transfer.
3. Scan the item.
4. Press **Enter**.
5. In the Qty field, enter the number of cases or standard units of measurement.
6. Press **Enter**.
7. Dispatch the transfer:

   > **Note:** To save a transfer, you must select Dispatch Now or Dispatch Later.

   - To dispatch now, press **4**.
   - To dispatch later, press **5**.
8. Press **Enter** to return to the Transfer menu.

Dispatch a Transfer

1. Press **3** (Dispatch Transfer).
2. Select the transfer.
3. To view details before dispatching:
   a. Press **2** (View Details).
   b. Press **Esc**.
4. Press **1** (Dispatch Transfer).
5. Press **Enter** to return to the Transfer menu.

Delete a Transfer

1. Press **4** (Delete Transfer).
2. Select the transfer.
3. To view details before deleting:
   a. Press **2** (View Details).
   b. Press **Esc**.
4. Press **1** (Delete Transfer).
5. Press **Enter** to return to the Transfer menu.

Returns

Navigate: Main Menu > **1** – Shipping/Receiving > **4** – Returns.

> **Note:** To save a return, you must select Dispatch Now or Dispatch Later.

Create a Return

1. Select the return destination:
   Return to a Warehouse
   a. Press **1** (Warehouse).
   b. Select a warehouse from the list.
   Return to the Supplier
   a. Press **2** (Supplier).
   b. Scan the item.
   c. Select the supplier from the list.
2. Enter the return authorization number.
3. Press **Enter**.
4. For each item to be returned:
   a. Scan the item.
   b. Press **Enter**.
   c. Select a Reason Code.
   d. In the Qty field, enter the number of cases or standard units of measurement.
   e. Press **Enter**.
5. Press ***** to view a summary.
6. View or edit the return:
   Add/Edit Item
   a. Press **1** (Add/Edit Item).
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or standard units of measurement.
   e. Press **Enter**.
   f. Press ***** to view a summary.
   Delete Item
   a. Press **2** (Delete Item).
   b. Scan the item.
   c. If you want to delete the item, press **1** (Yes).
   View Details
   a. Press **3** (View Details).
   b. Press **Esc**.

7. Dispatch the return:

> **Note:** To save a return, you must select Dispatch Now or Dispatch Later.

Dispatch Now
   a. Press **4** (Dispatch Now).
   b. Press **Enter** to return to the Returns menu.
Dispatch Later
   a. Press **5** (Dispatch Later).
   b. Press **Enter** to return to the Returns menu.

Modify a Return

1. Press **2** (Edit Return).
2. Select the return.
3. Edit the return:
   Add/Edit Item
   a. Press **1** (Add/Edit Item).
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or standard units of measurement.
   e. Press **Enter**.
   f. Press ***** to view a summary.
   Delete Item
   a. Press **2** (Delete Item).
   b. Scan the item.
   c. If you want to delete the item, press **1** (Yes).
4. Dispatch the return:
   Dispatch Now
   a. Press **4** (Dispatch Now).
   b. Press **Enter** to return to the Returns menu.
   Dispatch Later
   a. Press **5** (Dispatch Later).
   b. Press **Enter** to return to the Returns menu.

Delete a Return

1. Press **4** (Delete Return).
2. Select the return.
3. To view details before deleting:
   a. Press **2** (View Details).
   b. Press **Esc**.
4. Press **1** (Delete Return).
5. Press **Enter** to return to the Returns menu.

Dispatch a Return

1. Press **3** (Dispatch Return).
2. Select the return.
3. To view details before dispatching:
   a. Press **2** (View Details).
   b. Press **Esc**.
4. Press **1** (Dispatch Return).
5. Press **Enter** to return to the Returns menu.

Transfer Requests

Navigate: Main Menu > **1** – Shipping/Receiving > **3** – Transfers > **6** – Transfer Requests.

Request a Transfer of Items

1. Press **1** (Create).
2. Select a store from the list, or press **9** (Other) to look up a store:

Look Up by Store ID

 a. Press **1** (Store ID).
 b. Enter Store ID number.
 c. Press **Enter**.

Look Up by Store Name

 a. Press **2** (Store Name).
 b. Enter full or partial name.
 c. Press **Enter**.
 d. If more than one store displays, select the store from the list.

3. For each item requested:

 a. Scan the item.
 b. In the Qty field, enter the number of cases or standard units of measurement.
 c. Press **Enter.**
 d. Press ***** to view a summary of the request.

4. View or edit the transfer request:

Add/Edit Item

 a. Press **1** (Add/Edit Item).
 b. Scan the item.
 c. Press **Enter**.
 d. In the Qty field, enter the number of cases or standard units of measurement.
 e. Press **Enter**.

Delete Item

 a. Press **2** (Delete Item).
 b. Scan the item.
 c. If you want to delete the item, press **1** (Yes).

View Details

 a. Press **3** (View Details).
 b. Press **Esc**.

5. Request the transfer:

> **Note:** To save a transfer request, you must select Request Now or Request Later.

Request Now

 a. Press **4** (Request Now).
 b. Press **Enter** to return to the Tsf Request Summary menu.

Request Later

 a. Press **5** (Request Later).
 b. Press **Enter** to return to the Tsf Request Summary menu.

Send a Transfer Request

1. Press **3** (Request).
2. Select the transfer.
3. To view details before requesting:
 a. Press **2** (View Details).
 b. Press **Esc**.
4. Press **1** (Request Now).
5. Press **Enter** to return to the Tsf Request Summary menu.

Delete a Transfer Request

1. Press **4** (Delete).
2. Select the transfer.
3. To view details before deleting:
 a. Press **2** (View Details).
 b. Press **Esc**.
4. Press **1** (Delete Request).
5. Press **Enter** to return to the Tsf Request Summary menu.

Modify a Transfer Request

1. Press **2** (Edit).
2. Select the request.
3. Modify the request if needed:

   Add/Edit Item
   a. Press **1** (Add/Edit Item).
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or standard units of measurement.
   e. Press **Enter**.

   Delete Item
   a. Press **2** (Delete Item).
   b. Scan the item.
   c. If you want to delete the item, press **1** (Yes).
4. Request the transfer.

   > **Note:** To save a transfer request, you must select Request Now or Request Later.

   Request Now
   a. Press **4** (Request Now).
   b. Press **Enter** to return to the Tsf Request Summary menu.

   Request Later
   Press **5** (Request Later).
5. Press **Enter** to return to the Tsf Request Summary menu.

Inventory Management

Stock Counts
Unit and Amount All Locations Stock Counts

The following rules apply only to performing unit and amount all locations stock counts on the handheld terminal:

- When entering the location of the stock to count, select All Location Unit and Amount Stock Count. After selecting the stock count, you can enter the location count to start counting.

- For an unguided stock count, you are not prompted in sequence order for the items you are counting. You must decide the order of the items to count in that location. Scan the item and enter the quantity.

- If you scan an item that was not originally in that location, you are prompted to add the item to the count.

- Individual location counts cannot move to Recount or Authorize status until the items have been counted in all of their locations.

Enter Stock Count Results (Planned and Guided)

> **Note:** Planned stock counts include Unit, Unit and Amount (regular), and Problem Line stock counts. Guided stock counts order the items based on sequence or item number. A system option controls whether a stock count is guided.

Navigate: Main Menu > **2** – Inv. Management >
2 – Stock Counts.

1. Select the type of stock count:
    - Press **1** to perform a stock count for the first time.
    - Press **2** to perform a recount.

2. If more than one stock count is displayed, select the stock count from the list.

> **Note:** Depending on your system settings, you may be prompted to select whether this stock count is being performed before store open or after store close.

3. Select the stock count location that you want to count.

4. Record quantities and items.
    - To scan items in the order that they are presented, for each item:
        a. In the Qty field, enter the number of cases or standard units of measure.
        b. Press **Enter**.
        c. Scan the item.
        d. Press **Enter**.
    - To amend a quantity or count an item that is not currently displayed:
        a. Scan the item that you want to count.
        b. Press **Enter**.
        c. In the Qty field, enter the number of cases or standard units of measure.
        d. Press **Enter**.

5. Press **Enter** to return to the Stock Counts menu.

6. Press **Esc** to return to the Inv. Management menu.

Enter Stock Count Results (Unguided)

> **Note:** Unguided stock counts include unit, unit and amount, and problem line stock counts. Unguided stock counts do not order the items in a particular order and allow multiple users in the same stock count. A system option controls whether a count is guided, and whether to allow multiple users in the same stock count.

Navigate: Main Menu > **2 – Inv. Management >**
2 – Stock Counts.

1. Select the type of stock count:
   - Press **1** to perform a stock count.
   - Press **2** to perform a recount.

   If more than one stock count is displayed, select the stock count from the list. If you are joining an ongoing stock count, do one of the following:
   - Press **1** to continue the count.
   - Press **2** to review the count.
   - Press **3** to complete the count.
   - Press **4** when continuing the count or for a new count, record quantities, and items.

   > **Note:** Depending on your system settings, you may be prompted to select whether this stock count is being performed before store open or after store close.

2. Scan the item:
   a. In the Qty field, enter the number of cases or standard units of measure, or scan the same item multiple times.
   b. Press **Enter** or scan the next item.
   c. Scan the next item, or press ***** to go to the Summary screen.

   To amend a quantity of the item that is displayed:
   a. Press **Shift+5** (%) to amend the total.
   b. Enter the new number and press **Enter** to scan the next item, or press ***** to go to the Summary screen.

   When reviewing the count:
   a. Scan the item:
   b. Press **Enter**.
   c. Scan the new item for additional counted quantities or type in a new quantity and press **Enter**.
   d. Scan the next item or press * to go to the Summary screen.

On the Summary screen:

- To continue counting, press **1** to return to the count.
- To continue the count, but save any changes made, press **2** to save and return to the count.
- To save the stock count for completion later, press **3** to save and exit.
- To discard any changes, press **4**.
- To complete the stock count, press **5**.

Enter Stock Count Results – Ad Hoc

> **Note:** Ad hoc stock counts allow you to decide which items to count. A system option controls whether multiple users are allowed in the same stock count.

Navigate: Main Menu > **2** – Inv. Management > **2** – Stock Counts > **3** – Ad Hoc Stock Count

Press any other number to join an ongoing ad hoc stock count:

> **Note:** Depending on your system settings, you may be prompted to select whether this stock count is being performed before store open or after store close.

- Press **1** to continue the count.
- Press **2** to review the count.
- Press **3** to complete the count.

When continuing the count, or for a new count:

- Record quantities and items:
  a. Scan the item.
  b. In the Qty field, enter the number of cases or standard units of measure, or scan the same item multiple times.
  c. Press **Enter** or scan the next item.
  d. Scan the next item or go to the Summary screen by pressing *.
- To amend a quantity of the item that is displayed:
  a. Press **Shift+5** (%) to amend the total.
  b. Enter the new number and press **Enter** to scan the next item, or press * to go to the Summary screen.
- When reviewing the count:
  a. Scan the item
  b. Press **Enter**.
  c. Scan the new item or type in a new quantity, and press **Enter**.
  d. Scan the next item or press * to go to the Summary screen.

On the Summary screen:

- To continue counting, press **1** to return to the count.
- To continue the count, but save any changes made, press **2** to save and return to the count.
- To save the stock count for completion later, press **3** to save and exit.
- To discard any changes, press **4**.
- To complete the stock count, press **5**.

Item Requests

Navigate: Main Menu > **2** – Inv Management >
3 – Item Requests.

To save an item, you must select Request Now or
Request Later.

Request an Item

1. Press **1** (Create Request).
2. Enter the date that you want the item delivered to
   your location.
3. Press **Enter**.
4. For each item requested:
   a. Scan the item.
   b. In the Qty field, enter the number of cases or
      standard units of measurement.
   c. Press **Enter**.
   d. Edit the pack size if necessary.
   e. Press **Enter**.
   f. Press ***** to view a summary of the request.
5. To view or edit the request, you can add or edit an
   item:
   a. Press **1** (Add/Edit Item).
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or
      standard units of measurement.
   e. Press **Enter**.
6. Request the item:
   Request Now
   a. Press **2** (Request Now).
   b. Press **Enter** to return to the Item Request
      Summary menu.
   Request Later
   a. Press **3** (Request Later).
   b. Press **Enter** to return to the Item Request
      Summary menu.

Modify an Item Request

1. Press **2** (Edit).
2. Select the request.
3. Modify the date.
4. Press **Enter**. You can now scan items to add them.
5. Press ***** to view a summary of the request:
   Add/Edit Item
   a. Press **1** (Add/Edit Item).
   b. Scan the item.
   c. Press **Enter**.
   d. In the Qty field, enter the number of cases or
      standard units of measurement.
   e. Press **Enter**.
   Request Now
   a. Press **2** (Request Now).
   b. Press **Enter** to return to the Item Request
      Summary menu.
   Request Later
   a. Press **3** (Request Later).
   b. Press **Enter** to return to the Item Request
      Summary menu.

Delete an Item Request

1. Press **3** (Delete).
2. Select the request.
3. To view details before deleting:
   a. Press **1** (View Details).
   b. Press **Esc**.
4. Press **2** (Delete Item Request).
5. Press **Enter** to return to the Item Request Summary
   menu.

Send a Saved Item Request

1. Press **4** (Request).
2. Select the request.
3. Press **1** (Request Now).
4. Press **1** (Yes).
5. Press **Enter** to return to the Item Request Summary
   menu.

Item Tickets

> **Note:** You can also use Item Tickets to create price override labels.

Navigate: Main Menu > **2** – Inv. Management > **6** – Item Tickets.

1. Scan the item.
2. To make changes:
   Label Qty – Enter the number of item tickets to print.
   Override Price – If necessary, enter the new price.
3. Press **Enter**.
4. Repeat steps 2 – 3 for each item.
5. Press **Esc** to return to the Main Menu.

Inventory Adjustments

Navigate: Main Menu > **2** – Inv. Management > **1** – Inventory Adj.

1. For each item that requires inventory adjustment:
   a. Scan the item.
   b. Press **Enter**.
   c. Select the reason code.
   d. In the Qty field, enter the number of cases or standard units of measure.
   e. Press **Enter**.
2. Press **Esc** to return to the Inv. Management menu.

Pick Lists

Create a Pick List

Navigate: Main Menu > **2** – Inv. Management > **5** – Pick List.

1. Select when you want the pick list created for:
   1 – Within day pick
   2 – End of day pick
2. Press **Enter**.
3. Select the appropriate number for the product group for which you want to create a pick list.
4. For a Within Day pick list, enter the maximum amount to be picked.
5. Press **Enter**.
6. Select **1** – Yes to create the pick list.
7. Press **Enter** to return to the Pick List menu.

Action a Pick List

Navigate: Main Menu > **2** – Inv. Management > **5** – Pick List > **3** – Action Pick.

1. Select the pick list that you want to action.
2. For each item on the pick list:
   a. In the Actual field, enter the number of cases that you are picking.
   b. Press **Enter**.
   c. Scan the item.
   d. Press **Enter**.
3. Press **Enter** to return to the Pick List menu.

Sequencing

Sequence All Items in a Location

Navigate: Main Menu > **2** – Inv Management >
4 – Sequencing > **2** – Sequence all items in a location

1. Select the location where you want to sequence all items.
2. For each item in the location, starting with the first item in the sequence:
   a. Scan the item.
   b. For Capacity, enter the number of items, expressed in UOM, of the item that can fit at the shelf at this location.
3. Press **Enter**.
4. If available, select a label format.
5. If available, enter the number of labels to print.
6. Press **Enter**.
7. For each item, repeat steps 2 – 6.
8. Press ***** to view a summary.
9. Press **1** – Yes to save sequencing.
10. Press **Esc** to return to the Sequencing Inv. Management menu.

Sequence an Item

Navigate: Main Menu > **2** – Inv Management > **4** – Sequencing > **1** – Sequence Item.

1. Scan the item.
2. Add or remove a location, or move an item within a location:

   Add a Location

   a. Press **1** – Add Location.
   b. Select a location from the list of locations where the item is not currently sequenced.
   c. Enter item sequencing information:

      Capacity – Enter the quantity of the item that can fit at the shelf at this location.

      Qty – Enter the number of items, expressed in UOM.
   d. Scan the item that is before or after the current item.
   e. Press **Enter**.
   f. If available, select a label format.
   g. If available, enter the number of labels to print.
   h. Press **Enter**.

   Remove a Location

   a. Press **2** – Remove Location.
   b. Select a location from the list of locations where the item is currently sequenced.
   c. Press **1** – Yes to remove the location.

   Move an Item Within a Location

   a. Press a number that is **3** or greater.
   b. Select a location from the list of locations where the item is currently sequenced.
   c. Change item details or resequence the item:

      Change Item Details

      i. Press **1 (**Change Item Details)
      ii. Enter item sequencing information:
      iii. Capacity – Enter the quantity of the item that can fit at the shelf at this location.
      iv. If available, select a label format.
      v. If available, enter the number of labels to print.
      vi. Press **Enter**.

      Resequence the Item

      i. Press **2** (Move item)
      ii. Scan the item that is before or after the item you are sequencing.
3. Press **Esc** to return to the Sequencing menu.

Lookups

Look Up an Item

Navigate: Main Menu > **3** – Lookups > **1** – Item Lookup

1. Scan the item.
2. View item information.
    - Press **1** to view Price Information.
    - Press **2** to view Allocations/Transfer information.
    - Press **3** for inventory details. See additional information by pressing <next>.
    - Press **4** for related items.
3. Press **<Shift-9>** to go to the next screen.
4. Select an action:
    - Press **1** to print an item report.
    - Press **2** to view Price Information.
    - Press **3** for Stock Locator.
5. Press **Esc** to return to Main Menu.

Look Up Related Items

Navigate: Main Menu > **3** – Lookups > **1** – Item Lookup > **4** – Related Items.

1. Scan the item.
2. Press **4** to view related items. The Related Item Search screen opens and displays a list of diffs for the scanned item. If there are no diffs for the item, a list of related items is displayed immediately.
3. Select a diff to narrow down the range of related items, and continue selecting diffs until the item results screen is displayed or all customer preferences are met.
4. Press **<Shift-1>** to stop selecting diffs and search for related items at any point in the diff selection process.
5. Press **Esc** to return to the previous screen.

Look Up a Container

Navigate: Main Menu > **3** – Lookups > **3** – Container Lookup

1. Scan the container ID of a warehouse delivery intended for your store.
2. Press **Enter**.
3. Press **Esc** to return to Main Menu.

Look Up a Supplier

Navigate: Main Menu > **3** – Lookups > **2** – Supplier Lookup

1. Look up the supplier by ID or name:
    Look Up by Supplier ID
    a. Press **1** (Supplier ID).
    b. Enter Supplier Number.
    Look Up by Supplier Name
    a. Press **2** (Supplier Name).
    b. Enter whole or partial Supplier Name.
2. Press **Enter**.
3. Press **Esc** to return to Main Menu.