

handPoint *Retail*



handPoint Retail 4.3
Designer – Getting Started

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If you do not agree with the terms spelled out in the contract, please refrain from installing the product and return the product, in its entirety, to handPoint or the appropriate retailer.

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About this Manual

This manual constitutes the hands-on part of our user documentation for handPoint Retail. In this Manual we aim at familiarizing users with the application – both the server and client side – thus facilitating immediate implementation of the application for all retail routines of the user's current information system environment. The Manual is divided into a step-by-step Getting Started Guide that covers both server and client sided installation processes and guides future users through some of straightforward demo jobs in conjunction with a demo file, familiarizing them with the application. The latter part of this Manual covers the template section. As we have mentioned, handPoint Retail is a template based mobile retail application, and, in order to facilitate easy and quick implementation into customer's current information system environment and daily work routines, we have included a variety of onsite, mobile, retail tasks and routines. Hence the user needs only to load those templates, make a few adaptive changes and everything is ready for successful use of handPoint Retail within the environment in question.

System Requirements

A PC running Windows NT/2000/XP and a barcode enabled handheld device running Pocket PC 2000 or 2002.

Where to go from here?

Do go through the getting started step-by-step guide and familiarize yourself with the application and the handheld. Subsequently adapt the desired templates to your information system environment so that handPoint Retail can be smoothly implemented into your work environment.

Getting Started – A Simple Retail Project

This step-by-step guide to handPoint Retail is a good way for you to get to know the program. The guide will show you how to set up Retail and guide you through a simple retail project to show you how to use it. This is enough to get you started but advanced options are not covered.

Prerequisite: Windows NT 4(r), 2000, XP. ActiveSync must be installed on local PC and device should have been previously synchronized, i.e. the device has been named etc.

STEP 1

- Run the self-extracting Setup file called “**handPointRetailInstaller**”, and the Install shield will take you through the remainder of the installing process of both the Designer and Server Options Applications.
- Choose the **Full installation** if you intend to modify jobs. If you don't intend to modify jobs you should choose **handPoint Retail Server**.
- It is recommended that every component should be run from the PC's hard disk; so do not change the default settings unless it's necessary.
- The default root location for the extracted files is C:\Program Files\handPoint\Retail 4.
- Unless you want to run handPoint from a different location, click **OK** to accept default location and parameters.
- Install the handPoint Retail onto a barcode-enabled handheld Pocket PC 2000 or 2002 when you are prompted to do so.

If you didn't install handPoint Retail on a device during the setup or want to install it on more devices follow these steps to install it:

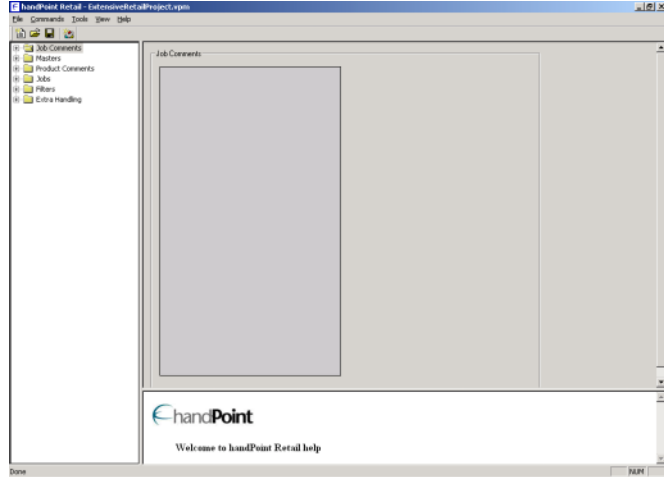
- Place handheld device in the cradle.
- In **Windows Start Menu** go to Programs > handPoint > Retail 4 and locate and launch **Install handPoint Retail on Pocket PC**.
- The program will be installed.

For details on how to install Microsoft ActiveSync and further information about installing handPoint Retail on a handheld device, see the **Retail Sync Instructions**.

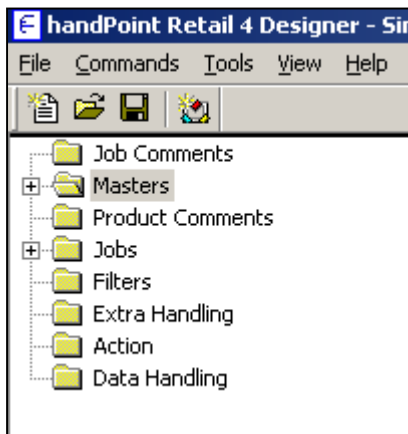
STEP 2

Launch **handPoint Retail** and load SimpleRetailProject.hpr.

- In **Windows Start Menu** locate and launch **handPoint Retail Designer**.
- The designer interface is used to create and define tasks to be executed using the handhelds.
- In **File Menu**, select **Open** and browse for **SimpleRetailProject.hpr**, located in `c:\Program Files\handPoint\Retail\projects\SimpleRetailProject.hpr`
- Select file and click **OK** to open project.

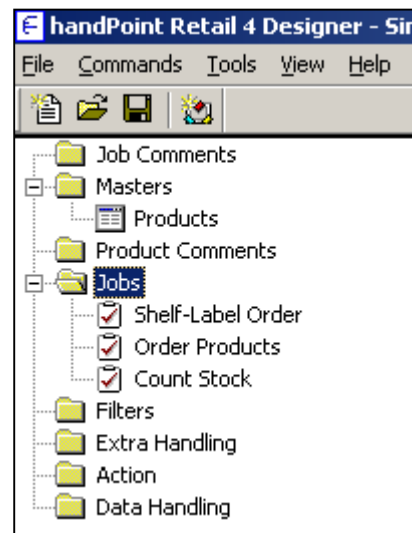


STEP 3





The expandable tree contains the individually configurable modules for the project. Opening the folders, by clicking the plus symbol, gives access to the individually configurable modules. Note that only job modules are active, all others are dormant and only operational in conjunction with a selected job.

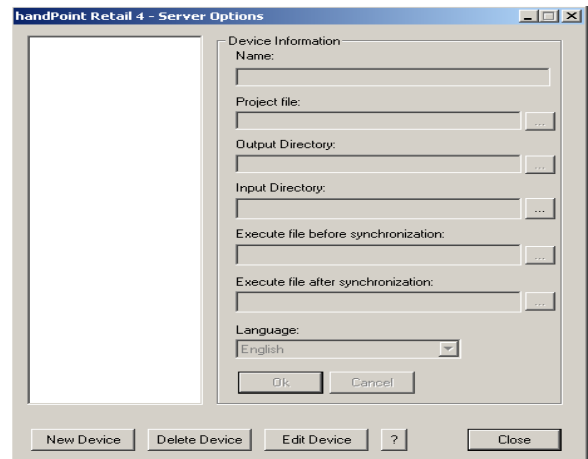
This screen contains all the enabled modules within this project. The currently enabled and defined job modules, to be transferred to the handheld, include Order Products, Shelf-Label Order and Count Stock.



STEP 4

Synchronize the project, (i.e. defined modules and all of their assigned CSV files, see page 19 for details on CSV files) to the handheld.

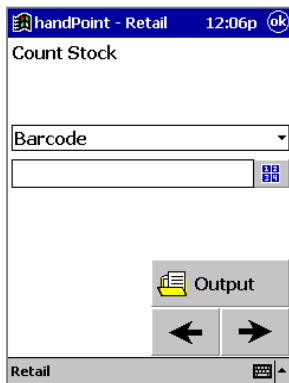
- Place device in cradle and click **OK** when you are prompted to sync.
- Click **Yes** when you are prompted to register the device in **Desktop Server Options**.
- **Server Options** are started automatically and the device name is placed in the **Name** field.
- Click the  button to the right of **Project file** box to locate the SimpleRetailProject.hpr in the projects folder.
- In **Output Directory** enter C:\Program Files\handPoint\Retail 4\output; or click the  button to the right of the Output Directory box to browse for and locate the same (or a different) folder where all generated output files will be stored when the handheld and the PC are synchronized at the end of a session.
- Leave the next three boxes blank.
- Select the language you want use on the device. If you don't select anything, the default language, which is English, will be used.
- Click **OK**.
- Remove the handheld device from the cradle and replace it to sync again.




Note: Be sure to allow enough time for the ActiveSync to disconnect before you put the handheld in the cradle again.

STEP 5

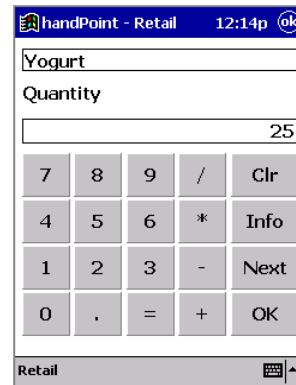
Run the **Count stock** job on the handheld.



- Locate the handPoint Retail icon  in the **Programs** folder and tap icon to launch the Application on the handheld.
- From list of jobs select **Count stock** and tap **Choose**.
- Scan Barcode:



- Enter the quantity by using the on-screen keyboard or the keypad on your device if it has one.
- Tap **OK**.
- Tap **←** button to select another process.



STEP 6

Now run the Order Products job.

- From the list of jobs select **Order Products** and tap **Choose**.
- Scan Barcode:



- Tap the **Quantity to Order** field and enter any number using the Graffiti Area, the on-screen keyboard (in the lower right corner of screen) or the keypad.
- Values in the remaining fields, i.e. Price and Quantity in Stock are taken automatically from the master product file.
- Tap **OK**.
- Tap **←** button to close this job and select another job.

STEP 7

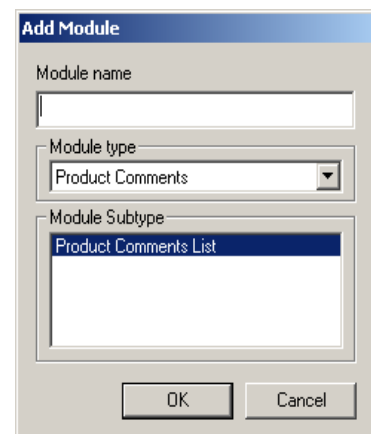
Take some time to test the other jobs that have been uploaded onto the handheld.

Finally, synchronize the handheld device to transfer the Output files from each job to the PC. Inspect them by accessing the *.txt files in the output folder specified above. (See individual job settings in the Designer for output files name details.)

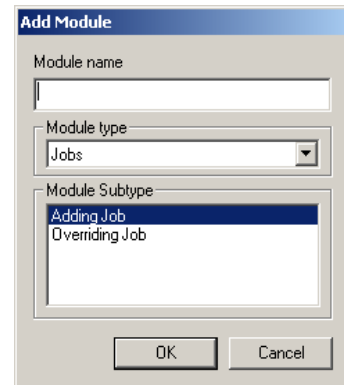
Create an additional job

You have now completed the first part of the getting started step-by-step guide, i.e. put into action a predefined job using a handheld. Now we will guide you through creating a new job in the server side GUI and performing the subsequent Barcode scans, using the handheld.

- Select the **Product Comments** folder in the tree structure and tap the insert key on your keyboard, or perform a right-click with your mouse, to trigger the **Add Module** dialogue window.



- Type *Return Reasons* in the Module name box, leave **Module type** in Default (Product Comments) setting. Click **OK**.
- In the expandable module tree, highlight the newly created **Return Reasons** module and configurable settings will appear in the window on the right.
- In **Input Filename** select *Return_reason.txt* from the master folder.
- Select the **Jobs** folder in the tree structure and tap the insert key on your keyboard, or perform a right-click with your mouse, to trigger the **Add Module** dialogue window.
- Type *Disposed Products* in the Module name box, leave **Module type** in Default (Job) setting, and select **Adding Job** from the **Module Subtype** listing. Click **OK**.
- In the expandable module tree, highlight the newly created **Disposed Products** module and configurable settings will appear in the window on the right.
- In Job settings set **Master** to **Products**.
- Enter *Return_output.txt* in **Output Filename** box.
- In **New Field Name** box write *Disposal Reason* and select **Comment field** from the dropdown list, then click **New Field** bar.
- Then select **Return Reasons** from **Product Comments** drop-down (this predefined module is linked to a CSV file with several predefined phrases that state the most common reasons for disposing of a product). After scanning a product you want to dispose of, a dropdown list of **Return reasons** is shown on the handheld and you can select an appropriate reason for disposal from that list.
- In **New Field Name** box write *Quantity* and select **Integer** from the dropdown list, then click **New Field** bar.
- The new job has been added to the project and draws on the same resources as the other jobs, i.e. same master file, Server Options settings. Save your work and after the next synchronization the new job will be accessible on the handheld.
- Test the new job by scanning the barcodes above, selecting an appropriate reason for the product's disposal from the list on the handheld's screen.



Congratulations! You have now set up and used a simple retail project and prepared your first customization. You can now get to work with the Simple Retail Project. If you need more functionality than is available in the Simple Retail Project you can either customize it to fit your needs or you can take a look at a more extensive project.

The Next Step – An Extensive Retail Project

Introduction

After trying the Simple Retail Project you now have some idea of how Retail works and what you can do with it. You are ready to take the next step and learn more about handPoint Retail. The Extensive Retail Project is a template that is included with Retail and it contains many pre-configured modules that can be used for all sorts of different onsite, mobile retail tasks. These tasks include many advanced options that were not present in the Simple Retail project template.

The Extensive Retail Project was designed to serve different needs and fields of operation for Retail Businesses. It contains a number of jobs, which include most conceivable functions a retail business environment needs from a handheld system. To use this project in your business you can either delete jobs you will not be using or add new jobs. All projects, modules and their connections can of course be altered and customized in order to fit a 100% into the pre-existing retail information back-end system.

Included template projects & template jobs

All templates that are included with handPoint Retail are located within the projects folder in the C:\Program Files\handPoint\Retail 4 root. The project this manual refers to is called **ExtensiveRetailProject.hpr** and it includes most common jobs.

Each individual job or task is defined within a job module and all other modules that are needed for the job are also selected. The most important inactive module is the Master module, which contains all of the store's back-end product information. Within our templates we have formatted and defined the Master module and its files so that it is easy to implement this project into almost any pre-existing retail information system environment.

The individual templates and their modules

Each task is a made up of interconnected modules. While the Job modules are different for almost each of the actual tasks, a lot of the other modules stay the same for the different tasks. Therefore we will provide screenshots and documentation for all the individual jobs, but for tasks where previously created modules can be used, a mention will be made to that effect. The modules have already been configured in the template projects so that you will not have to do any actual configuring of your own. The screenshots, therefore, merely include a commentary on the current template settings as well as suggesting various ways of adapting the current settings to the most common environments.

Shelf-Label Order

This template is designed to facilitate and streamline the ordering of new shelf-labels. Current inaccurate Shelf-Labels have to be replaced as quickly as possible. The user of the handheld performs a task, based on this template, to gather and record all the relevant information so that printing can be underway very quickly and without anyone having to re-enter any information. Modules used in this template are the Master module, referring to two separate files containing barcode and product information, and a job module. These two modules cooperate closely in order to generate the information necessary to get the job done quickly and efficiently.

Master Module Configuration

Select Product Master in Masters Folder to trigger this screen.

- The **Upload files** option is set to **Prompt**, allowing the user to decide, during each Synchronization, whether or not to upload the Master module and its associated files onto the handheld.
- **Prompt Wait Time** (sec) is set to **30** (default) seconds. This gives the user thirty seconds to make a choice on whether this module will be uploaded upon synchronization. If no choice is made nothing will be uploaded.
- The **File Paths** are set to the Product and Index template files located in the Masters folder, created upon the installation of the application. For further information on the format for CSV files used in conjunction with handPoint Retail see next chapter.
- **Allow Linking** has been enabled. For more information on this feature see the Reference Manual.
- The **Create New Field** section was used to define the fields within the product file. Although some of the data in the fields is numerical, active master fields are text-based, in order to simplify further computing.

Job Module Configuration

Select Shelf Label Order in Jobs folder to trigger this as well as the next screen.

- From the corresponding dropdown list the above master module, **Product Master**, has been selected. All the other module selectors remain blank for this task, though other modules could also be activated.
- The **Output filename** has been set to **OrderNewBarcodeLabels**. This file, upon synchronization, will be saved into the default Output folder (see Getting Started for Output folder selection within Server Options). For every scanned item, in addition to the inputted or displayed data that goes with it, the application creates one line of data.
- Other fields remain in their default settings.
- The fields required for this template were created using the **Create New Field** Section below. The format of the data to be displayed and recorded within the appropriate field was selected from the dropdown list of field types.

Active Fields:

Price

Active Field Settings	
Fields:	Price
Text	
<input checked="" type="checkbox"/> Hidden	
Suffix:	
Page number:	0
<input type="checkbox"/> Freeze	
<input checked="" type="checkbox"/> Master Look-Up	
Master Field Selector:	Price
<input type="checkbox"/> Auto Numberpad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
<input type="checkbox"/> Mandatory	
Default Value:	

- Upon scanning an item's barcode, this field will retrieve the item's Price data from the **Product master** file.
- The field, however, will remain hidden to the user of the handheld, for the data it retrieves will be used in conjunction with the **Script** for the auto-button setting in the Order Shelf Labels field.
- The Master Lookup function is selected and the **Price** field (previously created in the Master configuration) is selected from available Master Lookup fields.

Order Shelf Labels

Active Field Settings	
Fields:	Order label
Integer	
<input type="checkbox"/> Hidden	
Suffix:	
Page number:	0
<input type="checkbox"/> Freeze	
<input type="checkbox"/> Master Look-Up	
Master Field Selector:	0
<input type="checkbox"/> Auto Numberpad	
<input checked="" type="checkbox"/> Auto Buttons	
Script:	<PROD=Price>
Button One	
Text:	Order Label
Default Value:	1
Button Two	
Text:	Skip
Default Value:	0
<input type="checkbox"/> Mandatory	
Default Value:	

- As the prior field remained hidden, this is the field that will eventually appear on the handheld. **Auto-Buttons** are enabled. They have been developed in order to simplify and speed up onsite tasks, reducing manual input and focusing on scans, yet still record all the information required.
- Although they are recording data for only one field, the auto-buttons use the entire handheld screen. The Large Caption **Script** determines what is displayed in large captions above the two auto-buttons. In this instance it is <PROD=Price>. This means that for this job – initiated by the barcode scan of a specific product or item – the item's Price is displayed. PROD is a fixed value, whereas Price refers to the field created above, and uses its default value, in this case the Price information retrieved from the Product Master.
- Button One Text says **Order Label** and Button Two Text says **Skip**.
- Depending on which button will be selected, the corresponding instruction will be saved into the output file.

The handheld screen

The screenshot shows a handheld device interface for a retail application. At the top, it displays 'handPoint - Retail' and the time '11:24a'. Below this, the word 'Yogurt' is visible. A large, bold price '3.15' is displayed in the center. To the right of the price is an 'Info' button. Below the price are two large buttons: 'Order Label' and 'Skip'. At the bottom of the screen, there is a 'Retail' label and a keyboard icon.

- The item's barcode has been scanned and the item's price data is displayed in large captions above the two buttons.
- If the displayed **Price** does not correspond to the price on the shelf label (or if there is no shelf label at all for the item in question), the user of the handheld taps the **Order Label** button or, to limit manual input and save time, scans the item again to confirm the order. This will then be recorded into the generated output file.
- If the price, on the other hand, does correspond, the user of the handheld taps **Skip** or, to speed things up, scans the next item's barcode and confirms the Skipping action.

Product Inventory

The Product Inventory job is an integral part of inventory management, making it simpler and faster.

Job Settings & Active Field

Job Settings		Active Field Settings	
Hidden		Fields	Quantity
Master	Product Master	Integer	
Lookup master	None	Hidden	
Job Comments	None	Suffix	
Product Action	None	Page number	
Checklist	None	Freeze	
Output Actions	Total	Master Look-Up	
	Shell-Label w/L Out	Master Field Selector	
	Lookup - By Barcode	ID	
	Lookup - By ProdID	Auto Number-pad	
	Monarch 9460 (MPCL)	Auto Buttons	
	SMTP	Script	
Make Separate Output Files		Button One	
Allow Output Deletion		Text:	
Allow Output Creation		Action:	
Output Filename	CountStock_out.txt	Default Value:	
Output File Display Name		Button Two	
Output Screen Header		Text:	
Client Settings		Action:	
Home Screen	Input Screen	Default Value:	
Filter Settings		Mandatory	
Filter Settings...		Include In Data Handling Iteration	
Create New Field		Default Value	
New Field Name			
Field Type	Text		
New Field			
Delete Field			

- The standard template Product Master Module has been selected from the Master dropdown list.
- The only field that has been created for this Job is entitled **Quantity**. The **Auto-number pad** has been activated in order to facilitate data-entry for the user of the handheld. Upon scanning the shelf or item barcode, he or she will enter the number of items in that particular location using the auto-number pad.

Order Products

This task is designed in a similar way to inventory count in as far as the user of the handheld scans a product or a barcode shelf-label and enters the number of items that have to be ordered. However, in a regular retail environment most items can only be ordered in larger sized order units. In order to simplify the task for the user of the handheld, two more fields have been added that retrieve information from the master product file displaying both order unit type and number of single items within order units, assisting the user of the handheld to make the correct order. Finally there's an additional script field that can be added, and based on previously entered and retrieved information, informs the user of the handheld as to how many single items have been ordered.

Job Settings

Job Settings	
Hidden	
Master	Product Master
Lookup master	None
Job Comments	None
Product Action	None
Checklist	None
Output Actions	Total
	Shell-Label w/L Out
	Lookup - By Barcode
	Lookup - By ProdID
	Monarch 9460 (MPCL)
	SMTP
Make Separate Output Files	
Allow Output Deletion	
Allow Output Creation	
Output Filename	OrderProducts_out.txt
Output File Display Name	
Output Screen Header	
Client Settings	
Home Screen	Input Screen
Filter Settings	
Filter Settings...	
Create New Field	
New Field Name	
Field Type	Text
New Field	
Delete Field	
On Screen Notification	
Notification Text	

- The only other module attached to this job is the **Product Master Module** whence data will be retrieved to assist the handheld's user in decision making.

Active Fields

Sales Unit Count

Active Field Settings	
Fields	Sales Unit Count
Integer	
Hidden	
Suffix	
Page number	0
Freeze	
Master Look-Up	
Master Field Selector	ID
Auto Number-pad	
Auto Buttons	
Script	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
Mandatory	
Default Value:	

- This integer field remains in its default settings. The value entered refers to the **number of sale units** (pieces, boxes, etc.) but not necessarily the single item. The value entered will subsequently be used in the script for the fourth field and in conjunction with the Quantity in Sales unit display the actual number of single items ordered that the user of the handheld then confirms by tapping **Ok** or scanning the next item.

Sales Unit

Active Field Settings	
Fields	Sales Unit
Text	
<input type="checkbox"/> Hidden	
Suffix	
Page number	0
<input type="checkbox"/> Freeze	
<input checked="" type="checkbox"/> Master Look-Up	
Master Field Selector	Sales Unit
<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
<input type="checkbox"/> Mandatory	
Default Value:	

- This is the second field that will be displayed on the handheld. Its function is to retrieve the **Sales Unit** from the master product file.

Quantity in Sales Unit

Active Field Settings	
Fields	Quantity in Sales Unit
Text	
<input type="checkbox"/> Hidden	
Suffix	
Page number	0
<input type="checkbox"/> Freeze	
<input checked="" type="checkbox"/> Master Look-Up	
Master Field Selector	Quantity in Sales Unit
<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
<input type="checkbox"/> Mandatory	
Default Value:	

- This is the third field to be displayed on the handheld and similar to the previous field it is only meant to retrieve information from the master product file, this time the **Quantity in Sales Unit**.
- In conjunction with the other master lookup field it is to assist the decision making of the user of the handheld.

Single Items

Active Field Settings	
Fields	Single Items
Script	
<input type="checkbox"/> Hidden	
Suffix	
Page number	1
<input type="checkbox"/> Freeze	
<input type="checkbox"/> Master Look-Up	
Master Field Selector	
<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
Default Value:	<MUL<PROD= Sales Unit C

- This field does not require any data entry but using the **Script** <MUL<PROD=Sales Unit Count><PROD=Quantity in Sales Unit>> it displays the number of single items ordered by multiplying the data-entry of the first field, **Sales Unit Count**, with the retrieved information from the third field, **Quantity in Sales Unit**. It thus raises the user's awareness as to how many **single items** he or she has ordered.
- Scanning the next item will confirm that number and the recorded output data can be processed once Synchronization has been performed.

The Handheld screen 1

handPoint - Retail 11:41a

Yogurt 0

Sales Unit Count
35

Quantity in Sales Unit
5

Sales Unit
box

Calc

Delete Cancel Ok

Retail

- Upon scanning a barcode, the first field will remain at its default value but the second and third field will display **Quantity in Sales Unit** and **Sales Unit** data respectively.
- Basing the data-entry on the information provided in fields two and three; the user of the handheld enters the number of Sales Units that have to be ordered.

The Handheld screen 2

handPoint - Retail 11:44a

Yogurt 0

Single items
175

Calc

↑
↓

Delete Cancel Ok

Retail

- Having tapped the **Down** button, the **Single Items** field can be seen and it displays the number of ordered single items.
- The user of the handheld confirms and records the processed order into the output file by tapping **Ok** or scanning the next product.

Product picking

The Product picking job is designed for warehouse-based Product picking. An extra-handling module is created to which a CSV file, containing a list of items to be gathered for an outgoing delivery, is assigned. Alongside the master, job, and extra-handling module, this list is uploaded onto the handheld and can be used as a reference list. Once an item has been scanned and the quantity of removed order units entered for the record, said product is removed from the checklist. Moreover the list can be accessed at any time in order to tell which items still remain to be picked.

The Job Settings

Job Settings	
<input type="checkbox"/> Hidden	
Master	Product Master
Lookup master	None
Job Comments	None
Product Action	None
Checklist	Simple Checklist
Output Actions	Total Shell-Label w/L Out Lookup - By Barcode Lookup - By ProdID Monarch 9460 (MPCL) SMTP
<input type="checkbox"/> Make Separate Output Files	
<input type="checkbox"/> Allow Output Deletion	
<input type="checkbox"/> Allow Output Creation	
Output Filename	ProductPicking_out.txt
Output File Display Name	
Output Screen Header	
Client Settings	
Home Screen	Input Screen
Filter Settings	
Filter Settings...	
Create New Field	
New Field Name	
Field Type	Text
New Field	
Delete Field	

- In addition to the master module, the **Simple Checklist** is assigned to the job. From the Checklist dropdown list said checklist is selected. (Note that the checklist has to be created as an extra-handling module before being accessible within the job settings). The list can be accessed on the handheld for reference, and scanned items will be removed from the list.

The active field

Quantity

Active Field Settings	
Fields	Quantity
Text	
<input type="checkbox"/> Hidden	
Suffix	
Page number	0
<input type="checkbox"/> Freeze	
<input type="checkbox"/> Master Look-Up	
Master Field Selector	ID
<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
<input type="checkbox"/> Mandatory	
Default Value	1

- The active field for the order-picking job will be Quantity. The field will be left in its default text setting.

The extra-handling module

Checklist

Conclusion options	
File options	
Upload file	Always
Prompt Wait Time(sec)	5
<input type="checkbox"/> Multiple Input Files <i>Multiple Input Link String</i>	
Input Filename	..masters\checklist.txt
<input type="checkbox"/> Fixed Order List Restriction Level	
	None

- The Checklist CSV file will **Always** be uploaded. As most product picking directives differ from one another, it is probably most adequate to proceed thus in order to avoid mix-ups and uncertainty.
- The file is entitled checklist.txt and is located in C:\Program Files\handPoint\Retail 4\masters folder – unless different specs were entered upon installation.

The Handheld screen

ID	Description
3	Chocolate
4	Skimmed milk
5	Cheese

- Upon scanning an item's barcode, the corresponding item will be removed from the Checklist.
- The user of the handheld then enters the number of order units he or she is gathering for the delivery to be made into the quantity field.

Incoming Delivery

Incoming deliveries are “processed” on the loading bay and can make similar use of the checklist as the product picking job. All the items that have been ordered can be put into a checklist and this list can be displayed on the handheld at any time. All registered deliveries, again making use of an active quantity field are registered and automatically removed from the checklist.

The Job and active field settings

Job Settings	Active Field Settings
<input type="checkbox"/> Hidden Master: Product Master Lookup master: None Job Comments: None Product Action: None Checklist: None Output Actions: Total, Shell-Label W/L Out, Lookup - By Barcode, Lookup - By ProdID, Monarch 9460 (MPCL), SMTP <input type="checkbox"/> Make Separate Output Files <input type="checkbox"/> Allow Output Deletion <input type="checkbox"/> Allow Output Creation Output Filename: IncomingDelivery_out.txt Output File Display Name Output Screen Header Client Settings Home Screen: Input Screen Filter Settings Filter Settings... Create New Field New Field Name Field Type: Text New Field Delete Field	Fields: Quantity Text <input type="checkbox"/> Hidden Suffix Page number: 0 <input type="checkbox"/> Freeze <input type="checkbox"/> Master Look-Up Master Field Selector: ID <input checked="" type="checkbox"/> Auto Number-pad <input type="checkbox"/> Auto Buttons Script Button One Text: Action: None Default Value: Button Two Text: Action: None Default Value: <input type="checkbox"/> Mandatory <input type="checkbox"/> Include In Data Handling Iteration Default Value: 1

- The identical Product master module has been selected.
- In addition an extra-handling module, incoming delivery checklist, can be assigned to the job.
- As for the active field settings, there will be one active integer-field into which the user of the handheld is to enter the relevant quantity of incoming order units.

The Extra Handling Module

Checklist

Conclusion options	
File options	
Upload file	Always
Prompt Wait Time(sec)	5
<input type="checkbox"/> Multiple Input Files	
<i>Multiple Input Link String</i>	
Input Filename	..\masters\checklist.txt
<input type="checkbox"/> Fixed Order	
List Restriction Level	None

- In the Extra-handling module the **Always** option was chosen thus determining the upload frequency of the module onto the handheld.
- The input filename refers to the file and pathname of the actual CSV formatted checklist, located in C:\Program Files\handPoint\Retail\masters folder – unless different specs were entered upon installation.

The Handheld screen

handPoint - Retail 11:52a

Yogurt

Quantity

35

7	8	9	/	Clr
4	5	6	*	Info
1	2	3	-	Next
0	.	=	+	OK

Retail

- Upon scanning an item's barcode, the item will be removed from the checklist if the checklist is used.
- Into the active quantity field the user of the handheld will then enter the number of received order units. This data is then saved into the output file and can, upon resynchronization, be double checked within the back-end environment.

Disposed Goods

The Disposed Goods job is used to record the removal of disposed goods and comment on the reason why they are to be disposed of. The job is accessed, the item/s are scanned and the reason for disposal is selected from a predetermined list (attached, this time, to the product comments module linked to this job). The quantity of the items to be disposed is then added. In the output file, the line containing this information will therefore also contain information on the reason why this product has been disposed of, although only the id number corresponding to said reason will be recorded into the output file. See getting started guide, page 7 for more information on this job

The Product Comments Module

Product Comments List

File options	
Upload file	Always
Prompt Wait Time(sec)	5
Input Filename	..\masters\retun_reason.txt
<input checked="" type="checkbox"/> Mandatory	

- A **Product comment module** entitled Return Reason has been created to link to the Disposed Goods job. The Upload file option has been set to **Always**, thus the module and the file that belongs to it will be uploaded onto the handheld every time a HotSync operation is initiated.
- The File and pathname have been entered into the corresponding Input filename box. The file in question is located in the default masters folder within the larger handPoint\Retail folder.

Job Settings	
<input type="checkbox"/> Hidden	
Master	Product Master
Lookup master	None
Job Comments	None
Product Action	None
Checklist	None
Output Actions	Total Shell Label W/L Out Lookup - By Barcode Lookup - By ProdID Monarch 9460 (MPCL) SMTP
<input type="checkbox"/> Make Separate Output Files	
<input type="checkbox"/> Allow Output Deletion	
<input type="checkbox"/> Allow Output Creation	
Output Filename	DisposedGoods_out.txt
Output File Display Name	
Output Screen Header	
Client Settings	
Home Screen	Input Screen
Filter Settings	
Filter Settings...	
Create New Field	
New Field Name	
Field Type	Text
New Field	
Delete Field	

- The regular master module has been selected.
- The output file name has been set to Disposed Goods and will be saved into the default output folder.

Active Field

The quantity field

Active Field Settings	
Fields	Quantity
Integer	
<input type="checkbox"/> Hidden	
Suffix	pcs.
Page number	0
<input type="checkbox"/> Freeze	
<input type="checkbox"/> Master Look-Up	
Master Field Selector	ID
<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Default Value:	
Button Two	
Text:	
Default Value:	
<input type="checkbox"/> Mandatory	
Default Value	1

- This active quantity field is to be used to record the number of disposed items that are removed from the retailing area. The default value is set to 1, as that seems to be the most frequent number of disposable items within one product ID.
- No additional settings have been entered for this active field

Disposal reason

Active Field Settings	
Fields	Disposal Reason
Product Comments	Return Reason
Comment Field	
<input type="checkbox"/> Hidden	
Suffix	
Page number	0
<input type="checkbox"/> Freeze	
<input type="checkbox"/> Master Look-Up	
Master Field Selector	ID
<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Auto Buttons	
Script:	
Button One	
Text:	
Action:	None
Default Value:	
Button Two	
Text:	
Action:	None
Default Value:	0
<input type="checkbox"/> Mandatory	
<input type="checkbox"/> Include In Data Handling Iteration	
Default Value	

- The Disposal reason field is a comment field where the Return reason module is selected. This field will show a dropdown list of disposal reasons on the handheld.
- No additional settings have been entered for this active field

The Handheld screen

handPoint - Retail 1:25 OK

Cat Food New

Disposal Reason
Broken

Quantity
0 pcs.

Calc

Cancel Ok

Retail

- After the item that is to be disposed, is scanned the nature of the distress or the return reason has to be selected from the drop down list in the Disposal reason field. Then enter the number of single disposed items.
- Then tap **OK** or scan the next item in order to confirm the entry and the selection.
- The corresponding Product Comment Identification number will then be added to the record of the output file and the back-end administrator will therefore be able to read the nature of the distress and can take appropriate action if required.

Return Products

This job and its co-modules are identical to the one above. We have included it as an additional template for there are Retailers that like to consider these as two different tasks and jobs, and the most likely thing to change is the attached product comments.

Price Checks

This job limits itself for the time being to simple price checks, i.e. the user of the handheld can make sure that the price that is displayed on the handheld (based on a master look up) corresponds to the price displayed either on the product itself or the shelf label.

Job and active field settings

Job Settings		Active Field Settings	
<input type="checkbox"/> Hidden		Fields	Price
Master	Product Master	ReadOnly Text	
Lookup master	None	<input type="checkbox"/> Hidden	
Job Comments	None	Suffix	\$
Product Action	None	Page number	0
Checklist	None	<input type="checkbox"/> Freeze	
Output Actions	Total Shell-Label w/L Out Lookup - By Barcode Lookup - By ProdID Monarch 3460 (MPCL) SMTP	<input checked="" type="checkbox"/> Master Look-Up	
<input type="checkbox"/> Make Separate Output Files		Master Field Selector	Price
<input type="checkbox"/> Allow Output Deletion		<input type="checkbox"/> Auto Number-pad	
<input type="checkbox"/> Allow Output Creation		<input type="checkbox"/> Auto Buttons	
Output Filename	PriceChecks_out.txt	Script	
Output File Display Name		Button One	
Output Screen Header		Text:	
Client Settings		Action:	None
Home Screen	Input Screen	Default Value:	
Filter Settings		Button Two	
Filter Settings...		Text:	
Create New Field		Action:	None
New Field Name		Default Value:	0
Field Type	Text	<input type="checkbox"/> Mandatory	
	New Field	<input type="checkbox"/> Include In Data Handling Iteration	
	Delete Field	Default Value:	

- The same master module is selected for this job.
- The active field is entitled **Price** and, from the master look up, the Price master field is selected. Note that although this price field will come to display the same information as the Master Price field they are two different and independent things.
- \$ is used as default ending, recorded into output file.

The Handheld Screen

handPoint - Retail 12:32p

Yogurt New

Price 3.15 \$

Calc

↑

↓

Cancel Ok

Retail

- Upon scanning the barcode, the price for this particular product will be retrieved from the product file in the master module.

The format of the CSV files used in conjunction with handPoint Retail.

All output and input files used in conjunction with handPoint Retail are CSV based. These files contain at least 2 semicolon-separated entries, i.e. an ID number and corresponding descriptions in addition to any other designed and/or customized fields. The CSV fields are either uploaded onto the handheld or recorded, via data-entry or master lookup, into the fields of the output file.

The Index File

The index file is the only file that strays from the general format mentioned above. Within this CSV file the numeral barcode precedes the ID number. Note that the format for the index file cannot be altered.

The Product File

The other master file, i.e. the Product File, is the linking agent between the barcodes in the index file and the product description and the additional fields. Within the templates the format of the product file is as follows: Product ID, Product Description, Price, Order Unit, Quantity in Order Unit, Quantity in Stock; and, if your product file correspond to this format you can implement the templates without making any further changes to masters or jobs. Otherwise if any of the master files differ it is very easy to adapt that the master module. Any changes made within the master files therefore are automatically integrated into the Master Lookup dropdown lists in the individual jobs. Do note however that the first two fields within the Product file cannot be altered.

Two field files

In all two values input files – Product comments, and Checklists – the ID number is followed by a descriptive value. The latter represents the value displayed on the screen of the handheld, whereas only the ID number will be saved into a field in the output file.

Job comment

Job comments can have more than two fields. The first two fields are ID and Description, similar to two field files, plus any additionally created fields.

The output fields

In case there were attached Job comments, the descriptions corresponding to the ID numbers will precede the scanned product's ID number and product description. These initial fields will then be followed by the data gathered from any additionally created and customized fields within the job. Finally there will be any Product comments if such a module is attached to the job.