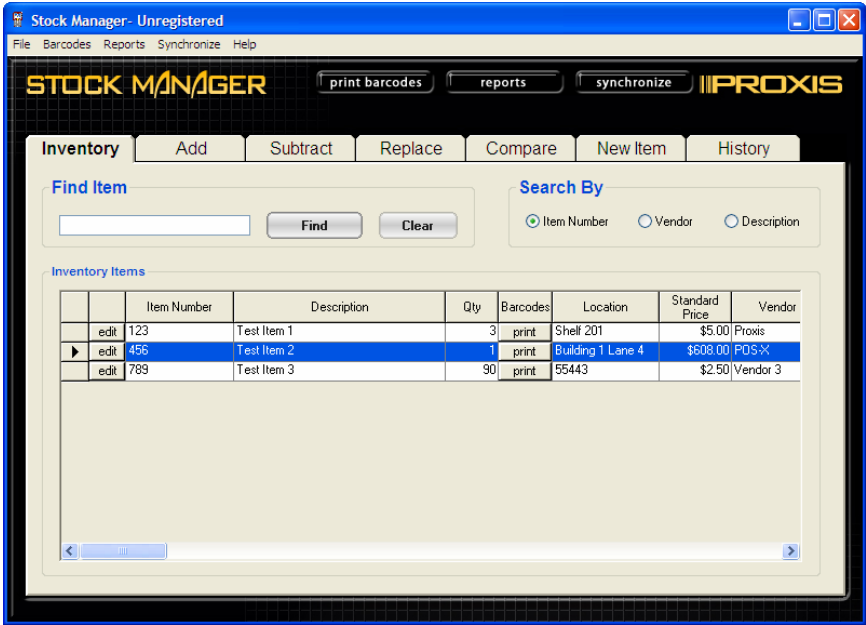


# Proxis Stock Manager User's Guide



Version 1.1.74

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# Proxis Stock Manager User's Guide

Stock Manager Version 1.1.74  
Proxis Software

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# Proxis Stock Manager User's Guide

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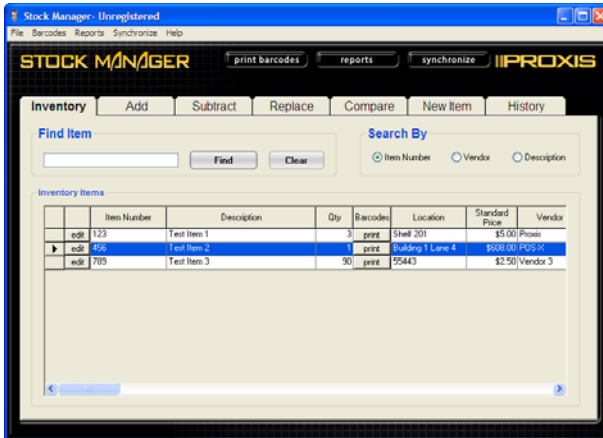
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# 1 Introduction

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

## 1.1 What is Stock Manager?

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



**Figure a.** Stock Manager Main Screen

Stock Manager is a simple but powerful inventory management tool specifically designed for use with both keyboard wedge barcode scanners as well as mobile devices like the POS-X Xt50, the Symbol SPT 1550, the Symbol SPT 1800 and the Symbol SPT 1846.

## 1.2 Stock Manager Features and Benefits

Stock Manager's robust features provide the following benefits:

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

Features include:

- Barcode Printing
- Barcode Scanning
- Physical Inventory Comparison Reporting
- Low Inventory Reporting
- Inventory Valuation
- Data Export (CSV – comma separated value) File
- Data Backup
- Mobile Device Integration

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

- Price Lookup
- Location Lookup
- Receive Items
- Enter New Items
- Edit Item Information
- Physical Inventory Scanning With Multiple Devices
- Item Calculator (Cost and Price)

### 1.3 Installation

Installing Stock Manager is straightforward. Simply double click the SetupStockManager.exe icon and follow the installation steps. The application is installed to the c:\Program Files\Proxis Software\Stock Manager folder by default.

After installation, the Stock Manager application should be registered to unlock the demo mode. Demo mode is limited to 10 inventory items.

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



**Figure a.** Stock Manager Welcome Screen

### 1.3.1 Registration and Activation

To register and activate the full version of Stock Manager:

1. Copy down the Registration Number found in the Product Registration screen.
2. Purchase a software license from a Proxis reseller.
3. The Proxis reseller will issue an activation code based on the registration number.



Figure a. Product Registration Screen

## 1.4 Hardware Setup

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

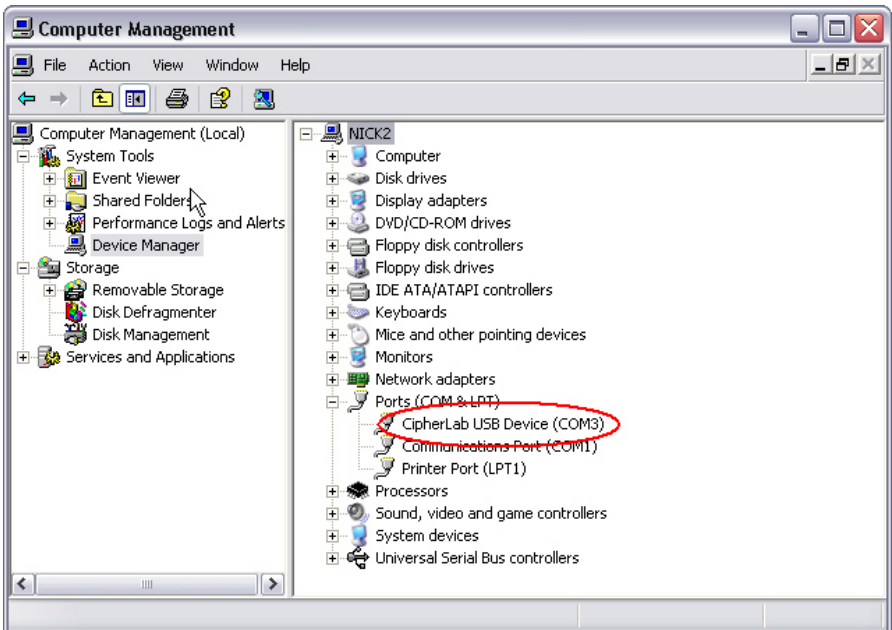
Often, a mobile barcode scanner is used to perform physical inventory and to lookup pricing when the user is away from the main computer.

### 1.4.1 Keyboard Wedge Barcode Scanner Setup

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

### 1.4.2 POS-X Xt50 mobile barcode scanner setup

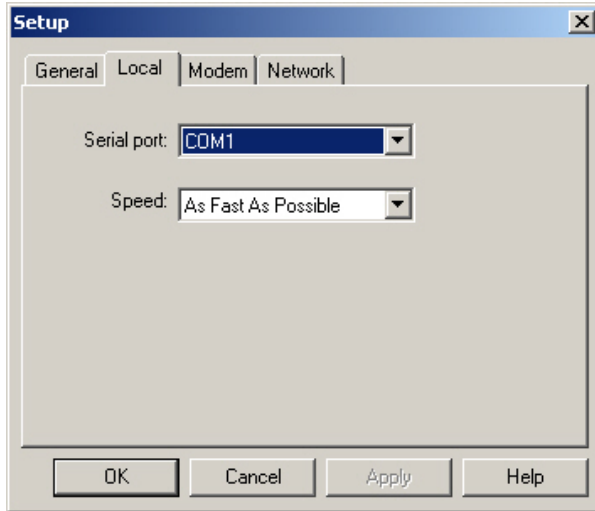
1. Plug the Power Supply into a wall outlet.
2. Plug the USB Cable into an available USB port.
3. Plug both Power Supply and USB cable into the Cradle.
4. Windows will prompt for a driver location.
5. Insert the supplied driver disc.
6. Select the drive letter associated with the driver disc.
7. The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



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

### 1.4.3 Symbol Barcode Scanner Setup

1. Plug the Power Supply into a wall outlet.
2. Plug the Serial Cable into an available serial port.
3. Plug both Power Supply and serial cable into the Cradle.
4. Install the Palm Desktop Software from one of the following locations: the Stock Manager CD, Palm Website, Proxis Website or Proxis Reseller Website.
5. Setup Hot Sync to use the serial port connected to the cradle (figure b.).
6. Synchronize the Symbol device to create a User ID.



**Figure b.** Palm HotSync Setup

### 1.4.4 Barcode Printer Setup

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

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

## 1.5 Getting Started

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



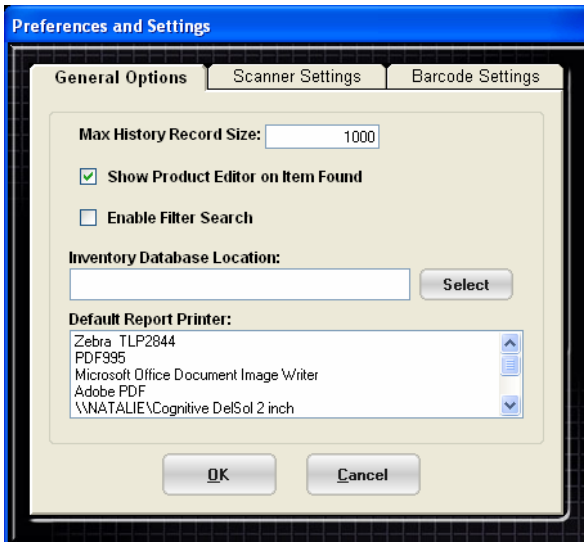
**Figure a.** Stock Manager Desktop Icon

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

## 1.6 Settings and Preferences

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

- Barcode Printer
- Barcode Label Format
- Reports Printer
- Mobile Barcode Scanner
- Database Location (for networked multi-user applications)



**Figure a.** General Options

## 1.6.1 General Options Tab

### Max History Record Size:

This setting specifies the number of history records kept in the database.

### Show Product Editor on Item Found:

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

### Enable Filter Search:

Filter the Inventory grid for items matching the search field.

### Inventory Database Location:

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

### Default Report Printer:

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

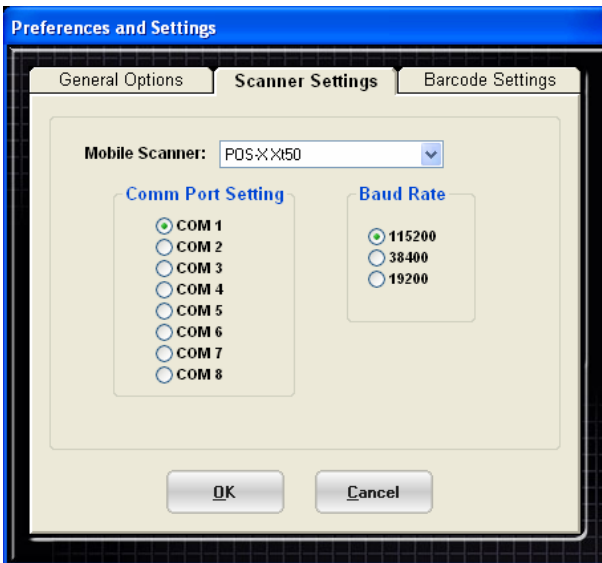


Figure b. Scanner Settings

### 1.6.2 Scanner Settings Tab

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

#### Mobile Scanner:

From the Mobile Scanner list, select the model number for the supported barcode scanner to be used. Currently supported scanners include the POS-X Xt50, Symbol SPT 1550, Symbol SPT 1800, and Symbol SPT 1846.

#### Comm Port Settings:

For use with the Xt50 barcode scanner. Select the correct communications port that the scanner's cradle is connected to. Refer to the hardware installation instructions (section 1.4) for further information.

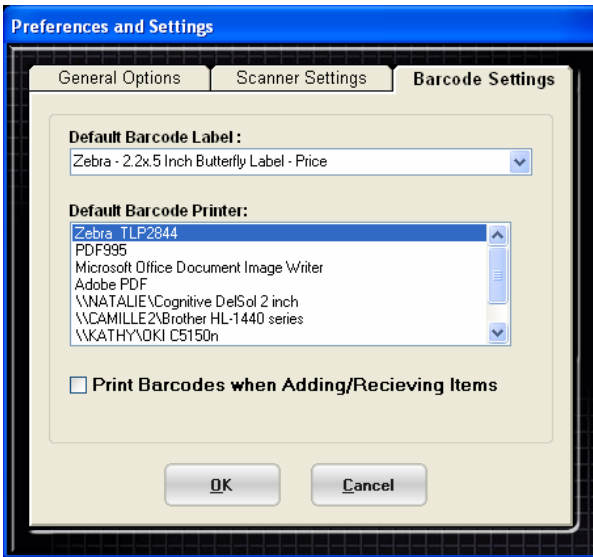


Figure c. Barcode Settings

### 1.6.3 Barcode Settings Tab

Barcode Settings sets the bar-coding information for Stock Manager.

#### Default Barcode Label:

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

**Default Barcode Printer:**

From the list of available printers, select the printer to be used for barcode printing. The selected printer should correspond to the selected barcode label format.

**Print Barcodes When Adding/Receiving Items**

Enabling this option will automatically print a barcode to the default printer when an item's quantity is increased (Add tab and during Mobile Scanner synchronization). Any new items received on a mobile scanner will automatically have a barcode printed to the default barcode printer.

## 2 Working with Inventory

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

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

- Inventory
- Add
- Subtract
- Replace
- Compare
- New Item
- History

Click on the tab to perform the function it describes. The Add tab will add inventory item quantities; the Replace tab will replace inventory item quantities with the values scanned.

Each function that modifies inventory levels (Add, Subtract, Replace and New Item) includes a history grid to display recent scans.

## 2.1 Main Inventory Screen

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

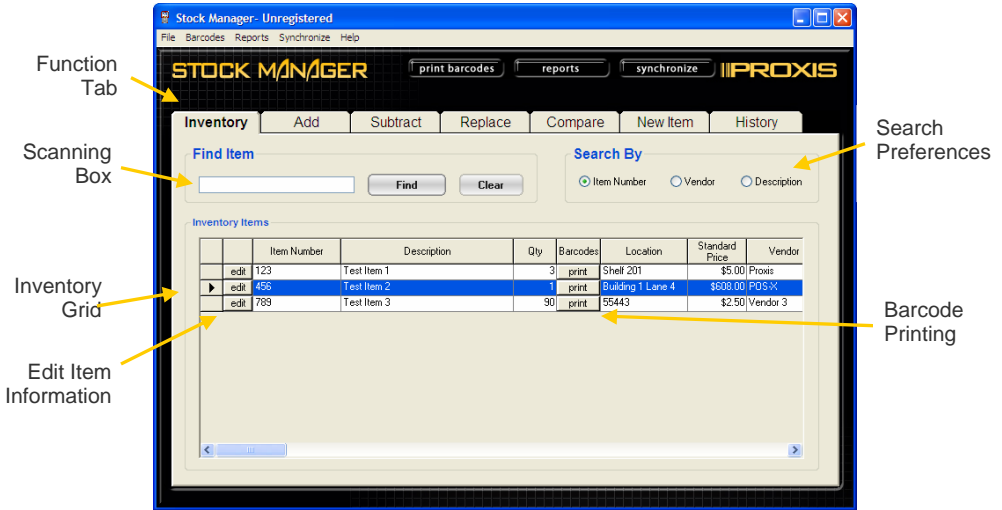


Figure a. Main Inventory Screen

Search By fields provide the option of searching on fields other than the barcode number.

Scanning an item not found in inventory will result in a prompt to add it.

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

### 2.1.1 Editing Items - General Tab

After scanning or clicking an item, the Item Editor screen will appear. This screen provides access to modify item information and print barcode labels.

The screenshot shows a software window titled "Edit Record" with a sub-header "Edit Inventory Item". Below the header are four tabs: "General", "Prices", "Barcode Labels", and "Limits". The "General" tab is active and contains the following fields:

- Item Number: 456
- Description: Test Item 2
- Location: Building 1 Lane 4
- Qty: 1
- Vendor: POS-X
- Notes: This is a test item. Please delete when finished testing.

At the bottom of the form are three buttons: "OK", "Delete", and "Cancel".

**Figure b.** Edit Item Screen General Tab

The General Tab contains standard item information such as:

- Item Number
- Description
- Location
- Qty (quantity in stock)
- Vendor
- Notes

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

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

To un-delete an item, simply scan or enter its item number. This will re-enable the item with its item information intact.

## 2.1.2 Editing Items - Prices Tab

The screenshot shows a software window titled "Edit Record" with a sub-header "Edit Inventory Item". Below the sub-header are four tabs: "General", "Prices", "Barcode Labels", and "Limits". The "Prices" tab is active. A text block explains: "Cost is commonly referred to as wholesale price. Current Price is the standard item price. List Price is also referred to as MSRP." Below this is a section titled "Item Pricing" containing three input fields: "Cost:" with the value "400.65", "Current Price:" with the value "608.02", and "List Price:" with the value "700.00". At the bottom of the window are three buttons: "OK", "Delete", and "Cancel".

**Figure c.** Prices Tab

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

- Cost
- Current Price
- List Price

The Cost refers to the amount that was paid for an item. The Current Price is what the item sells for and the List price is the retail price (also known as Manufacturer Suggested Retail Price or MSRP).

### 2.1.3 Editing Items – Barcode Labels Tab

Figure d. shows the Barcode Labels tab. This tab performs barcode label printing for the item. The Label Quantity defaults to the Quantity entered on the General tab. Otherwise, simply enter the number of barcodes that need to be printed.

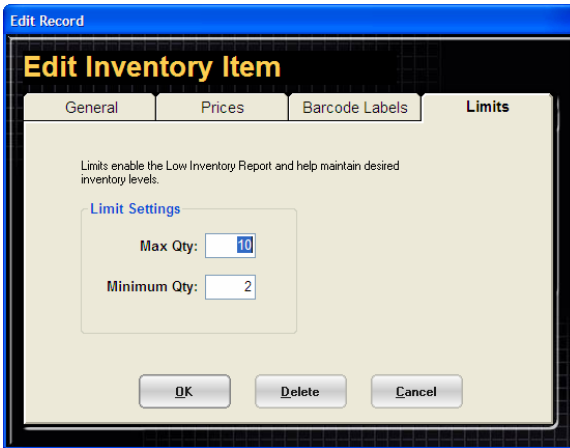
The Default Barcode Printer and Default Barcode Label settings on the Settings and Preferences screen must be set before barcodes can be printed.



**Figure d.** Barcode Labels Tab

For specific barcode label formatting or help printing barcodes please contact the Proxis help desk at 1-877-477-6947.

## 2.1.4 Editing Items – Limits Tab



The screenshot shows a software window titled "Edit Record" with a sub-header "Edit Inventory Item". Below the sub-header are four tabs: "General", "Prices", "Barcode Labels", and "Limits", with "Limits" being the active tab. The main content area contains the text: "Limits enable the Low Inventory Report and help maintain desired inventory levels." Below this is a section titled "Limit Settings" containing two input fields: "Max Qty:" with a value of "10" and "Minimum Qty:" with a value of "2". At the bottom of the window are three buttons: "OK", "Delete", and "Cancel".

**Figure e.** Limits Tab

Max Qty refers to the Maximum number of this item held in inventory. The Minimum Qty field sets the re-order point for an item. The Low Inventory report will show all items that have reached their Low Inventory thresholds and need reordering.

## 2.2 Add Screen

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

	Item Number	Description	Qty	Time Stamp	Vendor
undo	123	12	1	3/30/2006 2:17:42 PM	Vendor Test 123
undo	123	TestItem 123	1	3/30/2006 1:59:52 PM	Vendor Test 123
undo	123	TestItem 123	1	3/30/2006 1:59:52 PM	Vendor Test 123

**Figure a.** Add Screen

The Clear button will reset the Enter Item Number field. The Quantity field is a drop down number selector, but numbers may also be typed into this field.

To receive a large number of a certain item:

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

To Undo a scan:

1. Locate the scan to be deleted in the History of Additions grid.
2. Click the Undo button for that scan.
3. The quantity addition will be undone and the quantity increase reversed.
4. Be careful! Clicking the Undo button is not reversible.

## 2.3 Subtract Screen

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

The screenshot shows the 'Subtract' tab selected in a menu bar with options: Inventory, Add, Subtract, Replace, Compare, New Item, History. Below the menu is the 'Subtract From Inventory' form with an 'Enter Item Number' text box, a 'Quantity' dropdown menu, and 'Enter' and 'Clear' buttons. Below the form is the 'History of Subtractions' grid with columns: Item Number, Description, Qty, Time Stamp, and Vendor. The grid contains 10 rows of data, each starting with an 'undo' button in the first column.

	Item Number	Description	Qty	Time Stamp	Vendor
undo	3876	TestItem 9876	1	3/30/2006 5:15:03 PM	Vendor Test 9876
undo	54	TestItem 54	1	3/30/2006 5:15:02 PM	Vendor Test 54
undo	56	TestItem 56	1	3/30/2006 5:15:01 PM	Vendor Test 56
undo	32	TestItem 32	1	3/30/2006 5:15:00 PM	Vendor Test 32
undo	32	TestItem 32	1	3/30/2006 5:14:59 PM	Vendor Test 32
undo	123	12	1	3/30/2006 5:14:59 PM	Vendor Test 123
undo	123	12	1	3/30/2006 5:14:58 PM	Vendor Test 123
undo	123	12	1	3/30/2006 5:14:57 PM	Vendor Test 123
undo	123	12	1	3/30/2006 5:14:56 PM	Vendor Test 123

Figure a. Subtract Screen

The Clear button will reset the Enter Item Number field. The Quantity field is a drop down selector, but numbers may also be typed into this field.

To ship/subtract a large number of a certain item:

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

To Undo a scan:

1. Locate the scan to be deleted in the History of Subtractions grid.
2. Click the Undo button for that scan.
3. The quantity subtraction will be undone and the quantity decrease reversed.
4. Be careful! Clicking the Undo button is not reversible.

## 2.4 Replace Screen

The Replace tab allows a quantity specified (in the Quantity field) to replace the existing inventory quantity for the scanned item. The History of Replaced grid shows a historical list of previous scans.

	Item Number	Description	Qty	Time Stamp	Vendor
undo	65	TestItem 65	1	3/30/2006 5:16:15 PM	Vendor Test 65
undo	799	TestItem 799	4	3/30/2006 5:16:12 PM	Vendor Test 799
undo	65	TestItem 65	4	3/30/2006 5:16:11 PM	Vendor Test 65
undo	456	TestItem 456	1	3/30/2006 5:16:09 PM	Vendor Test 456
undo	545	TestItem 545	4	3/30/2006 5:16:08 PM	Vendor Test 545
undo	9999	TestItem 9999	4	3/30/2006 5:16:07 PM	Vendor Test 9999
undo	456	TestItem 456	4	3/30/2006 5:16:06 PM	Vendor Test 456
undo	123	12	39	3/30/2006 5:16:04 PM	Vendor Test 123

Figure a. Replace Screen

The Clear button will reset the Enter Item Number field. The Quantity field is a drop down selector, but numbers may also be typed into this field.

To replace a large number for a certain item:

1. Select or enter the quantity.
2. Scan the item.
3. The scan will appear in the History of Replaced grid.

To Undo a scan:

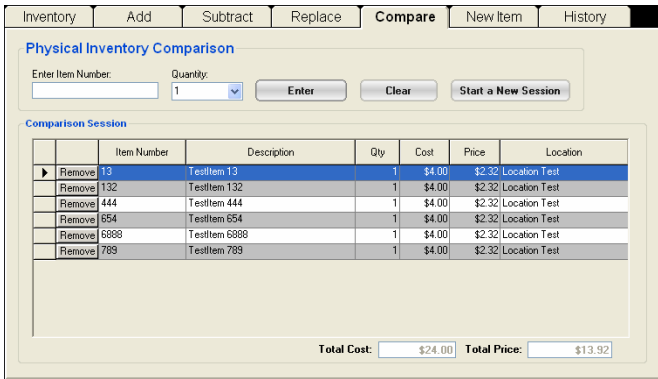
5. Locate the scan to be deleted in the History of Replaced grid.
6. Click the Undo button for that scan.
7. The quantity replacement will be undone and the quantity replacement reversed.
8. Be careful! Clicking the Undo button is not reversible.

## 2.5 Compare Screen

The Compare tab is used to conduct a physical inventory comparison. This function provides reporting to compare the actual stock scanned during a physical inventory count against item quantities listed in the Stock Manager database.

Comparison scanning from mobile barcode scanners may also be “staged” in this area from multiple devices before the comparison reports are run.

The Total Cost and Total Price fields at the bottom simply act as an item calculator for tallying cost and price for quotes, orders or blocks of inventory. They are not used for comparison scanning and are simply for reference.



	Item Number	Description	Qty	Cost	Price	Location
Remove	13	TestItem 13	1	\$4.00	\$2.32	Location Test
Remove	132	TestItem 132	1	\$4.00	\$2.32	Location Test
Remove	444	TestItem 444	1	\$4.00	\$2.32	Location Test
Remove	654	TestItem 654	1	\$4.00	\$2.32	Location Test
Remove	6888	TestItem 6888	1	\$4.00	\$2.32	Location Test
Remove	789	TestItem 789	1	\$4.00	\$2.32	Location Test

Total Cost: \$24.00 Total Price: \$13.92

Figure a. Compare Screen

The Comparison Session must have scanned items listed in the Comparison Session grid to enable the comparison reports.

After running comparison reports for physical inventory counts, click the Start a New Session button to clear comparison scanning. Be aware that starting a new session will delete all comparison scans.

The Remove button will remove a scan from the Comparison Session grid. This function is useful when an item is scanned more than once.

## 2.6 New Item Screen

The New Item tab is used to add new items (not currently in the database) to Stock Manager. New items can also be added from any function tab by simply scanning an item.

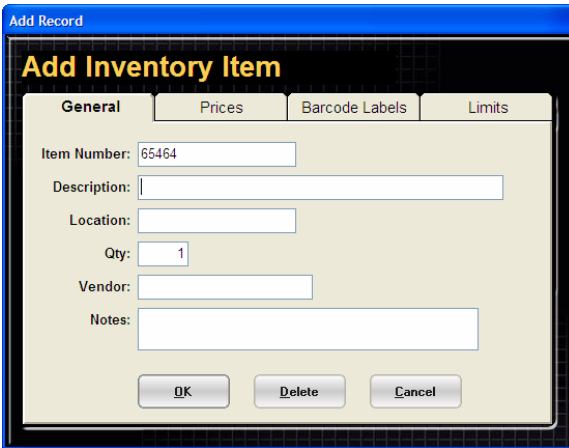
	Item Number	Description	Qty	Time Stamp	Vendor
undo	123	12	43	3/30/2006 2:18:16 PM	Vendor Test 123
undo	123	12	43	3/30/2006 2:18:01 PM	Vendor Test 123

**Figure a.** New Item Screen

Scanning a new item will open the Add Item screen shown in Figure b. The Add Item screen displays four tabs, each containing a list of item information.

To reverse the addition of a new item, click the item's Undo button in the History of New Items Entered grid. This will delete the item and remove it from the inventory.

## 2.6.1 Adding New Items – General Tab



The screenshot shows a software window titled "Add Record" with a sub-header "Add Inventory Item". Below the sub-header are four tabs: "General", "Prices", "Barcode Labels", and "Limits". The "General" tab is selected and contains the following fields:

- Item Number: 65464
- Description: [Empty text box]
- Location: [Empty text box]
- Qty: 1
- Vendor: [Empty text box]
- Notes: [Empty text box]

At the bottom of the form are three buttons: "OK", "Delete", and "Cancel".

**Figure b.** Add Item Screen General Tab

The General Tab contains standard item information such as:

- Item Number
- Description
- Location
- Qty (quantity)
- Vendor
- Notes

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

## 2.6.2 Adding New Items – Prices Tab



The screenshot shows a software window titled "Add Record" with a sub-header "Add Inventory Item". It features four tabs: "General", "Prices", "Barcode Labels", and "Limits". The "Prices" tab is active. Below the tabs, there is explanatory text: "Cost is commonly referred to as wholesale price. Current Price is the standard item price. List Price is also referred to as MSRP." Underneath this text is a section titled "Item Pricing" containing three input fields: "Cost:", "Current Price:", and "List Price:". At the bottom of the window are three buttons: "OK", "Delete", and "Cancel".

**Figure c.** Prices Tab

There are three pricing levels in Stock Manager:

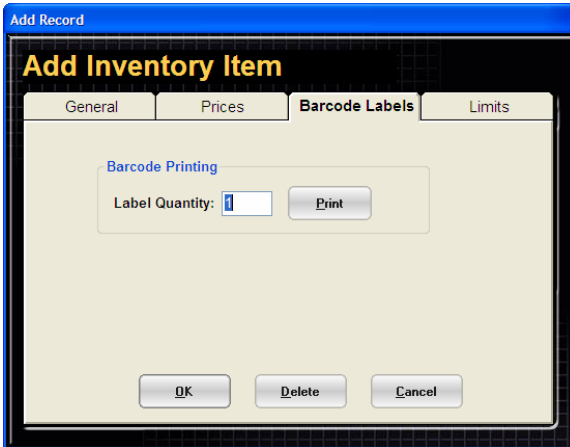
- Cost
- Current Price
- List Price

Cost refers to the amount that was paid for an item. Current price is what the item sells for and the List Price is the retail price (also known as Manufacturer Suggested Retail Price or MSRP).

### 2.6.3 Adding New Items – Barcode Labels Tab

Figure d. shows the Barcode Labels tab. This tab performs barcode label printing for the item. The Label Quantity defaults to the Quantity entered on the General tab. Otherwise, simply enter the number of barcodes that need to be printed.


The Default Barcode Printer and Default Barcode Label settings on the Settings and Preferences screen must be set before barcodes can be printed.



**Figure d.** Barcode Labels Tab

For specific barcode label formatting or help printing barcodes, please contact the Proxis help desk at 1-877-477-6947.

## 2.6.4 Adding New Items – Limits Tab



The screenshot shows a software window titled "Add Record" with a sub-header "Add Inventory Item". Below the sub-header are four tabs: "General", "Prices", "Barcode Labels", and "Limits". The "Limits" tab is selected and active. Inside this tab, there is a text box that reads: "Limits enable the Low Inventory Report and help maintain desired inventory levels." Below this text is a section titled "Limit Settings" which contains two input fields: "Max Qty:" and "Minimum Qty:". At the bottom of the dialog are three buttons: "OK", "Delete", and "Cancel".

**Figure e.** Limits Tab

Max Qty refers to the Maximum number of this item held in inventory. The Minimum Qty field sets the re-order point for an item. The Low Inventory report will show all items that have reached their Low Inventory thresholds and need reordering.

## 2.7 History Screen

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

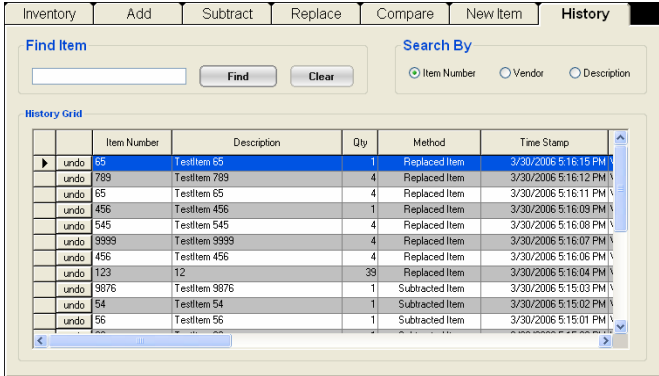


Figure a. History Screen

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

The Undo button will reverse the action shown in the Method column. Be careful! Clicking the Undo button is not reversible.

### 3 Barcode Labels



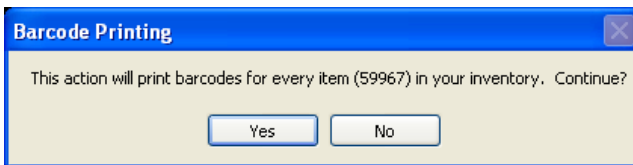
**Figure a.** Common Barcode Printers

Stock Manager prints barcode labels using common barcode and laser printers. There are a number of predefined label formats to choose from including sheets of Avery-style mailing labels. Label templates are created in Crystal Reports and can be modified.

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

#### 3.1 Printing All Item Labels

To print a barcode label for each item in the inventory, click on the Print Barcodes button.



**Figure a.** Printing Labels for All Items

This function will use the current inventory quantities. If there are 54 widgets with Item Number 123, Stock Manager will print 54 labels for this item.

There are three methods for printing barcodes for specific items. These methods are listed below.

## 3.2 Individual Item Barcode Printing

There are three methods for printing barcodes for individual items:

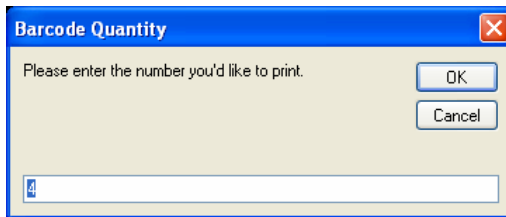
- From the Item Edit or Add Item screen's Barcode Labels tab.
- From the Main Screen Inventory tab's Barcodes column.
- When synchronizing inventory values with a mobile device.



**Figure a.** Printing Labels for Individual Items

Figure a. shows the Edit Inventory Item screen's Barcode Labels tab. This screen will print the designated label quantity for the item being edited.

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



**Figure b.** Printing Labels for Individual Items

## 4 Inventory Reporting

Stock Manager includes 5 basic inventory reports:

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




**Figure a.** Selecting an Inventory Report

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

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

## 4.1 Full Inventory Reporting

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



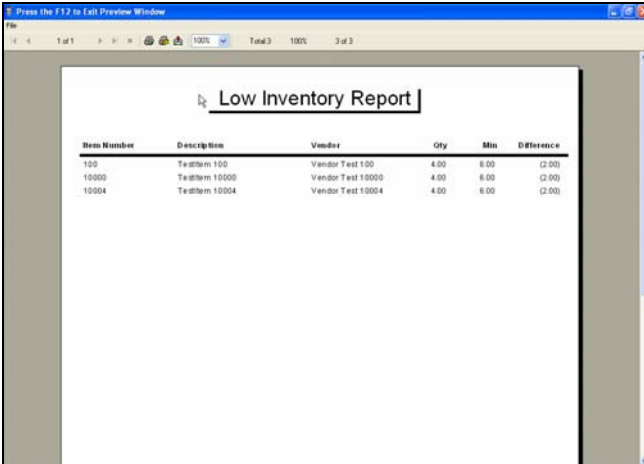
The screenshot shows a software window titled "Full Inventory Report" with a table of inventory items. The table has columns for Item Number, Description, Qty, Min, Max, Cost Per, Price Per, and List Price. The data is as follows:

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

Figure a. Full Inventory Report

## 4.2 Low Inventory Reporting

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



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

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

Figure a. Low Inventory Report

### 4.3 Physical Inventory Reporting

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

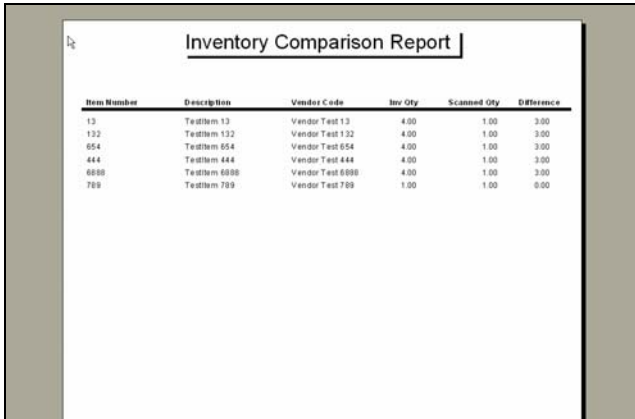
A typical Comparison session involves one or more mobile barcode scanners scanning and recording current quantities for every item in the inventory.



Figure a. Selecting a Comparison Report

### 4.3.1 Items Scanned Compared to Stock Manager Levels

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



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

Figure a. Inventory Comparison Report

### 4.3.2 Items Scanned but Not in Stock Manager

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

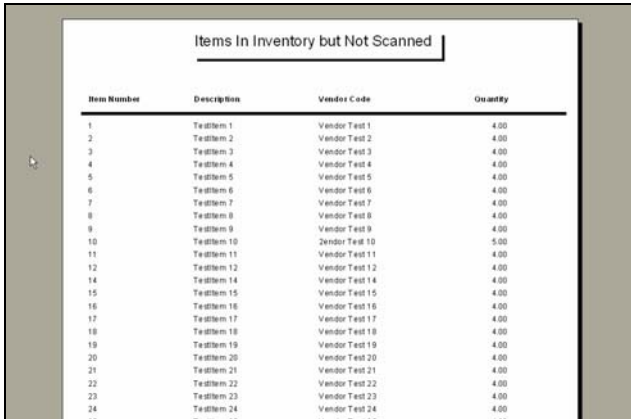


Item Number	Description	Vendor Code	Quantity
54654			1.00
601			1.00
6013343			1.00

Figure a. Items Not Found Report

### 4.3.3 Items in Stock Manager but Not Scanned

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



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

Figure a. Items Not Scanned Report

## 5 Backing up Data

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

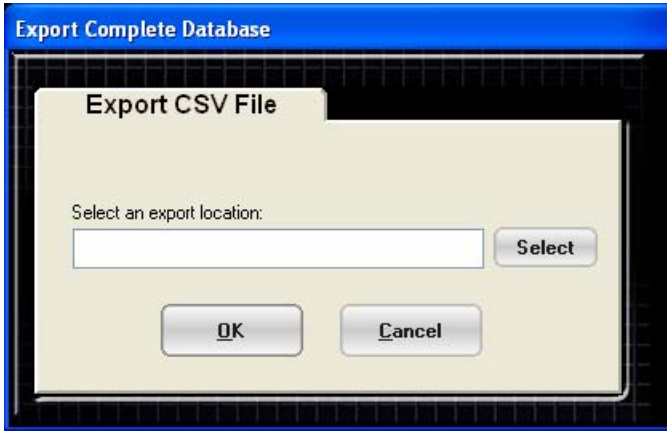


**Figure a.** Selecting a Backup Location

Please call the Proxis help desk at 1-877-477-6947 to restore the database from a backup.

## 6 Exporting Data

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



**Figure a.** Selecting an Export Location

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

## **7 Using the POS-X Xt50 Barcode Scanner**

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

### **7.1 Scanner Functions**

Stock Manager has the following scanner functions:

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

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



**Figure a.** Scanner Main Menu

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

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

## 7.2 Advanced Scanner Settings

The Xt50 Barcode Scanner has an Advanced Settings screen that controls functions like

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

### **To Enter the Advanced Setting mode:**

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

For more information on the Xt50 Advanced settings please contact the Proxis help desk at 1-877-477-6947.

### 7.3 Add To Inventory

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



Figure a. Add To Inventory

#### To add a single quantity to an existing item:

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

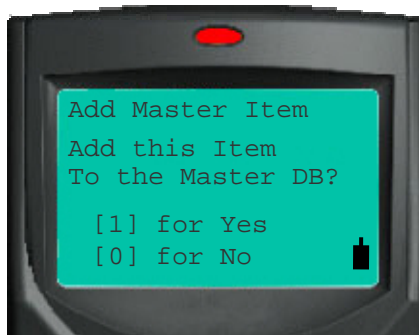
**To add a large quantity to an existing item:**

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

**To manually key in an item without a barcode:**

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

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



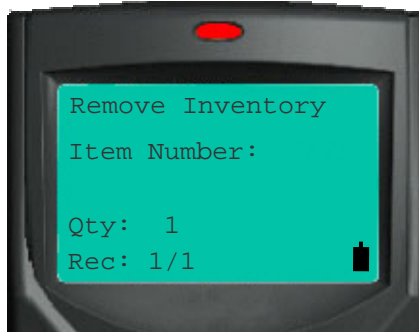
**Figure b.** Add New Items

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

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

## 7.4 Remove From Inventory

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



**Figure a.** Subtract From Inventory

This function works just like the Add to Inventory function in section 7.3.

### **To subtract a single unit from inventory:**

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

### **To subtract a large quantity from an existing item:**

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

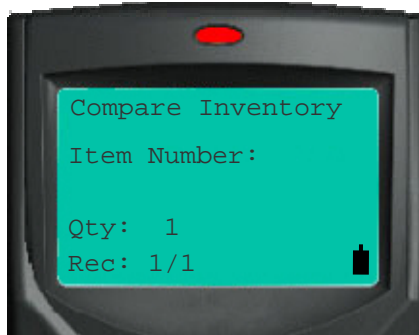
### **To manually key in an item without a barcode:**

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

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

## 7.5 Compare Inventory Quantities

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



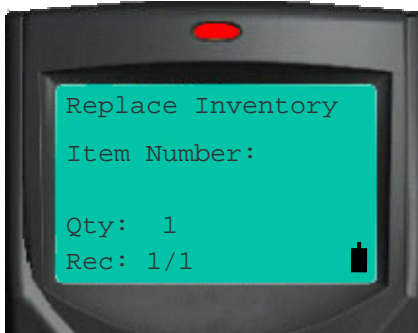
**Figure a.** Compare Inventory Quantities

This function works like Add To Inventory and Remove Inventory. Please refer to section 7.3 for scanning instructions.

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

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

## 7.6 Replace Inventory Quantities



**Figure a.** Replace Inventory Quantities

This function is similar to the Add To Inventory and Remove Inventory functions. Please refer to section 7.3 for scanning instructions.

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

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

## 7.7 Lookup Inventory

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



**Figure a.** Lookup Items

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

### **To change the value of an item:**

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

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

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

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

## 7.8 Synchronize

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



**Figure a.** Synchronize the Device

### To synchronize the device:

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

If synchronization doesn't occur immediately, click the Abort button on the desktop and perform steps 5 and 6 again.

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

## 7.9 Utility

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



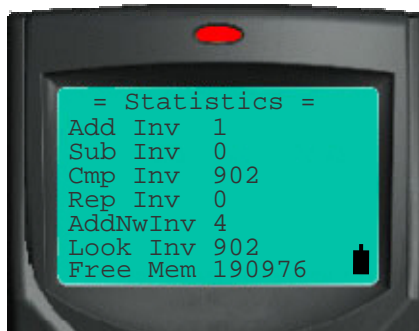
**Figure a.** Clear Data Utility

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

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

## 7.10 Status

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



**Figure a.** Memory Status

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

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

## 7.11 Scanner Advanced Settings

The Scanner Table configures the Xt50 barcode scanner for specific scanner settings. Support for ISBN barcodes can be turned on or off. Lead digits can be enabled or disabled. The scanner can even be restricted to only scan a certain barcode type.



**Figure a.** Scanner Table

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

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

## 8 Using the Symbol Palm Barcode Scanner



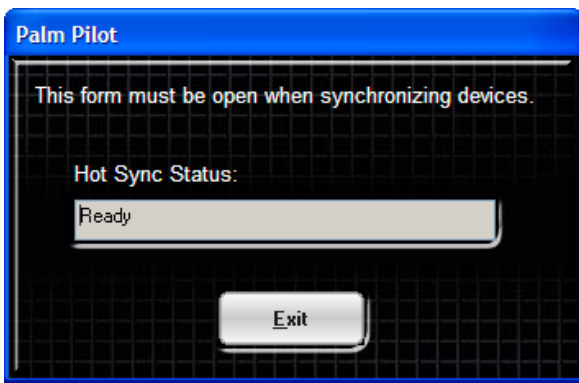
**Figure a.** Symbol SPT 1550 Barcode Scanner

Stock Manager for the Symbol SPT series scanners offers a versatile inventory management application for a standard Symbol Palm barcode scanner.

### 8.1 Sending Inventory Data to the Scanner

**To load inventory items onto the device:**

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



**Figure a.** Device Synchronization

## 8.2 Scanner Functions

The Palm version has the following basic scanner functions:

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

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

### Main Menu:

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

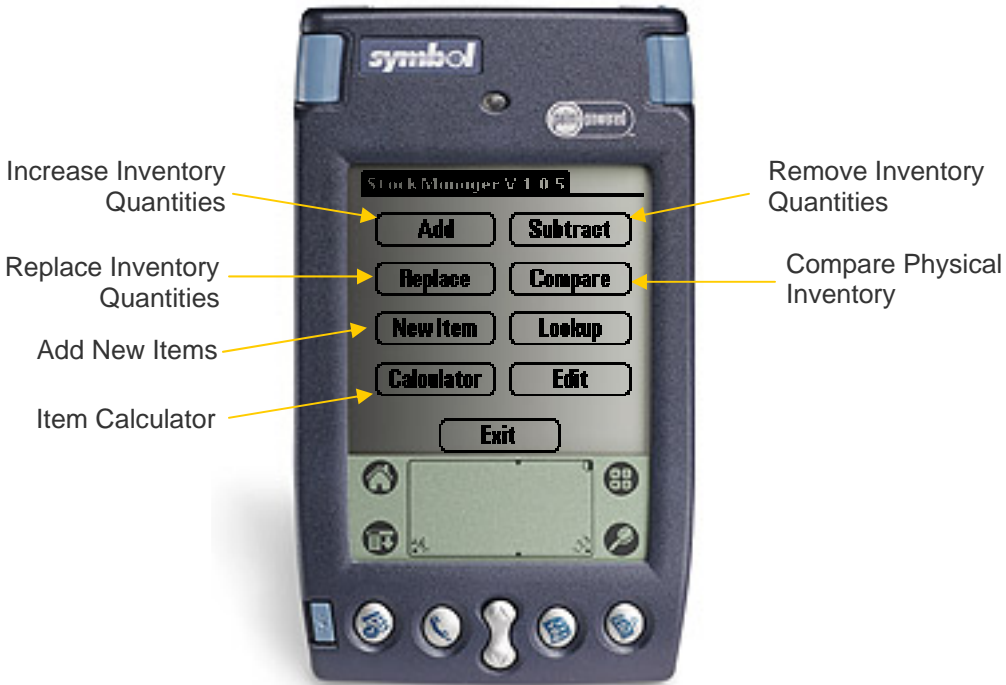


Figure a. Scanner Main Menu

## 8.3 Add To Inventory

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



Figure a. Add To Inventory

### To increase inventory quantities by a single unit:

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

### To increase an item by a number larger than one:

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

### To manually key in an item without a barcode:

1. Tap the Barcode field.

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



**Figure b.** Adding a New Item to Inventory

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

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

## 8.4 Subtract From Inventory

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

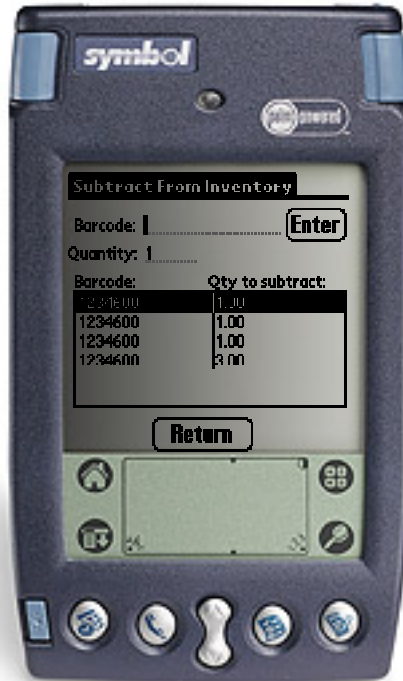


Figure a. Subtract From Inventory

### To decrease inventory quantities by a single unit:

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

### To decrease an item by a number larger than one:

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

**To manually key in an item without a barcode:**

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

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

## 8.5 Compare Inventory Quantities

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



**Figure a.** Compare Inventory Quantities

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

Scan each item or scan one and then change that item's quantity. After synchronizing, the scanned data is sent to the desktop for comparison. Refer to section 4.3 for Comparison Report options.

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

## 8.6 Replace Inventory Quantities



**Figure a.** Replace Inventory Quantities

This function is similar to the Add To Inventory and Subtract from Inventory functions. Please refer to section 8.4 for scanning instructions.

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

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

## 8.7 Add New Inventory Item

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



Figure a. Add New Inventory Items

### To add a new item:

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

### To exit without saving:

1. Press the Return button.

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



Figure b. Palm Soft Numeric and Text Keypads

## 8.8 Lookup Products

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

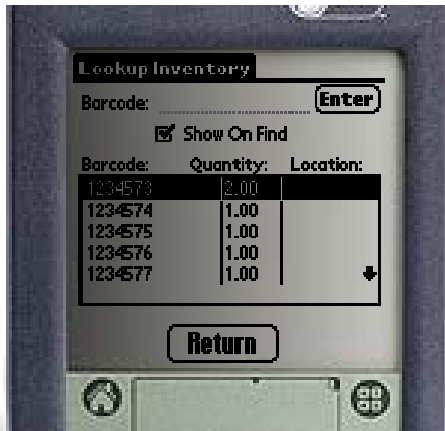


Figure a. Lookup Inventory Items

### Lookup Quantity and Location:

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

**Lookup All Item Information:**

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



**Figure b.** Show Scanned Item Information

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

## 8.9 Edit Inventory Information

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



Figure a. Lookup Inventory Quantities



Figure b. Lookup Inventory Quantities

## 8.10 Synchronize the Palm Scanner

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



**Figure a.** Synchronize the Device

### To synchronize the device:

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

## 8.11 Data Utility

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



Figure a. Main Menu Drop Down



Figure b. Clear Data Utility

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

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

## 8.12 Palm Device Status

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

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

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



Figure a. Clear Data Utility

### 8.13 Calculator Function

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

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

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



Figure a. Item Calculator

# Appendix and Supplemental Information

## Appendix A: The Xt50 Alpha Keyboard

The Alpha Keyboard feature on the Xt50 barcode scanner allows the user to key in letters using the numeric keypad. The Alpha Keyboard works much like a standard cell phone's texting function.

To enter an Upper case letter using the keypad:

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

To enter a Lower case letter:

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

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

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

## Appendix B: Device Registration

The Xt50 barcode scanner has a simple registration screen. Scanners are generally registered at the manufacturer's warehouse.

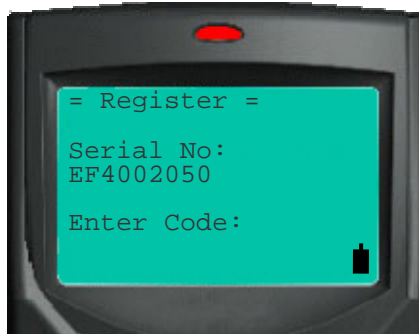


Figure B.1 Xt50 Registration Screen

An activation code is required when installing a new inventory application on Symbol Palm barcode scanners. This code is based off of the device ID. Activation codes are available from your vendor.

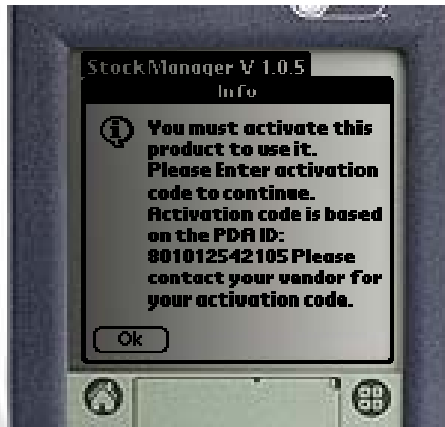


Figure B.2. SPT 1550 Unregistered Copy

Enter the activation code received from your vendor:



**Figure B.3.** SPT 1550 Registration Screen

## Appendix C: Installing Palm Files

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

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



Figure C.1. HotSync Icon in System Tray

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

### To Install Palm Program Files:

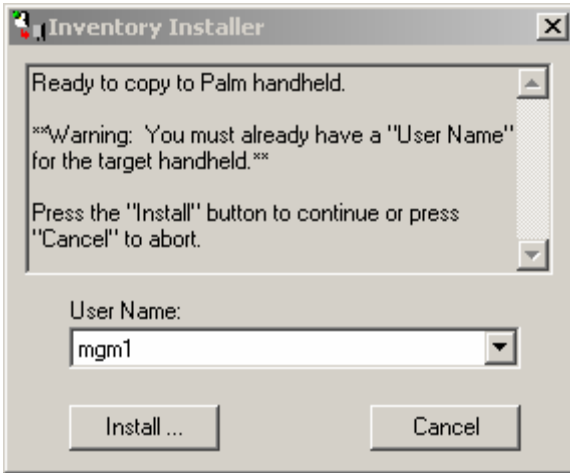
1. Browse to the C:\WinPOS40\Palm Support Files\ directory.
2. Double click the Install\_Palm\_Files.exe application.
3. If the prompt in Figure C.2 is displayed, follow the first time installation directions below.
4. Wait a few moments for the HotSync Manager to restart.
5. Press the hot synch button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



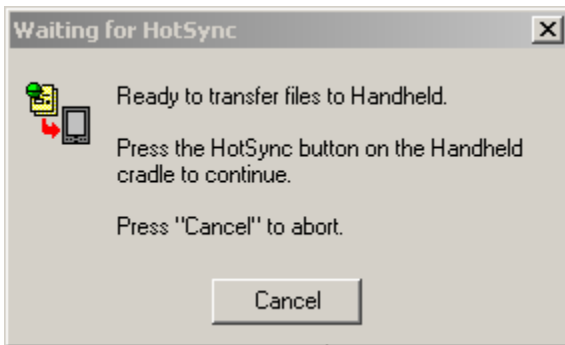
Figure C.2. First Installation Prompt

**First Time Installation:**

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



**Figure C.3.** Select Palm User Name



**Figure C.4.** HotSync Status