StoreNext

PocketOffice for ISS45

Release 3 User Reference

PocketOffice User Reference

Date of Issue	Product Identification Number	Part Number	Brief Description
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About this Reference Guide

The Pocket Office User Guide is divided into chapters as follows:

Chapter 1, Introducing Pocket Office provides an overview of Pocket Office. In addition, this chapter outlines how Pocket Office works with StorePoint Office as well as its features and benefits.

Chapter 2, Getting Started with Pocket Office, introduces you to basic Pocket Office iPAD operations and terminology. This chapter explains the PocketOffice interface to ISS45. Item Maintenance profiles created here are implemented on the Pocket PC within PocketOffice Item Maintenance and PocketOffice Batch Item Maintenance.

Chapter 3, Quick Shelf Audit, introduces you to basic Pocket Office Shelf Audit operations. Pocket Office Stock Counting provides you with the tools to audit shelf prices and make price changes.

Chapter 4, Q-Buster, introduces you to entering and processing Q-Buster transactions. Q-Buster is an important tool used to reduce customer checkout time.

Chapter 5, Pocket Office Item Maintenance, introduces you to Pocket Office Item Maintenance operations. Pocket Office Item Maintenance turns your Hand-Held Computers (HHCs) into powerful tools in facilitating StoreNext Item Maintenance.

Chapter 6, Pocket Office Batch Item Maintenance, introduces you to Pocket Office Batch Item Maintenance operations. Batches created here are downloaded to ISS45 for activation.

Chapter 7, Pocket Office Dashboard, introduces you to Pocket Office Dashboard operations. RPO Dashboard provides you with a tool to manage and monitor POS activity.

Chapter 8, Pocket Office Remote Manager Authorization, introduces you to Pocket Office RMA operations. RPO RMA allows you to receive and resolve control checks and alerts from the POS.

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Introducing Pocket Office for ISS45

This chapter provides an overview of Pocket Office. In addition, this chapter outlines how Pocket Office works with ISS45 as well as its features and benefits.

In this chapter:

What is Pocket Office?

Welcome to Pocket Office®. Pocket Office is a suite of applications designed to expand and extend the capabilities of ISS45 through a wireless network of iPADs. With Pocket Office, your iPADs (with built-in barcode scanners) running Microsoft Windows CE® become an extension of ISS45 and provide you with the ability to:

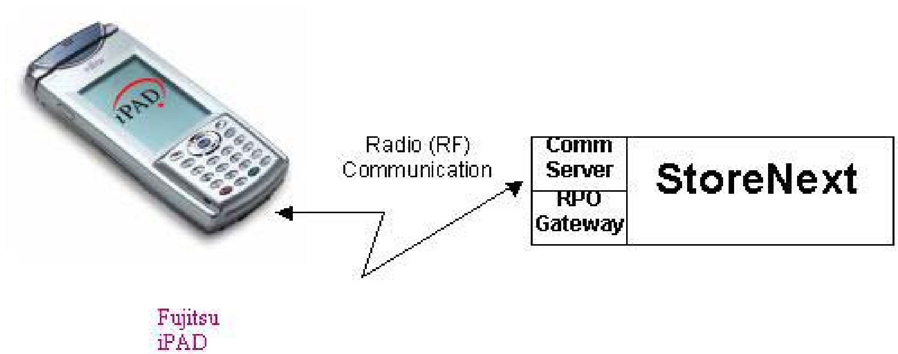
- Implement Q-Buster™ – the ability to scan the items in a customer's basket prior to reaching the POS. At the POS, the transaction can be promptly retrieved for tendering—reducing checkout time.
- Perform quick shelf audits and price changes
- Streamline item file maintenance using a customizable profile creator—offering unlimited combinations of field attributes and preset field values.
- Monitor POS sales, checker activity and send messages to the POS terminal.

How does Pocket Office Work?

Pocket Office software resides on your iPAD and communicates with ISS45 through additional layers of software stored on your server. These applications are known as the Mobile Communication Server and the Pocket Office Gateway.

The Comm Server handles all communication between the iPAD and the Pocket Office Gateway. The Pocket Office Gateway handles data conversion and exchange from ISS45 to the iPADs.

iPADs containing contain RF (radio frequency) hardware communicate and exchange data directly to ISS45 through the Comm Server.



"On-Line" Mode Communication

Features & Benefits

Pocket Office applications provides the following features and benefits:

Ease of Use:

- Intuitive graphical user interface.
- Minimal steps to complete core tasks.
- Dedicated workflow for exception handling.

Scaleable:

- In iPADs without keyboards, virtual keyboards are available for all fields.
- Data elements reside on the server and data is accessed and updated in real time.

Software Technology:

Pocket Office communicates and exchanges data with products through two layers of software

- Pocket Office (Pocket Office) Gateway™ – The layer of software residing on the server PC that handles data conversion and exchange from the back office application to the iPADs.
- Comm Server™ – The layer of software that resides on the Server PC and handles all communication between the iPADs and the Pocket Office Gateway.

Hardware Technology:

Current hardware support includes the following iPAD models (with built-in, hands-free scanners) running Microsoft® WIndows® CE Version 3.0.

- Fujitsu iPAD

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Getting Started with Pocket Office

This chapter introduces you to basic iPAD operations and terminology. The chapter explains the Pocket Office Admin application interface to ISS45. Item Maintenance profiles created here will be implemented on the iPAD (see also Chapter 5, Pocket Office Item Maintenance and Chapter 6, Pocket Office Batch Item Maintenance). In addition, this chapter explains the powerful RPO Audit Query & Reporting application.

In this chapter:

Hand-Held Computer Basics

Buttons

While basic operation of the iPAD is fairly intuitive, several iPAD buttons have been integrated within Pocket Office applications to streamline data entry.

Fujitsu iPAD

On/Off Button

Turns the iPAD back on after being turned off manually or automatically (sleep mode). You are returned to the same application screen and field prior to being turned off.

Scanner Activation Buttons

Activates the scanner (in a barcode enabled field) as well as acts as an Enter key when a focus (see Terminology below) is on a button.

Scroll (Cursor) Up Button

The Cursor Up button on your iPAD may be used to increment stock counts and delivery counts (by one) after a successful scan of one unit.

Scroll (Cursor) Down Button

The Cursor Down button(s) on your iPAD may be used to decrement inventory counts and delivery counts (by one).

Virtual Tab Button (iPADs Only)

On iPADs, the “X” button can be used to tab (move) from field to field on Pocket Office screens.

Application Menu Header Bar Icons

Each Pocket Office application menu has the following three icons that appear above the menu name.

Utils Icon

Tapping on the Utils icon 

will open the Utility Menu which consists of the following options:

- Get Data (See page 2-61)
- Settings (See page 2-8)
- Register as Roving (See page 2-12)
- Exit – To return to the Pocket Office Main Menu

Up Arrow Icon

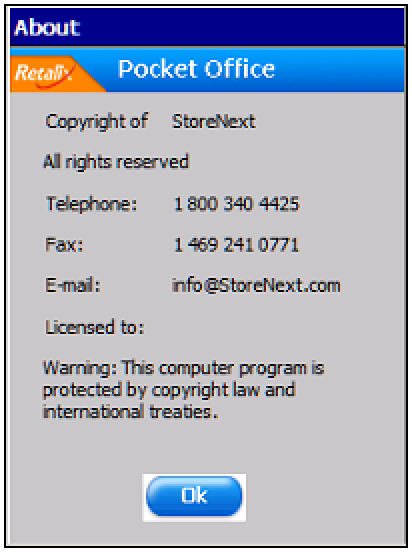
Tapping on the Up Arrow icon 

will move you to the previous application menu.

About Icon

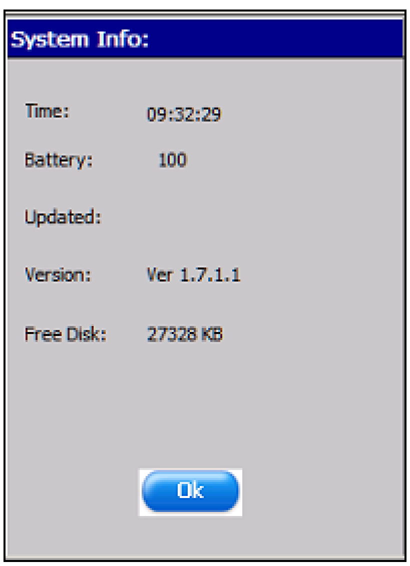
Tapping on the About icon 

will display an information screen about Pocket Office.



Info Icon

Tapping on the Info icon  will display an information screen regarding your software version and your remaining iPAD battery charge and free disk space.



Tapping

Tapping refers to touching the plastic stylus (or your finger) to the desired screen location one time. Tap a field to place cursor in a field or to select a button. On iPADs without a keyboard, a tap into a non-barcode enabled field will activate a numeric or alphanumeric keypad.

Dragging (for overrides)

Dragging refers to highlighting an existing entry in a field by placing the plastic stylus (or your finger) to the right of the entry and “dragging” it back across to the left. This serves to “highlight” the entry and allows it to be overridden.

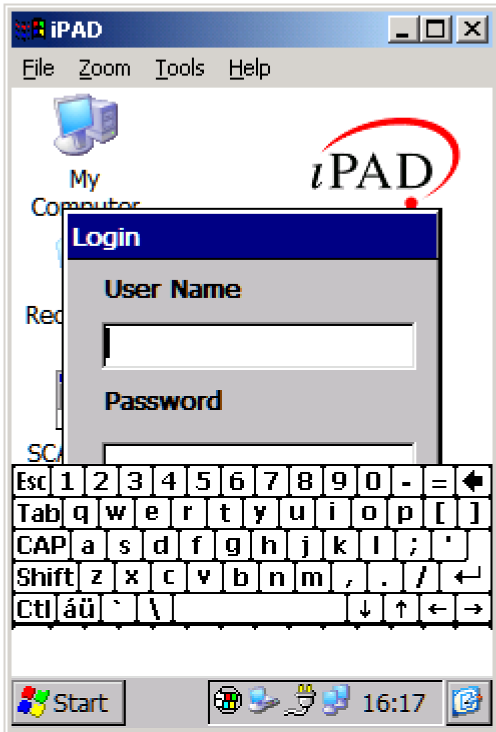
Entering Amounts

When entering dollar and quantity amounts, Pocket Office assumes no implied decimals. Once a decimal is entered, Pocket Office will assume “zeros” follow the last number entered. For example, please look at the chart below to see how the keypad entries are interpreted by Pocket Office for a dollar amount field.

Entry	Pocket Office Interpretation
165	$165.00
1.6	$1.60
.7	$0.70

Virtual Alphanumeric Keypad

On non-scan enable fields the alphanumeric keyboard is launched automatically when the cursor is placed in the field. The key layout is similar to a computer keyboard.



On Fujitsu iPADs, press the **<SFT><0>** keys together to manually launch the virtual keyboard. Press **<SFT><0>** again (or the **<SFT><CAN>** keys) to close the keyboard. On Symbol iPADs, close the keypad by tapping the **X** located in the upper right-hand corner of the keypad window.

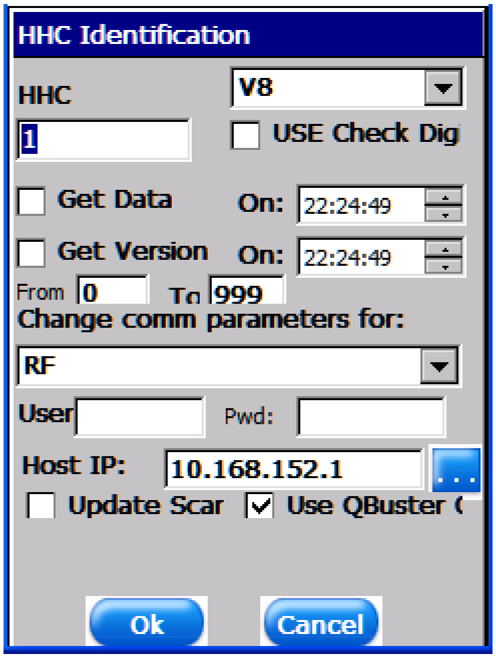
Pocket Office Terminology

Throughout this manual the several different terms will used to describe the Pocket Office application. Please be familiar with the following list:

Word	Description
Pocket Office Server	The layer of software that sits on the server PC and handles all communication between the iPADs and the Pocket Office Gateway on the server.
Focus	The location on the screen that contains the flashing cursor or highlighted button.
HHC	An acronym for Hand-Held Computer.
Groups	One or more users who share the same item maintenance profiles.
On-Line Mode	The wireless communication between the iPADs (with RF capability) and ISS45.
Profile	A predefined list of item maintenance fields and field attributes that display within the Item Maintenance and Batch Item Maintenance applications.
RF	An acronym for Radio Frequency. iPADs with RF capability are in “on-line” mode when using Pocket Office.
Pocket Office Gateway	The layer of software residing on the server PC that handles data conversion and exchange from ISS45 to the iPADs.
Users	Individuals assigned privileges that determine what item maintenance profiles can be accessed.

Pocket Office Settings

The Pocket Office Settings govern the iPAD Identification and automated iPAD synchronization routines. To access Pocket Office Settings you will be prompted to enter a User Name and Password with privileges to make these changes.



The following fields appear on the iPAD Identification screen.

Setting	Description
StoreLine/ISS45 Version	Tap the version drop-down selection arrow and select **V7** or **V8** (depending on the StoreLine/ISS45 version installed).
HHC Identification	The identification number assigned to the iPAD.
Use Check Digit	Leave unchecked.
Get Data	Not Used.
On:	Not Used.
Get Version	A check denotes that the iPAD will automatically download the latest Pocket Office iPAD software from the Pocket Office Gateway at a designated time.
On:	The designated time of the day (in hours, minutes and seconds) the iPAD will attempt to download the latest software from ISS45. To change the time, highlight (tap) the hour, minute or second segment and use the arrow up or arrow down button to increment or decrement the setting.
From	(ISS45 V7 Systems Only) – The beginning file extension number to use to uniquely identify batch files created from this iPAD. (**Note**: Assign a unique range of 50 or more per iPAD. For example, iPAD #1, 1 through 50. iPAD #2, 51 through 100. iPAD #3, 101 through 150, etc.)
To	(ISS45 V7 systems only) – The ending file extension number of the range that will be used to uniquely identify batch files created from this iPAD.
Change comm parameters for:	The method used for communicating to iPADs. Tap the arrow down button and choose RF (for communicating in on-line mode).
User	Not Used.

Setting	Description
Password	Not Used.
Host IP	The IP Address of the server. (If you do not know the IP Address of the server, you can click the ellipsis button and perform a query – see below).
Update Scanner	If the scanner was modified during the Pocket Office install in order to properly read one or more barcode types, check this box so that it will be saved as unique to Pocket Office. This will permit other applications to have unique settings and still leave Pocket Office operations unaffected.
Use Q-Buster	Check this box if you are using Q-Buster Cards (with up to 8-digit barcodes). Leave this box blank if you are using the Member Card as the Q-Buster Card.

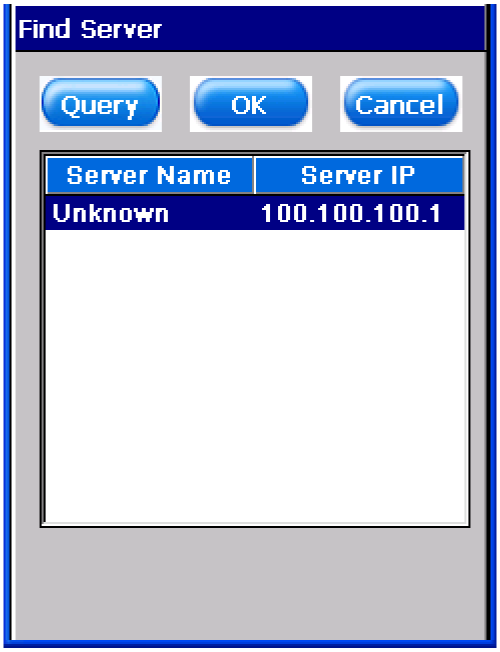
➢ **To change the Pocket Office configuration settings:**

1 From the Pocket Office Main Menu, tap the Utils icon and choose **Settings**. *The iPAD Identification Menu is displayed.*

2 Make the desired changes.

3 (Optional) To obtain the IP Address of the server by performing a query, click the Host IP field's ellipsis button:

The Find Server screen appears:



4 Tap **Query**.

The IP Address is retrieved.

5 Tap **OK**.

You are returned to the HHC Identification screen with the Host IP Address field completed.

6 When finished, click **OK**. *The changes are saved and you are returned to the Pocket Office Main Menu.*

Note:

To use the automated "Get Version" feature, the iPAD must be left at the Pocket Office Main Menu. Otherwise, the "Cannot Get New Version, Not in Main Screen" message will appear at the designated "On" time.

Roving HHC Registration

HHCs that are moved for use in multi-store environments must be registered as "Roving" prior to use. To register a Roving HHC, you must have the Registration Key provided to you.

➢ **To register the Roving HHC:**

1 From the Pocket Office Main Menu, tap the Utils icon and choose **Register as Roving**. *The Roving Unit screen appears:*

2 Enter the Registration Key and tap **OK**.

3 The HHC is now ready to be used in the store.

Note:

This procedure only needs to be performed once for each roaming device. You must perform the following steps each time the HHC is moved to a different environment:

1) Confirm the RPO Server is running
2) Configure the Settings Screen (see page 2-54)

Pocket Office Admin

Pocket Office Admin is a program that resides on the ISS45 server that controls the operations of Pocket Office applications. This powerful tool establishes and maintains:

- The users with access to the Pocket Office applications

- User login names and passwords
- Groups that will share the same application and item maintenance profile accessibility
- Item Maintenance Profile field-level attributes including:
    - Field display order
    - Read/Write or Read Only access
    - Preset field default values
    - Required or non-required entry
- General item maintenance functionality including:
    - Permission to add new items
    - Permission to delete items
- Audit File Queries – the ability to view details of Item Maintenance and Shelf Audits performed from the HHCs as well as operator performance statistics.

Pocket Office Security

Pocket Office requires individuals (***users***) to sign on, which identifies them to the system and provides access to authorized applications. To make administration of these rights as simple as possible, Pocket Office combines users into ***groups***, or sets of users who all possess similar Pocket Office application and item maintenance profile access.

A group can contain many users. Each of the users in the group has the same set of rights and can access the same applications and item maintenance profiles.

On the other hand, the same user may have different job functions, and want to access a different set of item maintenance profiles in the application. Therefore, Pocket Office allows users to belong to many groups. Users and groups provide you with the security you need to ensure appropriate access to Pocket Office.

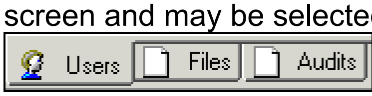
User information includes the name and password of each individual who is allowed to access to Pocket Office.

Groups can have unique application and item maintenance profile access or share its privileges with another group. A good rule of thumb is to share profile groups that possess lesser application and item maintenance field-accessibility privileges with groups that have greater privileges. Group profiles that have the highest application and item maintenance field-accessibility privileges should not be shared with another group.

When an item maintenance profile is added to a shared group, it is automatically added to the profile list of the parent (destination) group.

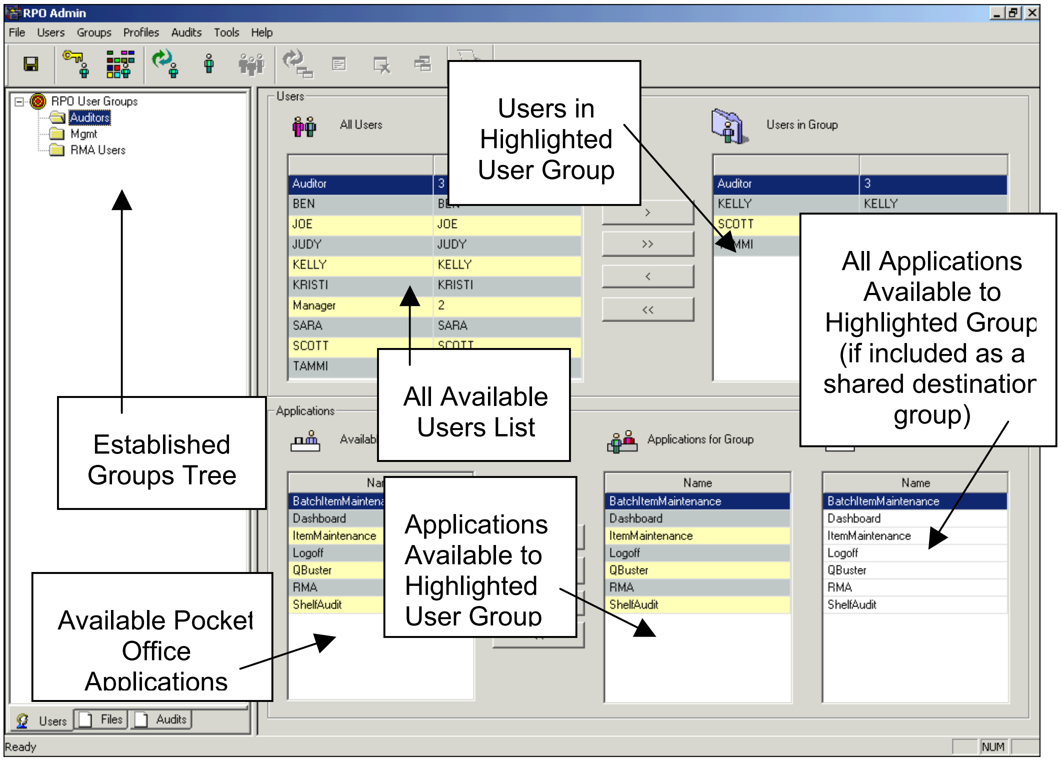
An alternative to group sharing is to selectively “duplicate” or copy a profile from one group to another.

Pocket Office Admin Screen

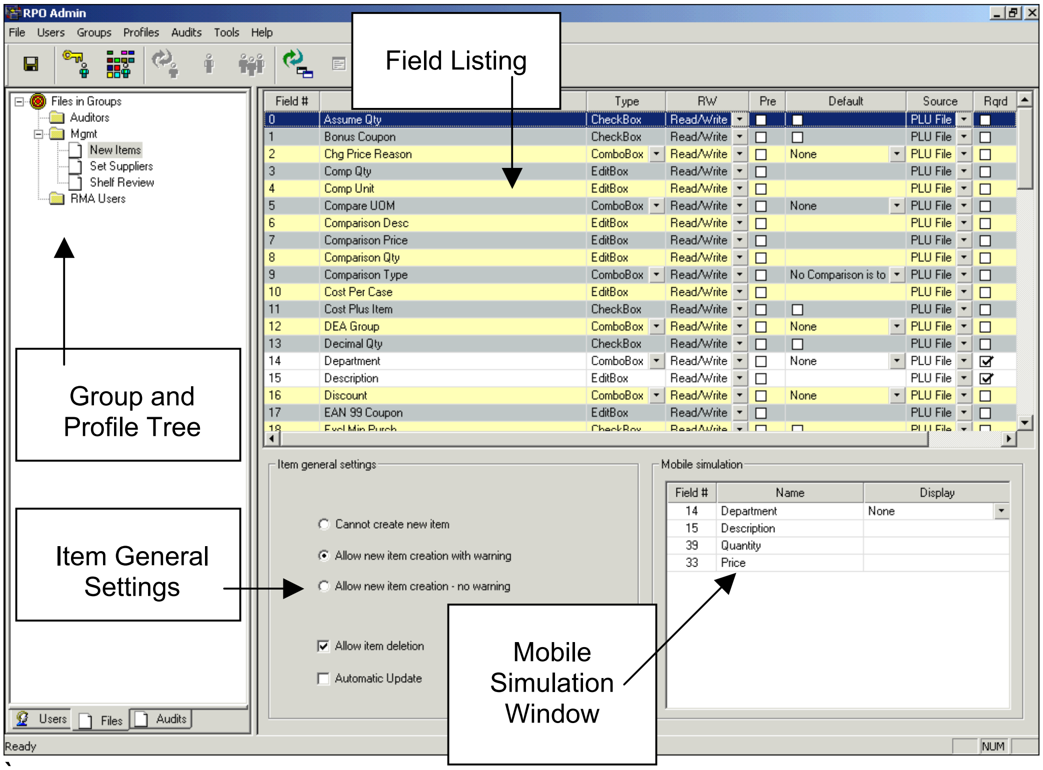
The Pocket Office Admin screen contains three tabs: Users, Files and Audits. (The tabs display in the lower left had corner of the screen and may be selected by clicking the desired tab


).

The “Users” tab displays the established user groups and the users and applications assigned to each group. It is within this tab that user and group maintenance takes place.

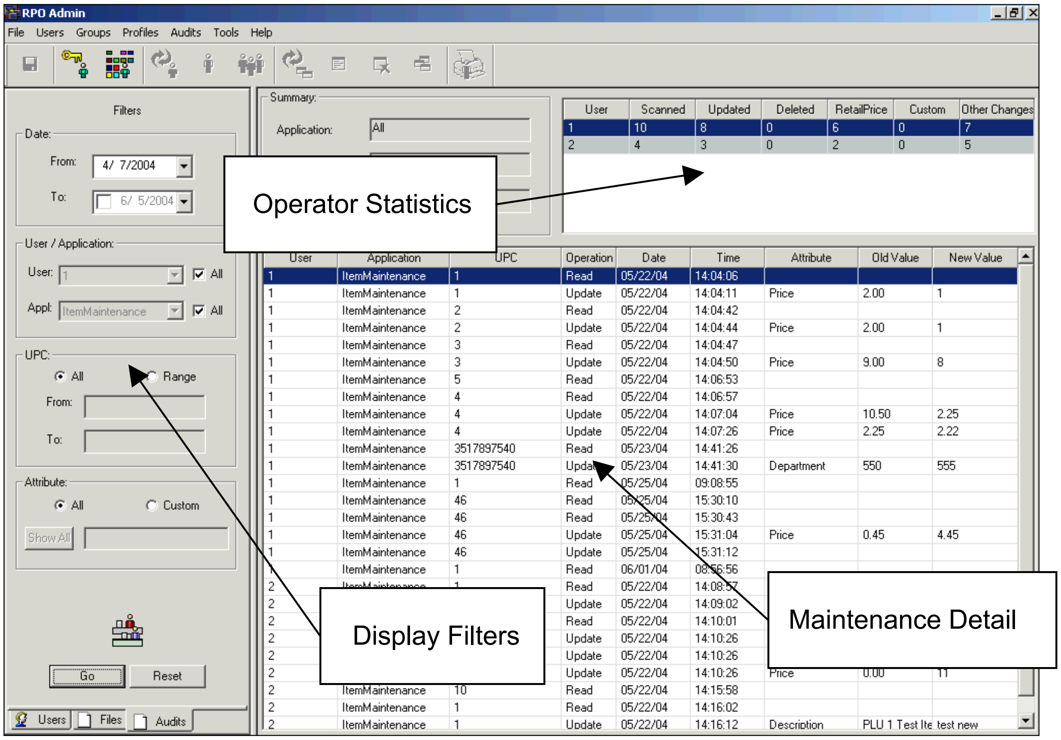


The "Files" tab displays the profiles that have been created and assigned to a group. When the profile is highlighted the field listing (with prior modifications for this profile), the Item General Settings and Mobile Simulation display in their respective area on the tab.



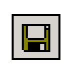
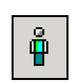
The "Audits" Tab allows you to view details of Item Maintenance and Shelf Audits performed from the HHCs as well as operator performance statistics. Through a powerful filter you can choose to query maintenance:

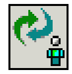
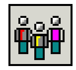
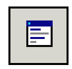
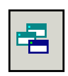
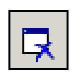
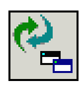
- By Date or Date Range
- By Operator
- By RPO Application
- By UPC or UPC Range
- By Field(s) Modified

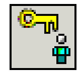
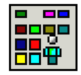


Pocket Office Admin Toolbar & Menus

The table below describes the functions available in the Pocket Office Admin screen:

To …	**Use this button**	**or this menu command**
Save the changes to Users and Groups		File | Save
Exit from Pocket Office Admin		File | Exit
To create a new user		Users | Add New Users
To delete the selected user		Users | Delete
To display user name, login and password information.		Users | Properties

To …	**Use this button**	**or this menu command**
To synchronize Back Office Users and Passwords with RPO Users.		Users | Synchronize
To create a new group		Groups | New
To delete the selected group		Groups | Delete
To rename the selected group		Groups | Rename
To share group privileges with another group		Groups | Share
To create a new profile under the selected group		Profiles | New
To open the selected profile for editing		Profiles | Open
To save the latest changes to the profile		Profiles | Save
To delete the selected profile		Profiles | Delete
To rename the selected profile		Profiles | Rename
To copy an existing profile to another group		Profiles | Duplicate
To clear all profile settings and return all them to their default values		Profiles | Clean
To synchronize Back Office Tables with RPO.		Profiles | Synchronize
To save the Audit Summary Information from an executed query in a Microsoft Excel ® Comma Space Value (CSV) file.		Audits | Save Summary
To save the Detail Summary Information from an executed query in a Microsoft Excel ® Comma Space Value (CSV) file.		Audits | Save Details
To print the results of the executed audit query. (Unavailable in this release)		Audits | Print

To …	**Use this button**	**or this menu command**
To change Pocket Office Administrator's Passwords		Tools | Password
To schedule automatic synchronization of users and profiles.		Tools | Scheduler
To display the installed version of Pocket Office Admin		Help | About

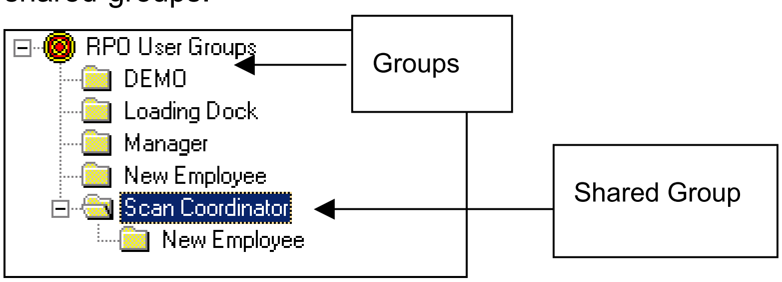
Tip: You can also access several of these commands by right-clicking a group, user or profile and selecting the desired command.

Group Tree

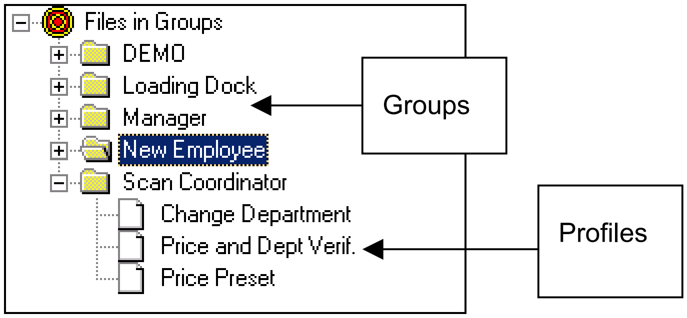
The Group Tree provides a tree and branch view of each group, shared-group and group profile listing. The tree functionality is unique to the tab that is displayed: Users or Files:

To expand a branch of the tree, click the expand () icon. To collapse the tree, click the collapse () icon.

In the Users tab, the group tree displays a list of all group and shared-groups.



The Files Tab displays item maintenance profiles attached to each group.



Pocket Office Admin User / Group Maintenance

Creating a User

Create users to define individual login information. You may create new RPO users or add them from a list of BackOffice Users.

Note:

RPO Users who will be using the Remote Manager Authorization (RMA) module must be created from the list of BackOffice Users.

When you create passwords, balance the need for system security (for example, a randomly generated password containing both letters and numbers) against the need for users to be able to remember the password easily. Keep in mind that because the Login name and Password are manually entered on the iPAD using a virtual keyboard, the longer the name and password are, the longer it will take the user to access the Pocket Office menu.

➢ **To create a new user:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 From the menu choose **Users**, followed by **Add New Users.** The Add/Create Users window appears with your cursor in the Name field:

3 Enter the name of the user.

Note:

The “Name” field can be a descriptive as you wish. It is the “Login” name that the user will enter each time they wish to access Pocket Office.

4 Click inside the **Login** field and enter a user login name.

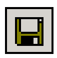
5 Click inside the **Password** field and enter the user’s password.

Note:

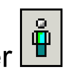
The password will appear in “asterisks” as you type.

6 Click the **Create** button. The user is added to the “All Users” listing.

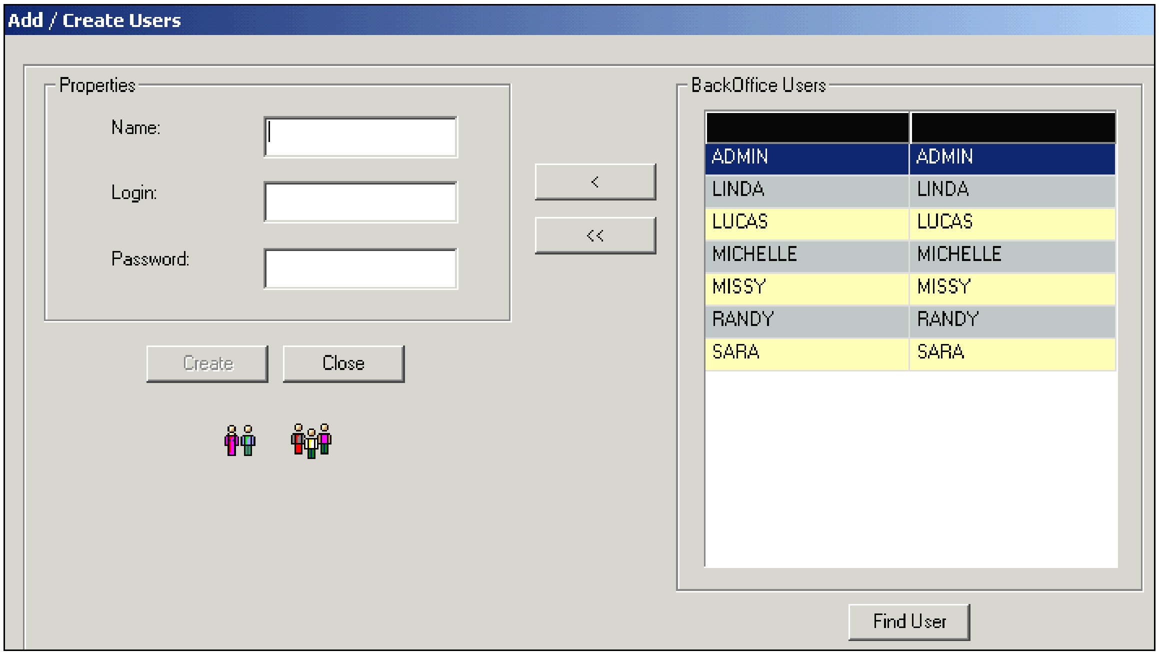
7 Click **Close** to return to the Pocket Office Admin screen.

8 Click the Save  button.

➢ **To create an RPO User from the list of BackOffice Users:**

1 From Pocket Office Admin screen, click the Add New User  button.

The Add / Create Users screen appears displaying a list of all BackOffice Users who have not been used to create an RPO User.



2 Highlight (click) a user from the list and click the < button.

Note:

You may optionally click the Find User button to search for a user by name.

The Properties fields are populated.

3 Click the Create button.

The RPO User is created and the Add / Create Users screen redisplays (and the newly created user is removed from the BackOffice Users list).

Note:

The Front Office User's Login and Password to access ISS45 are the same used to log into RPO.

4 Repeat steps 1 through 3 for each BackOffice User you wish to make an RPO User.

5 When finished, click the Close button.

You are returned to the Pocket Office Admin screen.

Note:

Newly created RPO Users using these steps must still be placed in groups that have RMA privileges.

➢ **To update a user:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Click (highlight) the user in the **All Users** list.

3 From the menu choose **Users**, followed by **Properties.** *The User Properties window appears with the Name field highlighted.*

4 Make the desired changes to the **Name**, **Login** and/or **Password** fields and click **OK**. *You are returned to the Pocket Office Admin menu.*

5 Click the Save button.

➢ **To delete a user:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Click (highlight) the user in the **All Users** list.

3 From the menu choose **Users**, followed by **Delete.** *A confirmation window appears.*

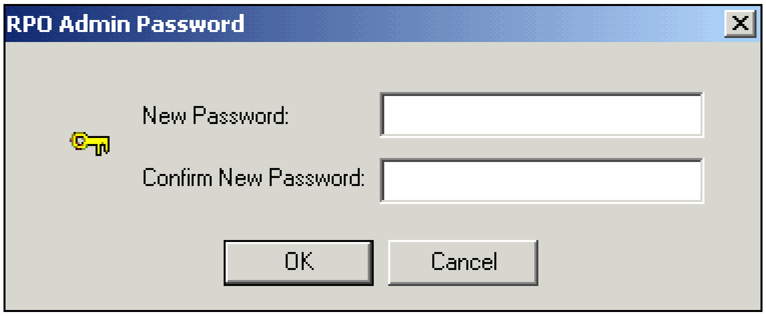
4 Click **Yes** to confirm the deletion. *You are returned to the Pocket Office Admin menu.*

5 Click the Save button.

➢ **To establish or change the Pocket Office Administrator Password:**

1 From the Pocket Office Admin Menu, click **Tools** followed by **Password**.

The RPO Admin Password Screen displays:



2 Enter the new password into the **New Password** field and confirm that password by entering it into the **Confirm New Password** field.

3 When finished, click **OK**.

Note:

Pocket Office Admin comes installed without an Administrator Password. Once you establish this password, you will be required to enter it upon launching Pocket Office Admin (before the Main Menu is displayed). If a password has been established and you wish to revert back to a no password environment, place your cursor in the "New Password" field and press the Backspace Key. Click **OK** to confirm.

Creating Groups

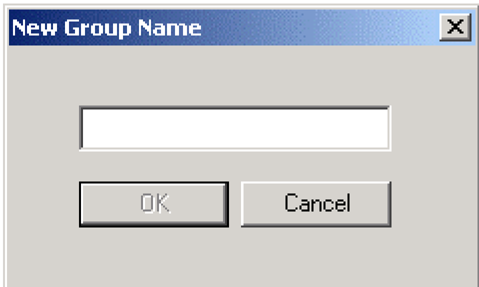
Pocket Office Admin groups are the link between users and Pocket Office applications and item maintenance profiles. Users, application access and item maintenance profiles will all be assigned to these established groups.

➢ **To create a group:**

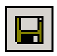
1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Highlight **Pocket Office User Groups** in the group tree.

3 From the menu choose **Groups**, followed by **New.** *The New Group Name window appears with your cursor in the Name field:*



4 Enter the group name and click **OK**. The Group is added to the list and you are returned to the Pocket Office Admin menu.

5 Click the Save  button.

➢ **To rename a group:**

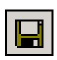
1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group.

4 From the menu choose **Groups**, followed by **Rename.** *The group name is placed in edit mode.*

5 Key in the new group name and press **Enter**.

6 Click the Save  button.

➢ **To delete a group:**

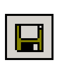
1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group.

4 From the menu choose **Groups**, followed by **Delete.** *A confirmation window appears.*

5 Click **Yes** to confirm deletion. *The group is removed and you are returned to the Pocket Office Admin menu.*

6 Click the Save  button. *The save changes confirmation window appears.*

7 Click **Yes**. *The Save Succeeded message appears.*

8 Click **OK** to return to the Pocket Office Admin screen.

Note:

Deleting a group automatically removes all profiles associated with the group. Even if the deleted group was previously shared, its profiles can no longer be used.

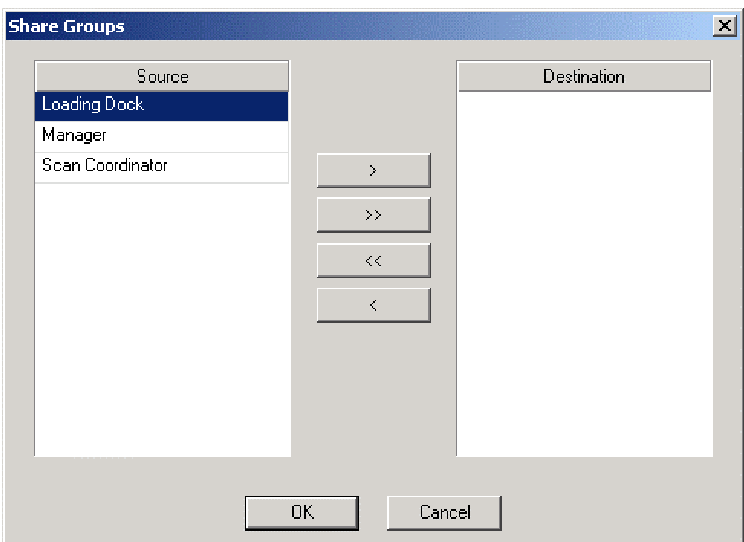
➢ **To share a group.**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

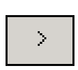
2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group that will receive access to another group's Pocket Office application access and item maintenance profiles.

4 From the menu choose **Groups**, followed by **Share.** *The Share Groups window appears:*



5 Highlight the "source" group whose Pocket Office application access and item maintenance profiles will be shared.

6 Click the right arrow  to add the group to the Destination List.

7 (Optional) Repeat steps 5 and 6 for each group whose application access and item maintenance profiles will be shared (or click the double-right arrow to add all groups).

8 (Optional) Modify the destination list by removing a highlighted destination group and clicking the left arrow (or remove them all by clicking the double-left arrow)

9 When finished, click **OK**. *You will be returned to the Pocket Office Admin screen.*

10 Click the Save button.

Note:

Shared groups will display as sub-folders under the group that has received access. When the Group is highlighted, the complete list of applications accessible to the group will display under “Shared Applications” list. A list of applications directly associated with the group will appear under the “Applications for Group” list.

Including Users & Applications in Groups

Include users in groups to define which users perform similar tasks and thus require similar access to applications and item maintenance profiles. Remove them when they no longer require the access.

➢ **To include a user in a group:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group that will receive the new user. *Any existing users within the group will display in the “Users in Group” list.*

4 Highlight (click) the user to add in the “All Users” list.

5 Click the right arrow button. *The user is added to the “Users in Group” list.*

6 Repeat steps 4 and 5 for each user to add (or click the double-right arrow to add all users to the group).

7 Click the Save button.

➢ **To provide Pocket Office application access to a group:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group that will receive application access. Any existing users within the group will display in the “Users in Group” list and any applications that the group currently has will display in the “Applications for Group: list.

4 Highlight (click) the application to add in the “Available Applications” list.

5 Click the right arrow button. The user is added to the “Applications for Group” list.

6 Repeat steps 4 and 5 for each application to add (or click the double-right arrow to make all applications available to the group).

7 Click the Save button.

➢ **To remove a user from a group:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group that contains the user that is being removed. *Existing users within the group will display in the “Users in Group” list.*

4 Highlight (click) the user to remove in the “Users in Group” list.

5 Click the left arrow button. *The user is removed to the “Users in Group” list.*

6 Repeat steps 4 and 5 for each user to remove (or click the double-left arrow to remove all users to the group).

7 Click the Save button.

➢ **To remove application access from a group:**

1 Click the **Users** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group that currently has access to an application that is to be removed. *Existing applications the group now possess display in the “Applications for Group” list.*

4 Highlight (click) the user to remove in the “Applications for Group” list.

5 Click the left arrow button. *The application is removed to the “Applications for Group” list.*

6 Repeat steps 4 and 5 for each application to remove (or click the double-left arrow to clear all application access for the group).

7 Click the Save button.

Pocket Office Admin Profile Maintenance

Pocket Office Admin Item Maintenance profiles are created and maintained within the “Files” tab of Item Maintenance screen. The screen’s powerful toolset provides a “customized construction area” for each profile you maintain. The toolset consists of three main areas:

Field Listing

All ISS45 item maintenance field are potentially available to be included in a profile.

Field #	Name	Type	RW	Pre	Default	Source	Rqrd
0	AllowDiscountGreaterThanPrice	CheckBox	Read/Write	☐	☐	PLU File	☐
1	AssumeQuantity	CheckBox	Read/Write	☐	☐	PLU File	☐
2	BonusBuyDescription	EditBox	Read/Write	☐		PLU File	☐
3	BonusBuyOpCode	EditBox	Read/Write	☐		PLU File	☐
4	BonusCoupon	CheckBox	Read/Write	☐	☐	PLU File	☐
5	BucketNumber	EditBox	Read/Write	☐		PLU File	☐
6	ComparativeUOM	EditBox	Read/Write	☐		PLU File	☐
7	CompareQty	EditBox	Read/Write	☐		PLU File	☐
8	CompareUnit	EditBox	Read/Write	☐		PLU File	☐

The attributes associated with each item maintenance field can be altered to serve the purpose of the profile. Alterations to the item maintenance attributes are specific to the profile being maintained and does not affect any other profiles. Thus each profile maintains its separate set of field customizations.

The following are examples of field-level attributes that may be altered for an item maintenance profile:

- Marking a field as "Read Only" so maintenance cannot be performed.
- Presetting a field's value so that each item scanned receives identical field maintenance.
- Requiring entry within a field before maintenance can be saved.

Item General Settings

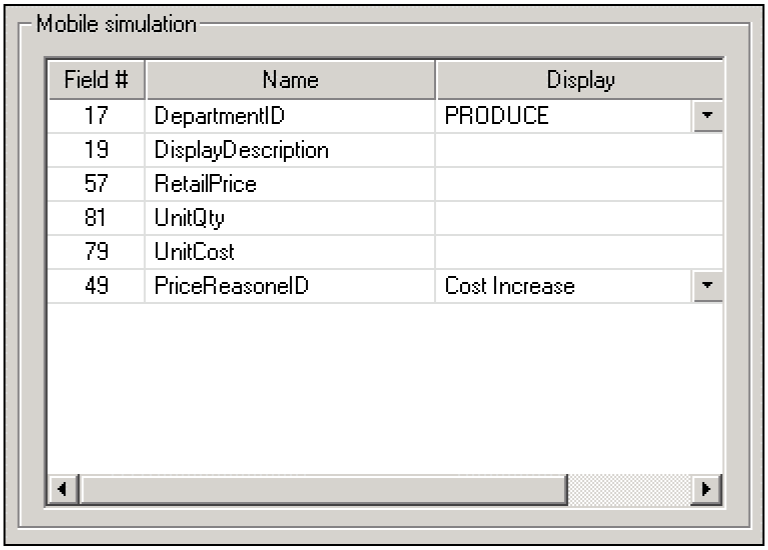
The Item General Settings control the attributes to allow the profile to add to, delete from and update the Item File. The following

Setting	Description
Cannot create new item.	Click this radio button to deny the profile the ability to add new items.
Allow new items with warning.	Click this radio button to allow the profile new item creation privileges after first alerting the operator.
Allow new item creation – no warning.	Click this radio button to allow the profile new item creation privileges without an operator warning.
Allow item deletion	Click this button to allow the profile item deletion privileges
Automatic Update	Click this button to allow the profile automatic update privileges (to the current record) by simply scanning the next item. If left unchecked, the operator must tap the “Update” button before changes to the item are executed.

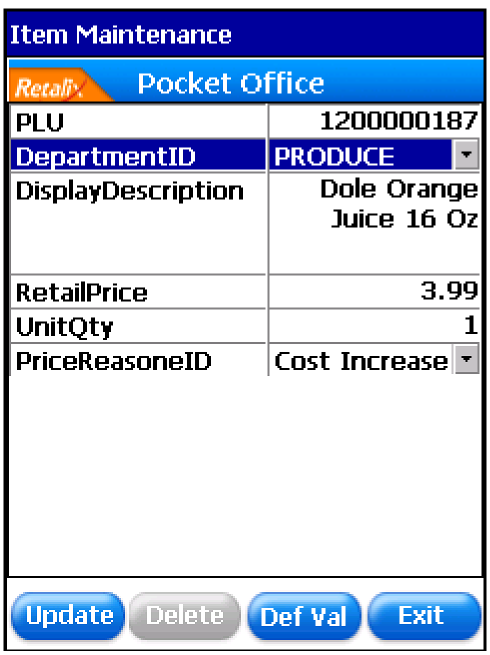
Mobile Simulation Window

As a profile is created, field attributes are “dragged and dropped” into the Mobile Simulator. Mobile Simulation gives the user a preview of how the given profile will look on the iPAD.

For example, the mobile simulator containing the following fields—

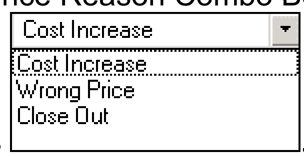


— translates to the follow iPAD display after scanning an item:



Item Maintenance Field Attributes

The list of ISS45 fields available for your profile is fixed, as is field names that display both on the item maintenance screen and the iPAD. However, the following field attributes can be altered to customize a profile:

Attribute	Description
Type	Some fields have the option to display on the iPAD as a combination (combo) box or as an Edit Box. A Combo Box displays a list of available code “descriptions” associated with a field selection. For example, an ISS45 Change Price Reason Combo Box may display as . The user must tap the selection arrow to see the table list. If the field attribute is changed to an Edit Box, the user is required to know the number associated with the field selection. For example, ISS45’s table may be: 1 = Cost Increase, 2 = Wrong Price, 3 = Close Out. If the field is set to Edit Box, the user must know that “2” is “Wrong Price” and enter 2 into the field. For long lists (i.e. department codes), you may want to use the Edit Box type to eliminate having to scroll down a long list.
RW (Read/Write)	By default, all fields in a profile are set to have both Read (display) and Write (edit) privileges. However, you may wish to mark certain profile fields as “Read Only”. These fields will display on the iPAD (to provide information to the user) but cannot be edited. For example, the Item Display Description field is always helpful to display, but you may only wish to give the field write privileges in profiles used by

Attribute	Description
	department managers and scan coordinators.
Pre (Preset)	Check this box to mark the field as “pre-defined”. Preset fields display on the iPAD before scanning is enabled in Item Maintenance mode and are typically associated with a “Default” value (see Default below). Items scanned thereafter automatically receive these preset values for each pre-defined field. You can accept these values prior to update (or override them if the field has read/write privileges). **Note:** Preset fields are typically connected to a “Default” field value (see below).
Default	When the Source (see below) field is set to “Default”, this field holds the default value for the field. If the “Type” column displays “Combo Box”, this field holds the default selection. If the “Type” column displays “Edit Box”, this field holds the default alphanumeric description, number or field selection code. This field is used primarily when the “Preset” column box is checked, to pre-define a field with a default value.
Source	Click the selection arrow and choose the display source for the field. The default setting of “PLU File” indicates that the present value for the field in the item file will be displayed on the iPAD. A setting of “Default” directs Pocket Office to display the field value entered in the “Default” column (described above). A setting of “None” indicates no value for the field will display on the iPAD (regardless of whether or not a value exists in the item file). NOTE: A setting of “None” is used primarily when the “Required” column box (see below) is

Attribute	Description
	checked, requiring the user to re-establish the field's value.
Rqrd (Required)	Check this box to indicate that the field must contain a value before the item can be updated.

Creating New Profiles

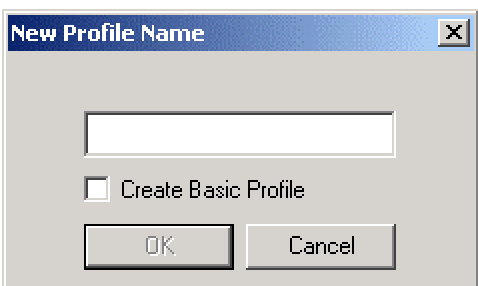
➢ **To create a new profile:**

1 Click the **Files** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Highlight (click) the group that will have access to the new profile.

4 From the menu choose **Profiles**, followed by **New.** *The New Profiles window appears with your cursor in the Name field:*



5 Enter the profile name.

6 (Optional) Check the "Create Basic Profile" checkbox if you want to automatically add the Display Description, Retail Price and Unit Quantity fields to the profile.

Note:

If you will be adding new items with the profile, check the "Create Basic Profile" to insure that all the required fields are present.

7 Click **OK**. The Profile is added to the group and the Field Listing window is populated:

8 Highlight (click) a field to add to the profile.

9 Alter the field attributes (if required). (For more information see Item Maintenance Field Attributes on page 2-34).

10 Click and hold the left-mouse button and drag the field into the Mobile Simulation window. Release the mouse button. *The field displays in the Mobile Simulation Window.*

Note:

A field that is being used by the profile (and displays in the Mobile Simulation Window) will display as a white field in the Field Listing window. This indicates that the field is in use.

11 Repeat steps 8 through 10 for each field to add to the profile.

12 (Optional) To adjust the profile field display order, click (highlight) the field in the Mobile Simulation window. Hold the left-mouse button down and drag the field to its new location. Release the mouse button. *The field is inserted at the release point.*

13 (Optional) Adjust the Item General Settings by selecting the desired “New Item” and “Item Deletion” settings.

14 Click the Save  button.

➢ **To update a profile:**

1 Click the **Files** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Expand the group that contains the profile you wish to edit.

4 Highlight (click) the profile. *The profile’s settings appear in the Field Listing, Item General Settings and Mobile Simulation Window.*

5 (Optional) To adjust the attributes of a field that already exists in the Mobile Simulation Window, you can adjust the setting to the row (appearing in white) within the Field Listing window.

Tip: To locate the field within the Field Listing more easily, right-click the field in the mobile simulator and choose **Locate**. You will automatically be taken to the row.

Note:

If you are changing an existing profile field to become a "Preset" field, it is recommended that you remove the field from the Mobile Simulation Window, make the changes to the field then "drag and drop" the field back into the mobile simulator.

6 (Optional) To remove a profile field from the Mobile Simulation Window, right-click the field and select **Remove**. *A confirmation window will display*. Click **Yes** to approve removal.

Note:

If you wish to remove all fields from the Mobile Simulation Window, from the menu choose **Profiles**, followed by **Clean**. A confirmation message will appear. Choose **OK** to remove all fields.

7 (Optional) Adjust the Item General Settings by selecting the desired "New Item" and "Item Deletion" settings.

8 Click the Save button.

➢ **To rename a profile:**

1 Click the **Files** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Expand the group that contains the profile you wish to rename.

4 Highlight (click) the profile. *The profile's settings appear in the Field Listing, Item General Settings and Mobile Simulation Window.*

5 From the menu choose **Profiles**, followed by **Rename.** *The profile name is placed in edit mode.*

6 Key in the new profile name and press **Enter**.

7 Click the Save button.

➢ **To delete a profile:**

1 Click the **Files** tab (in the lower left-hand portion of the screen).

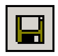
2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Expand the group that contains the profile you wish to delete.

4 Highlight (click) the profile. The profile's settings appear in the Field Listing, Item General Settings and Mobile Simulation Window.

5 From the menu choose **Groups**, followed by **Delete.** A confirmation window appears.

6 Click **Yes** to confirm deletion. The profile is removed and you are returned to the Pocket Office Admin screen.

7 Click the Save  button.

Note:

Deleting a group automatically removes all profiles associated with the group. Even if the deleted group was previously shared, its profiles can no longer be used.

➢ **To copy a profile to another group.**

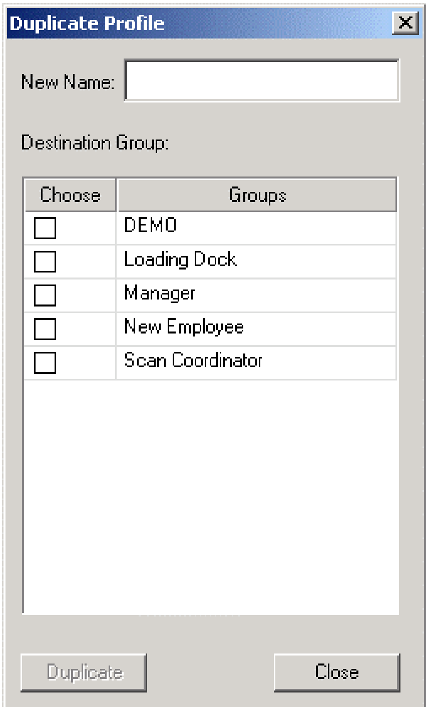
1 Click the **Files** tab (in the lower left-hand portion of the screen).

2 Expand the **Pocket Office User Groups** tree (if collapsed).

3 Expand the group that contains the profile you wish to copy.

4 Highlight (click) the profile. *The profile's settings appear in the Field Listing, Item General Settings and Mobile Simulation Window.*

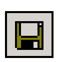
5 From the menu choose **Profiles**, followed by **Duplicate.** *The Duplicate Profile window appears with your cursor placed in the New Name field.*



6 Enter the name of the profile that will be copied to other groups.

7 Place a checkmark (click) the boxes associated with the group that will receive the profile.

8 Click **Duplicate**. *The profile is copied and you will be returned to the Pocket Office Admin screen.*

9 Click the Save  button.

Note:

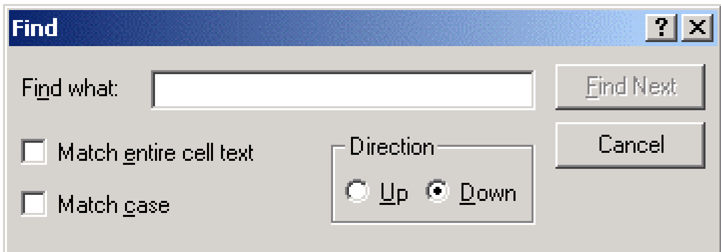
You may also use this utility to copy a profile within the same group. This may facilitate the building of a new profile that is similar to an existing profile.

Using the Find Feature

When performing profile maintenance, you can use the Find utility to assist in locating a desired field. While the field names are listed alphabetically, you can search using a partial text string to assist in identifying the correct field.

➢ **To find a desired field:**

1 Right-click inside the “Name” column and left-click “Find”.
The Find window appears:



2 Enter a text string. (For example, enter “UOM” to locate the Comparative UOM field).

3 (Optional) If desired, click inside the “Match entire cell text” checkbox to search for only the text entered.

4 (Optional) If desired, click inside the “Match case” checkbox to make the search case sensitive.

5 Click **Find Next**. The first occurrence of the text, if present, is located.

6 Repeat step 5 until you locate the field.

Note:

Depending on where the search was initiated, you may want to change the search direction to “Up” (and click **Find Next**) if you are have not located the field.

Creating Manual Links

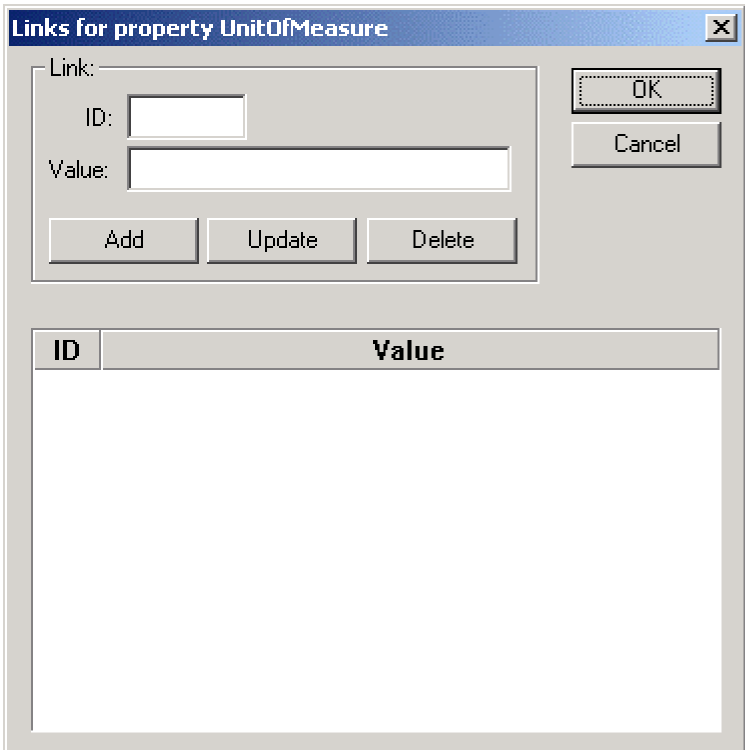
When performing profile maintenance, the Manual Links utility allows you to create and edit field combo box selections. In effect, this utility turns an RPO “EditBox” field into a “ComboBox” field and allows you to establish a set of RPO-specific table selections that are accessed from the iPAD by tapping the field selection arrow.

Note:

Some fields (i.e. Department Number) will always pull from the ISS45 tables. The Manual Links utility will not be available for these fields.

➢ **To create a manual link:**

1 Right-click inside the “Name” column and left-click “Manual Links”. *The Links window appears for the field:*



2 Click inside the ID field and enter an identification number for the field selection.

3 Click inside the Value field and assign the value for the selection.

4 Click the **Add** button. *The value is added to the selection list.*

5 Repeat steps 2 through 4 until the selection table is complete.

6 Click **OK** to return to Profile Maintenance. *The box type changes from “EditBox” to “ComboBox”.*

➢ **To edit a manual link:**

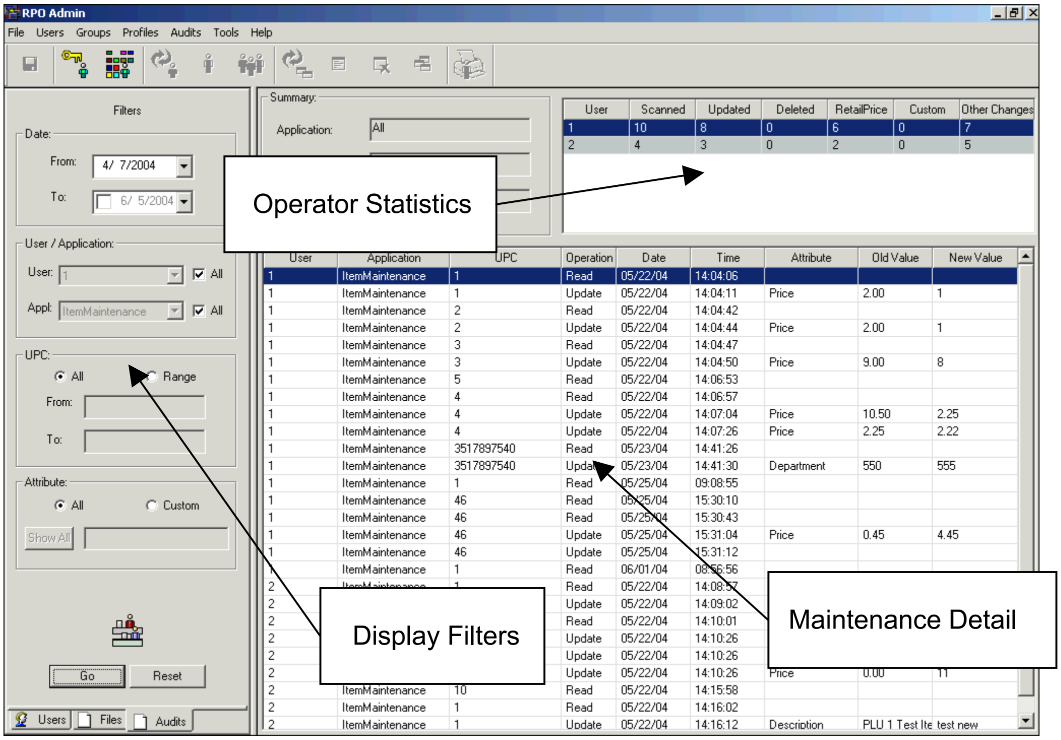
1. Right-click inside the "Name" column and left-click "Manual Links". *The Links window appears for the field displaying the existing selection table.*
2. To change a field value, highlight (click) the row, click inside the Value field (at the top of the window) and enter the new value. Click **Update** when finished.
3. To remove a field ID and value, highlight (click) the row and click the **Delete** button.
4. To add a new field, click inside the ID field and enter an unused identification number. Click inside the Value field and assign the value for the selection. Click **Add** when finished.
5. When finished updating the link, click **OK** to return to Profile Maintenance.

Note:

If you no longer wish to use a ComboBox for a field, simply change the field type from ComboBox back to EditBox within the profile.

Pocket Office Audit Query & Reporting

The Pocket Office Admin "Audits" tab is the gateway the powerful RPO query and reporting tool. Actions performed by RPO Users within the Quick Shelf Audit and Item Maintenance applications are recorded for reporting here. The screen is separated into three sections: Filters, Summary and Details.



The Filter section maintains the following fields and buttons:

Field	Description
From (Date):	Enter the beginning RPO maintenance read or update date on which to filter.
To (Date):	(Optional) Enter the ending RPO maintenance read or update date on which to filter. **Note:** The checkbox next to the date indicates a date range and will be automatically checked if a date is selected. If left blank, the date filter range will be between the From Date and today's date.
User:	Click the selection arrow and choose a specific RPO User on which to filter. **Note:** This field is only accessible if the All (User Checkbox) is blank.
All (User Checkbox)	(Default) Check this box to indicate you wish to include all RPO Users in the query.
Appl:	Click the selection arrow and choose a specific RPO Application on which to filter. **Note:** This field is only accessible if the All (Application Checkbox) is blank.
All (Application Checkbox):	(Default) Check this box to indicate you wish to include all RPO Applications in the query.
All (UPC Radio Button)	(Default) Check this box to indicate you wish to include all UPCs in the query.
Range (UPC Radio Button):	Check this box to indicate you wish choose a UPC Range on which to filter.
From (UPC):	Enter the starting UPC number of the UPC Range. **Note:** This field is only accessible if the Range (UPC

Field	Description
	Checkbox) is checked.
To (UPC):	Enter the ending UPC number of the UPC Range. **Note:** This field is only accessible if the Range (UPC Checkbox) is checked.
All (Attributes Radio Button)	(Default) Check this box to indicate you wish to include all maintenance field attributes in the query.
Custom (Attributes Radio Button)	Check this box to indicate you wish to choose a specific maintenance field on which to filter. When selected, the "Show All" button becomes enabled (where the field may be chosen)
Custom Attribute	(Read Only) This field displays the chosen custom attribute.

Button	Description
Show All	Click this button to choose a specific maintenance field on which to filter. (The Audit Actions window displays in which a field may be chosen). Maintenance affecting this field will be included in the audit details when the query is executed.
Go	Click this button to execute the query based on the selected filters.
Reset	Click this button to reset the filter fields back to their default settings.

The Operator Statistics section maintains the following fields:

Field	**Description**
Application	(Read Only) This field displays the specific RPO Application chosen on which to filter. **Note:** This field displays "All" if no application filter was selected.
From:	(Read Only) This field displays the beginning RPO maintenance read or update filter date.
To:	(Read Only) This field displays the ending RPO maintenance read or update filter date. **Note:** This field is blank if no ending filter date was selected in the query. If blank, the date filter is for the one-day displaying in the "From:" field above.
User	This field displays the RPO User associated with the statistics for this row.
Scanned	This field displays the number UPCs scanned or key-entered (from the Maintenance Detail section).
Updated	This field displays the number UPCs updated by the user (from the Maintenance Detail section).
Deleted	This field displays the number of UPCS removed by the user (from the Maintenance Detail section).
RetailPrice	This field displays the number of retail price changes made by the user (from the Maintenance Detail section).
Custom	This field displays the number of custom field attribute changes made by the user (from the Maintenance Detail section). **Note:** The field changed displays in the "Attribute" filter field.

Field	Description
Other Changes	This field displays the number of non-retail and non-custom field attribute changes made by the user (from the Maintenance Detail section). For example, POS Description, Department Number, etc.

The Maintenance Detail section maintains the following fields:

Field	Description
User	This field displays the RPO User who performed the operation.
Application	This field displays the specific RPO Application (Item Maintenance or Shelf Audit).
UPC	This field displays the UPC scanned or key-entered.
Operation	This field displays the operation performed by the user (Read or Update).
Date	This field displays the date the operation was executed.
Time	This field displays the time the operation was executed.
Attribute	This field displays the attribute changed by the user.
Old Value	This field displays the value of the attribute prior to change.
New Value	This field displays the value of the attribute after the change.

Executing a Pocket Office Audit Query

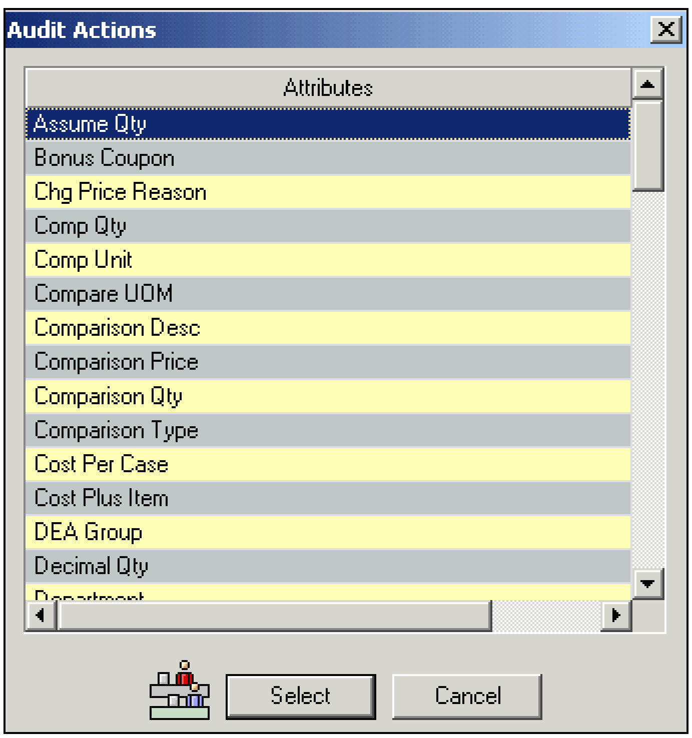
➢ **To execute a Audit Query:**

1 With the Pocket Office Admin screen displaying, click the **Audits** tab.

2 Establish the Date, User/Application and UPC filters as desired (see page 2-45 for more information). If not using a Field Attribute filter, skip to step 6.

3 (Optional) To include a field attribute change in the filter, click the "Custom" radio button, followed by the Show All button.

The Audit Actions window appears:



4 Locate and click (highlight) the field on which you wish to search for modifications.

5 Click the Select button.

6 The field displays in the Attribute field.

7 Click the Go button.

The results appear in the Operator Statistics and Maintenance Detail sections.

Saving Audit Summary and Detail Information

➢ **To save the results of an Audit Query:**

1. Perform the Query (using the steps above).
2. *The results appear in the Operator Statistics and Maintenance Detail sections.*
3. From the Audits Menu on the Toolbar choose on of the following:
   - **Save Summary** – To save the Operator Statistics section results.
     - The results are placed in the \PocketOffice\RPOSummaryLog.csv file.
   - **Save Detailed** – To save the Maintenance Detail section results.
     - The results are placed in the \PocketOffice\RPODetailLog.csv file.

Note:

If the file currently exists you will be prompted whether to overwrite the file. Click “OK” to continue and overwrite the file.

Synchronizing RPO Files

There are two reasons to synchronize RPO with ISS45:

- For Users - To update RPO passwords with ISS45 passwords for linked users (See *Linking Cashiers to Front Office Users* in Chapter 8).
- For Profiles - To update new table values from ISS45 into RPO (i.e. Department File).

There are two methods of synchronization: Manually or using the and Scheduler

➢ **To manually synchronize Users and Profiles:**

1 From the Pocket Office Admin screen, click the **Users** Tab.

2 From the Pocket Office Menu, click **Users** followed by **Synchronize**.

User Synchronization is executed and you are returned to the Pocket Office Admin screen.

3 Click the **Files** Tab.

4 From the Pocket Office Menu, click **Profiles** followed by **Synchronize.**

A warning message is displayed.

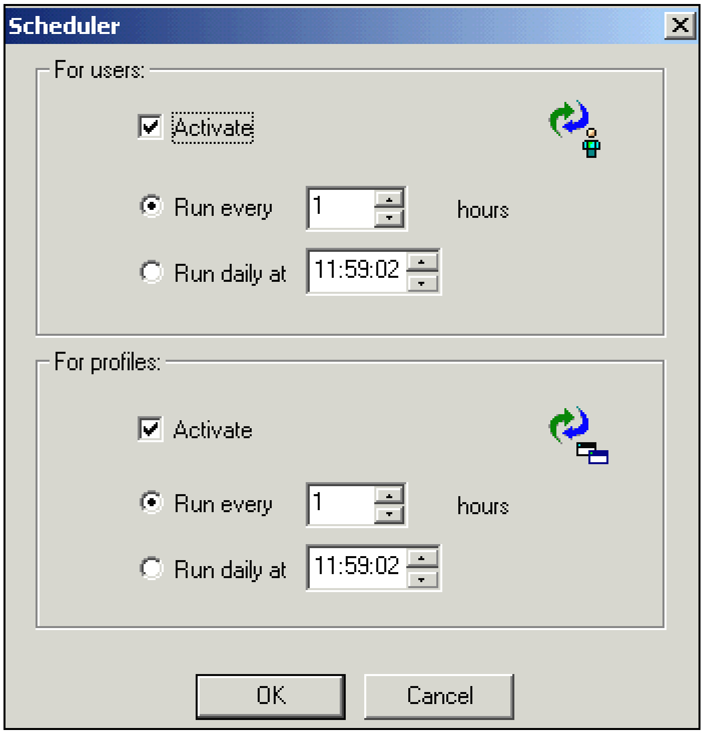
5 Click **Yes**.

User Synchronization is executed and you are returned to the Pocket Office Admin screen.

➢ **To schedule automatic synchronization:**

1 From the Pocket Office Admin screen, click the **Tools** followed by **Scheduler**.

The Scheduler Screen displays:

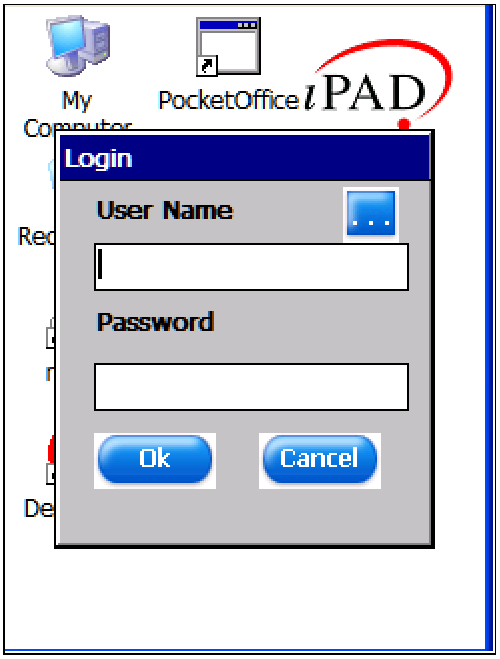


2 Check the Activate Box and set the interval and start times for both Users and Profiles.

3 When finished, click **OK**.

The Login Screen

If the Pocket Office Configuration Setting for “Must Login” is enabled for Pocket Office, the Login Screen will be displayed when Pocket Office is selected from the desktop:



The Login Screen maintains the following fields and buttons:

Field	Description
User Name	The 8-digit (maximum) User ID.
Password	The 8-digit (maximum) Password.

Button	Description
	This button will appear on the login screen if no IP address is detected or if this is a roving device. (See page 2-54).
OK	Tap this button to gain access to the desired application after entering in your User Name and Password.
Cancel	Tap this button to return to the prior menu.

➢ **To log into the Pocket Office module:**

1 Tap inside the User Name field. *A flashing cursor will display.*

2 Enter your user name.

Note:

On iPADs without keyboards, use the pop-up numeric keypad to enter your User ID and Password.

3 Tap inside the Password field (or press the Tab key to move to the next field). *A flashing cursor will display.*

Note:

On Fujitsu iPADs, use the "X" key to tab from field to field.

4 Enter your numeric Password. Asterisks will display to mask your entry.

5 Tap the **OK** button. The Pocket Office Main Menu will display.

The Roving Settings Screen

Once Roving HHCs are registered (see page 2-12) and placed into operation within a store's environment, their settings must be first configured. The Settings screen displays when the ellipsis button is pressed from the Login Screen (see page 2-52).

The Settings Screen maintains the following fields and buttons:

Field	Description
ISS45 Version	Click the field selection arrow and choose the version of ISS45 installed in the store: V7 or V8.
Host IP Address	Enter the server IP address or click the Ellipsis Button to perform a query.

Button	Description
	Tap this button to obtain the IP Address of the server by performing a query
OK	Tap this button to save the settings and return to the login screen.
Cancel	Tap this button to cancel the setting changes and return to the login screen.

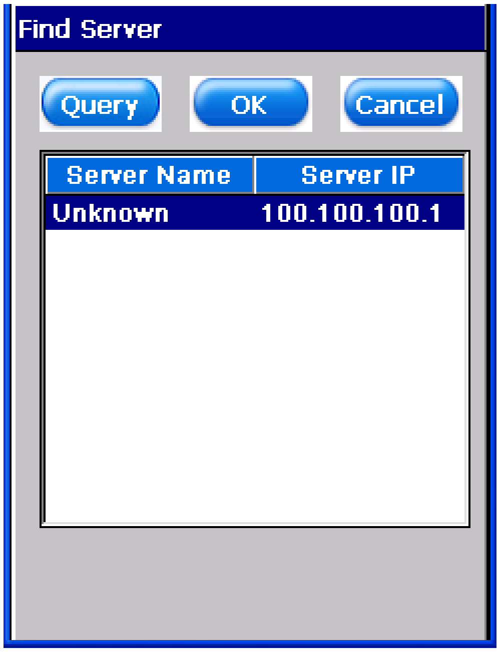
➢ **To enter the Roving HHC settings:**

1 Tap the ellipsis button on the Login Screen. *The Settings Screen displays.*

2 Tap the software version selection arrow and choose the store’s installed ISS45 version.

3 Tap inside the Host IP Address field and enter the server IP Address. To obtain the IP Address by performing a query, click the Host IP field’s ellipsis button:

The Find Server screen appears:



4 Tap **Query**.

The IP Address is retrieved.

5 Tap **OK**.

You are returned to the Settings screen with the Host IP Address field completed.

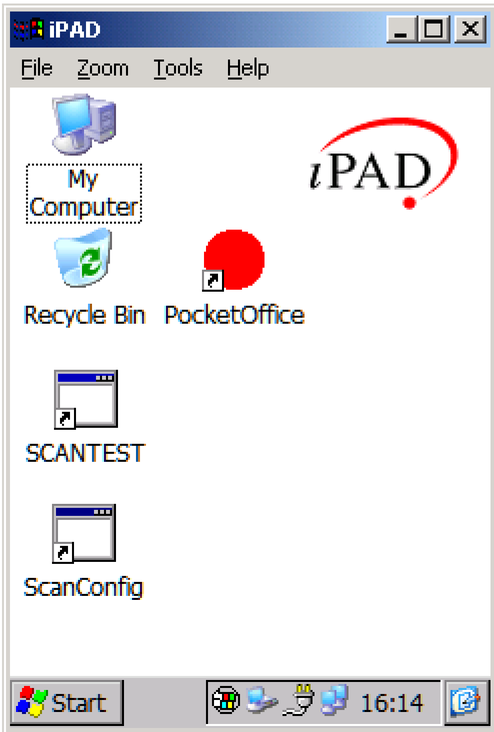
6 When finished, click **OK**. *The changes are saved and you are returned to the Login Screen.*

Pocket Office Main Menu

The Pocket Office Main Menu will display all available Pocket Office functions. Those that have been enabled for your store will appear with bold icons and titles.

➢ **To access the Pocket Office Main Menu from the iPAD:**

1 Tap the Start icon in the lower left-hand corner of screen.



2 Double-tap the **Pocket Office** icon. *The login screen displays.*

3 Enter a User Name and Password and tap OK. *The Pocket Office Main Menu is displayed.*

Note:

Pocket Office has been initially configured to allow access with a User Name of “2” and a Password of “2”.

The Pocket Office menu contains the following icons:

Icon	Description
Quick Shelf Audit	Tap this button to launch the Pocket Office Quick Shelf Audit module.
QBuster	Tap this button to launch the Pocket Office Q-Buster module.
Get Data	Tap this button to update iPAD Pocket Office software.
Settings	Tap this button to set the iPAD Identification number and IP Address.
Item Maintain…	Tap this button to launch the Pocket Office Item Maintenance module.
Batch Item Maintain…	Tap this button to launch the Pocket Office Batch Item Maintenance module.
Alert	Tap this button to launch the Pocket Office Remote Manager Authorization (RMA) module.
DashBoard	Tap this button to launch the Pocket Office Dashboard module.
LogOff	Tap this button to log off Pocket Office and return to the login screen.

Note:

iPAD operation instructions for “Quick Shelf Audit” are found in Chapter 3.

iPAD operation instructions for “Q-Buster” are found in Chapter 4.

iPAD operation instructions for “Item Maintenance” are found in Chapter 5.

iPAD operation instructions for “Batch Item Maintenance” are found in Chapter 6.

iPAD operation instructions for “Dashboard” are found in Chapter 7.

IPAD operation instructions for “Alerts” are found in Chapter 8.

Changing the iPAD Identification Number & IP Address

Each iPAD in your store must carry a unique identification number and IP Address. As iPADs are occasionally added or replaced, it is important to maintain these numbers.

➢ **To modify the iPAD Identification Number:**

1 From the Pocket Office Main Menu, tap the Utils icon and choose **Settings**. *The iPAD Identification Menu is displayed.*

2 Enter the unique number for this iPAD in the HHC field.

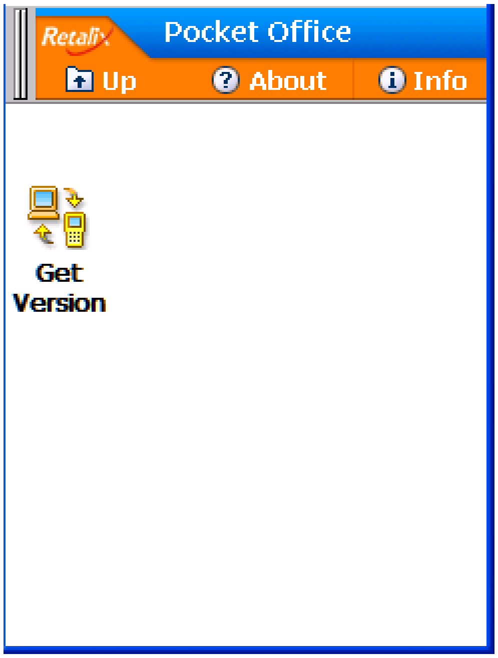
3 Tap **OK**. You are returned to the Pocket Office Main Menu.

Manually Updating Pocket Office iPAD Software

Updated iPAD application files need to be retrieved periodically from the Pocket Office Gateway. This may be automated using the Pocket Office Setting's Get Version function (see *Pocket Office Settings* above) or manually using the procedure listed below.

➢ **To retrieve application file updates from the Pocket Office Gateway:**

1 From the Pocket Office Main Menu, tap the Utils Icon and choose **Get Data**. *The Get Data menu appears.*



2 Tap **Get Version**. The Select Communication Profile window appears.

3 Tap **OK**. A completion bar displays as data is retrieved. When finished and the files are unzipped, you will be returned to the Pocket Office Main Menu.

Note:

Pocket Office Server must be initiated on the server PC for this process to complete successfully. The Pocket Office Server is loaded automatically at startup.

3

In this chapter:

Pocket Office Quick Shelf Audit

The chapter introduces you to basic Pocket Office Shelf Audit operations. Pocket Office Stock Counting provides you with the tools to audit shelf prices and make price changes.

Pocket Office Shelf Audit Overview

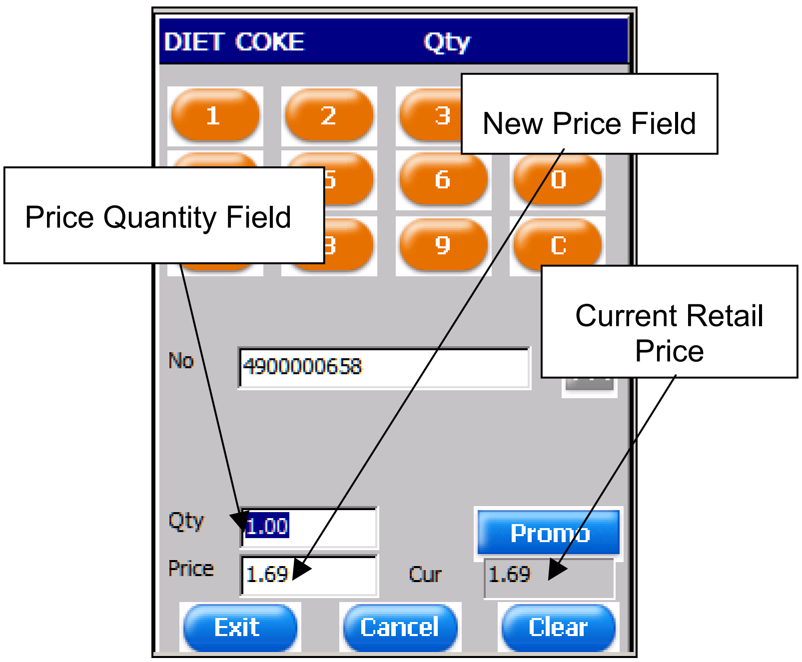
The Pocket Office Quick Shelf Audit module is a simple, effective tool for auditing your store's product pricing and shelf labels.

The module has the same "look and feel" as other Pocket Office modules. The user is able to quickly move from item to item, looking for price inconsistencies. If retail price of the item needs to be changed, a new price can be entered. The new price immediately updates the item file.

Understanding Pocket Office Shelf Audit operations requires basic iPAD knowledge. It is recommended that you read Chapter 2, *Getting Started with Pocket Office* before proceeding.

Shelf Audit Screen

The Shelf Audit screen displays when the Quick Shelf Audit icon is tapped from the Pocket Office Main Menu. Items can be scanned in or key-entered using the screen's built-in keypad.



The screen contains the following fields and buttons:

Field	Description
No	The product's UPC number.
Qty	The product's price multiple (For example, "3.00" if sold 3 for $1.99).
Price	The entry field to change the current price.
Cur	The current retail price of this item.

Button	Description
Promo	Tap this button to display ISS45 promotion detail from promotions in which the item resides. (See page 3-6).
Exit	Tap this button to update the item with the entered price change and return to the Pocket Office Main Menu.
Cancel	Tap this button to cancel any changes and return to the Pocket Office Main Menu.
Clear	Tap this button to clear all input and remain within the Quantity Screen.

Performing Shelf Audits

➢ **To audit the price of an item:**

1 Scan or key-enter in the item's lookup code. After validation, the item's description will appear on the screen's header and pricing information will be displayed.

Note:

If key-entering an item code, you must manually tap inside the Price: field to continue.

2 Scan the next item to acknowledge a correct audit of the pricing information.

Note:

If key-entering an item code, you must manually tap inside the No: field and key-enter the next item code.

3 Repeat steps 1 and 2 for each item to audit.

4 When finished, tap **Cancel**. *You are returned to the Pocket Office Main Menu.*

Performing Price Changes

➢ **To audit and optionally enter a new price for an item:**

1 Scan or key-enter in the item's lookup code. *After validation, the item's description will appear on the screen's header and pricing information will be displayed.*

Note:

If key-entering an item code, you must manually tap inside the Price: field to continue.

2 If the price quantity needs to change, enter the new price multiple.

3 Tap inside the **Price:** field and highlight the current price.

4 Enter new price information.

5 Tap **OK** or scan the next item.

Note:

If key-entering an item code, you must manually tap inside the No: field and key-enter the next item code.

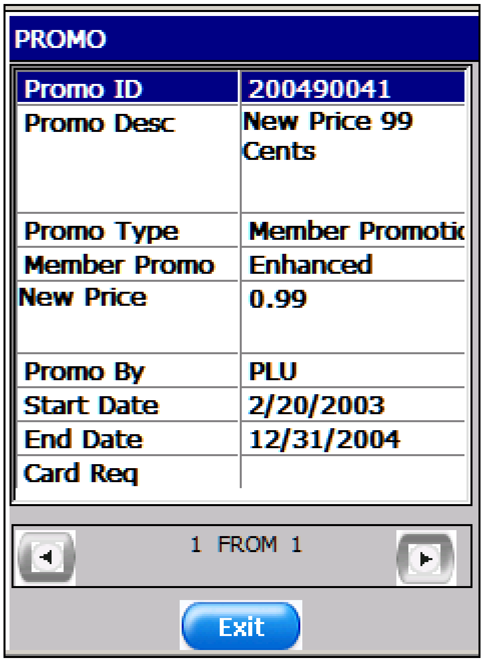
6 When finished tap **Cancel**. You are returned to the Pocket Office Main Menu.

Note:

Depending on how your Shelf Audit configuration settings were established, you may receive a message stating "Not Legal Price" if you are not allowed to enter a lower (or higher) price.

Promotion Detail Screen

The Promotion Detail Screen displays when the Promo button is tapped on the Shelf Audit Screen. The screen displays promotion details from ISS45 Promotions in which the item resides.



The screen contains the following fields and buttons:

Field	Description
Promo Desc	The description of the Promotion.
Promo Type	The type of ISS45 Promotion.
Member Promo	For Member Promotions, this field displays the member promotion type: Enhanced, Group, Level or Credit.
New Price	This field displays the promotion price for the item.
Promo By	This field displays the attachment type of the promotion: PLU, Department, Mix & Match, etc.
Start Date	The start date of the promotion.
End Date	The end date of the promotion.
Card Req	A check will display here for Member Card Required promotions.

Button	Description
	Tap this button display detail from the previous promotion (in which the item resides).
	Tap this button display detail from the next promotion (in which the item resides).
Exit	Tap this button to return to the Shelf Audit Screen.

4

Pocket Office Q-Buster

The chapter introduces you to entering and processing Q-Buster transactions. Q-Buster is an important tool used to reduce customer checkout time.

In this chapter:

PocketOffice Q-Buster Overview

PocketOffice Q-Buster turns your iPADs into portable checkout lane scanners. At a convenient location in the store, shopping basket items are scanned into a suspended POS transaction under a temporarily issued Q-Buster card number or (if a loyalty program exists) the customer's Loyalty Card number. When the customer reaches the POS, the card is re-scanned to resume the transaction where it can be immediately totaled and tendered. With Q-Buster, a customer transaction can be initiated from either the iPAD or a department POS. Even in post-resumption situations where additional items are added, coupons need to be scanned and produce items need to be weighed, time spent in the lane is minimal and customer satisfaction is maximized.

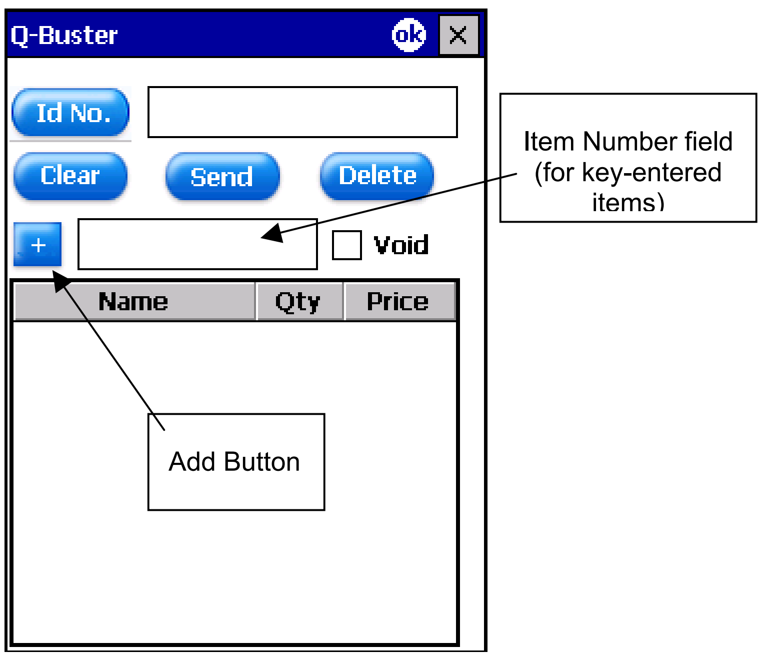
Q-Buster Transactions

The steps involved in completing a Q-Buster Transaction are:

- Create a Q-Buster item transaction list
- Scan the Q-Buster or Loyalty Card (at some point during item scan)
- Edit the item list as necessary
- Send the transaction to the POS

Q-Buster Screen

The Q-Buster Screen displays immediately after **QBuster** is selected from the PocketOffice Main Menu.



The screen contains the following fields and buttons:

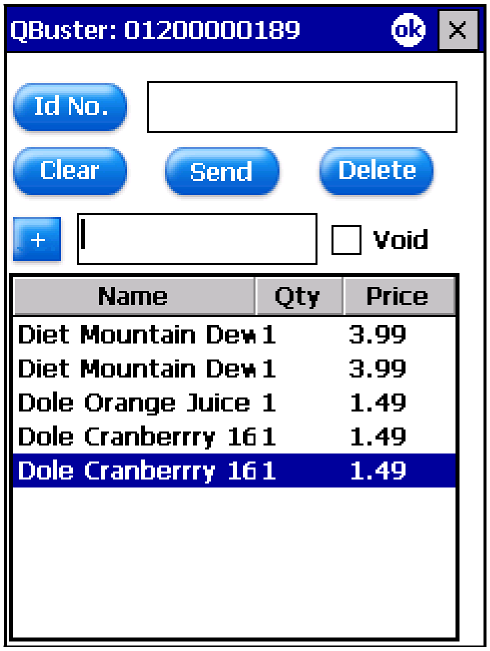
Field	Description
ID No.	The Q-Buster or Loyalty Card number. (**NOTE:** The card number will automatically be placed in this field, regardless of when the card is scanned in the transaction).
Item Number field	Item number field for key-entered item codes.
Void	Tap (or check) this box prior to scanning the item a second in order to remove it from the transaction.

Button	Description
+ (Add)	Tap the Add button to add the manually entered item code to the transaction list.
Clear	Tap this button to remove all previously scanned items from the transaction.
Send	Tap this button to send the suspended transaction to the POS.
Delete	Tap this button to remove the highlighted item from the transaction.
OK	Tap this button (on the top toolbar) to return to the PocketOffice Main Menu.

Entering a Q-Buster Transaction

➢ **To enter a Q-Buster Transaction:**

1 Scan the items within the customer’s basket. Items are added to the transaction list.



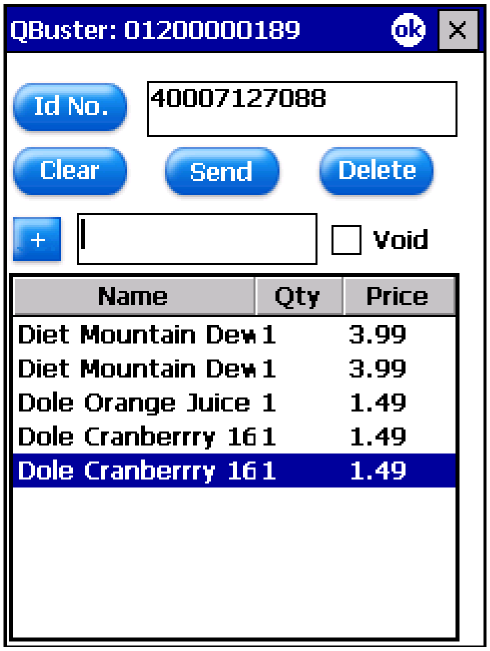
Note:

If key-entering an item code, you must manually tap inside the Item Number field, enter the item number and tap the Add (+) button.

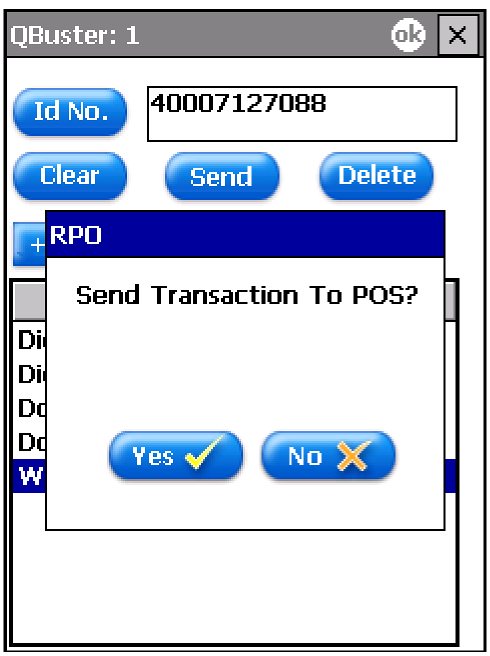
2 Issue and scan the customer a temporary Q-Buster Card or if the store has issued the customer a Loyalty Card, scan the Loyalty Card. The transaction identification number will automatically be placed in the ID No. field.

Note:

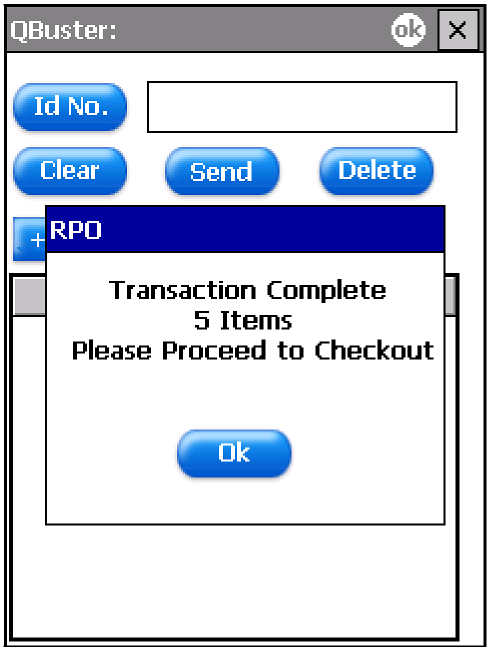
The card can be scanned at any point in the transaction prior to “sending” the transaction to the POS.



3 When finished entering items, tap the Send button. A confirmation message will display:



4 Tap Yes. The transaction is sent to the POS in a suspended status and a confirmation message appears:



5 Tap **OK** and direct the customer to the checkout lane.

6 Repeat steps 1 through 5 for the next basket you wish add as a Q-Buster transaction.

7 When finished, tap the **OK** button on the top toolbar to return to the PocketOffice Main Menu.

Q-Buster Transaction Exceptions

Below is a list of actions that may need to be performed prior to sending a Q-Buster transaction to the POS:

- Voiding an Item
- Deleting an Item
- Clearing all previously scanned items

Voiding an Item

You may wish to remove an item from the transaction in cases where an item was scanned twice or the customer desires not to purchase an item.

➢ **To void an item during a Q-Buster transaction:**

1 Tap the **Void** checkbox.

2 Scan the Item you wish to remove from the transaction. *The item is removed from the transaction list and the void checkbox is cleared.*

Deleting an Item

Deleting an item produces the same result as voiding an item. For small baskets or voiding key-entered items, the Delete function may prove to be more convenient.

➢ **To delete an item from a Q-Buster transaction:**

1 Locate the item you wish to delete from the transaction list.

2 Tap the **Delete** button.

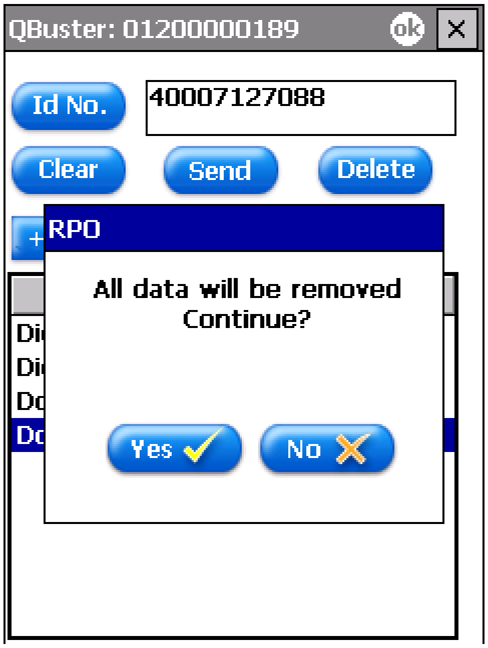
3 Tap the item. *The item is removed from the transaction list.*

Clearing the Transaction List

At times you may want to remove all items from the Q-Buster transaction list and restart the transaction.

➢ **To clear all items from a Q-Buster transaction:**

1 Tap the **Clear** button. *A confirmation message displays:*



2 Tap **Yes**. *All items are removed from the transaction list and you are returned to the Q-Buster screen.*

5

Pocket Office Item Maintenance

The chapter introduces you to Pocket Office Item Maintenance operations. Pocket Office Item Maintenance turns your iPADs into powerful tools for facilitating ISS45 Item Maintenance.

In this chapter:

Pocket Office Item Maintenance Overview

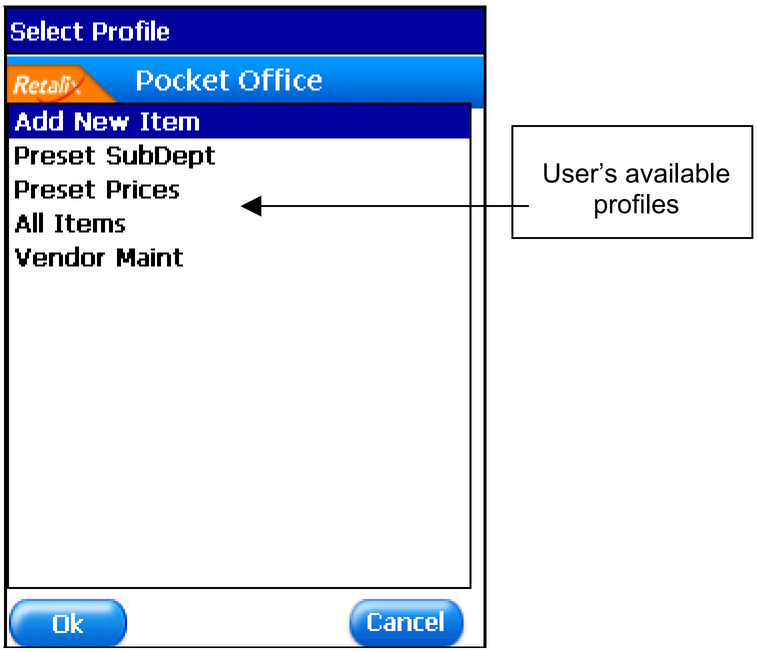
Pocket Office Item Maintenance implements the profiles created using the Item Maintenance Profile Creator (within the ISS45 back office). Unlike other Pocket Office modules, profile customizations make your installation unique. This chapter will deal with generalizations for operating Pocket Office Item Maintenance. The screens presented are not intended to parallel your installation.

Please read the following sections in Chapter 2, *Getting Started with Pocket Office* before proceeding:

- Item Maintenance Security
- Item Maintenance Screen
- Item Maintenance Profile Creator
- Login Screen

Select Profile Screen

After a successful login to the Item Maintenance module (by first tapping the Item Maintenance icon from the Pocket Office Main Menu), the Select Profile Screen appears.



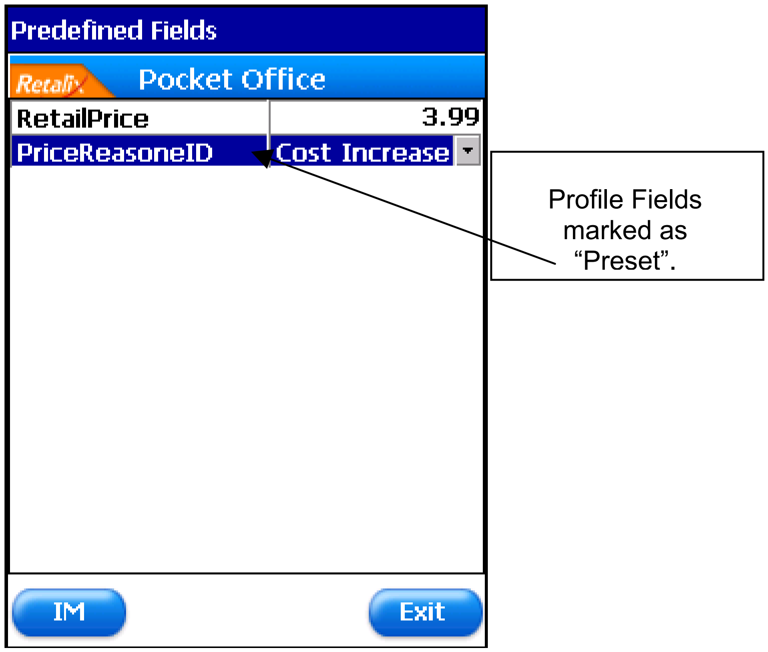
The profiles that display on the "Select Profile" screen were previously attached to the group to which the login user belongs.

The Select Profile screen contains the following buttons:

Button	Description
OK	Tap this button to launch the highlighted profile.
Cancel	Tap this button to return to the Pocket Office Main Menu.

Predefined Fields Screen

The Item Maintenance Predefined Screen only displays if the profile selected from the Select Profile screen has one or more fields marked as "preset".



The screen contains the following buttons:

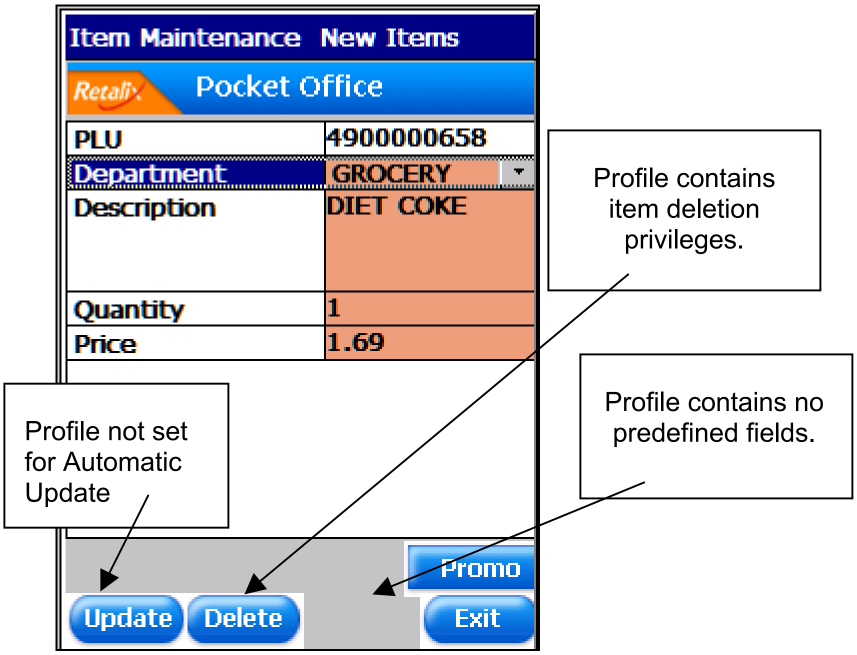
Button	Description
IM	Tap this button to accept the predefined values and move to the Profile Item Maintenance screen.
Exit	Tap this button to return to the Pocket Office Main Menu.

Note:

Predefined Fields that have Read/Write attributes may be changed prior to moving to the Select Profile screen.

(Profile) Item Maintenance Screen

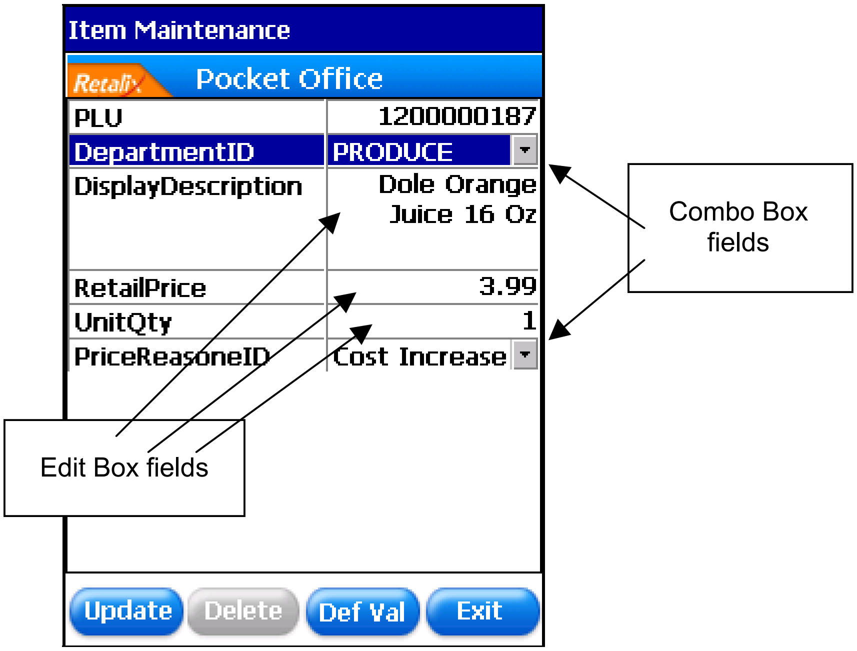
The Item Maintenance screen displays the fields within the selected profile. If the profile contains predefined fields, they will display with their preset values prior to scanning the first item.



The screen contains the following buttons:

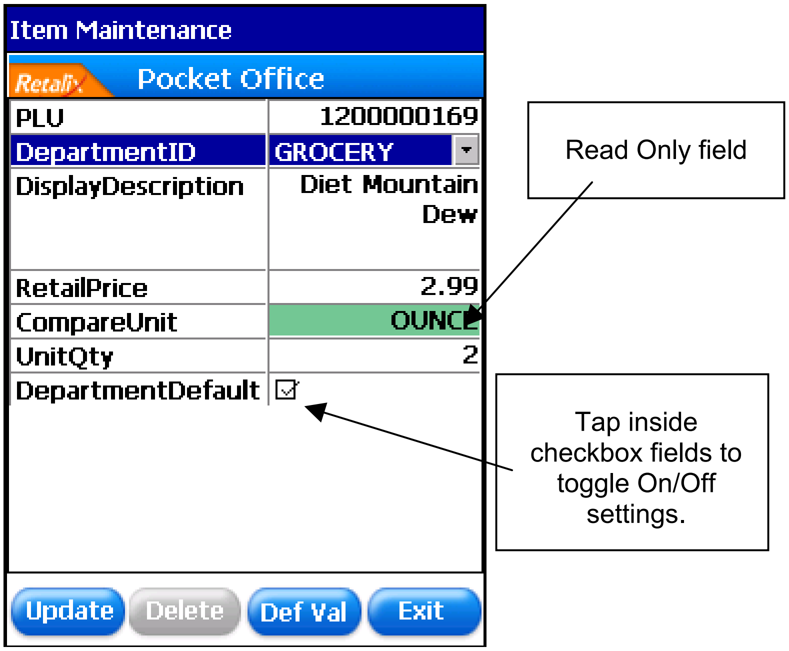
Button	Description
Promo	Tap this button to display ISS45 promotion detail from promotions in which the item resides. (See page 5-14).
Update	Tap this button to update the item file with the maintenance applied here. **Note:** This button is only available if the “Automatic Update” setting for the profile is unchecked. (See Chapter 2: *Item General Settings*).
Clear	Tap this button to clear the last change to the item. **Note:** This button is only available if the “Automatic Update” setting for the profile is checked. (See Chapter 2: *Item General Settings*).
Delete	Tap this button to delete the item from the item file: **Note:** This button will be inactive (grayed out) if the profile does not contain item deletion privileges.
Def Val	Tap this button to return to the Predefined Fields screen to change preset values. **Note:** This button will only appear if the profile has at least one preset field.
Cancel	Tap this button to return to the Select Profile Screen.
Exit	Tap this button to save the last change and exit Item Maintenance.

After scanning the first item, the profile fields are populated. If the profile contains predefined fields with preset values, maintenance is automatically performed on these fields. You may make additional changes as necessary.



Read Only fields

Read Only fields will display as color-filled.



Note:

Tap inside checkbox fields to toggle between an “On” and “Off” setting. A check indicates an “On” setting.

Performing Pocket Office Item Maintenance

Having reviewed each screen that may appear when performing Pocket Office Item Maintenance (above), the following is a general example of the all the steps involved.

➢ **To update an item using Pocket Office Item Maintenance:**

1 From the Select Profile screen, tap (highlight) the profile you wish to use and tap the **OK** button. If the profile contains predefined fields, the Predefined Fields screen appears. If the profile does not contain predefined fields, skip to step 3.

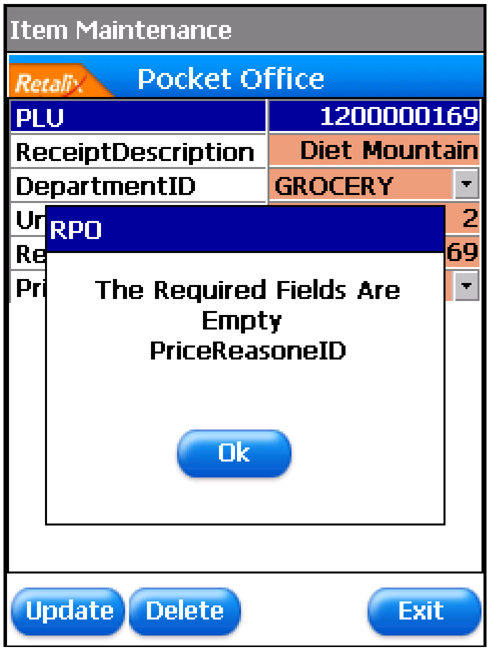
2 Review the pre-defined field settings from the profile and change them if necessary and permitted from the profile. When finished, tap the **IM** button. The Item Maintenance screen appears displaying the profile’s fields (and its predefined field values, if any).

3 Scan the item you wish to update. Fields that either have existing values (and have a Source setting of anything other than “None”) or newly applied predefined values will be populated.

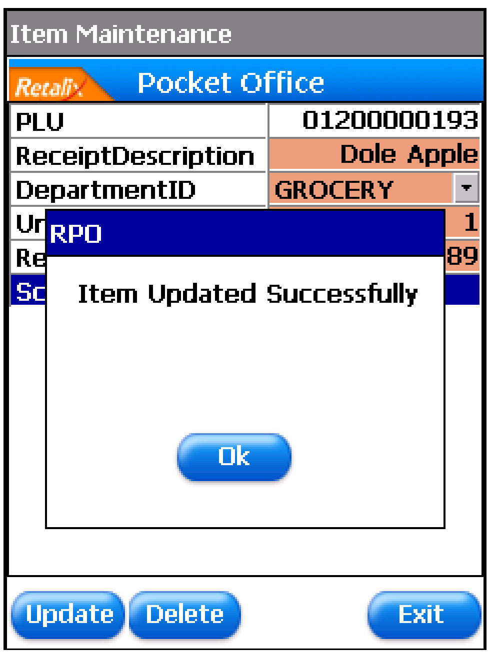
4 Make changes to the item as necessary. To move from field to field, use the Scroll Down and Scroll Up buttons or move directly to the desired field by tapping its location. For changes to a “ComboBox” field, tap the drop-down arrow and tap the desired selection. For “CheckBox” fields, tap inside the checkbox to toggle the setting from “On” to “Off” and visa versa. For changes to “EditBox” fields (that require an alphanumeric entry), press the Enter key. The existing entry will become highlighted and the virtual keyboard will automatically launch. Make the desired change and press the Scroll Down button to set the change. Press the Scroll Down (or Up) button to remove the virtual keyboard and move to the next (or previous) field. When finished making changes to the item, tap the **Update** button. You will be prompted if any “Required” fields are left blank. Otherwise, skip to step 6.

Note:

If Automatic Update is enabled for the chosen profile, the Update button will not appear and you can simply scan the next item to update the item. If this is your last item to maintain, tap **Exit**. For more information, see Chapter 2: ***Item General Settings***.



5 Tap **OK** and complete the required fields. When finished, tap **Update**. The success confirmation screen appears:



6 Tap **OK**.

7 Repeat steps 3 through 6 for the next item to update.

Note:

Remember that if the template has predefined fields, identical preset values will be applied to the next item.

8 (Optional) If this template has predefined fields that you wish to change, tap the **Def Val** button, make the necessary changes and repeat steps 2 through 7 for the next item.

9 When finished performing Item Maintenance or wish to begin with step 1 using a new template, tap the **Exit** button. The Select Profile screen appears.

10 To return to the Pocket Office Main Menu, tap **Cancel**.

Note:

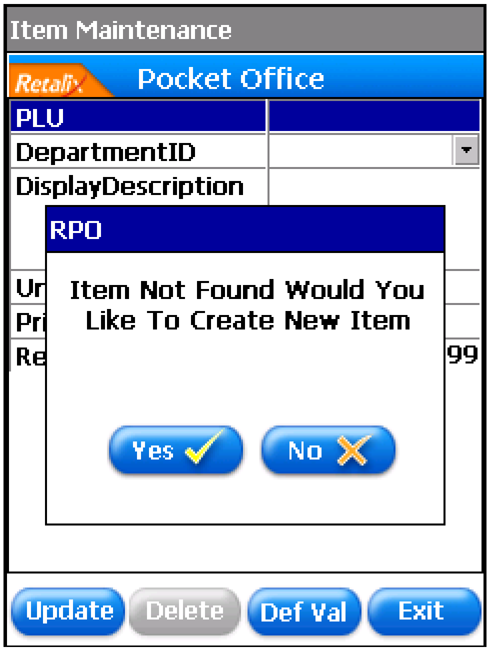
If you at any point you try to update an item after inputting invalid values, the message "One or More of the Fields are Invalid, Cannot Update PLU Data" message appears. Return the Item Maintenance screen and locate the field(s) that need to be changed.

➢ **To add a new item:**

1 From the Select Profile screen, tap (highlight) a profile containing at a minimum all basic profile fields and tap the **OK** button. *If the profile contains predefined fields, the Predefined Fields screen appears. If the profile does not contain predefined fields, skip to step 3.*

2 Review the pre-defined field settings from the profile and change them if necessary and permitted from the profile. When finished, tap the **IM** button. *The Item Maintenance screen appears displaying the profile's fields (and its predefined field values, if any).*

3 Scan the item you wish to add. *If the profile allows new item creation with a warning, the following message appears. (Otherwise, skip to step 4).*



Note:

If you chose a profile that does not allow item creation, the "Item Not Found Not Allowed to Create New Item" message will appear.

4 Tap Yes.

5 At a minimum (if allowed by the template), complete the Department ID, Display Description, Retail Price and Unit Qty field.

6 Tap **Update**. *The success confirmation screen appears.*

Note:

If Automatic Update is enabled for the chosen profile, the Update button will not appear and you can simply scan the next item to add the item. If this is your last item to maintain, tap **Exit**. For more information, see Chapter 2: ***Item General Settings***.

7 Tap **OK**.

➢ **To delete an item:**

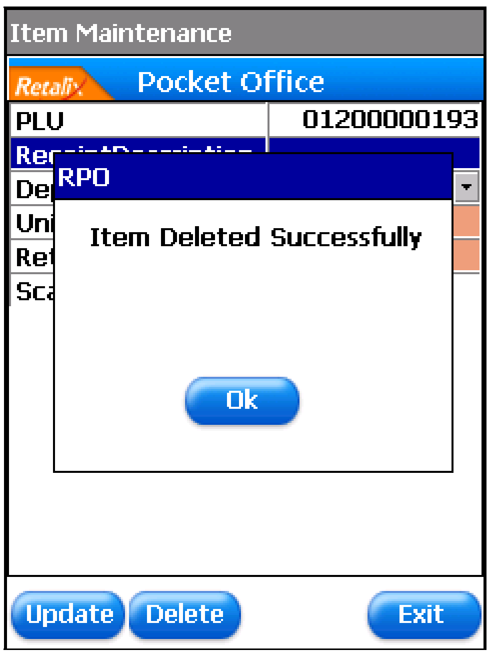
1 From the Select Profile screen, tap (highlight) a profile possessing item deletion privileges and tap the **OK** button. If the profile contains predefined fields, the Predefined Fields

screen appears. If the profile does not contain predefined fields, skip to step 3.

2 Review the pre-defined field settings from the profile and change them if necessary and permitted from the profile. When finished, tap the **IM** button. *The Item Maintenance screen appears displaying the profile's fields (and its predefined field values, if any).*

3 Scan the item you wish to delete. *Fields that either have existing values (and have a Source setting of anything other than "None") or newly applied predefined values will be populated.*

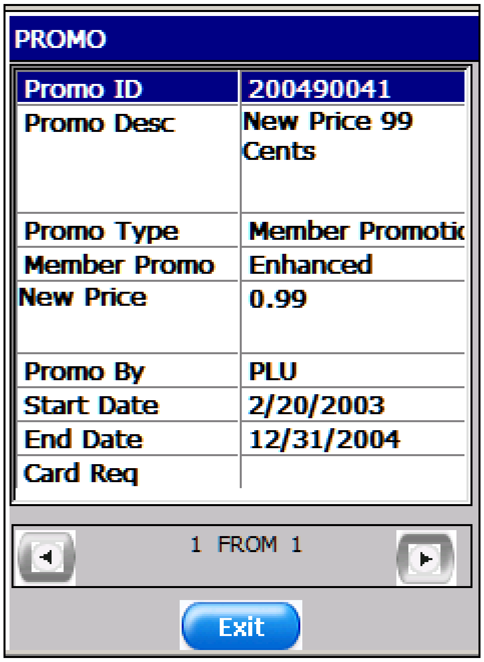
4 Tap the **Delete** button. *A confirmation screen appears:*



5 Tap **OK**.

Promotion Detail Screen

The Promotion Detail Screen displays when the Promo button is tapped on the Shelf Audit Screen. The screen displays promotion details from ISS45 Promotions in which the item resides.



The screen contains the following fields and buttons:

Field	Description
Promo Desc	The description of the Promotion.
Promo Type	The type of ISS45 Promotion.
Member Promo	For Member Promotions, this field displays the member promotion type: Enhanced, Group, Level or Credit.
New Price	This field displays the promotion price for the item.
Promo By	This field displays the attachment type of the promotion: PLU, Department, Mix & Match, etc.
Start Date	The start date of the promotion.
End Date	The end date of the promotion.
Card Req	A check will display here for Member Card Required promotions.

Button	Description
	Tap this button display detail from the previous promotion (in which the item resides).
	Tap this button display detail from the next promotion (in which the item resides).
Exit	Tap this button to return to the Item Maintenance Screen.

6

Pocket Office Batch Item Maintenance

The chapter introduces you to Pocket Office Batch Item Maintenance operations. Batches created using Batch Item Maintenance are downloaded to ISS45 for activation.

In this chapter:

Pocket Office Batch Item Maintenance Overview

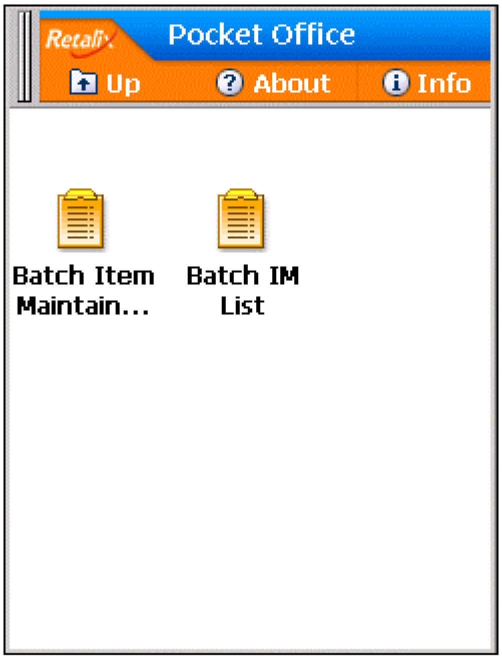
Pocket Office Item Maintenance implements the profiles created using the Pocket Office Item Maintenance Profile Creator to place maintenance within batches. These batches, once successfully downloaded to ISS45, will be activated automatically (on its activation time and date) or can be manually executed through ISS45.

Please read Chapter 5, *Pocket Office Item Maintenance* as well as the following sections in Chapter 2, *Getting Started with Pocket Office* and before proceeding:

- Item Maintenance Security
- Item Maintenance Screen
- Item Maintenance Profile Creator
- Login Screen

Batch Item Maintenance Menu

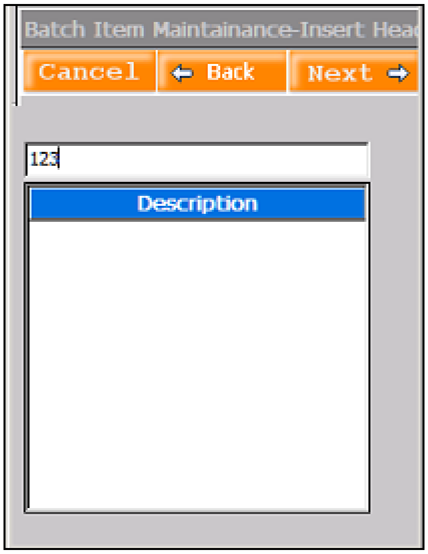
After a successful login to the Batch Item Maintenance module (by first tapping the Batch Item Maintenance icon from the Pocket Office Main Menu), the Batch Item Maintenance Menu appears:



Tap the Batch Item Maintenance icon to create a new batch or edit an existing batch. Tap the Batch IM List icon to view a list of suspended (non-downloaded) batches or delete a batch.

Batch Item Maintenance-Insert Header Screen

The Batch Item Maintenance – Insert Header screen appears when the Batch Item Maintenance icon is selected. To create a new batch header, tap inside the description field and enter a batch description.



Note:

Any batches that have been previously suspended will be listed. To resume a batch, tap (highlight) the batch, then tap **Next**.

The screen contains the following fields and buttons:

Field	Description
Description	The description of the Batch.

Button	Description
Cancel	Tap this button to cancel the selected batch header.
Back	Tap this button to return to the Batch Item Maintenance menu.
Next	Tap this button after entering or selecting a batch header to move to the Select Profile screen.

Selecting a Batch Header

➢ **To create a new batch:**

1. Tap inside the default batch description field. If an existing description displays, highlight the description.
2. Enter in a new batch description.
3. Tap Next to continue. The Batch Item Maintenance – Select Profile screen displays.

➢ **To select a batch you wish to append to:**

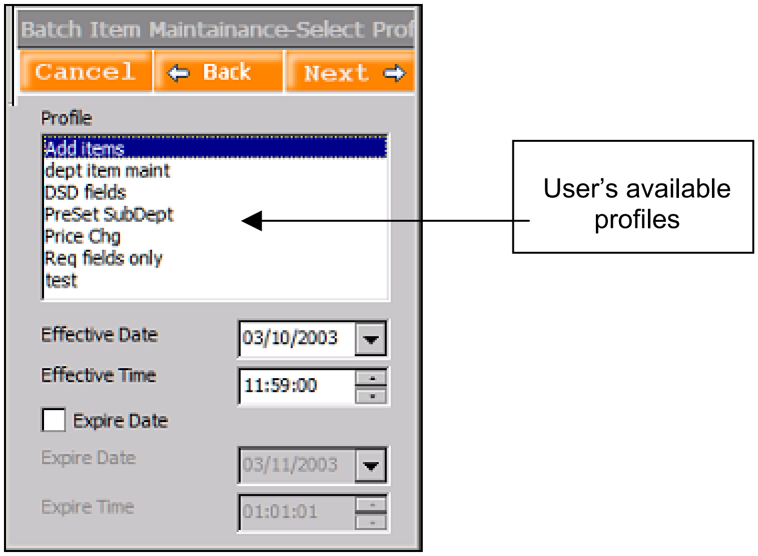
1. Tap the batch description. *The header will become highlighted.*
2. Tap **Next** to continue. *The Batch Item Maintenance – Select Profile screen displays.*

Note:

A batch can only be edited using the profile that was used to first create the back. The Select Profile Screen will only display the one profile.

Select Profile Screen

After selecting or entering a batch description, the Batch Item Maintenance - Select Profile Screen appears.

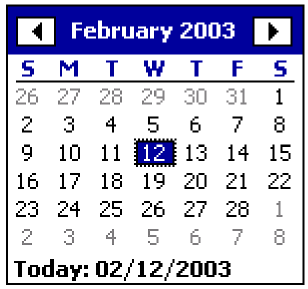


The item maintenance profiles that display in the profile list were previously attached to the group to which the login user belongs.

The Select Profile screen contains the following fields and buttons:

Field	Description
Profile	Tap the profile you wish to use to create or edit the batch.

Button	Description
Effective Date	Tap this field's selection arrow to select the batch's effective date by tapping the date from the calendar:



Note: You can view next month's calendar by tapping the button.

Button	Description
Effective Time	Tap inside each segment (hour, minutes, seconds) and tap the up and down arrows to increment and decrement the default activation time setting.
Expire Date checkbox	Tap this checkbox if the maintenance within the batch is temporary and would like to set an expiration date for the batch.
Expire Date	Tap this field's selection arrow to select the batch's expiration date by tapping the date from the calendar. This field is only available if the Expire Date checkbox is marked.
Expire Time	Tap inside each segment (hour, minutes, seconds) and tap the up and down arrows to increment and decrement the default expiration time setting. This field is only available if the Expire Date checkbox is marked.

Selecting an Item Maintenance Profile & Setting Batch Dates

➢ **To select an Item Maintenance Profile and set batch dates:**

1 Tap the desired Item Maintenance Profile you wish to use.

2 Tap the batch's Effective Date selection arrow and select an effective date from the calendar.

3 Change the default Effective Time (if desired) by incrementing or decrementing the hour, minute and second settings.

4 (Optional) Tap the Expire Date checkbox if the maintenance within the batch is temporary.

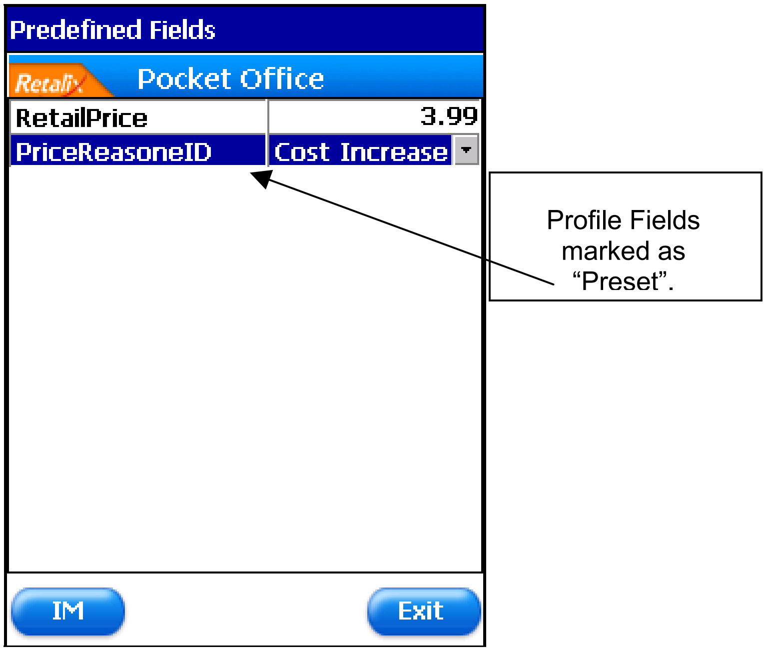
5 (Optional) Tap the batch's Expire Date selection arrow and select a batch expiration date from the calendar.

6 (Optional) Change the default Expire Time (if desired) by incrementing or decrementing the hour, minute and second settings.

7 Tap Next. The profile attributes display.

Predefined Fields Screen

The Item Maintenance Predefined Screen only displays if the profile selected from the Select Profile screen has one or more fields marked as "preset".



The screen contains the following buttons:

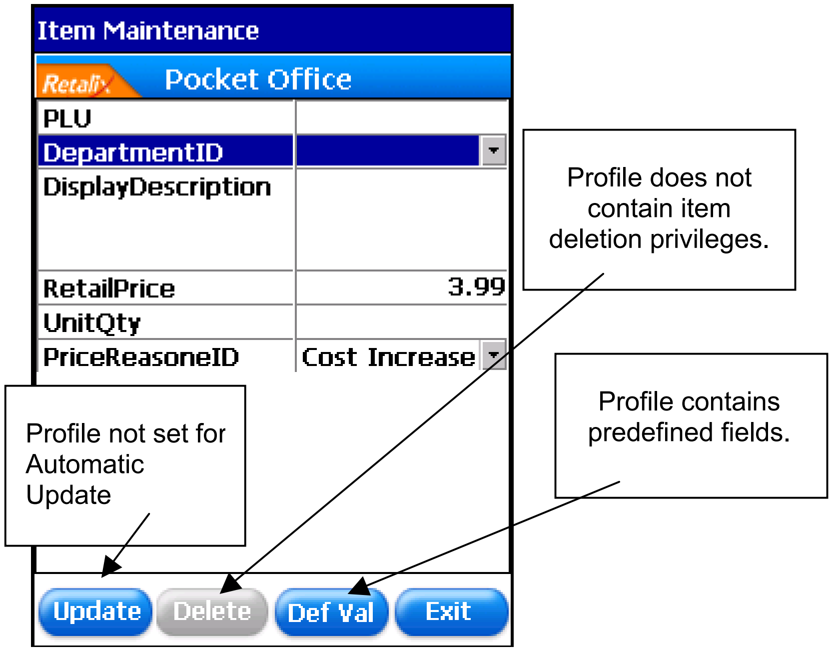
Button	Description
IM	Tap this button to accept the predefined values and move to the Profile Item Maintenance screen.
Exit	Tap this button to return to the Pocket Office Main Menu.

Note:

Pre-defined Fields that have Read/Write attributes may be changed prior to moving to the Select Profile screen.

(Profile) Item Maintenance Screen

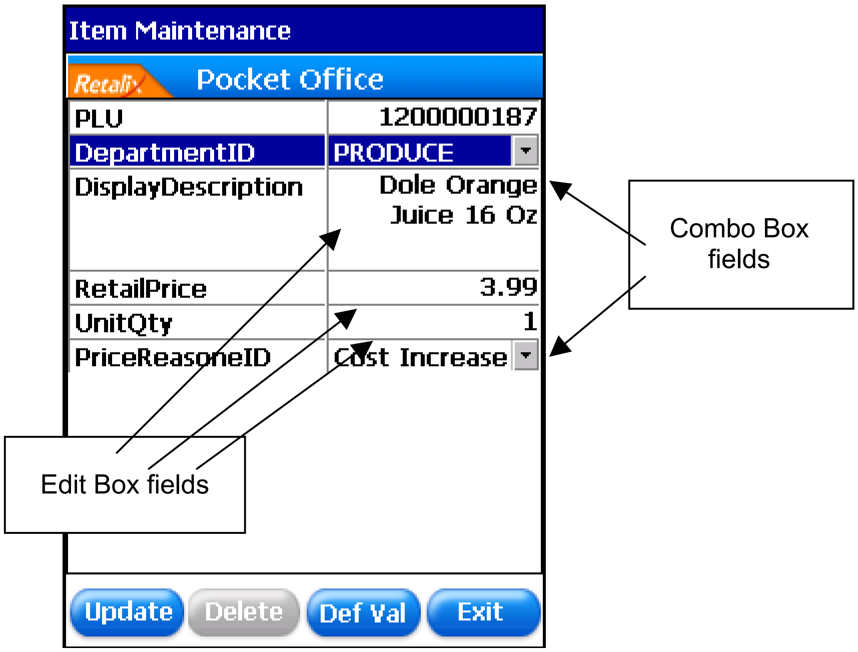
The Item Maintenance screen displays the fields within the selected profile. If the profile contains predefined fields, they will display with their preset values prior to scanning the first item.



The screen contains the following buttons:

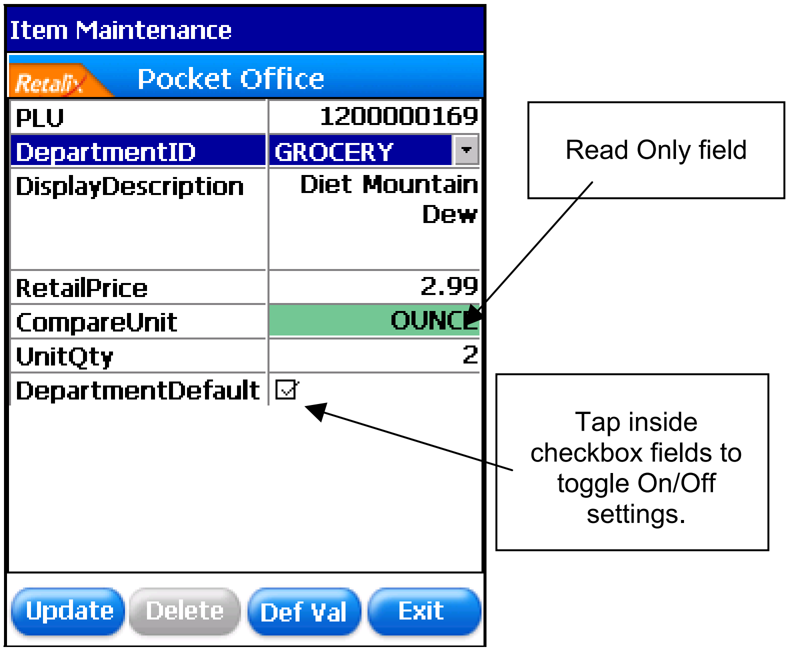
Button	**Description**
Update	Tap this button to update the item file with the maintenance applied here. **NOTE:** This button is only available if the “Automatic Update” setting for the profile is unchecked. (See Chapter 2: *Item General Settings*).
Clear	Tap this button to clear the last change to the item. **NOTE:** This button is only available if the “Automatic Update” setting for the profile is checked. (See Chapter 2: *Item General Settings*).
Delete	Tap this button to delete the item from the item file: **NOTE:** This button will be inactive (grayed out) if the profile does not contain item deletion privileges.
Def Val	Tap this button to return to the Predefined Fields screen to change preset values. **NOTE:** This button will only appear if the profile has at least one preset field.
Cancel	Tap this button to return to the Select Profile Screen.
Exit	Tap this button to save the last change and exit Batch Item Maintenance.

After scanning the first item, the profile fields are populated. If the profile contains predefined fields with preset values, maintenance is automatically performed on these fields. You may make additional changes as necessary.



Read Only fields

Read Only fields will display as color-filled.



Note:

Tap inside checkbox fields to toggle between an "On" and "Off" setting. A check indicates an "On" setting.

Performing Pocket Office Batch Item Maintenance

Having reviewed each screen that may appear when performing Pocket Office Item Maintenance (above), the following is a general example of the all the steps involved.

➢ **To add an existing item to the batch using Pocket Office Item Maintenance:**

1 From the Batch Item Maintenance - Select Profile screen, after selectin the profile and setting the batch dates, tap the Next button. If the profile contains predefined fields, the Predefined Fields screen appears. If the profile does not contain predefined fields, skip to step 3.

2 Review the pre-defined field settings from the profile and change them if necessary and permitted from the profile. When finished, tap the **IM** button. *The Item Maintenance*

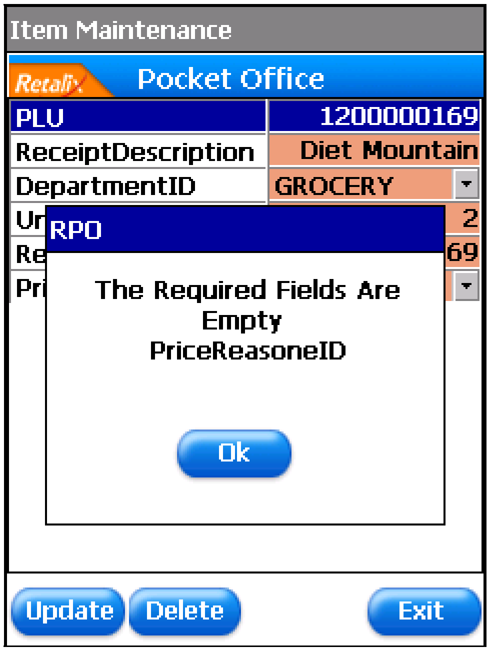
screen appears displaying the profile's fields (and its predefined field values, if any).

3 Scan the item you wish to update. Fields that either have existing values (and have a Source setting of anything other than "None") or newly applied predefined values will be populated.

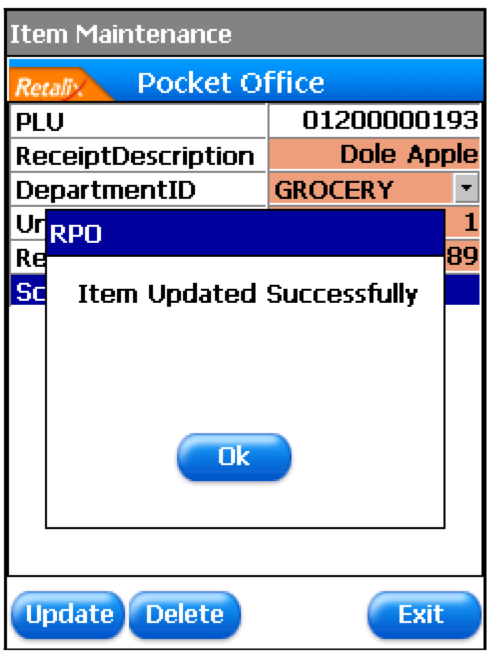
4 Make changes to the item as necessary. To move from field to field, use the Scroll Down and Scroll Up buttons or move directly to the desired field by tapping its location. For changes to a "ComboBox" field, tap the drop-down arrow and tap the desired selection. For "CheckBox" fields, tap inside the checkbox to toggle the setting from "On" to "Off" and visa versa. For changes to "EditBox" fields (that require an alphanumeric entry), press the **Enter** key. The existing entry will become highlighted and the virtual keyboard will automatically launch. Make the desired change and press the Scroll Down button to set the change. Press the Scroll Down (or Up) button to remove the virtual keyboard and move to the next (or previous) field. When finished making changes to the item, tap the **Update** button. You will be prompted if any "Required" fields are left blank. Otherwise, skip to step 6.

Note:

If Automatic Update is enabled for the chosen profile, the Update button will not appear and you can simply scan the next item to update the item. If this is your last item to maintain, tap **Exit**. For more information, see Chapter 2: ***Item General Settings***.



5 Tap **OK** and complete the required fields. When finished, tap **Update**. *The success confirmation screen appears:*



6 Tap **OK**.

7 Repeat steps 3 through 6 for the next item to update.

Note:

Remember that if the template has predefined fields, identical preset values will be applied to the next item.

8 (Optional) If this template has predefined fields that you wish to change, tap the **Def Val** button, make the necessary changes and repeat steps 2 through 7 for the next item.

9 When finished performing Item Maintenance or wish to begin with step 1 using a new template, tap the **Exit** button. *The Select Profile screen appears.*

10 To return to the Pocket Office Main Menu, tap **Cancel**.

Note:

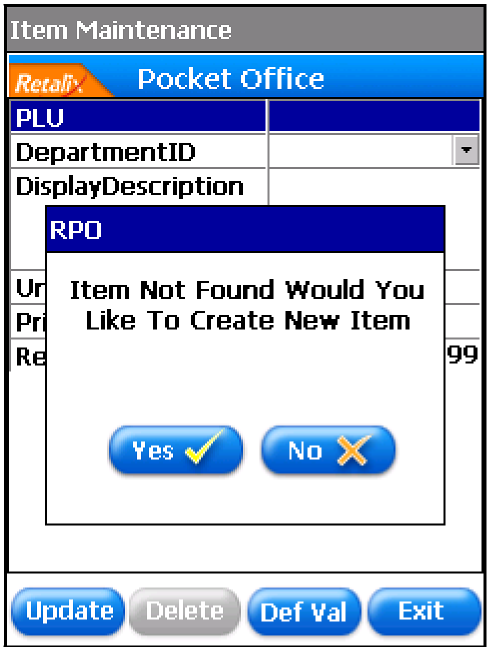
If you at any point you try to update an item after inputting invalid values, the message “One or More of the Fields are Invalid, Cannot Update PLU Data” message appears. Return the Item Maintenance screen and locate the field(s) that need to be changed.

➢ **To add a new item to a batch:**

1 From the Batch Item Maintenance - Select Profile screen, after selecting the profile and setting the batch dates, tap the Next button. If the profile contains predefined fields, the Predefined Fields screen appears. If the profile does not contain predefined fields, skip to step 3.

2 Review the pre-defined field settings from the profile and change them if necessary and permitted from the profile. When finished, tap the **IM** button. *The Item Maintenance screen appears displaying the profile’s fields (and its predefined field values, if any).*

3 Scan the item you wish to add. *If the profile allows new item creation with a warning, the following message appears. (Otherwise, skip to step 4).*



Note:

If you chose a profile that does not allow item creation, the "Item Not Found Not Allowed to Create New Item" message will appear.

4 Tap Yes.

5 At a minimum (if allowed by the template), complete the Department ID, Display Description, Retail Price and Unit Qty field.

6 Tap Update. *The success confirmation screen appears.*

Note:

If Automatic Update is enabled for the chosen profile, the Update button will not appear and you can simply scan the next item to add the item. If this is your last item to maintain, tap **Exit**. For more information, see Chapter 2: ***Item General Settings***.

7 Tap **OK**.

➢ **To perform delete maintenance within a batch:**

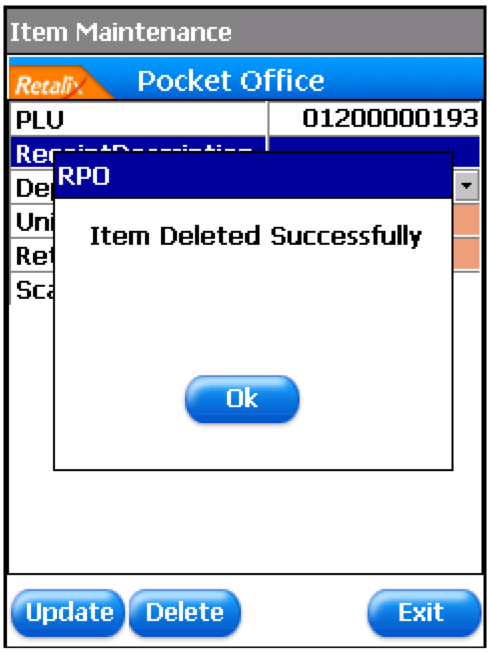
1 From the Batch Item Maintenance - Select Profile screen, after selecting the profile and setting the batch dates, tap the Next button. If the profile contains predefined fields, the

Predefined Fields screen appears. If the profile does not contain predefined fields, skip to step 3.

2 Review the pre-defined field settings from the profile and change them if necessary and permitted from the profile. When finished, tap the **IM** button. *The Item Maintenance screen appears displaying the profile's fields (and its predefined field values, if any).*

3 Scan the item you wish to delete. *Fields that either have existing values (and have a Source setting of anything other than "None") or newly applied predefined values will be populated.*

4 Tap the **Delete** button. *A confirmation screen appears:*

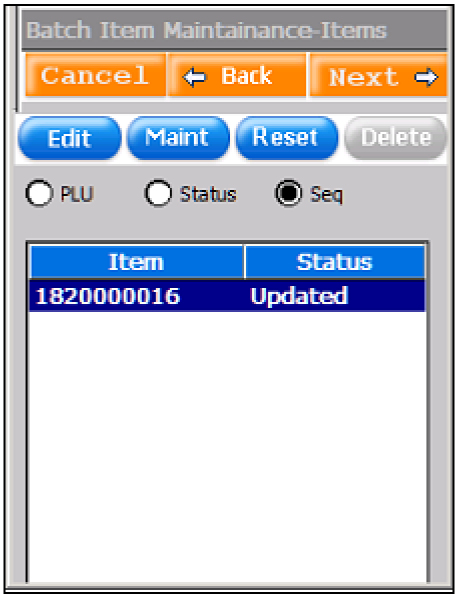


5 Tap OK.

Batch Item Maintenance -Items Screen

The Batch Item Maintenance screen appears when you exit the Item Maintenance screen. The screen displays a list of the items within the batch and their status.

The Batch Item Maintenance – Items screen contains the following buttons and columns.



Button	Description
Cancel	Tap this button to cancel batch maintenance and return to the Batch Item Maintenance menu. (You will be prompted for a Cancel confirmation) The batch will be placed in a suspended status.
Back	Tap this button to move back to the Batch Item Maintenance - Select Profile screen.
Next	Tap this button to move to the Batch Item Maintenance – Summary screen.
Edit	Tap this button to edit the highlighted item within the batch.
Maint	Tap this button to return to the Item Maintenance screen for the last selected profile.
Reset	Tap this button to remove the highlighted item from the batch.
Delete	Tap this button to delete the highlighted item from the item file. **NOTE:** This button is only available if the currently selected profile has been configured to “Allow item deletion” (See Chapter 2: *Item General Settings*)
Search	Tap this button to select the item by entering the item’s description or by entering an alphanumeric string that occurs anywhere in the description (See ***Chapter 2, Getting Started with Pocket Office*** for more information).
PLU (Radio Button)	Tap this button to sort the batch item list by UPC number (ascending) order.
Status (Radio Button)	Tap this button to sort the batch item list by status.
Seq (Radio	Tap this button to sort the batch item list by

Button	Description
Button	the order the items were entered into the batch.

Column	Description
Item	The item number.
Status	The item's status (Updated, Deleted, etc.)

Reviewing Batch Contents

➢ **To review the contents of a batch:**

1 From the Item Maintenance Screen, tap Exit. The Batch Item Maintenance – Items screen appears displaying a list of all items within the batch and their corresponding statuses.

2 Tap **Maint** to return to the Item Maintenance Screen or **Next** to display the Batch Item Maintenance Summary Screen.

Batch Item Maintenance-Summary Screen

The Batch Item Maintenance-Summary Screen displays the total number of items within the batch and the total number of items marked for deletion. From here the batch can be finalized and downloaded to ISS45 or left in a suspended status.

The screen contains the following buttons and fields.

Button	Description
Cancel	Tap this button to cancel all batch maintenance for this session and return to the Batch Item Maintenance menu.
Back	Tap this button to move back to the Batch Item Maintenance – Items screen.
Next	Tap this button to save all batch maintenance and return to the Batch Item Maintenance menu. The batch will either be downloaded or suspended (depending on the **Finalize** checkbox).

Field	Description
Finalize	Tap this checkbox to mark the batch as completed.

Finalizing the Batch

➢ **To finalize the batch:**

1 From the Batch Item Maintenance – Items screen, tap Next. The Batch Item Maintenance – Summary screen appears displaying batch totals.

2 Tap the **Finalize** checkbox.

Note:

If you leave this box unchecked, the batch will be placed in a suspended status.

3 Tap **Next**. The “Batch downloaded successfully” message appears.

4 Tap **OK**. You are returned to the Batch Item Maintenance menu.

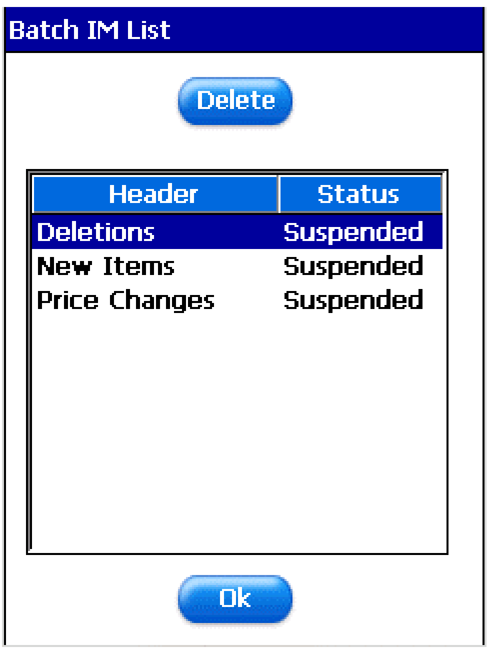
Using the Batch IM List

Batch IM (Item Maintenance) List is the second option on the Batch Item Maintenance menu. The Batch IM List provides functions that allow you to:

- View all suspended (incomplete) batch item maintenance headers
- Delete batches prior to downloading

Batch IM List Screen

The Batch IM List screen contains a combination of the following fields and buttons.



Field	Description
Header	The description of the batch.
Status	The status of the batch.

Button	Description
Delete	Tap this button to delete the highlighted batch.
OK	Tap this button to close the Inventory List screen and return to the Inventory menu.

Viewing the Batch List

The Batch List displays a list of batches that are in a suspended (non-finalized) state.

➢ **To view the batch list:**

1. Tap the Batch IM List icon from the Inventory menu. The Batch IM List screen displays.
2. When finished, click **OK**. *You are returned to the Batch Item Maintenance menu.*

Deleting Batch Headers

At times you wish to delete a header prior to uploading to the Pocket Office Gateway.

➢ **To delete a suspended batch:**

1. Tap the Batch IM List icon from the Inventory menu. The Batch IM List screen displays.
2. Tap the header you wish to delete. *The header is highlighted.*
3. Tap **Delete**. *A confirmation screen appears.*
4. Tap **Yes**. *The batch is removed and you are returned to the Batch IM List.*

7

Pocket Office Dashboard

The chapter introduces you to Pocket Office Dashboard operations. RPO Dashboard provides you with a tool to manage and monitor POS activity.

In this chapter:

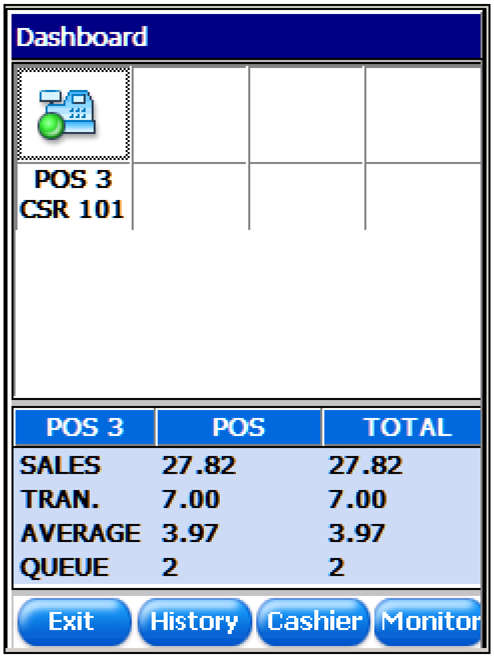
Pocket Office Dashboard Overview

The Pocket Office Dashboard module transforms your iPAD terminal into a tool to streamline management of POS activity. Using the RPO Dashboard, you can:

- View sales totals for each POS terminal
- View overall store sales totals
- View cashier statistics
- Send messages to a specific cashier (or all cashiers)
- View an electronic version of the POS receipt tape – as sales are ringing in real time
- Compare today's sales activity with the same day from the previous week

Dashboard Main Menu Screen

After a successful login to the Dashboard module (by first tapping the Dashboard icon from the Pocket Office Main Menu), the Dashboard Main Menu appears:



The screen contains the following fields and buttons:

Field	Description
POS Icon	Displays the POS Number, the employee number (if logged in) and the status of the terminal. Green for "Open" and Red for "Closed".
Sales	Displays the gross daily sales total for the highlighted POS and the overall gross store sales totals.
Transactions	Displays the daily transaction total for the highlighted POS and the overall store transaction totals.
Average	Displays the daily average transaction total for the highlighted POS and the daily average transaction total for the store.
Queue	Displays the last entered Q-Length entry for the highlighted POS and the Q-Length totals for the store. **Note:** The Q-Length feature, when enabled, prompts the cashier to key in the number of shoppers waiting at requested intervals.

Button	Description
Exit	Tap this button to return to the Pocket Office Main Menu.
History	Tap this button to view today's store totals compared to the same day from the previous week. (See Store History Screen on page 7-6).
Cashier	Tap this button to display all the cashiers logged into the highlighted POS for the day. (See Cashiers Screen on page 7-8).

Displaying POS Sales Totals

➢ **To display sales totals for a POS:**

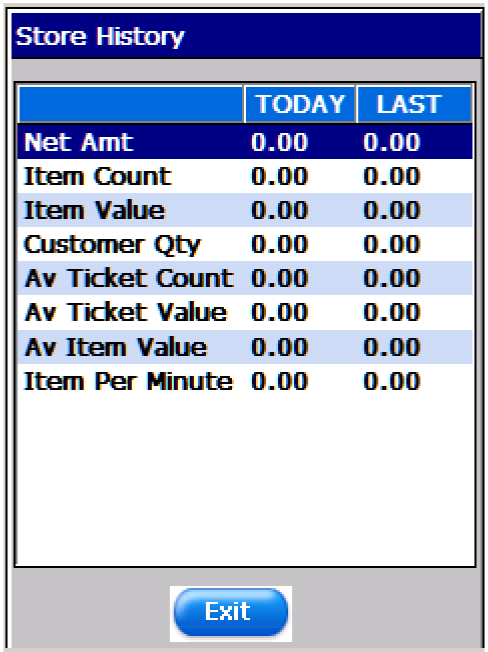
1 Tap the POS icon. The sales totals for the POS displays.

Note:

The data displayed for both the POS and the Store change as transactions are finalized at the POS. Store Totals will change as transactions at other POS terminals are finalized.

Store History Screen

After tapping the History button from the Dashboard Main Menu screen, the Store History Screen appears.



The Store History screen displays the daily store sales activity figures (for the entire store) in the “Today” column, compared to the same day from the previous week, in the “Last” column.

The screen contains the following fields and buttons:

Field	Description
Net Amount	The total amount of store sales (including sales tax).
Item Count	The total number of items sold.
Item Value	The total amount of all items sold.
Customer QTY	The total number of customers.
Av Order Count	The average number of items purchased per transaction.
Av Item Value	The average sales amount for each item sold.
Item Per Minute	The average number of items sold per minute.

Button	Description
Exit	Tap this button to return to the Dashboard Main Menu.

Cashiers Screen

The Cashiers screen displays when the Cashier button is tapped from the RPO Dashboard Main Menu.

The screen displays all the cashiers logged into the highlighted POS for the day and the duration of log in time for each cashier.

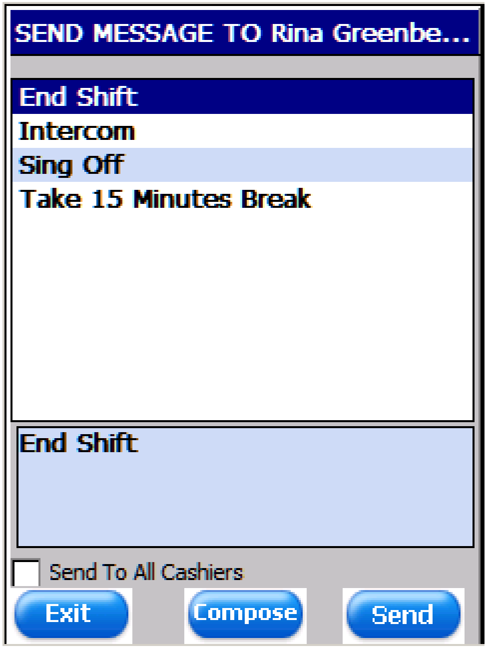
The screen contains the following fields and buttons:

Field	Description
#	The cashier list line number.
Name	The cashier name.
Duration	The duration of log in time in minutes and seconds.

Button	Description
Exit	Tap this button to return to the Dashboard Main Menu.
Message	Tap this button to send a message to the POS terminal or optionally all POS terminals. (See below)
Details	Tap this button to view additional cashier statistics. (See Cashier Details Screen on page 7-14).
Monitor	Tap this button to view the on-line receipt tape for the terminal. (See Cashier Monitoring Screen on page 7-17).

Send Message Screen

The Send Message Screen appears when the Message button is tapped from the Cashiers Screen. The screen displays all pre-defined POS messages that were created in the back office.



The screen contains the following fields and buttons:

Field	Description
Message Description Window	Displays a description of all pre-defined messages.
Full Message Display	Displays the completed message for the highlighted pre-defined message description.

Button	Description
Send To All Cashiers	Tap this checkbox to send the pre-defined message to all POS terminals.
Exit	Tap this button to return to the Cashier's Screen.
Compose	Tap this button launch the Compose Message screen to enter a new message.
Send	Tap this button to send the message to the POS terminal(s).

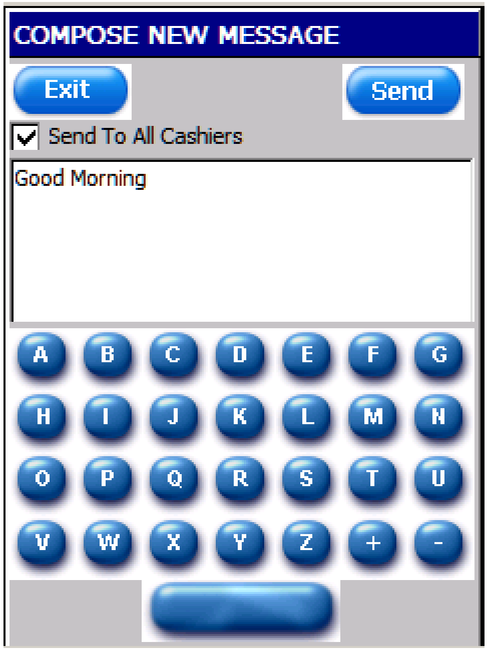
Sending a Pre-Defined Message

➢ **To send a pre-defined message to the POS terminal(s):**

1. From the Dashboard Main Menu, tap the POS icon for the terminal you wish to send a message to.
2. Tap the Cashier button.
3. Tap the Message button. *The Send Message screen displays.*
4. Tap the Pre-Defined message description you wish to send.
5. (Optional) Check the "Send to All Cashiers" checkbox (to send the message to every POS terminal).
6. Tap the Send button. *The message is transmitted.*

Compose New Message Screen

The Compose New Message Screen appears when the Compose button is tapped from the Send Message Screen. The message is created here and sent to the POS terminal(s).



The screen contains the following fields and buttons:

Field	**Description**
Send To All Cashiers	Tap this checkbox to send the message to all POS terminals.

Button	Description
Exit	Tap this button to return to the Cashiers screen.
Send	Tap this button to send the message to the POS terminal(s).
A-Z (+, - spacebar)	Tap the keys on the keyboard to create the message.

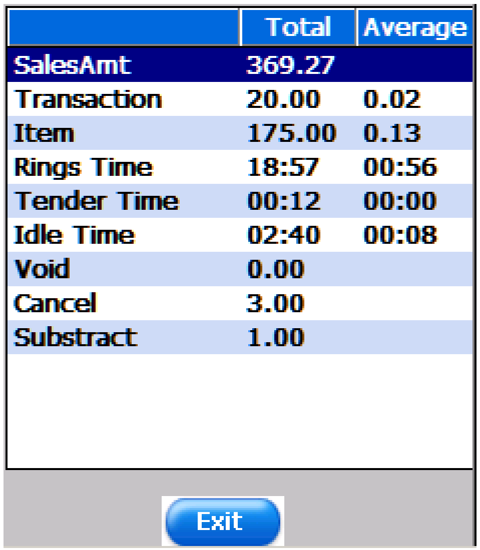
Sending a Message

➢ **To send a composed message to the POS terminal(s):**

1. From the Dashboard Main Menu, tap the POS icon for the terminal you wish to send a message to.
2. Tap the Cashier button.
3. Tap the Message button. *The Send Message screen displays.*
4. Tap the Compose button. *The Compose New Message screen displays.*
5. Compose the message using the screen's keyboard.
6. (Optional) Check the "Send to All Cashiers" checkbox (to send the message to every POS terminal).
7. Tap the Send button. *The message is transmitted.*

Cashier Details Screen

The Cashier Details Screen appears when the Details button is tapped from the Cashiers Screen. Transaction and Item total statistics as well as time-specific cashier statistics (in both totals and averages) are displayed.



	Total	Average
SalesAmt	369.27	
Transaction	20.00	0.02
Item	175.00	0.13
Rings Time	18:57	00:56
Tender Time	00:12	00:00
Idle Time	02:40	00:08
Void	0.00	
Cancel	3.00	
Substract	1.00	

Note:

The total duration of log in time in minutes and seconds appears for the employee at the top of the screen.

The screen contains the following fields and buttons:

Field	Description
SalesAmt	The dollar value of all sales transactions.
Transaction	The total number of transactions and average number of transactions per minute.
Item	The total number of items sold and average number of items sold per minute.
Ring Time	The total amount of ring time and average ring time per minute.
Tender Time	The total amount of tender time and average tender time per customer.
Idle Time	The total amount of idle time and average idle time per customer.
Void	The total number of item voids.
Cancel	The total number of canceled transactions.
Subtract	The total number of subtract items (i.e. coupons).

Button	Description
Exit	Tap this button to return to the Cashiers screen.

Viewing Cashier Details

➢ **To view detailed cashier statistics:**

1 From the Dashboard Main Menu, tap the POS icon possessing the employee you wish to view.

2 Tap the Cashier button. *The Cashiers screen is displayed.*

3 If more than one line of employees exist, tap the line associated with the employee you wish to view.

4 Tap the Details button. *The Cashier Details Screen is displayed.*

Cashier Monitoring Screen

The Cashier Monitoring Screen appears when the Monitor button is tapped from the Cashiers Screen. An electronic receipt tape can be viewed in real time (with a scrolling stop and restart capability).

The screen contains the following buttons:

Button	Description
Exit	Tap this button to return to the Cashiers screen.
Message	Tap this button to launch the Compose New Message screen. (See page 7-12).
Stop / Start	Tap the Stop button to suspend the on-line receipt tape. (No additional receipt lines will be added to the screen). Tap the Start button to resume adding transaction lines to the screen in real-time.

Monitoring a Cashier

➢ **To monitor a cashier:**

1. From the Dashboard Main Menu, tap the POS icon for the terminal you want to monitor.
2. Tap the Cashier button.
3. Tap the Monitor button. *The on-line receipt is displayed.*
4. (Optional) Tap the Stop button to suspend the receipt. Drag the scroll bar on the right to scroll up and down through the receipt.

8

Pocket Office Remote Manager Authorization (RMA)

The chapter introduces you to Pocket Office Remote Manager Authorization (RMA). RPO RMA allows you to receive and resolve control checks and alerts from the POS.

In this chapter:

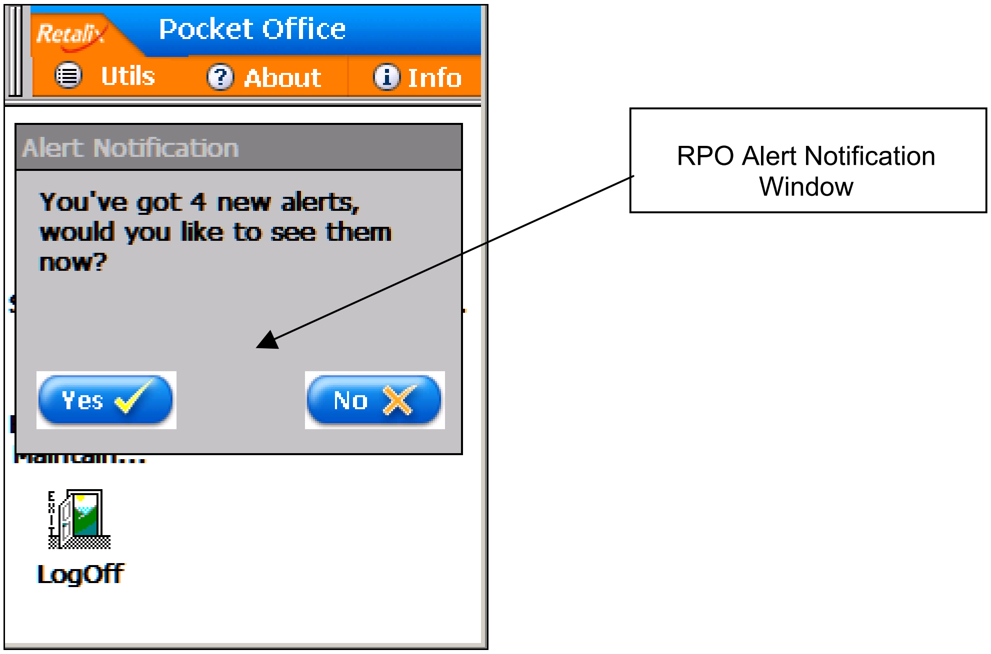
Pocket Office RMA Overview

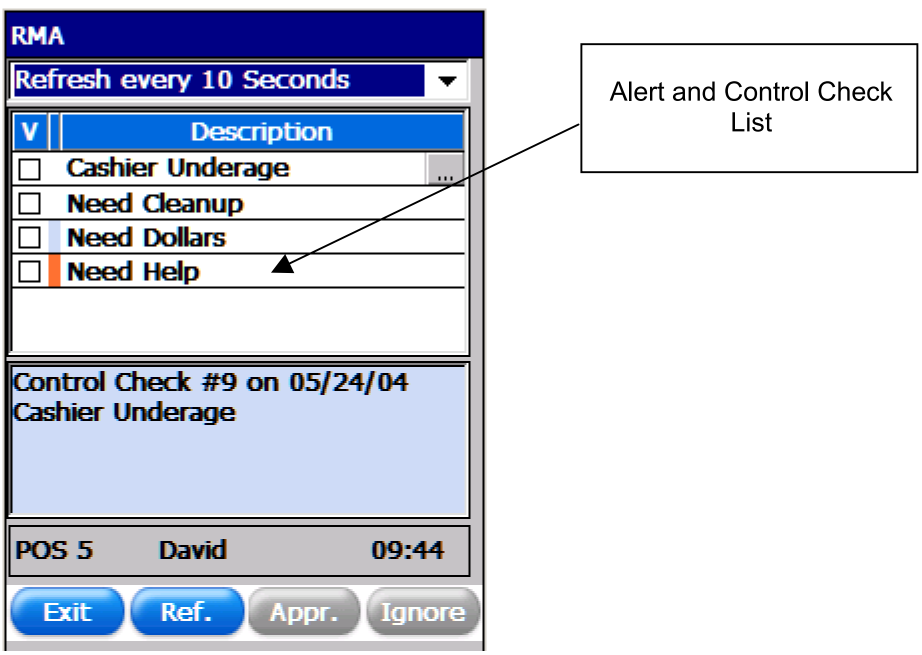
The Pocket Office Remote Manager Authorization (RMA) module transforms your iPAD terminal into a tool to receive the following control check requests and alerts from the POS and File Servers:

- Control Checks (Ask Yes/No, Manager\Supervisor Key Lock Required, Warnings)
- Keyboard functions that trigger manager authorization
- System Alerts (i.e., Printer Error, OLA Offline, etc.)
- Manual Cashier Requests (from pre-defined keys at the POS)

Depending on how ISS45 is configured, selected control check responses as well as keyboard functions that trigger manager authorization requests and can be set to:

- Inform the RPO User Only — display on the HCC but do not allow approval from the HHC. Resolution must occur at the POS.
- Allow Approval — display on the HCC and allow approval from the HHC. Resolution may occur either from the HHC or the POS.
- Not appear on the HHC


Pocket Office
Utils
About
Info
Alert Notification
You've got 4 new alerts, would you like to see them now?
Yes
No
LogOff
RPO Alert Notification Window

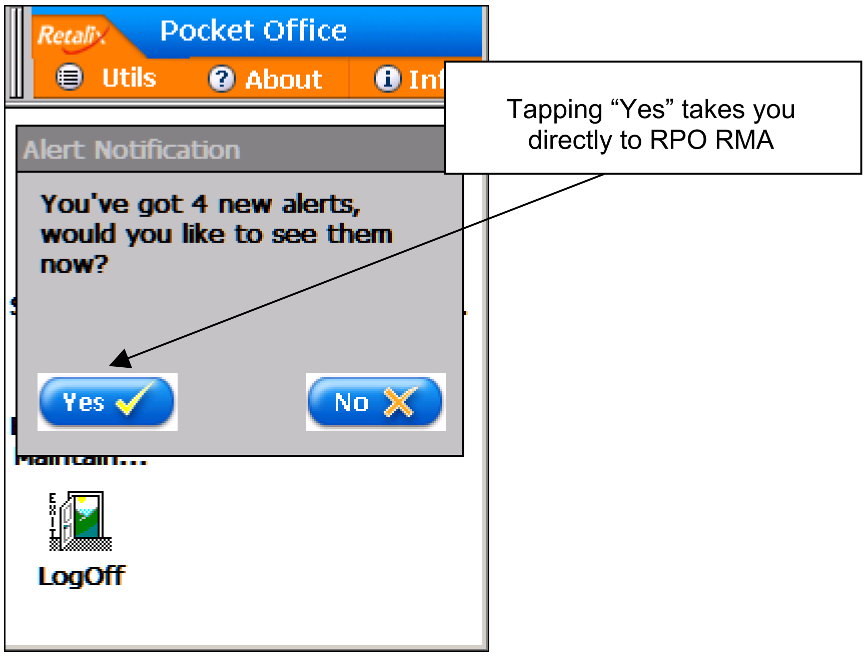

RMA
Refresh every 10 Seconds
V
Description
Cashier Underage
Need Cleanup
Need Dollars
Need Help
Control Check #9 on 05/24/04
Cashier Underage
POS 5
David
09:44
Exit
Ref.
Appr.
Ignore
Alert and Control Check List

The steps for configuring RPO RMA are found in the RPO-StoreNext Installation Guide. Configuring both Pocket Office Admin and ISS45 must be completed before RPO RMA can be implemented.

RMA Main Menu Screen

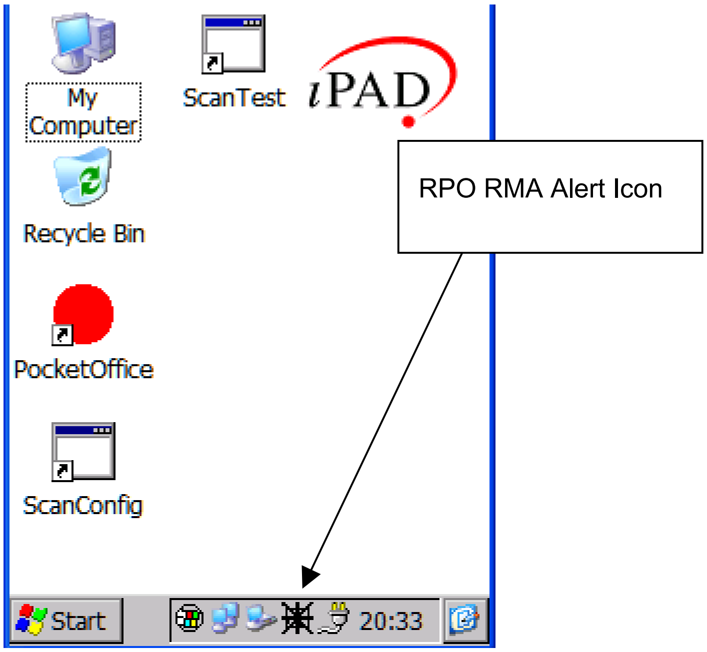
Unlike other RPO modules, the RPO RMA Main Menu Screen can be accessed one of three ways:

1 After tapping "Yes" when the Alert Notification window displays:

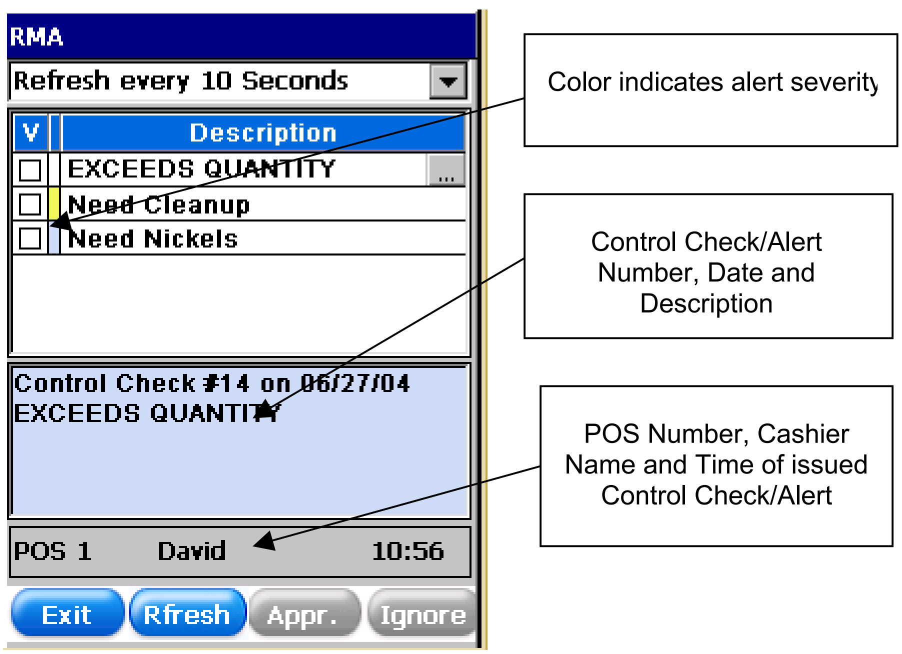


2 After a successful login to the RMA module (by first tapping the Alert icon from the Pocket Office Main Menu).

3 When in a non-RPO application, by tapping the Alert Icon that flashes in the tray.



The RMA Main Screen appears:



Note:

Control Checks will only appear to those RPO operators who have privileges to approve them.

The screen contains the following fields and buttons:

Field	Description
Refresh Selection	Click the field's selection arrow ▼ and choose the desired setting to poll ISS45 for the latest unresolved Control Checks/Alerts. Available options are: 1 Minute, 5 Minutes and Stop. **Note:** If you select "Stop", Control Checks/Alerts will stop being displayed until the next login.
Checkbox	Tap the checkbox next to the Control Checks and Alerts you wish to respond to.
Alert Status	(Read Only) This column displays a color based on the alert severity. Red displays for an emergency alert, yellow for a warning alert and blue for an informational alert. **Note:** Alert Severity is designated in ISS45 Alerts Maintenance.
Description	(Read Only) This column displays the description of the Alert or Control Check.
Control Check / Alert Detail	(Read Only) The Control Check/Alert Number, Date and full description from the selected Control Check/Alert.
POS / Cashier / Time Detail	(Read Only) The POS Number, Cashier Name and Time from the issued Control Check/Alert.

Button	Description
...	Click the ellipsis button next to the control check to view transaction detail. (See *Control Check Transaction Detail Screen* on page 8-9).
Exit	Tap this button to return to the Pocket Office Main Menu.
Ref.	Tap this button to force a refresh of the unresolved Control Check/Alerts list. **Note:** While in the RMA Main Menu screen, the system will not automatically display new control check/alerts. You must tap this button to display them.
Appr.	Tap this button to approve and to take ownership of the selected Alerts. These Alerts will then be removed from other RPO-RMA User's lists where the Alerts are present. **Note:** The Appr. button on the RPO RMA Main Menu is enabled for Alerts only. (To approve a Control Check, see page 8-14)
Ignore	Tap this button to Ignore the selected (checked) Control Checks/Alerts. These Control Checks/Alerts will no longer appear on your list but will remain on other RPO-RMA User's lists where the Control Check/Alert is present.

Responding to Alerts

➢ **To respond to an Alert:**

1 With the RPO RMA Main Menu displaying, tap (highlight) the description of the Alert you wish to view.

The Alert Number and full description display along with the POS Number and Time it was the issued.

2 Tap inside the checkbox of the alert you wish to respond to either approve or ignore.

Note:

If desired, you may select multiple alerts by tapping multiple checkboxes.

3 (Optional) Tap the **Appr.** button to respond to the alert.

The Alert will be removed from other RPO-RMA User's lists where the Alert is displaying.

4 (Optional) Tap the **Ignore** button to bypass taking action.

The Alert will be removed from your alert list but will remain on other RPO-RMA User's lists where the Alert is present.

Control Check Transaction Detail Screen

The Control Check Transaction Detail Screen displays when the control check's ellipsis button is tapped from the RMA Main Menu Screen. The screen contains the following Tabs:

Note:

The tabs will be displayed only if the relevant information is available. If no information available 'No Ticket Information' will be displayed

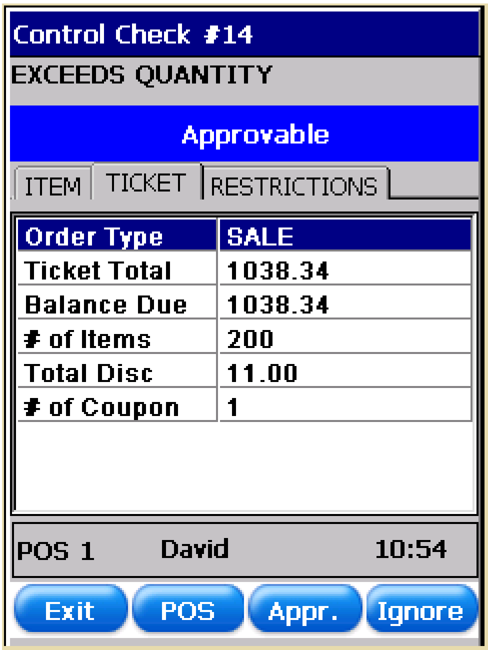
- Item Tab – Information on the item that generated the Control Check
- Ticket Tab – Information on the transaction that contains the item that generated the Control Check
- Restrictions Tab – Information on the Control Check restriction

Item Tab

The following fields displays on the Control Check Detail Screen's Item Tab

Field	Description
Item ID	The UPC/PLU of the item that generated the Control Check.
Item Name	The description of the item.
Dep. Name	The description of the item's department.
Item Price	The price multiple and price of the item.

Ticket Tab



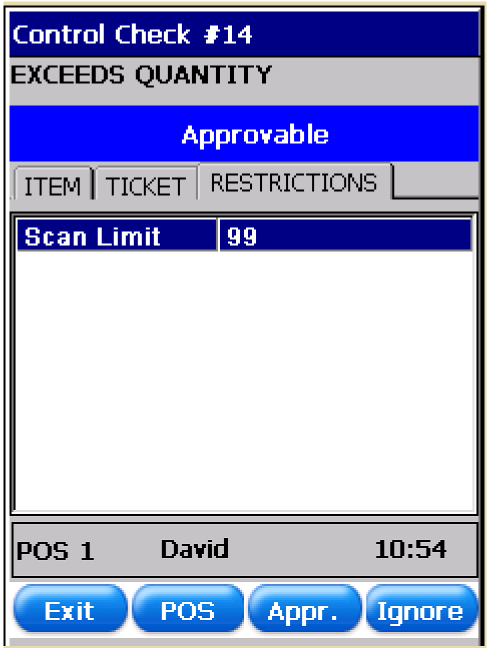
The following fields displays on the Control Check Detail Screen's Ticket Tab:

Field	Description
Order Type	The type of transaction: Sale, Return, etc.
Ticket Total	The total of transaction total before the control check was issued.
Balance Due	The tender balance due. **Note:** In some cases the total ticket will not include the value of the item that triggered the Control Check.
# of Items	The number of items scanned/key-entered before the control check was issued.
Total Disc	Total dollar amount discounts issued within the transaction.
# of Coupon	The number of coupons entered within the transaction.

Note:

The Ticket Tab will not appear if the item that generated the control check is the first item in the transaction.

Restrictions Tab



The following fields displays on the Control Check Detail Screen's Restriction Tab:

Field	Description
Description	The description of the control check.
Reason	The reason for the issued control check.

Note:

The available information for the specific ticket will be displayed. Not all Control Check transactions have the same data.

The following buttons appear on the Control Check Transaction Detail Screen:

Button	Description
Exit	Tap this button to return to the RPO RMA Main Menu.
POS	Tap this button to indicate that the Control Check will be resolved at the POS.
Appr.	Tap this button to Approve the displayed Control Check. This Control Check will be removed from other RPO-RMA User's lists where the Control Check is present.
Ignore	Tap this button to Ignore the selected Control Check. This Control Check will no longer appear on your list but will remain on other RPO-RMA User's lists where the Control Check is present.

Responding to Control Checks

➢ **To respond to an issued Control Check:**

1 Tap the Ellipsis icon ... of the Control Check you wish to view.
The Control Check Transaction Detail Screen displays.

Note:

If the Control Check is flagged for "Info Only", the **Appr.** button will be disabled (grayed-out) and "Info Only" will be display at the top of the screen.

2 Tap the Tab you wish to view.

3 (Optional) Tap the Appr. button to approve the control check.

The Control Check will be removed from other RPO-RMA User's lists where the Control Check is displaying.

4 (Optional) Tap the POS to indicate that you will resolve the control at the POS.

The Control Check will be removed from other RPO-RMA User's lists where the Control Check is displaying.

5 (Optional) Tap the Ignore button to bypass taking action.

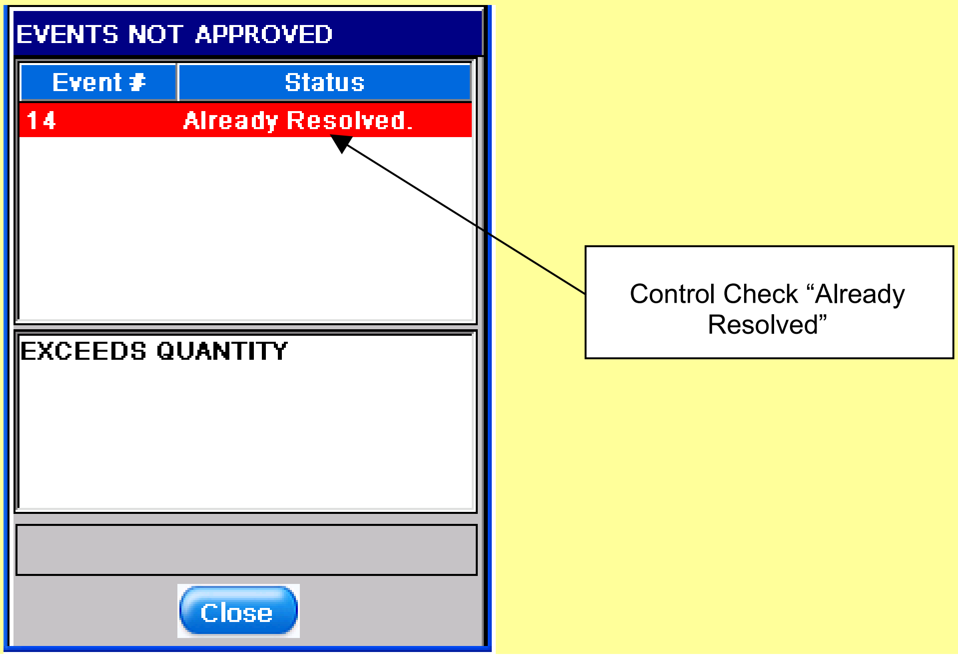
Note:

You can also Ignore a Control Check from the RPO RMA Main Menu. See page 8-15.

The Control Check will be removed from your Control Check list but will remain on other RPO-RMA User's lists where the Control Check is present.

Note:

If you attempt to resolve an Alert/Control Check that has been either resolved at the POS or by another RPO RMA user, a screen will appear that shows the status as "Already Resolved". Click the Close button to return to the RPO RMA Main Menu.



➢ **To ignore a Control Check from the RPO RMA Main Menu:**

1 With the RPO RMA Main Menu displaying, tap (highlight) the description of the Control Check you wish to view.

The Control Check Number and full description display along with the POS Number, Cashier Name and Time it was the issued.

2 Tap inside checkbox of the control check you wish to ignore.

3 (Optional) Tap the Ignore button to bypass taking action.

The Control Check will be removed from your Control Check list but will remain on other RPO-RMA User's lists where the Control Check is present.

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