Retail STAR/ICE
Physical Inventory
Instructions and
PDT Manual

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Physical Inventory Instructions

The control of inventory is an integral part of effective business management. Therefore, it is essential for a physical inventory to be accomplished correctly from its introduction and on through the business cycle. Correct accomplishment and maintenance of physical inventory can provide vital management information for use in:

- Accurate reporting and forecasting
- Maintaining model stock
- Purchasing and transferring inventory
- Shrinkage detection and prevention

Nevertheless, there is no software or equipment that will magically make your inventory more accurate by itself. Beginning with a good physical inventory and implementing periodic reporting as a method of controlling and detecting procedural, systematic, or training issues that might need addressing can prevent inventory inaccuracies. Properly implemented, these systems can help reduce errors. However, none of them will eliminate all errors, and a poorly implemented system can leave you worse off than you were before.

This document will cover the steps involved in taking a Physical Inventory for the Retail STAR and Retail ICE programs. The focus of this document is to help achieve increased accuracy in counting inventory. The most basic outline for any inventory is as follows.

- Planning
- Setting cutoff of inventory movement
- Snapshot current inventory
- Physical inventory count
- Comparison and review
- Discrepancy reconciliation
- Posting
- Reviewing and analyzing

The amount of preparation you do will directly impact the success of your physical inventory. You can save yourself time and headaches if you are adequately prepared. Following is a list of procedures that our customers have used as guidelines to prepare their stores. The physical inventory is designed to conduct the PI data entry at the physical location. In addition, only one selected computer in that location can be used to take the snap, enter the count, and post the count if multiple computers are in that store location.

PI Store Preparation

Because Retail STAR/ICE works as a real-time system (meaning the transactions post to the database immediately), it is extremely important that no sales are processed within the time that the Physical Inventory Snapshot is taken until the Physical Inventory Count is downloaded into the PI grid. If any items must be sold during this time, the inventory for these transactions must be manually logged for adjustment after the physical inventory.

- Multi-store only: Verify all product records exist at all remote locations and that all products have an on-hand record. To find the total count of products, open Office STAR, click on Inventory, select Product Change by Range, double-click on Description under Fields to choose from, then click <F3> List Products. The store location’s total product amount will be in the lower right corner of the screen. Record the number in each store and verify they match. Exit the menus without saving.

- Confirm that an active inventory record exists for every UPC. Retail STAR has a utility to check for this: On the Utilities submenu, select Inventory Activation, and change the Store No. to All Stores from the pull-down menu, then click <F10> Run. This utility can take up to one hour to run depending on the size of the database and the speed of the computer.
• Decide on the best cutoff date to stop inventory movement such as purchase order receivers, transfers, adjustment levels, and preferably, sales. Allow sufficient time for the store to handle all shipments before beginning the physical inventory.

• All transfers in transit must be received before the physical inventory begins.

• Decide if any merchandise would be faster to count manually; for example, loose items such as bows, shoe polish, clips, pens, jewelry, etc. Print count sheets or create worksheets for these items.

• Store managers should walk through the store and pull out merchandise items that are without tags. Attach tags to these items before the inventory.

• Check that all stock is neatly accessible and has its barcode label facing out.

• Wall and window displays should have their UPCs, labels, and/or a sheet describing what they are accessible. They should be placed on the display or in some central place near the display. Do not make personnel/counters climb into windows or up to the wall and pull apart displays. Retail STAR/ICE can create zone sheets to help you label your PI areas with barcodes to scan. On the Inventory submenu, select Print Count Sheets, type in the Number of Zones you will have, then click <F11> Print.

• Pre-count layaways, holds, off-season merchandise, and back stock items in storage. Mark their racks, boxes, and/or containers with the count and seal them.

• Pre-count all wall and window displays and mark the count near their respective displays.

• Schedule sufficient staff for the inventory count. Use the following formula:
  *
  500 item scans per hour, per PDT for novice personnel assigned scanning.

  *
  1,200 scans per hour for more experienced scanners.

  *
  Decrease the number to 300 scans per hour if the merchandise is difficult to access or if tags are dirty, smudged, faint, or wrinkled.

  *
  Increase scans per hour to somewhere between 800 and 2000 for very accessible, easily scannable items such as boxes on shelves where the barcodes are facing out, or other situations where the tag itself does not need to be handled.

• Store manager(s) and PI supervisor(s) should walk the store to see that all the above items have been accomplished.

• PDT units should be fully charged before all inventories. Once a month, the battery must be completely discharged. The unit should remain in the cradle when not in use. Additional batteries may be purchased from Symbol.

• Test the PDT before starting the inventory and scanning the entire store. It may have worked last time, but make sure it still works. Take a snap, then scan one item and download it. Verify the item is populated with the correct count on the Physical Inventory screen. Once it has been confirmed that the hardware works, delete the Physical Inventory and snapshot.

• Verify all PO receiving and transfer receiving has been done for any items to be counted. Items not received yet should not be counted.

• Backup your database. On the Utilities submenu, select Database Copy Utility. Make sure Copy main database for backup is selected under Default Options, and that only the Step #1 - Backup Main Database option box is selected. Click on the Browse button (...) at the end of the Backup Destination Directory edit box and select a drive and folder to write the backup file to. Now click <F10> Run to create a backup. Note the location where the file is saved; this is very important if a restore needs to be conducted.

• It is also recommended to create and verify that a tape backup is done prior to the physical inventory. Mark the backup tape as PreINV(date code).
PI TIPS

It is recommended by CAM that the store be closed during a full physical inventory. No inventory movements in or out of the Retail STAR/ICE inventory program should occur. No movements of inventory should occur between the time the snapshot is taken and the posting of the PI. This will ensure the most accurate physical inventory.

- Trying to carry out a physical inventory while conducting sales at the same time can cause confusion and inaccuracies. It can be done, however, realize that this would be at the expense of time and ease. To be able to ring sales, strict recording of sold merchandise must be enforced for later careful adjustments.

- The longer the physical inventory process takes, the more fatigued your staff will become and, consequently, the less accurate the count will be. Prepare everything as far in advance as possible and do everything you can to make the process go smoothly.

- Scan in teams of two people, with one person responsible for handling the tags and the other doing the double count.

- Involve your other store managers in the current store’s physical inventory so they can become familiar with the inventory process. Practice makes perfect!

- Talk to your staff before you start counting. Let them know how important accuracy is. Tell them you like them to move quickly, but not at the expense of accuracy.

- Review the double count process with your staff and set a standard method for scanning each fixture.

- Have the PI supervisor available to help delete and edit records.

- Regular cycle counts not only keep your data in tip-top shape, they also send a strong signal to your employees that you know what is in your store.

- If you do not have a scanner/PDT to count your items, using a custom report in Report STAR to write in your unit count next to each size may be helpful. A report for each department can be generated by changing the filter (x) to your department codes.

Generate a Report STAR report of the following criteria:

- Report Name: .......... PI items
- Date Range: .......... (Current Date Only)
- Store Selection: ....... (Current store prepped for PI)
- Level of Detail: ........ Department, Style, Color, Size, Subsize
- Column Selection: ...... OH
- SubTotals: ............... Department, Style, Color
- Filter: ..................... Department Equals (x)

SUMMARY OF PI STEPS

✓ Put fixture tags in store
✓ Brief staff
✓ Run and print out your pre-reports
✓ Take the physical inventory snapshot in the computer system
✓ Count the physical count of the floor and enter into system
✓ Review your PI variances; make any necessary changes
✓ Post the Physical Inventory Count
✓ Run and print out your post-reports
FULL STORE PI PROCEDURES

It is recommended that this PI process be completed while the store is closed.

1. Run reports to capture your pre-inventory values. You may want to create more custom reports using Report STAR at this point to view inventory amounts prior to posting the PI, along with the one offered. In Report STAR, create the following report to review your current inventory status. The level of detail can be narrowed down by selecting style, color, size, subsize, etc.

   Report Name: ………… PI Count and Value
   Date Range: ………… (Current Date Only)
   Store Selection: ………. (Current store prepped for PI)
   Level of Detail: ………... Department
   Column Selection: ……. OH, EI, $EIC, $EIR
   SubTotals: ……………… Department

   Take the time to analyze carefully any negative or non-matching amounts between OH & EI. This will be corrected on the next step if there is a discrepancy.

2. In the Physical Inventory option in Retail ICE/STAR, take a snapshot by clicking <F2> Snap.
   (a) This feature, by design, will recalculate the OH (On Hand) figures to match EI (Ending Inventory). If discrepancies are found, a message will pop up asking if you would like to view and print the changes. Open PLU’s will always have a discrepancy by design, since OH is never depleted when creating receipts.
   (b) The main function is to take a picture of the store’s current inventory, essentially capturing the store’s OH in the snapshot within the system. In addition, this will allow you to ring sales while you are analyzing the PI Variance report, which would be after all items are completely counted and before the actual post. Items that have a zero (0) quantity at the time of the snap must be added to the PI Grid if you plan on receiving, adjusting, or selling before the post; otherwise, the items will go back to zero (0) during the post on a full PI.

3. Divide the store into separate areas/zones/departments/sections.

4. Count, download, key, or import the merchandise values into Retail STAR/ICE.
   (a) PDT users scan areas one at a time and download after scanning each section.
   (b) Non-PDT users write down UPC’s and the amounts on paper and enter them into the PI grid.
   Click the Save button periodically to save the information entered.
   (c) Users that hire a third-party company to count their store inventory for them (e.g., RGIS) should be supplied with a disk with a file on it.
      i. Typically, these companies prefer to compare the UPC’s they scanned with the UPC’s that are actually set up in Retail STAR/ICE. Support can supply you with a Validation Utility that will create a file with all valid UPC’s in your Retail STAR/ICE system for comparison.
      ii. PI services like RGIS convert PI data into a CSV file for importing into PI. Once the file is supplied, the extension may need to be renamed to a .txt file if it has not been renamed already (i.e., IN000002.TXT).
      iii. To import the file, on the Physical Inventory screen, click on <F4> Import, find the file(s) (i.e., IN000002.TXT), and select one file at a time. This will import the RGIS file into the PI screen.

5. Run a PI variance report to view all discrepancies. On the Physical Inventory Search screen, click on <F11> Report. By default, a current standard variance report can be viewed by now clicking <F11> Report again. Carefully review this report for all variances. A large variance could indicate a mistake on entering the count. There is an option for the PI Variance report to only show variances and to show a report by zone.

6. Run any additional reports that you have created to help you with inventory values before posting your count.
7. At this point, you are agreeing with all report values and discrepancies entered into the system and there is no reversing the next step which is the actual posting of the inventory. **If there is a problem with a value or discrepancy, it must be resolved before continuing.**

8. When posting Physical Inventory, select the *Post all UPC entries* radio button, and click to select the *Zero OH for items that do NOT get posted in the PI* option box. Your count is now your inventory. This ends the Physical Inventory in Retail STAR.

(a) This process will post your PI count to the on-hand value by adjusting in or adjusting out the amount needed to correct what your inventory was and what the new value is. For example, if the computer shows 5 units, and you count 3 units, the post will adjust out –2 units. This –2 is recorded historically by the PIVar value for the day of the inventory.

(b) At the physical inventory value, there are two options. These options are primarily used for cycle or partial counts. The first option will only post the records in the PI grid that have a check mark in the counted column. The second option will post all UPC’s in the PI grid with the count value.

(c) The *Zero OH for items that do NOT get posted in the PI* option box will zero out all UPC on-hand values that are not listed in the PI grid if it is selected. Therefore, you would want to select this option box on a full inventory and you would not want to select this option on a partial inventory. Selecting this option on a full inventory will zero out the on-hand items that you did not populate on the PI grid. This will correct all the negative values on your computer, as well as bring up all UPC’s that show a value that really should be 0.

9. Refer to the Post-Physical Inventory Reports and Verification section below for post reporting.

**PARTIAL/CYCLE COUNT PI PROCEDURES**

1. Run reports to capture your pre-inventory values for the specific vendor or department. In Report STAR, create the following report to review your current inventory status. The level of detail can be narrowed down by selecting style, color, size, subsize, etc. You may want to create more custom reports using Report STAR at this point to view inventory amounts prior to posting the PI.

   Report Name: ............... PI Count and Value
   Date Range: ............... (Current Date Only)
   Store Selection: .......... (Current store prepped for PI)
   Level of Detail: .......... Vendor or Department
   Column Selection: ...... OH, EI, SEIC, SEIR
   SubTotals: ................. Based on either Vendor or Department

   **Take the time to analyze carefully any negative or non-matching amounts between OH & EI. This will be corrected on the next step if there is a discrepancy.**

2. Take a snapshot by clicking <F2> Snap (see the Full Store PI Procedure section above).

3. Count, download, key, or import the merchandise values into Retail STAR/ICE.
   (a) PDT users scan areas one at a time and download after scanning each section.
   (b) Non-PDT users write down UPC’s and the amounts on paper and enter them into the PI grid. Click the Save button periodically to save the information entered.
   (c) Users that hire a third-party company to count their store inventory for them (e.g., RGIS) should be supplied with a disk with a file on it.

   i. Typically, these companies prefer to compare the UPC’s they scanned with the UPC’s that are actually set up in Retail STAR/ICE. Support can supply you with a Validation Utility that will create a file with all valid UPC’s in your Retail STAR/ICE system for comparison.
ii. Once the file is supplied, the extension will need to be renamed to a .txt file if it has not been renamed already (i.e., IN000002.TXT).

iii. To import the file, on the Physical Inventory screen, click on <F4> Import, find the file(s) (i.e., IN000002.TXT), and select the file. This will import the RGIS file into the PI screen.

4. Click <F10> Save every time you download and process.

**Items not counted in the PI (of the products that were populated to the screen) should show a count of zero (0) and will be zeroed in the database when the Physical Inventory is posted.**

5. Populate the entire vendor or department that is going to be inventoried.

   (a) On the Physical Inventory screen, click the <F9> Populate button.
   
   (b) On the Product Search screen, choose the search criteria for retrieving the product for a partial PI that you are going to inventory, or choose the department for the departmental PI that is to be completed.
   
   (c) Clicking the <F10> Return button will search and return the UPC’s for all of the products that are encompassed by the search criteria that you specified.

       • If your intention is to post at this time, **DO NOT** select the Zero OH for items that do NOT get posted in the PI option box on the Posting Physical Inventory screen. Selecting this option box will zero out the rest of your store inventory.

       • The PI file or PDT **must** be downloaded at the store where the inventory was taken.

       • Take the time to analyze carefully and review any negative or non-matching numbers.

6. Review the Physical Inventory that you have done so far.

   ➢ Review the Physical Inventory screen for any errors that you might notice. This would include, but is not limited to: unrecognized UPC entries, overinflated PI counts, missing data on certain UPC’s, and any other noticeable errors.

   **It is recommended that you correct or delete any noticeable errors that you encounter on this screen.**

7. Click <F8> to post the physical inventory.

   ➢ Select the *Post all UPC entries* radio button on the Posting Physical Inventory screen. **DO NOT** select the option box that reads *Zero OH for items that do NOT get posted in the PI*.

8. Refer to the Post-Physical Inventory Reports and Verification section above for post reporting.

**POST-PHYSICAL INVENTORY REPORTS AND VERIFICATION**

1. In Report STAR, select and re-run the same reports run prior to taking a snapshot (see PI Count and Value report described in the Full Store PI Procedures section above).

2. In the Physical Inventory Search screen, click on <F11> Report, select History under *Report type*, and change the *Begin Date* and *End Date* to the day the PI was posted.

3. Create the following report using Report STAR to see the variances; you can take advantage of filters and sorts after the PI has been posted.

   Report Name: ............ PI Variances
   Date Range: ............. (PI Date Only)
   Store Selection: ........... (Current store prepped for PI)
ADDITIONAL INFORMATION

OH (On Hand) vs. EI (Ending Inventory):

- OH is always a current value. OH does not reflect any historical information. Any time this is used, it will return a quantity figure for what the system believes the on hand quantity is right now.
- EI is a calculated figure. It is calculated from the following formula every time it is used in the BI to EI Comparison (All OH/EI transactions) report (#24 in Report STAR):

  \[ EI = BI + Rcvd - Sold +/− Adj +/− PIVar +/− Transfers (In / Out) \]

PHYSICAL INVENTORY WHILE RINGING SALES

(Only if absolutely necessary)

√ Items that have a zero (0) quantity at the time of the snap must be added to the PI grid if you plan on receiving, adjusting, or selling before the post. Otherwise, the items will go back to zero (0) during the post on a full PI.
√ If the store must sell uncounted items, it is a good idea to mark/tag the inventory that has been counted. This way, the items without the special tags are known to be uncounted and need to be logged and adjusted out after the PI is posted.
√ If the store must ring sales before posting the physical inventory, the cashier must keep track of any UNCOUNTED items sold. (The Transaction Review Report in Office STAR/ICE and the Register Receipt Review would show what product UPCs were sold).
√ If an item has already been counted, it is safe to sell this item even if the physical inventory has not been posted yet.
√ The list of uncounted/sold items must be included in the PI grid before the post or deducted in Adjust Levels after the post.

ADDITIONAL INFORMATION

OH (On Hand) vs. EI (Ending Inventory):

- OH is always a current value. OH does not reflect any historical information. Any time this is used, it will return a quantity figure for what the system believes the on hand quantity is right now.
- EI is a calculated figure. It is calculated from the following formula every time it is used in the BI to EI Comparison (All OH/EI transactions) report (#24 in Report STAR):

  \[ EI = BI + Rcvd - Sold +/− Adj +/− PIVar +/− Transfers (In / Out) \]
Introduction to the Portable Data Terminal (PDT)

The Portable Data Terminal (PDT) is powerful because it is portable. It functions almost entirely as a counting device. If your physical count is done in an organized, mapped-out way, the PDT can assist you in getting your physical count into your computer quickly. Like any other power tool, it requires some practice for you to become skilled. If you have never used one, we strongly recommend that you practice, practice, practice. There are certain basic skills that everyone should know, such as how to change the batteries, move around from menu to menu, enter data, transmit data, purge data, and reset the PDT. These things should be second nature before attempting to inventory your store.

There are three applications that the PDT can be used with: Physical Inventory, Adjustments, and Receiving. By far, the most common use of the PDT is Physical Inventory. Almost everyone who has a PDT uses it for that application. The basic skills for all of these applications are almost identical.

The PDT is programmed to work specifically with Retail STAR and Retail ICE. This document discusses each component of the PDT, along with each menu option.
PDT Components

The PDT 3100 will either include a power supply with a cable connection or a cradle with a cable connection. The cable connection plugs into one of the COM ports (9 pin connection) on the back of the computer. It is not important which one it is connected to, as you will select the actual port number when you are downloading the inventory through the Physical Inventory submenu option. Once the inventory is entered into the PDT and you are ready to download the detail, you will plug the cable connection into the PDT or, if applicable, place the PDT in the cradle.

Terminal

When not being used, the PDT should be turned off and kept in the power cradle. This ensures that the battery will always be properly charged. The PDT is designed to turn off automatically to maintain the battery charge. To turn the unit back on, press <PWR>. The PDT then returns to the screen you left. If the battery runs out of charge, the RAM drive loses all information.

The amount of battery usage depends on what you are doing with the PDT. If you are using the scanner wand or entering large amounts of data, the battery drains much quicker.

The keypad is generally alphanumeric, but there are many functions that correspond to each key on the keyboard.

The different modes depend on the state of the keyboard. If <ALPHA> is pressed, the keys are alphabetic characters. When <ALPHA> is pressed again, you’re in numeric mode, which allows for the number keys and the black labeled keys to respond to entry. The black symbols are [ ] = * / \ : +. Under normal circumstances, they should not be used to enter data. The other keys considered numeric are the arrow keys.

If an option screen displays a prompt that allows for special options, such as the screen below where “F1 Case” is displayed, you can access this function by holding down <FUNC>, then pressing the corresponding function key. The F1
through F10 keys correspond to the numeric keys. That is, F1 corresponds to <1>, F2 corresponds to <2>, and so on. In the example below, you would press <FUNC><1> to bring up the Case entry mode.

```
<Physical Inventory>
1000
>---
*Unit Qty, F1 Case
```

Generally, the keyboard mode state will automatically be switched by the software.

The following table describes the system keys used to activate the different modes of the keyboard.

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALPHA</td>
<td>Switches the keyboard from numeric to alphabetic entry. The caret ^ shows the position (i.e., press the &lt;ALPHA&gt; key, the caret points up).</td>
</tr>
<tr>
<td>arrows</td>
<td>The four arrow keys used to maneuver around the menu are K (left), L (right), M (up), and N (down).</td>
</tr>
<tr>
<td>BKSP</td>
<td>Backspaces to remove unwanted characters entered.</td>
</tr>
<tr>
<td>CLEAR</td>
<td>Takes you to the previous menu or screen.</td>
</tr>
<tr>
<td>ENTER</td>
<td>Used to accept information entered or to select a menu option.</td>
</tr>
<tr>
<td>FUNC</td>
<td>Used in maintenance areas for tasks (i.e., change, search, and delete).</td>
</tr>
<tr>
<td>PWR</td>
<td>Turns the unit ON or OFF.</td>
</tr>
<tr>
<td>SPACE</td>
<td>Used in alpha mode to insert a space.</td>
</tr>
</tbody>
</table>

**Scanner**

The scanner at the top of the PDT can be moved based on your preference. To move the wand, grab it from the sides and lift up. With the wand lifted up, turn it toward the back of the PDT and lock it into place. DO NOT FORCE the head. To use the scanner, press the buttons on the left or right sides of the PDT. The left button is the default button. You can change which button to use by pressing <FUNC>, then pressing the desired scanner button.

The scanner will not turn on until the program has been placed into the proper mode; for example, when entering the product identifier or when in a search mode.

**Memory**

The PDT allows one type of entry function to operate at a time, due to memory constraints within the unit. Based on the amount of memory your unit has built in, there is a physical limitation of the amount of entry. The basic unit, which comes with 640 kB of memory, allows approximately 5500 physical entries into the unit.

The memory allocation breaks down into the following formula:

<table>
<thead>
<tr>
<th>Memory Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Memory</td>
<td>640,000 - 640 kB</td>
</tr>
<tr>
<td>System Programs</td>
<td>(-) 350,000 - 350 kB</td>
</tr>
<tr>
<td>Available for Files</td>
<td>290,000 - 290 kB</td>
</tr>
</tbody>
</table>

The file space needed for the entry functions is broken down into the following formula:

<table>
<thead>
<tr>
<th>Entry Function</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Inventory</td>
<td>31 B</td>
</tr>
<tr>
<td>Adjustments</td>
<td>49 B</td>
</tr>
<tr>
<td>Receiving</td>
<td>49 B</td>
</tr>
</tbody>
</table>
To compute the number of entries you can enter, divide the available file space by the function you want to perform. For example:

\[
\frac{290,000 \text{ (available)}}{31 \text{ (physical inventory)}} = 9354 \text{ entries}
\]

This example will only give you an estimate of the number of entries allowed. This is due to the memory needed by the program to operate.

**PDT Main Menu Features**

The option screens are designed to help you move easily through the program. The top line of each screen contains a title, which displays between the < > symbols, and the bottom line, known as the prompt line, displays the current options permitted.

The Main Menu is where all options can be accessed. To maneuver around the menu, use the arrow up/down keys to highlight options, then press <ENTER> to accept the option, or press the number key associated with the menu option. To back up or leave an option, press <CLEAR>.

<table>
<thead>
<tr>
<th>&lt;Main Menu&gt;</th>
<th>1 Data Entry</th>
<th>Allows you to enter physical inventory, adjustments, or receiving.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2 Send Data</td>
<td>Sends the PDT inventory file to Physical Inventory for download.</td>
</tr>
<tr>
<td></td>
<td>3 Delete Data</td>
<td>Deletes data stored on the PDT.</td>
</tr>
<tr>
<td></td>
<td>4 Configuration</td>
<td>Allows you to configure the system parameters.</td>
</tr>
<tr>
<td></td>
<td>5 About</td>
<td>Displays ownership, copyright, and software version information.</td>
</tr>
</tbody>
</table>

The PDT software is designed to only allow one of the options above to be performed at one time. You will receive the following error if you attempt to use another option before sending or deleting the current option.

<table>
<thead>
<tr>
<th>&lt;ERROR&gt;</th>
<th>xxx file exists</th>
<th>Send/Delete file</th>
</tr>
</thead>
</table>

*Press Clear

Press the <CLEAR> button twice to return to the Main Menu, select <3> Delete Data, then select <1> Physical Inventory, <2> Adjustments, or <3> Receiving depending on the type of file that already exists. When the “Are YOU Sure Y/N:” prompt displays, press <Y> to delete the file.

**Data Entry**

Data Entry allows you to enter physical inventory, adjustments, and receiving data into the PDT 3100. To enter this option, from the Main Menu, press <1> or <ENTER>.

<table>
<thead>
<tr>
<th>&lt;Data Entry Menu&gt;</th>
<th>1 Physical Inventory</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2 Adjustments</td>
</tr>
<tr>
<td></td>
<td>3 Receiving</td>
</tr>
</tbody>
</table>

The table below summarizes each option shown in the menu box.
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Physical Inventory</td>
<td>Allows you to enter merchandise physical counts.</td>
</tr>
<tr>
<td>2 Adjustments</td>
<td>Allows you to enter adjustment types from and to store locations.</td>
</tr>
<tr>
<td>3 Receiving</td>
<td>Allows you to receive items for a purchase order.</td>
</tr>
</tbody>
</table>

**Physical Inventory**

To conduct a physical inventory count, follow the steps below.

With the Data Entry Menu displayed:

1. Press the <ENTER> key or the <1> key to accept the Physical Inventory selection. The Physical Entry window displays.

   
   `<Physical Entry>`
   
   `Id:      Loc:       St:`
   
   `Comp:      Person:`
   
   `*Inv Id,F1Tot,F7Cont`

2. Press <ENTER> five (5) times, or hold down the <FUNC> key and press <7> to skip this screen and move directly to the Physical Inventory window.

   
   `<Physical Inventory>`
   
   `--------------`
   
   `*Enter Item Key`

3a. Scan the inventory item. The item’s barcode displays in the screen and shows a Scan quantity of 1.

   
   `<Physical Inventory>`
   
   `1000`
   
   `>----     Scan:1`
   
   `*Enter Unit Qty`

   - If you want each inventory item that you scan to have only a quantity of 1, continue by scanning each item without pressing <ENTER> after each scan.
   
   - If you want to enter a quantity of more than 1, scan the item, enter the correct quantity, then press <ENTER>.

   You can also scan the same item multiple times to reach the desired quantity. If you choose this method, scan the item as many times as applicable, then press <ENTER> to display a new screen for the next scan.

3b. Instead of scanning, you can manually enter the UPC and quantity in the Physical Inventory window. Enter the UPC, press <ENTER>, then enter the quantity and press <ENTER>. Repeat for the next UPC.

4. Once the inventory count is complete, press the <CLEAR> key three (3) times to return to the Main Menu.

To get the total number of physical counts entered into the PDT, from the Physical Entry screen, press <FUNC><1>, then press <ENTER> five (5) times to display the total.
The Maintenance options allow you to change or delete items that have been entered while in physical inventory. With the Physical Inventory screen displayed, press the up arrow key to enter into the maintenance mode.

The maintenance options are displayed at the bottom of the screen. The table below summarizes each option available.

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;FUNC&gt;&lt;2&gt;</td>
<td>Change mode; allows you to modify entered data.</td>
</tr>
<tr>
<td>&lt;FUNC&gt;&lt;3&gt;</td>
<td>Delete mode; allows you to delete an entered record.</td>
</tr>
<tr>
<td>&lt;FUNC&gt;&lt;4&gt;</td>
<td>Search mode; allows you to search for an entered key.</td>
</tr>
</tbody>
</table>

Change Mode

Change mode allows you to change an entered quantity. Use the <BK SP> button to backspace and erase the current count, then enter the new count in the Unit field and press <ENTER>. When the prompt, “Update change Y/N:” displays, press <Y> to update or any other key to cancel. At any time, you can press the <CLEAR> button to stop the process.

Delete Mode

Delete mode lets you delete an entry from the data file. When the prompt, “Delete item Y/N:” displays, press <Y> to delete the record or any other key to cancel. At any time, you can press the <CLEAR> button to stop the process.

Search Mode

Search mode allows you to search for a key (UPC/style) that has been entered into the PDT. Type in the key to look for
and press <ENTER>, or scan the barcode. The program will return to the maintenance screen if a match was found, or an error will display if there is no match.

**Final Notes**

When you are finished entering data, you must send the data prior to using any other option within the Data Entry Menu, such as Adjustments or Receiving. To return to the Main Menu, press <CLEAR> until it displays.

**Adjustments**

The Adjustments mode allows you to enter adjustments to inventory counts. To enter adjustments, follow the steps below.

With the Data Entry Menu displayed:

1. Press the <2> key to select Adjustments. The Adjustments Entry window displays.

   `<Adjustments Entry>
   Adj:---  Person:
   From:   To:
   *AdjCode,F1Tot,F7Con`

2. Enter the data into the appropriate fields and press <ENTER>. **You must enter data into the Adj (adjustment code) field.** Press <ENTER> several times or press <FUNC><7> to bypass the remaining fields.

3. When the Adjustments screen displays, enter the UPC or style to make adjustments. You can also scan the barcode printed on the product.

   `<Adjustments>
   -------------------
   *Enter Item Key`

4. The Adjustments screen displays the key entered and is ready for you to enter the counted quantity.

   `<Adjustments>
   1000
   >-----  *Enter Unit Qty`

5. There are two ways to enter counted merchandise. The first is by keying in the number on the keypad, then pressing <ENTER> to accept the figure; the second is by scanning the merchandise.

   `<Adjustments>
   1000
   >-----  Scan: 1
   *Enter Unit Qty`

6. When items are scanned, the Scan field lets you know the current count. You can continue to scan the same item to increment the counter, then press <ENTER> to accept the scanned quantity. You can also key in the quantity, then press
18

<ENTER>. If you scan a different barcode, the program will automatically accept the scanned quantity and continue to the next item. This allows you to continue scanning without having to press <ENTER> each time you scan a new item into the PDT.

7 Press <ENTER> when you are finished scanning items. The last scan entered will remain on the screen until this key is pressed.

To get the total number of adjustments entered into the PDT, from the Adjustments Entry screen, press <FUNC><1>, then press <ENTER> four (4) times to display the total.

![Adjust Totals Table]

Press the <CLEAR> button three (3) times to return to the Data Entry Menu.

The Adjust Criteria screen allows you to enter parameters to narrow the search for the entries that will be totaled. If you do not enter a parameter, the program will total all of the records entered into the PDT. With the Adjustments Entry screen displayed, press <FUNC><1>.

![Adjust Criteria Table]

Enter data for the search, then press <ENTER> to pass through the remaining fields or press <FUNC><7>. The program will go through the entered data, filtering the records that do not match the parameters, and then it will display the totals on the screen. Press <CLEAR> three (3) times to return to the Data Entry Menu.

**Maintenance**

The Maintenance options allow you to change or delete items that have been entered while in adjustments. With the Adjustments screen displayed, press the up arrow key to enter into the maintenance mode.

![Maintenance Table]

The maintenance options are displayed at the bottom of this screen. The table below summarizes each option available.

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;FUNC&gt;&lt;2&gt;</td>
<td>Change mode; allows you to modify entered data.</td>
</tr>
<tr>
<td>&lt;FUNC&gt;&lt;3&gt;</td>
<td>Delete mode; allows you to delete an entered record.</td>
</tr>
<tr>
<td>&lt;FUNC&gt;&lt;4&gt;</td>
<td>Search mode; allows you to search for an entered key.</td>
</tr>
</tbody>
</table>
Change Mode

Change mode allows you to change an entered quantity. Use the <BK SP> button to backspace and erase the current count, then enter the new count in the Unit field and press <ENTER> twice. When the prompt, “Update change Y/N:” displays, press <Y> to update or any other key to cancel. At any time, you can press the <CLEAR> button to stop the process.

Delete Mode

Delete mode lets you delete an entry from the data file. When the prompt, “Delete item Y/N:” displays, press <Y> to delete the record or any other key to cancel. At any time, you can press the <CLEAR> button to stop the process.

Search Mode

Search mode allows you to search for a key (UPC/style) that has been entered into the PDT. Type in the key to look for and press <ENTER>, or scan the entered barcode. The program will return to the maintenance screen if a match was found, or an error will display if there is no match.

Final Notes

When you are finished entering data, you must send the data prior to using any other option within the Data Entry Menu, such as Physical Inventory or Receiving. To return to the Main Menu, press <CLEAR> until it displays.

Receiving

The Receiving option allows you to enter received order counts. To use the PDT to receive against POs, follow the steps below.

With the Data Entry Menu displayed:

1 Press the <3> key to select Receiving. The Receiving Entry screen displays.

2 Enter the PO number that you are receiving against. The PO field must be entered; if it is not, the program will ask for the vendor code. The program will not continue until one of these fields is entered. Press the left arrow key if you need to return to the previous field. g fields.

3 Verify that the Store number displayed is correct, or press <ENTER> twice and enter the correct store number.

4 Press <ENTER> several times or press <FUNC><7> to continue. The Receiving screen displays. Enter the UPC or style to receive. You can also scan the barcode printed on the product.

5 The Receiving screen displays the key entered is is ready for you to enter the received quantity.
Scan or manually enter the UPC number of the first item that you are receiving. You can also scan the barcode printed on the product.

6 There are two ways to enter received merchandise. The first is by keying in the number on the keypad, then pressing <ENTER> to accept the figure; the second is by scanning the merchandise.

7 When items are scanned, the Scan field lets you know the current count. You can continue to scan the same item to increment the counter, then press <ENTER> to accept the scanned quantity. You can also key in the quantity, then press <ENTER>. If you scan a different barcode, the program will automatically accept the scanned quantity and continue to the next item. This allows you to continue scanning without having to press <ENTER> each time you scan a new item into the PDT.

8 Press <ENTER> when you are finished scanning items. The last scan entered will remain on the screen until this key is pressed.

To get the total number of receiving entries entered into the PDT, from the Receiving Entry screen, press <FUNC><1>, then press <ENTER> four (4) times to display the total.

Press the <CLEAR> button three (3) times to return to the Data Entry Menu.

The Receiving Criteria screen allows you to enter parameters to narrow the search for the entries that will be totaled. If you do not enter a parameter, the program will total all of the records entered into the PDT. With the Receiving Entry screen displayed, press <FUNC><1>.

Enter data for the search, then press <ENTER> to pass through the remaining fields or press <FUNC><7>. The program will go through the entered data, filtering the records that do not match the parameters, and then it will display the totals on the screen. Press <CLEAR> three (3) times to return to the Data Entry Menu.
**Maintenance**

The Maintenance options allow you to change or delete items entered while in receiving. With the Receiving screen displayed, press the up arrow key to enter into the maintenance mode.

```
<Maintenance>
#1000
Unit: 1 Pack:
*F2Chg, F3Del, F4Srch
```

The maintenance options are displayed at the bottom of this screen. The table below summarizes each option available.

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;FUNC&gt;&lt;2&gt;</td>
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</tr>
</tbody>
</table>

**Change Mode**

Change mode allows you to change an entered quantity. Use the <BK SP> button to backspace and erase the current count, then enter the new count in the Unit field and press <ENTER>. When the prompt, “Update change Y/N:” displays, press <Y> to update or any other key to cancel. At any time, you can press the <CLEAR> button to stop the process.

**Delete Mode**

Delete mode lets you delete an entry from the data file. When the prompt, “Delete item Y/N:” displays, press <Y> to delete the record or any other key to cancel. At any time, you can press the <CLEAR> button to stop the process.

**Search Mode**

Search mode allows you to search for a key (UPC/style) that has been entered into the data terminal. Type in the key to look for, or scan the entered barcode. The program will return to the maintenance screen if a match was found, or an error will display if there is no match.

**Final Notes**

When you are finished entering data, you must send the data prior to using any other option within the Data Entry Menu, such as Physical Inventory or Adjustments. To return to the Main Menu, press <CLEAR> until it displays.

**Send Data**

Send Data allows you to send the data that have been entered through Data Entry. To enter this option, from the Main Menu, press <2> or press the down arrow key to move to the option and press <ENTER>.

```
<Send Menu>
1 Physical Inventory
2 Adjustments
3 Receiving
```

Place the PDT in its cradle. **The PDT MUST be in the power cradle in order to send data.**

Press a number key to select the file you want to send to the host computer: <1> for Physical Inventory, <2> for Adjust-
Delete Data

This screen displays once you choose an option. It notifies you that the PDT is waiting for the host to link up.

In Retail STAR/ICE, initiate the receive procedure in Physical Inventory, Adjust Levels, or PO Receiving.

The screen will then display, “<Sending Physical>,” “<Sending Adjustment>,” or “<Sending Receiving>” depending on the type of files being sent. When the file has been sent successfully, the PDT will ask whether you want to delete the sent file.

Press <Y> if everything has been sent successfully, or press any other key to cancel the deletion. (You can delete the file later by using the Delete Data utility from the Main Menu). The program will return you to the Main Menu.

Delete Data

The Delete Data options allow you to delete any of the data entry files. To enter into this option, from the Main Menu, press <3> or press the down arrow key to move to the option and press <ENTER>.

This option completely deletes the file. If you choose to use this option and you make a mistake, you cannot recover the data.

Press a number key to select the type of file you want to delete from the PDT: <1> for Physical Inventory, <2> for Adjustments, or <3> for Receiving.

The PDT will ask you to confirm that you want to delete the file.

Press <Y> to delete the file, or press any other key to cancel the deletion. The program will return you to the Main Menu.

**It is safe to keep the data in the PDT until after the posting process is completed in Physical Inventory. Make sure to delete the data in the PDT prior to another Physical Inventory count.**
**Configuration**

Prior to using the PDT to perform an inventory count, follow the steps below to verify that the PDT configuration is correct.

With the Main Menu displayed:

1. Press the <down> arrow key to the Configuration selection and press <ENTER>, or press the <4> key. The Configuration screen displays.

   ![Configuration Screen]

   <Configuration>
   Level:2 Store:1
   Scn:0 Idx:N Bd:9600
   *Enter System Level

   2. The **Level** field determines the type of files the PDT sends to the host computer and must be set at 2. If this is not the case, press the <BK SP> (backspace) key once, then enter **2**. **Do not change this option unless instructed to do so by a Retail STAR technician.** Press the <ENTER> key to continue.

3. Verify that the **Store** field displays the number of the store where you are currently scanning the inventory. If it is incorrect, press the <BK SP> key to erase the store number and enter the correct store number.

4. Press the <ENTER> key to move through each of the other fields. Do not change the settings in any of the other fields (Scn: 0, Idx:N, Bd:9600).

5. The message, “Update change Y/N” displays at the bottom of the screen.

   ![Configuration Screen]

   <Configuration>
   Level:2 Store:1
   Scn:0 Idx:N Bd:9600
   Update change Y/N:

6. Press <Y> to save the changes, or press any other key if you do not want to save the changes. The program will return you to the Main Menu.

**About**

The About information shows you to view the current version of PDT software. It is used to help the service department determine which version is currently loaded. To enter this option, from the Main Menu, press <5> or press the down arrow key to move to the option and press <ENTER>.

![About Information]

CAM Data Systems
Copyright 1996
PDT version x.x

The Main Menu will redisplay in a few seconds.
PHYSICAL INVENTORY PROCEDURES USING ZONES AND A PDT

If you plan to use zones, you need to follow these steps when taking a physical inventory using a PDT. It is strongly recommended that you read the Physical Inventory section of this manual prior to beginning. Also, you may want to run through this procedure in Training Mode before using it with your live database. For any special circumstances, contact a trainer or technical support before proceeding.

1 In the Inventory>Print Count Sheets option, enter the Number of Zones, select the Print Sheets and Print Barcodes option boxes, and then click on the Print button or press <F11>. When the print dialog box displays, select the tag type to print barcodes. Click on the Print button or press <F10>. The count sheets and barcodes will print.

2 In the Inventory>Physical Inventory option, click on the Snap button or press <F2>. Select the store in the Snapshot Store Selection window and click on the OK button. When the prompt displays, click on the Yes button to create a full snapshot of the inventory for the selected store.

3 To scan products, do the following:
   (a) Turn on the PDT.
   (b) At the Main Menu, press <ENTER> or the <1> key to select Data Entry.
   (c) At the Data Entry Menu, press <ENTER> or the <1> key to select Physical Inventory.
   (d) Enter ID, Loc, and Check Store # (if desired).
   (e) Press <ENTER> until the Physical Inventory field is active.
   (f) Scan ZONE; press <ENTER>.
   (g) Scan products; once finished, press <ENTER> to accept the last scan.
   (h) Press <CLEAR> until you return to the Main Menu.

4 To download the data from the PDT into Office, do the following:
   (a) Insert the PDT into its cradle.
   (b) Turn on the PDT.
   (c) At the Main Menu, press the <down> arrow key to the Send Data selection and press the <ENTER> key, or press the <2> key.
   (d) Press the <ENTER> key or the <1> key to accept the Physical Inventory selection. Note: You have ten (10) seconds before the PDT times out.
   (e) In the Inventory>Physical Inventory option in Office, click on the PDT File button or press <F6>.
   (f) In the PDT Download For Physical Inventory window, click on the Download button or press <F7>.
   (g) When the download is complete, click on the OK button in the prompt that displays.
   (h) In the PDT Download for Physical Inventory window, click on the Process File button or press <F10>.

   If you receive an error log:
   - Click on the Report button or press <F11>
   - Print the report
   - Close the report
   - Click on Clear Log or press <F6> **THIS IS VERY IMPORTANT**
   - Click on Exit or press <F12>

   (i) Click on the Save button or press <F10>.
   (j) The PDT will display, “Delete Sent File - Are YOU Sure Y/N.” Press the <Y> key for Yes.

5 Continue scanning zones and items with the PDT and upload each section to Office.

6 When finished, click on the Report button or press <F11> on the Physical Inventory window.

7 Under Report Type, click in the PI Variance radio button and select the Group by Zone option box.

8 Click on the Report button or press <F11>. Review the variance report and check a few random items for accuracy.

9 You can change the count in the Physical Inventory window by clicking in the Count column next to the item and entering the new count or by scanning it in.
To post the inventory, click on the Post button or press <F8>. In the Posting Physical Inventory window that displays, click on the Post only counted UPC entries radio button and click in the Zero OH for items that do not get posted in the PI option box.

When selecting both options, the system will update the items counted and will ZERO items that were not counted.

Click on the Post button or press <F10>.

Click on the Exit button or press <F12> to close the Physical Inventory option.

**ERROR CODES**

This section describes the error codes that may be displayed while using the PDT. Generally, you will get the most errors in the communication areas of the software. This is because there are many things going on between the unit and the host system.

To minimize errors, follow the guidelines below:

- Make sure that the PDT is placed in the power cradle prior to sending.
- Place the host system into send or receive mode prior to starting transmission from the PDT.
- Make sure all connections are secure between the power cradle and the host computer.
- When uploading the price file from the host computer, make sure the number of records you choose can fit into the amount of available memory space within the PDT.

Although the software has been written to avoid errors, occasionally you will receive them. The main problem that can occur with the data file driver is a low memory condition. If the PDT tells you that you are running low on memory, STOP entering data and send the file to the host machine, then delete the file to clear up the used space.

The following tables are broken down into critical areas of the system where the potential of error is great. In the event of an error, press <CLEAR> and try again. If this does not work, write the message down and call the service department.

### Data Files

These are errors that may be received due to data file errors:

<table>
<thead>
<tr>
<th>Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-1</td>
<td>Data file could not be opened.</td>
</tr>
<tr>
<td>-2</td>
<td>File has not been opened (handle not initialized).</td>
</tr>
<tr>
<td>-3</td>
<td>Index number specified was out of range.</td>
</tr>
<tr>
<td>-4</td>
<td>Too many indexes requested during an open.</td>
</tr>
<tr>
<td>-5</td>
<td>Index file could not be opened.</td>
</tr>
<tr>
<td>-6</td>
<td>Specified record number was out of range.</td>
</tr>
<tr>
<td>-7</td>
<td>Index specified has not been defined.</td>
</tr>
<tr>
<td>-8</td>
<td>Index specified is already in use.</td>
</tr>
<tr>
<td>-9</td>
<td>No occurrences of the search data were found.</td>
</tr>
<tr>
<td>-10</td>
<td>Field definition is invalid.</td>
</tr>
<tr>
<td>-11</td>
<td>File name specified is invalid.</td>
</tr>
<tr>
<td>-12</td>
<td>Maximum number of file handles could not be set.</td>
</tr>
<tr>
<td>-13</td>
<td>Index verification failed.</td>
</tr>
<tr>
<td>-14</td>
<td>Invalid record length.</td>
</tr>
<tr>
<td>-15</td>
<td>Insufficient memory for record buffer allocation.</td>
</tr>
<tr>
<td>-16</td>
<td>Maximum record size already set.</td>
</tr>
</tbody>
</table>
**Communications**

These are errors that may be received due to communication errors:

<table>
<thead>
<tr>
<th>Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Overrun of data occurred.</td>
</tr>
<tr>
<td>6</td>
<td>Startup of port time out.</td>
</tr>
<tr>
<td>12</td>
<td>Character time out.</td>
</tr>
<tr>
<td>15</td>
<td>Receive queue full.</td>
</tr>
<tr>
<td>16</td>
<td>Unexpected modem response.</td>
</tr>
<tr>
<td>17</td>
<td>Out of system resources.</td>
</tr>
<tr>
<td>-4</td>
<td>DOS channel could not be opened.</td>
</tr>
<tr>
<td>-7</td>
<td>Illegal header specified.</td>
</tr>
<tr>
<td>-8</td>
<td>File not opened by the translation function.</td>
</tr>
<tr>
<td>-9</td>
<td>Translation function is not taking in data, but the receive buffer is full.</td>
</tr>
<tr>
<td>-10</td>
<td>Translation functions are not taking in data, and no data coming in.</td>
</tr>
<tr>
<td>-15</td>
<td>No modem response.</td>
</tr>
</tbody>
</table>

**PDT File Format**

**Header:**

```
|———>Adjustment file |
|———>Adjustment ID |
|———>From store |
|———>To store |
|———>Employee ID |
/A 1, 1, 7, 75
```

**Line:**

```
<———>UPC |
<———>Qty |
<———>Case Qty |
<———>End of line marker |
00166521,4,0,.|
```

**Reloading the PDT Software**

If the PDT is not functioning properly, contact the CAM Support Department for help with reloading the PDT software.
To use the PDT P460 with Retail STAR after the snapshot has been taken:

1. Scanning inventory (on the PDT):
   (a) No configuration is necessary on the PDT unit. When powered on by pressing <Enter>, it should be ready to scan items.
   (b) The <*> is also the option to allow you to view what has been scanned and the total scanned items. The code is the UPC number, and the bottom right will display the current line number/total line numbers. Use the up and down arrow buttons to view the different lines in the PDT.
   (c) To verify that there is no data in the PDT from the last PI, press <ENTER> once on the scan ready screen, then press the <*> button. The PDT will beep twice if empty, or it will display the last UPC and total if not empty.
   (d) To completely delete unwanted items scanned in the PDT from the last PI done, you must download the data. You will then be prompted to delete data on the PDT (as instructed in step 4 below), then delete the data imported into Retail STAR.
   (e) Once you have confirmed the PDT does not have any items in the unit from the last use, start scanning your inventory.

2. After scanning the first section/area/zone, prepare the computer for the download.
   (a) In Office STAR, click on Utilities, then select Scanner Configuration. Make sure the Baud rate is 9600, Stop bits is 1, Data bits is 8, Parity is NONE, Port is the port being used, Protocol is RTS, End character 1 is 13, and End character 2 is 10. Click <F10> Save.
   (b) In Office STAR, click on Inventory, then select Physical Inventory.
   (c) After the snapshot has been taken, click on <F5> Scan.
   (d) Select the scanner interface to use (this depends on how the PDT was hooked up). Then select the correct scanner interface (typically COM port).
   (e) If the scanner configuration screen appears (which was already set up in, and should match, step (a) above), click <F10> Save. The computer is now ready for upload.

3. Now get the PDT ready.
   (a) Press <ENTER> to power on, then press <FUNC> and then press <1>. The display on the PDT will read, “Uploading data. Please wait…”
   (b) Place the PDT unit in its cradle to start the download. The cradle light will come on.
   (c) When the system finishes, the computer will display, “The download is complete.” Click on OK. Then click on OK on the Edit Mode screen.

4. Continue scanning on the PDT.
   (a) When the PDT is taken out of the cradle to continue scanning, the display will read, “Success!”
   (b) Press <ENTER> to delete downloaded items, or press <BK> if something went wrong and you don’t want to delete the data.
   (c) After pressing <ENTER> to delete, you can now continue scanning the next batch.
This section explains how to configure the Symbol P460/P360 scanner for use with Gift Registry, Physical Inventory, and Adjust Levels.

**RS-232 SERIAL SETUP FOR THE SYMBOL P460/P360 MEMORY SCANNERS FOR RETAIL STAR/ICE**

Equipment Requirements:

- 25-17817-20 RS-232 cable (plugs into cradle)
- Symbol P460/P360 scanner
- PL-460-1000WW cradle
- Symbol 50-14000-101 power supply

Be sure the scanner is fully charged before setting it up.

1. Take the scanner off the docking station and turn it on by pressing <ENTER> on the keypad.

2. Press <FN> <*>, then <FN> <BK> quickly afterwards to begin the phaser setup. You will now be able to scroll through a menu.

3. Press the down arrow on the keypad until you reach Parameter Control, then press <ENTER>.

4. Select Scan Parameters and press <ENTER>. This places the scanner in a mode that is ready to receive special scan codes to program the scanner.

**Setting Up the Scanner**

Scan these barcodes in the following order.

1. This resets the scanner back to its factory defaults:

   ![Barcode Image]

2. This sets the scanner to transmit at a rate of 9600 baud:

   ![Barcode Image]

3. This sets the parity to NONE:

   ![Barcode Image]
4 This sets the hardware handshaking to RTS/CTS OPTION 1:

5 This sets the software handshaking to NONE:

6 This sets the stop bit to 1STOP BIT:

7 This sets the ASCII format to 8-BIT:

8 This sets the MCL Batch Host to OTHER:

9 Press <FN> <BK> to exit back to the menu on the scanner (option 0 - System Setup).

10 Press the up arrow button until Set Scan Options is selected, then press <ENTER>.

11 Scroll down to <DATA> <SUFFIX> and press <ENTER>. This option sets the scanner to put a carriage return and line feed at the end of every barcode that is sent to the host computer.

12 Scroll up to the (Back to Main) option and press <ENTER>.

13 Press the up arrow button until Return to App is selected, then press <ENTER>. 
Configuring STAR/ICE to Work With the Scanner

In Retail STAR/ICE, go to Utilities>Scanner Configuration and follow the steps to set up communications for the scanner. Use the settings shown below (select the correct COM port that the scanner/cradle is connected to):

If using a port other than Port 1, you must set it in Utilities> Scanner Configuration in Retail STAR/ICE.

Press <F10> to save.

Setting Up the Cradle

1. Follow these instructions for setting up the cradle.

![Cradle Diagram]

- Connect to host COM1
- Daisy Chain
- Power port

Figure 2-3. Ports on the Cradle

1. Connect an appropriate power supply to the Power port on the cradle. The indicator light on the cradle blinks, signifying successful power-up.

Figure 2-4. Power Supply Port

2. Insert the cable from the host computer into COM1.

If daisy chaining multiple cradles, connect the daisy chaining cable to COM2. For additional information on daisy chaining, see Daisy-Chainaby Cradles on page 3-6.
2 Connect the serial cable to an appropriate COM port on the host computer.

**If using a port other than Port 1, you must set it in Utilities> Scanner Configuration in Retail STAR/ICE.**

You are now ready to start scanning items into the scanner.

Once you are finished scanning items and you wish to download them, go to the supporting program in Retail STAR/ICE and initiate a download (for example, in Gift Registry, click the PDT Import button or press <F9>). Then press <FN> <1> on the scanner. You will have 30 seconds to dock the scanner on the cradle so it can download the items to the host computer.

**SYNAPSE KEYBOARD WEDGE SETUP FOR THE SYMBOL P460/P360 MEMORY SCANNERS**

There are two functions this scanner can utilize using a keyboard wedge. One option is for memory scans; the other is for POS scans or a single scan with immediate output to the computer.

Equipment Requirements:
- 25-32944-01 synapse adapter cable (plugs into bottom of scanner)
- Symbol P460/P360 scanner
- Symbol 50-14000-101 9-volt power supply
- PS/2 synapse adapter ST180-0200

**Be sure the scanner is fully charged before setting it up.**

1 Take the scanner off the docking station and turn it on by pressing <ENTER> on the keypad.

2 Press <FN> <*, then <FN> <BK> quickly afterwards to begin the phaser setup. You will now be able to scroll through a menu.

3 Press the down arrow on the keypad until you reach Parameter Control. Press <ENTER>.

4 Select Scan Parameters and press <ENTER>. This places the scanner in a mode that is ready to receive special scan codes to program the scanner.

**Setting Up the Scanner**

Scan these barcodes in the following order.

1 This resets the scanner back to its factory defaults.

NOTE: If you are using an RS-232 cable connection with this scanner, DO NOT scan this barcode. You will want to retain the programming you did in the beginning of this documentation for the COM port communications this device will be using.
2 This resets the scanner to its defaults for a keyboard wedge:

3 This sets the MCL POS Host to OTHER:

4 This sets the MCL Batch Host to OTHER if you have not configured your scanner for RS-232 communications:

5 Press <FN> <BK> to exit back to the menu on the scanner (option 0 - System Setup). Press <ENTER>.

6 Press the up arrow button until Set Scan Options is selected, then press <ENTER>.

7 Scroll down to the <DATA> <SUFFIX> option and press <ENTER>. This option sets the scanner to put a carriage return and line feed at the end of every barcode that is sent to the host computer.

8 Scroll up to the (Back to Main) option and press <ENTER>.

9 Arrow up until you reach Return to App and press <ENTER>.

**Setting Up a PS/2 Synapse Adapter**

**Using a Synapse Cable with the Scanner**

1 Follow these instructions for setting up the scanner with a keyboard wedge.
1. Make sure all host devices are powered down.

**IMPORTANT**

Before power is provided to the scanner (step 6), the following steps must be completed. The Synapse cable must be connected to the scanner (step 2) **AND** the flying power lead plugged in (step 4). If the cables are not connected in this sequence, the Synapse Interface Adapter will not operate properly.

2. Connect the Synapse cable into the bottom of the scanner.
3. Connect the other end of the Synapse cable to the Synapse Interface adapter.
4. The Synapse cable has a flying power lead. Connect this lead to the receptacle in the Synapse Interface adapter, as shown in Figure 2-7. See the Synapse guide for details.

```
Figure 2-7. Synapse and Adapter Cable
```

5. Connect the Synapse Interface adapter to the host.
6. Connect the standard Phaser memory scanner power supply to the power receptacle in the Synapse cable.
7. Connect the appropriate line cord to the power supply and into an AC receptacle.
8. Scan the appropriate Synapse bar codes to set up the Synapse cable for your specifications.

**POS Scanning**

For POS scanning, the 25-32944-01 synapse cable plugs directly into the bottom of the scanner as outlined below.
Connecting the Cable to the Scanner

1. Power down all devices that will be connected to the scanner.

2. Plug the modular connector on the cable into the receptacle on the bottom of the Phaser handle.

   ![Connecting the Cable to the Phaser](image)

   Figure 2-1. Connecting the Cable to the Phaser

3. Turn the cable twist lock 1/8 turn clockwise to seat it.

   ![Locking the Cable to the Phaser](image)

   Figure 2-2. Locking the Cable to the Phaser

4. Gently pull the cable to make certain it is properly seated.

Scanning Identical Items

You can enter a quantity before scanning a barcode to keep from having to scan identical items repeatedly. You can also use this feature when manually entering barcode data.

1. Press <*> , and the following screen will display with a default value of 1.

   ![Quantity Screen](image)

2. Key in the correct quantity and press <ENTER>.

3. When the barcode data entry screen reappears, scan the item's barcode. The scanner sends the barcode data to the host as many times as you specified in Step 2.

Reviewing and Deleting Stored Records

You can review and delete stored records while running the Batch/Inventory application.

1. Press the <FUNC> key, then press <2>. This screen appears:
The fields shown on this screen represent the following:

- **XXXX** = data contained within the record (first 25 characters)
- **aaaa** = index number of record displayed
- **bbbb** = total number of records stored in memory

2 Use the up and down arrow keys to scroll through the stored data.

3 Press <ENTER> at any time to exit the Review Records mode.

4 To delete the record displayed, press <BK>. A confirmation screen displays.

Press <ENTER> to delete the record, or press <BK> to keep the record.

If a record is deleted, the total number of records displayed on the bottom right of the review screen (**bbbb**) will not change. For example, if five records have been scanned and stored in memory, and the third record is deleted, the review screen will continue to show the total number of records stored in memory as five. However, a review of the individual records will show no third record existing. The reviewed records will index from the second record (2/5) to the fourth (4/5), skipping the deleted third record (3/5).