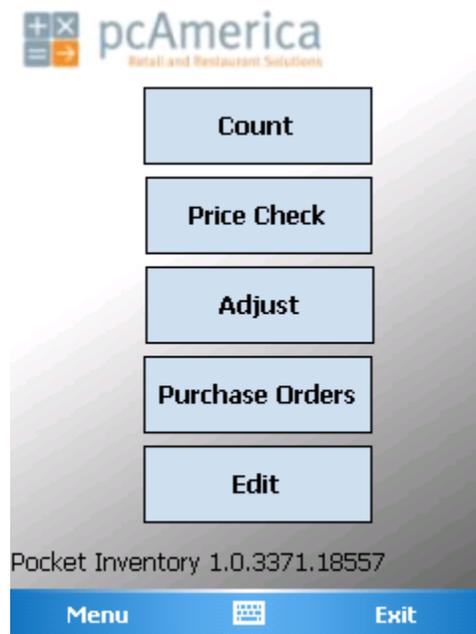# Pocket Inventory Usage Guide

This document will describe how to use the features of Pocket Inventory. It assumes that you have already followed the steps in the document entitled **Pocket Inventory Installation and Setup** (search for it on http://faq.pcamerica.com).

Receiving changes from CRE

Before you do anything, you should receive changes from CRE. This will ensure that you are working with the most up-to-date information. Log in and follow these steps.
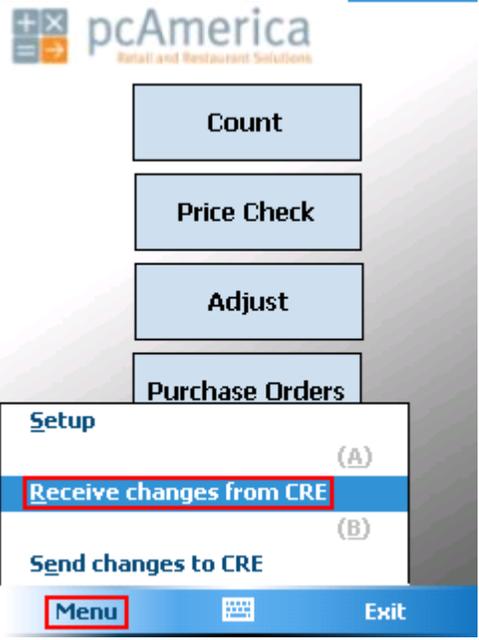
	1. Select **Menu**. 2. Select **Receive changes from CRE**.

Performing an inventory count

To count an item in Pocket Inventory, log in and follow these steps.

	1. Select **Count**.

Count Inventory [ ] [Submit] | **UPC** | **Name** | **Count** | [Change] [Remove] **Save Exit Lookup**	2. Scan or type the number of the item that was counted. 3. Select **Submit**. • If the item is not found, you will be given the opportunity to create a new one.
Affenpinscher **Enter Count** [10] [<---] [1] [2] [3] [4] [5] [6] [7] [8] [9] [.] [0] [-] [Cancel] [Enter]	4. Provide the count and select **Enter**.

	5. You can change or remove the count by selecting it from the list (clicking the triangle) and pressing the **Change** or the **Remove** button. When you are finished, select **Save**.

Performing a price check

To check the price of an item in Pocket Inventory, log in and follow these steps.

	1. Select **Price Check**.

Price/Stock Check [ ] Submit **Item Number** [ ] **Item Name** [ ] **Price** [ ] **In Stock** [ ] **Save Exit Lookup**	2. Scan or type the number of the item you want the price of. 3. Select **Submit**.
Price/Stock Check [ ] Submit **Item Number** [d1] **Item Name** [Affenpinscher] **Price** [$1.00] **In Stock** [0] **Save Exit Lookup**	4. The item's number, name, price, and quantity in stock will be displayed. You can check the price of other items from this screen. When you are finished, select **Save**.

Performing an inventory adjustment

To change the stock levels of an item in Pocket Inventory, log in and follow these steps.
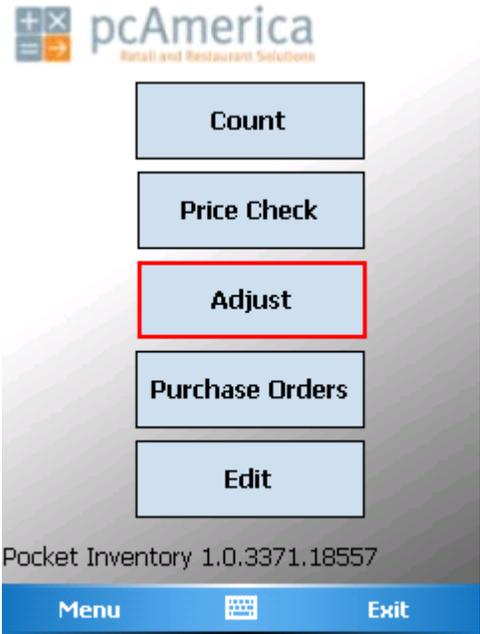
	1. Select **Adjust**.
	2. Select a reason for the adjustment. Reason codes are configured by selecting **Reason Codes** in the **Invoice Settings** tab of **Setup Screen**.

Adjust Inventory

	UPC	Name	Count

[Change]   [Remove]

Save Exit Lookup

3. Scan or type the number of the item with stock levels that are being adjusted.

4. Select **Submit**.

Afghan Hound
Enter Count

5

1	2	3
4	5	6
7	8	9
.	0	-

[Cancel]   [Enter]

5. Provide the count and select **Enter**.

Note: If a positive value (5) is entered then the amount will deduct from what was counted. If a negative value (-5) was entered it will add to the stock added.

6. You can change or remove the adjustment by selecting it from the list (clicking the triangle) and pressing the **Change** or the **Remove** button.

   You can also make adjustments to other items from this screen.

   When you are finished, select **Save**.

Receiving items in a purchase order

To receive items in a purchase order in Pocket Inventory, log in and follow these steps.

1. Select **Purchase Orders**.

	2. Select **Receive PO**.
	3. Select the purchase order that is being received. 4. Select **Select**.

Receive Purchase Order [ ] [Submit] **ItemNum** / **Ordrd** / **Rcvd** / **Dmgd** d101 / 5 / 0 / 0 **Total Items** 0 **Vendor** United Canine Distri ▾ **Reference** [ ] [Change] [Damaged] [Remove] **Save Exit Lookup Order Status**	5. Select an item by clicking the triangle to the left of its listing. 6. Select **Change** and provide a quantity in order to receive the item. Select **Damage** and provide a quantity in order to note the receipt of damaged items.
Receive Purchase Order [ ] [Submit] **ItemNum** / **Ordrd** / **Rcvd** / **Dmgd** d101 / 5 / 5 / 0 **Total Items** 5 **Vendor** United Canine Distri ▾ **Reference** [ ] [Change] [Da ✔ **Open** ove] [ ] **Completed** **Save Exit Lookup Order Status**	7. When appropriate, select **Order Status** and change the status of the order from "Open" to "Completed".

Receive Purchase Order [ ] [Submit] **ItemNum** / **Ordrd** / **Rcvd** / **Dmgd** d101 / 5 / 5 / 0 **Total Items** 5 **Vendor** [United Canine Distri ▼] **Reference** [ ] [Change] [Damaged] [Remove] **Save** Exit Lookup Order Status	8. Select **Save** when you are finished.

Creating a purchase order

To create a purchase order in Pocket Inventory, log in and follow these steps.

pcAmerica Retail and Restaurant Solutions [Receive PO] [Create PO] [DSD] [DSD Credit] Exit	1. Select **Create PO**.

2. Select a vendor and due date.

3. Optionally provide a reference number and shipping preferences.

4. Select **Add Items**.

5. Scan or type the number of an item to add to the purchase order.

6. Select **Submit**.

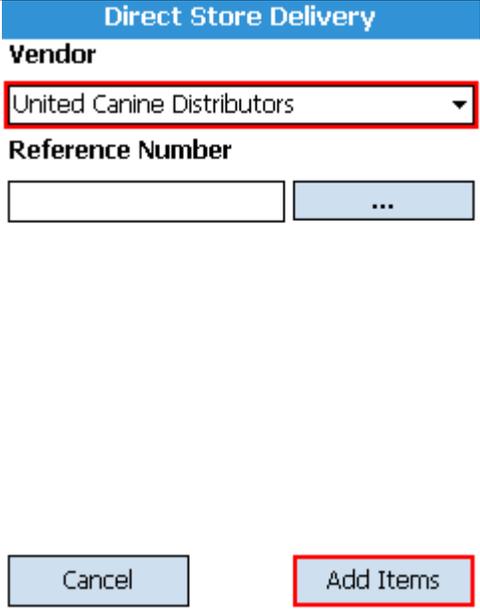|	

Bulldog
 In Stock = 0, On Order = 5
 Enter Quantity
 	
 `5` `<---`
 	
 `1` `2` `3`
 `4` `5` `6`
 `7` `8` `9`
 `.` `0` `-`
 	
 `Cancel` `Enter`
	7. Provide the quantity to order and select **Enter**.

Create Purchase Order `_____` `Submit` 	ItemNumber	Quantity	 ▸	d101	5	 **Total Items** 5 **Vendor** `United Canine Distri ▼` **Reference** `_____` `Change` `Remove` **Save** **Exit Lookup** ▦ ▲	8. To change the quantities being ordered, select an item from the list (click the appropriate triangle) and select **Change**. To remove it, select **Remove**. You can add more items to the purchase order from this screen. When you are finished creating the purchase order, select **Save**.

Creating a DSD (Direct Store Delivery)

To create a DSD (the Pocket Inventory equivalent of an instant PO, log in and follow these steps.
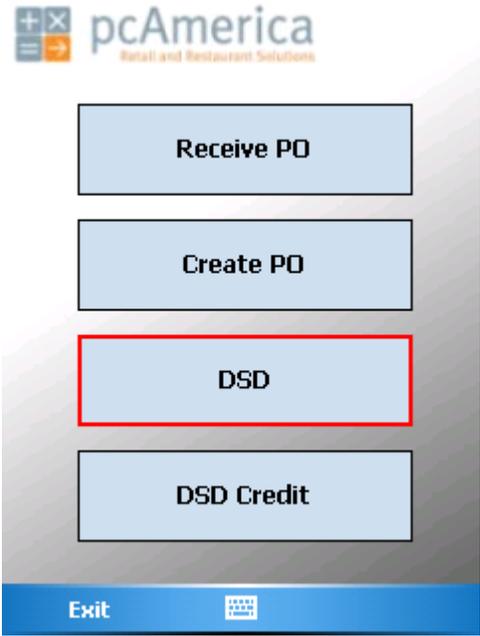
	1. Select **DSD**.
	2. Select a vendor. 3. Optionally provide a reference number. 4. Select **Add Items**.

Direct Store Delivery [ ] Submit | ItemNumber | Rcvd | Dmgd | **Total Items** **Vendor** United Canine Distri ▼ **Reference** [ ] [Change] [Damaged] [Remove] Save Exit Lookup ▦ ▲	5. Scan or type the number of the item being received. 6. Select **Submit**.
Bulldog In Stock = 0, On Order = 10 **Enter Quantity** [5] [<---] [1] [2] [3] [4] [5] [6] [7] [8] [9] [.] [0] [-] [Cancel] [Enter]	7. Provide the quantity being received and select **Enter**.

	This screen is practically identical to the screen used to receive items in a purchase order.

Creating a DSD Credit

To create a DSD Credit (items are being returned to a vendor) in Pocket Inventory, log in and follow these steps.

	1. Select **DSD Credit**.

DSD Credit **Vendor** United Canine Distributors ▼ **Reference Number** [ ] [...] [Cancel] [Add Items]	2. Select a vendor. 3. Optionally provide a reference number. 4. Select **Add Items**.
DSD Credit [ ] [Submit] | ItemNumber	Received | **Total Items** **Vendor** United Canine Distri ▼ **Reference** [ ] [Change] [Remove] **Save Exit Lookup** ▦ ▲	5. Scan or type the number of the item being returned to the vendor. 6. Select **Submit**.

|	
Bulldog In Stock = 0, On Order = 15 **Enter Quantity** [<---] [1] [2] [3] [4] [5] [6] [7] [8] [9] [.] [0] [-] [Cancel] [**Enter**]	7. Provide the quantity being returned to the vendor and select **Enter**.
DSD Credit [ ] [Submit] | **ItemNumber**	**Received** | | d101 | -2 | **Total Items** -2 **Vendor** [United Canine Distri ▾] **Reference** [ ] [Change] [Remove] **Save Exit Lookup**	8. Select an item by selecting the appropriate triangle. The quantity being returned can be changed by selecting **Change**. The item can be removed by selecting **Remove**. Other items can be added to the DSD Credit on this screen. When you are finished, select **Save**.

Editing inventory

To edit inventory in Pocket Inventory, log in and follow these steps.

	1. Select **Edit**.
	2. Scan or type the number of the item you wish to edit. 3. Select **Submit**.

4. Modify the item's name and department, the number of barcode labels that should be printed for it, its location, cost, price, retail price, vendor, and vendor part number as needed. These fields are located in one of the five tabs.

5. When you are finished editing the item, select **Save** (lower left-hand corner of the screen).

Sending changes to CRE

After counting items, adjusting their stock levels, receiving or creating purchase orders, DSDs, and DSD credits, and editing inventory, you must send the changes to CRE. To do so, log in and follow these steps.
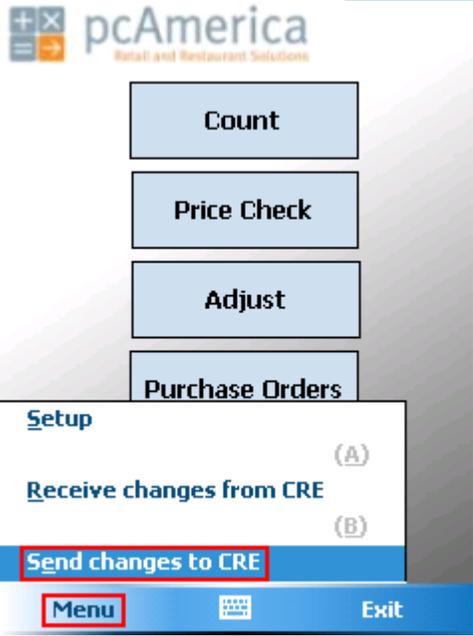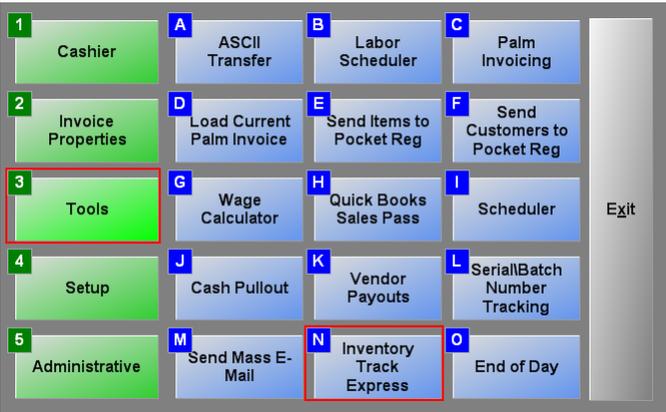
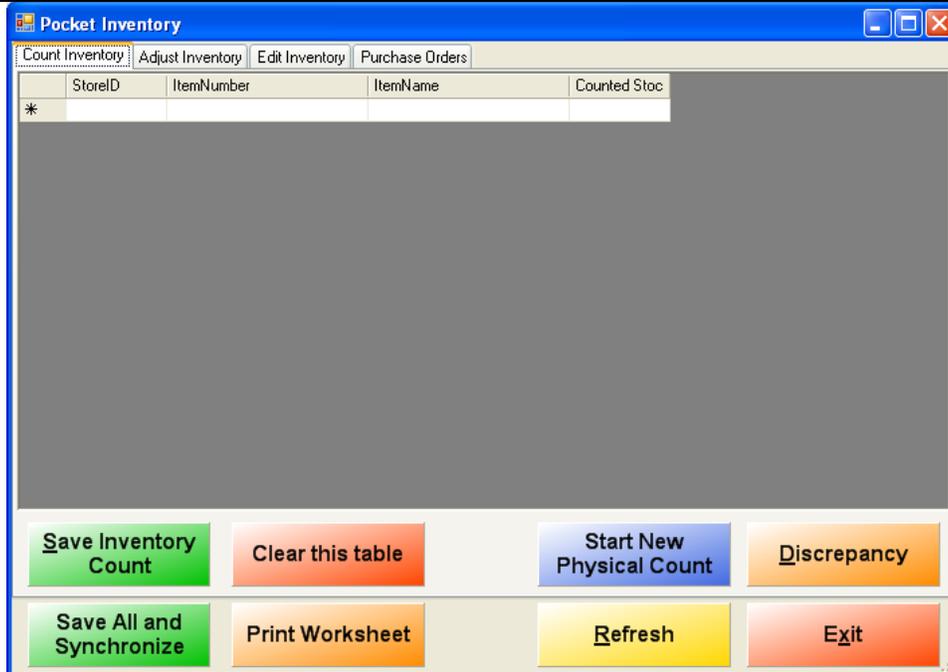|	
	1. Select **Menu**. 2. Select **Send changes to CRE**.

Using Inventory Track Express to review changes before committal

Before the changes made on the handheld have an impact on the appropriate sections of CRE, you can review them with Inventory Track Express. Start CRE, select **Manager** from the login screen, provide the requested credentials, and follow these steps.

	1. Select **Tools** and then **Inventory Track Express**.

After syncing your handheld with the computer you can save the changes performed on the handheld.

Select **Count Inventory**, **Adjust Inventory**, **Edit Inventory**, or **Purchase Orders** in order to view counts, adjustments, edits, and purchase order changes made on the handheld.
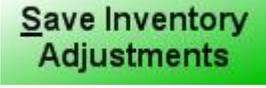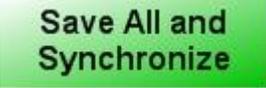
	2. **Clear this table** - Will clear any records present in the Count Inventory table.
	3. **Start New Physical (Inventory) Count** - Will clear any information present in the table and give you the ability to enter the count of every item in your inventory, manually. You can select the Print Worksheet to print a worksheet so that you can use it in your store.
	4. **Discrepancy** - Will print a report displaying the Item Name, Item Number, Recorded Stock, Recorded Value, Counted Stock, Counted Value, Discrepancy Value. If any Discrepancy's exist they will be highlighted in the last column of that table.

Save Inventory Count **Save Inventory Adjustments** **Save Inventory Edits** **Save Purchase Orders**	5. If necessary, modify the changes made on the handheld. 6. Select **Save Inventory Count**, **Save Inventory Adjustments**, **Save Inventory Edits**, or **Save Purchase Orders** to save the changes in the corresponding tab.
Save All and Synchronize	If you prefer to save all changes at once, select **Save All and Synchronize**.
Print Worksheet	7. **Print Worksheet** - Will print a worksheet displaying your inventory with the item number, description, number in stock (on the computer), and an area where you can write in the physical number in stock. This is helpful when doing a **Physical Inventory Count** .
Refresh	8. **Refresh** - Will refresh the active screen, updating any information.
Exit	9. **Exit** - Will exit the Inventory Track Express screen.

Be sure to select the appropriate handheld type (Windows Mobile / Pocket PC) on **Page 2** of the **Hardware** tab of **Setup Screen**. This will ensure that **Inventory Track Express** works correctly.