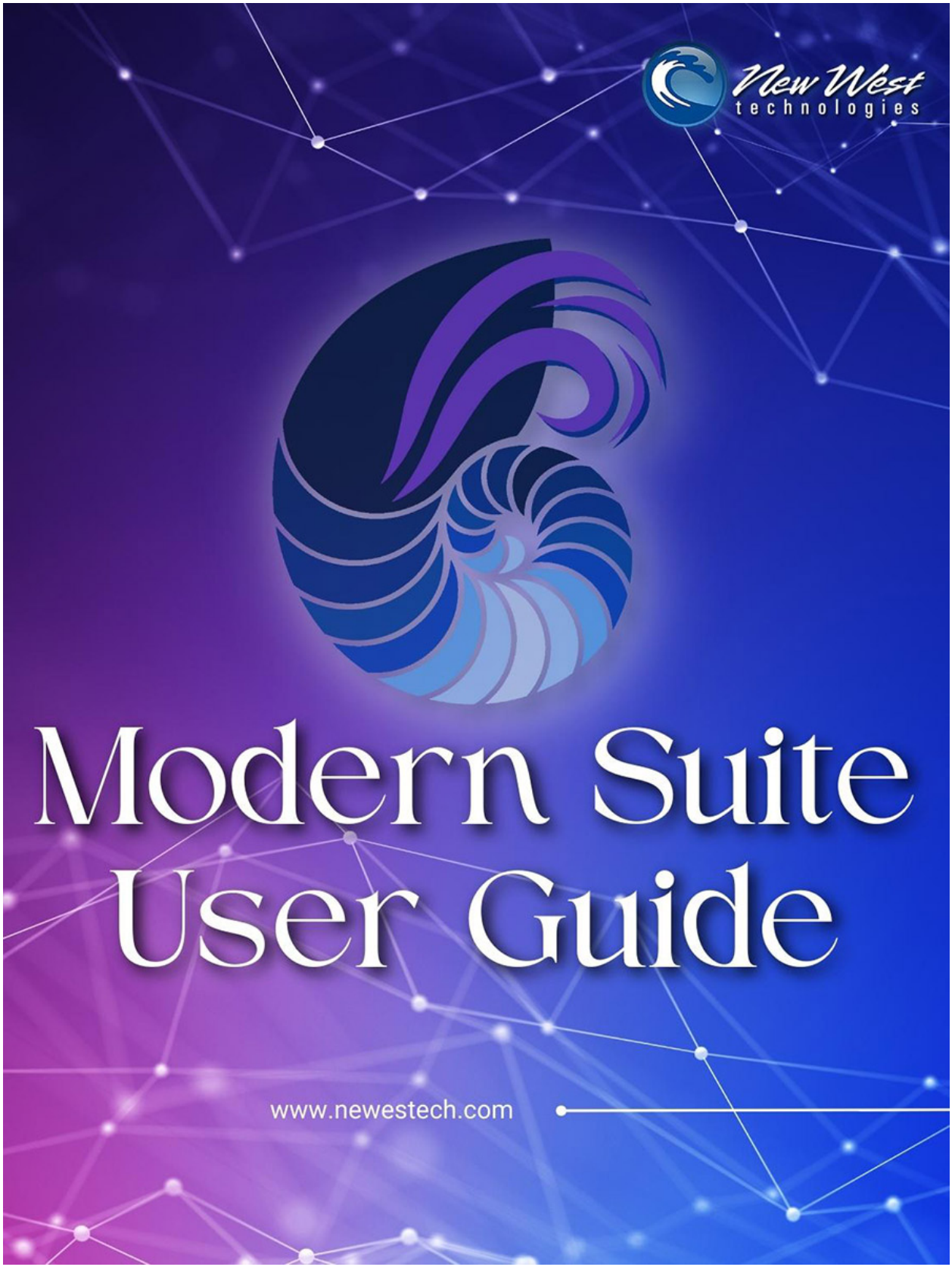
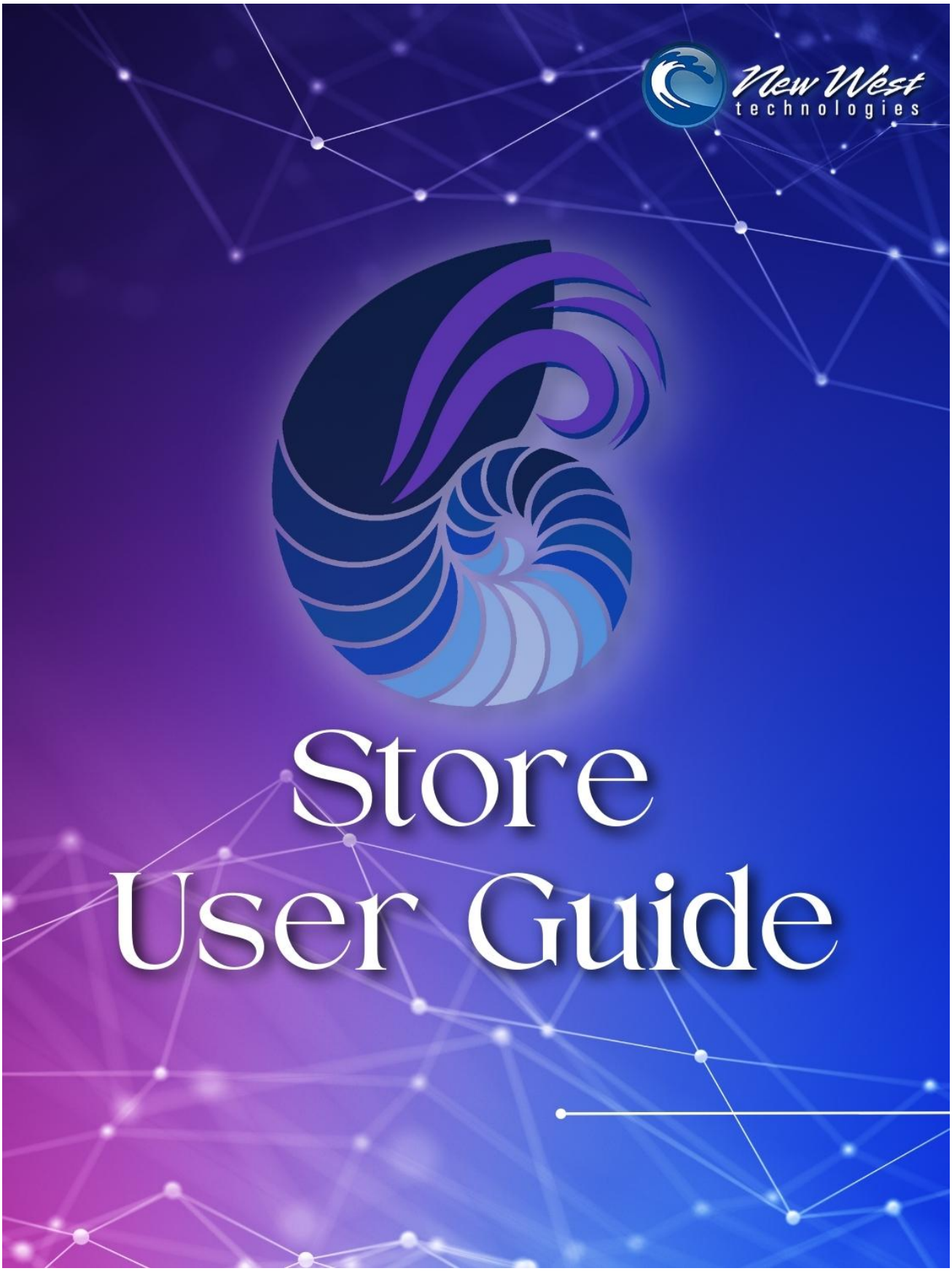

New West
technologies
Modern Suite
User Guide
www.newestech.com

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Store User Guide

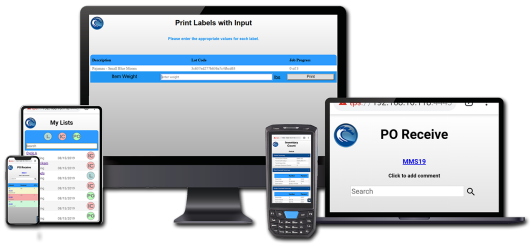


Welcome

Modern Suite from New West Technologies, Inc. is built to interact with the Retail Management Hero (RMH) and Microsoft RMS environments.

There are modules for Purchase Orders with Predictive Order Guidance, Localization, Label Printing, Quick Tasks, Import and Export, Analytics, Inventory Count (Stock Take) with Smart Audit, Inter-Store Transfers, Item Lookup, Item Edit, and Special Order Tracker all included. Modern Suite is beyond mobile and works on any device, any OS, any time!

In this document, we will describe the available Modules and Features this application has to offer.



Requirements

The following prerequisites must be met prior to installing and running the application:

Supported Operating Systems

Windows 10 (64-bit)

Software

- Retail Management Hero (v3.9.5 and above).
- Microsoft .NET Framework v4.5.1
- SQL 2008 R2 (Express) and above; SQL Browser service should be running.
- **Please note:** Modern Suite is capable of interacting with RMS Headquarters or RMH Central, but this is not required for base functionality of Modern Suite.
- **Please note:** Modern Suite for RMH must be installed on the same computer/server that RMH is installed on.

Additional Hardware and software

- The Modern Suite client is web based and can be accessed from a wide range of modern desktop computers, laptops, tablets and smart phones.
- Depending on the device you use to access the Modern Suite client, Bluetooth scanners and keyboard wedge scanning software are compatible.

Pre-Installation Check List

1) What operating system are you running on the POS client stations?

Confirm the operating system is supported. Refer to Requirements – Supported Operating System.

Steps to determine the operating system used:

- Click on the Windows Start Menu
- Choose Run
- Type “winver"

Press Ok

2) What point of sale software are you running?

- RMH: What version of Retail Management Hero RMH are you running?
  - Steps to determine the RMH version: Run Retail Management Hero Store Administrator, click File and About.
- RMS: What version of Retail Management System RMS are you running?
  - Steps to determine the RMS version: Run RMS Store Operations Administrator, click Help and About.

3) Do you have the SQL Database credentials available? You will need the following at the time of installation:

- SQL Server Computer Name SQL Database Name
- SQL Server Login ID
- SQL Server Password

4) What version of SQL Server are you running? Confirm the SQL Server version meets the supported version.

Steps to determine the version of SQL Server using a SQL script ran against the RMH database:

- Run Retail Management Hero Store Administrator
- Click File, Connect
- Select the correct database, enter the SQL password, and press OK
- Choose Query and New

Enter the following SQL script in the query window and Press F5 SELECT @@VERSION AS SQL_Version

5) Was SQL Server installed with the RMS/RMH Installation Disc or as a separate instance?

If installed separately, the SQL client components required for our integration to connect to the RMS/RMH SQL database may be missing.

If this is the case.

6) Is the SQL Instance listening on Port 1433?

To check the SQL Server port.

7) Is Microsoft.NET framework v4.5.1 installed on the POS client stations? If not, please download from:

https://www.microsoft.com/en-us/download/details.aspx?id=40779

8) Does your SQL server have the correct compatibility level configured?

https://docs.microsoft.com/en-us/sql/relational-databases/databases/view-or-change-the-compatibility-level-of-a-database?view=sql-server-2017

9) Are you running any other RMS or RMH Add-ins?

Installation Directions For RMH

The below steps will walk you through a successful installation.

Before completing the following steps, please ensure your **System Requirements** have been met

Installing MS for RMH Steps 1-4

Step #1

Locate and open the installation program. Double-click the icon to begin the installation.



Step #2

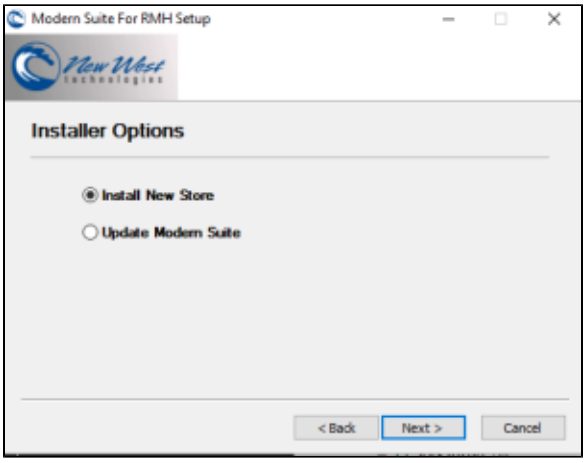
Please review the welcome screen and perform any recommended tasks.

Click Next to continue.



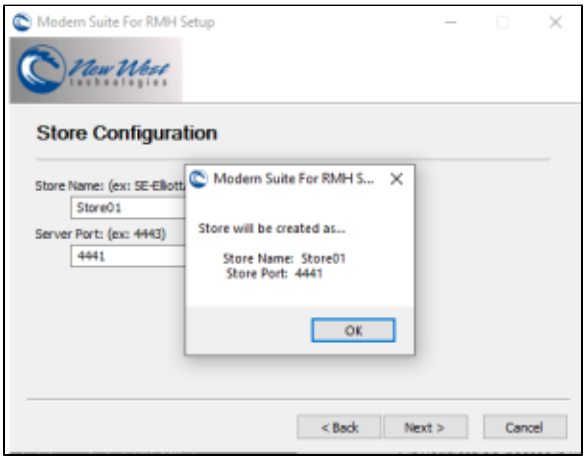
Step #3

Choose either **Install New Store** or **Update Modern Suite**.



Step #4

When installing a new store, you must choose a store name and assign a port number to be used.

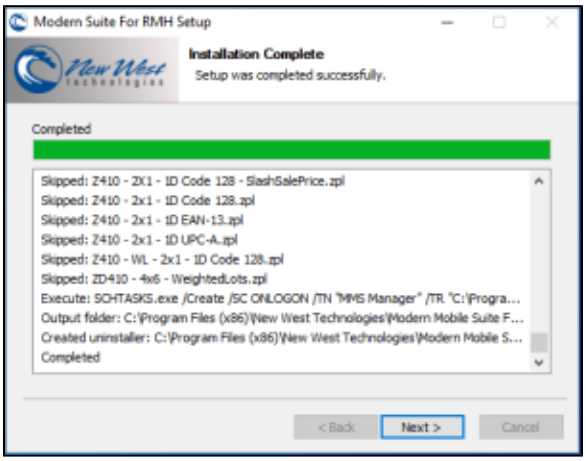


Installing MS for RMH Steps 5-8

Step #5

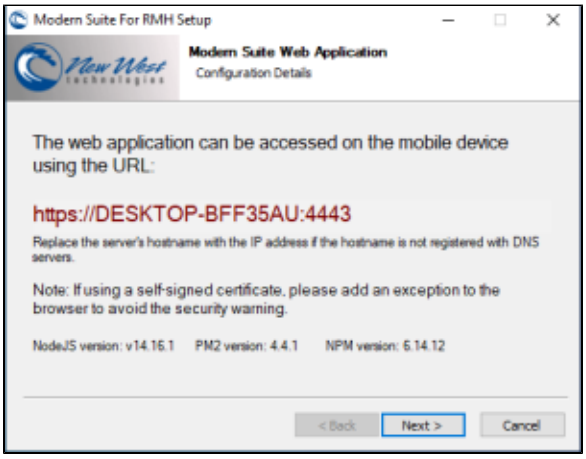
The installation is complete.

Click Next to continue.



Step #6

This window explains how to access the Modern Suite client website after the installation has completed.



Step #7

Click Finish to complete the installation process. Leave the check box checked you wish to launch the Modern Suite website.



Step #8

When you first access the Modern Suite client website you will be prompted to enter your point of sale database information.

- Host: The address of the computer running the MS server software. In most cases you can leave "localhost" in this field.
- Port: The port number of the MS server software. In most cases you can leave "1433" in this field.
- Name: The name of the point of sale database.
- Username: The username used to log into the SQL Server.

- Password: The password for the username used to log into the SQL Server.

Click Save to continue to the Modern Suite log-in screen.

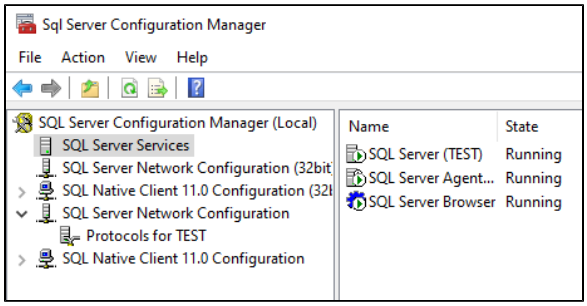


Optional Configuration Options

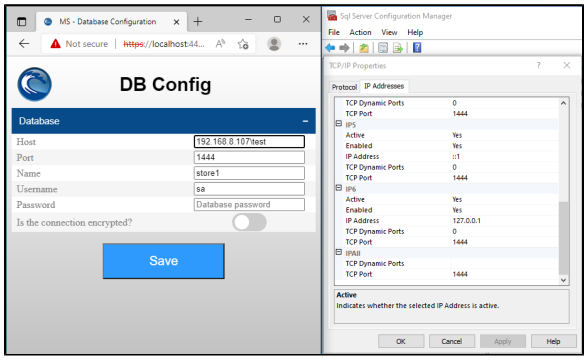
SQL Named Instance support

Sequelize requires the SQL server browser running for named instances. This applies to both SQL servers running on the local machine and remote machine.

Make sure the SQL server Brower is turned on and running. If not, enable SQL server browser and restart SQL servers.



In this example both a SQL Named Instance and non-standard port are used:

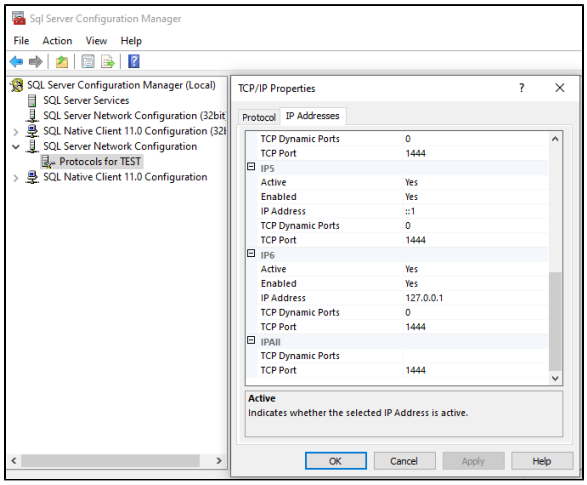


Non-standard Port support

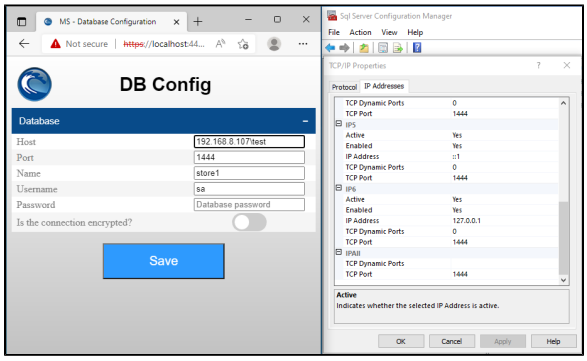
To configure non-standard ports for named instances, launch SQL Server Configuration Manager and expand SQL server network configuration.

Make sure TCP/IP is enabled for each protocol. In the TCP/IP properties, go to IPALL at the bottom node in the list.

Clear the TCP Dynamic Ports field (should be empty) and enter a number in the TCP Port field. Now restart the SQL servers.



In this example both a SQL Named Instance and non-standard port are used:



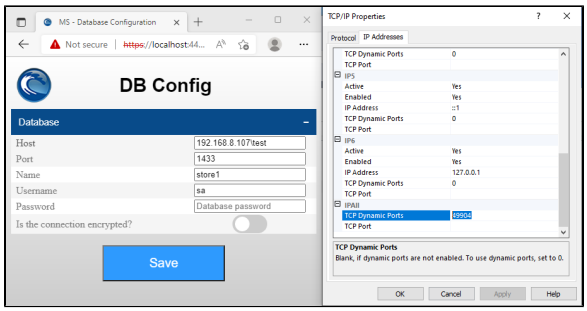
Dynamic Port support

To configure a dynamic ports for named instances, launch SQL Server Configuration Manager and navigate to SQL server network configuration. Make sure TCP/IP is enabled for each protocol.

In the TCP/IP properties, go to the IPALL (bottom node in the list) and enter 0 in the TCP Dynamic Ports field. Clear the TCP port field (should be empty).

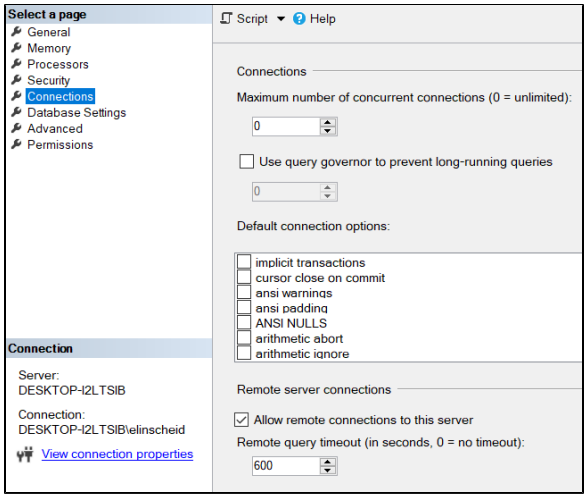
Restart SQL servers, which will assign a random port numbers to the named SQL instances.

In the example to the right, you can see that a dynamic port of 49904 was assigned, although in MS/C there is no need to specify that port number.

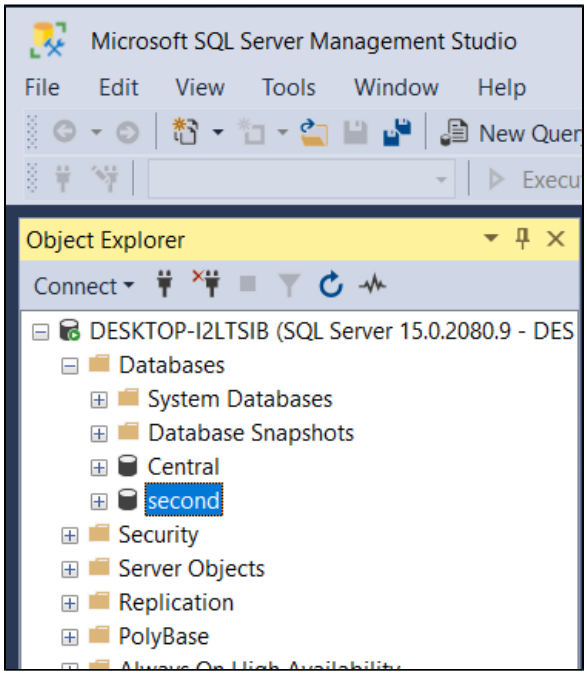


Remote SQL Database support

From the server hosting the SQL database, launch SQL Server Management Studio. Make sure the option "Allow remote connections to this server" is checked in SQL server connection properties.

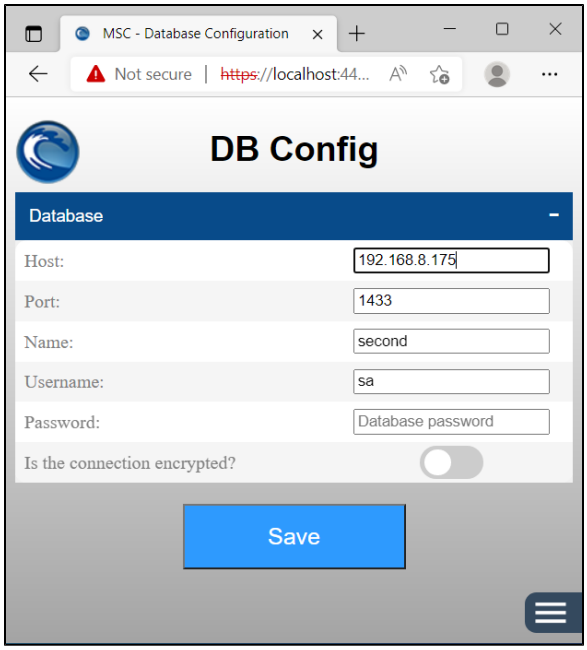


In the example to the right, you can see a database named 'second' is hosted on one computer.



And in this picture, you can see the MSC configuration window where it has connected to database 'second'.

If the connection to the remote database is refused, turn off the firewalls temporary. If the connection works then you may need a firewall exception configured.



Installation Directions For RMS

The below steps will walk you through a successful installation.

Before completing the following steps, please ensure your **System Requirements** have been met

Installing MS for RMS Steps 1-4

Step #1

Locate and open the installation program. Double-click the icon to begin the installation.



Step #2

Please review the welcome screen and perform any recommended tasks.

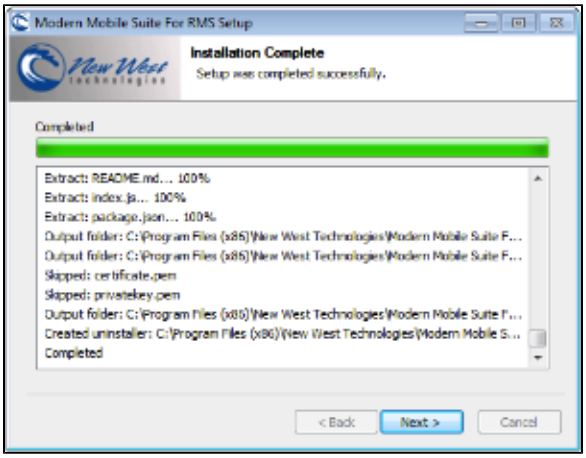
Click Next to continue.



Step #3

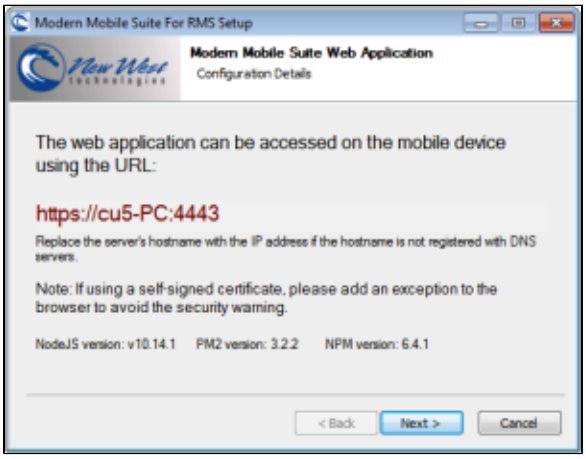
The installation is complete.

Click Next to continue.



Step #4

This window explains how to access the Modern Suite client website after the installation has been completed.



Installing MS for RMS Steps 5-6

Step #5

Click Finish to complete the installation process. Leave the check box checked if you wish to launch the Modern Suite website.



Step #6

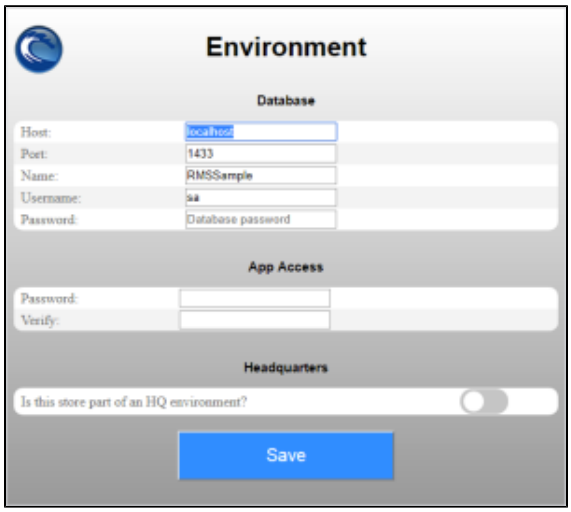
When you first access the Modern Suite client website, you will be prompted to enter your point of sale database information.

- Host: The address of the computer running the MS server software. In most cases, you can leave "localhost" in this field.
- Port: The port number of the MS server software. In most cases, you can leave "1433" in this field.
- Name: The name of the point of sale database.
- Username: The username used to log into the SQL Server.
- Password: The password for the username used to log into the SQL Server.

App Access: Enter the password to be used for logging into the MS client software.

Headquarters: Click to enable if your store is part of an HQ environment.

Click Save to continue to the Modern Suite log-in screen.



License Activation

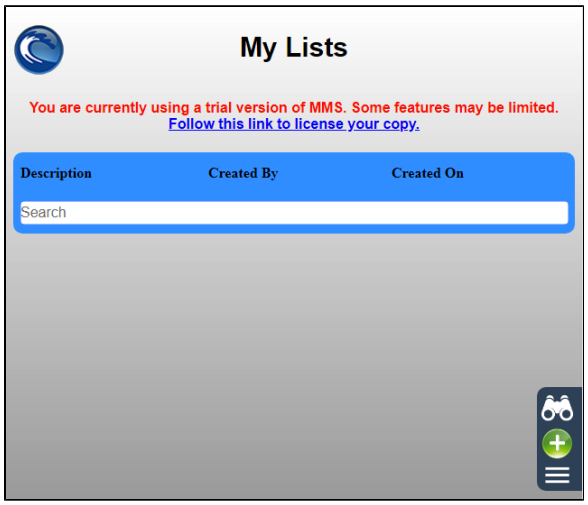
Step # 1:

After logging into MS, the software will initially be in trial mode.

The trial mode has a maximum of:

- 5 concurrent users.
- 10 total product lists.
- 10 entries per list.

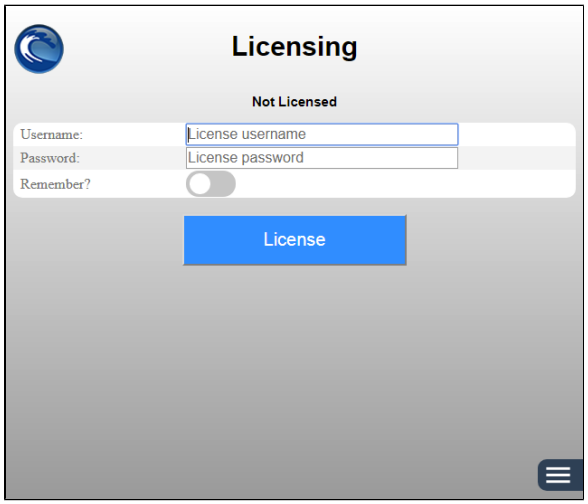
To activate and unlock all the features of Modern Suite, click on the "Follow this link to license your copy" button.



Step #2:

At the licensing screen, enter the e-mail address and password you received from New West Technologies after you purchased your Modern Suite license.

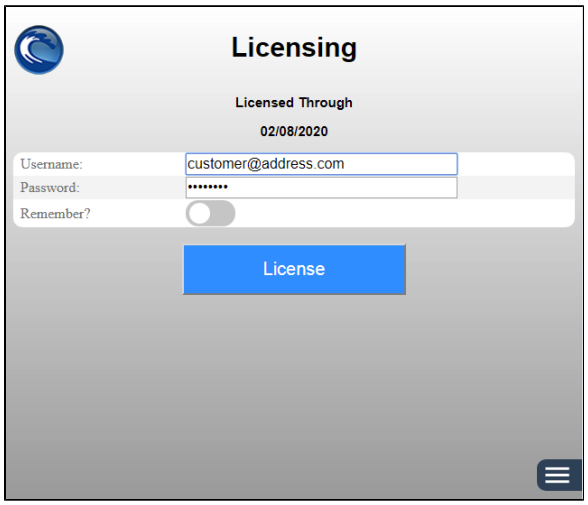
Then click the "License" button.



Step #3:

Modern Suite should now be licensed.

Click on the menu button at the bottom right of the screen to proceed to other areas of the software.



CortexWedge Scanning Software

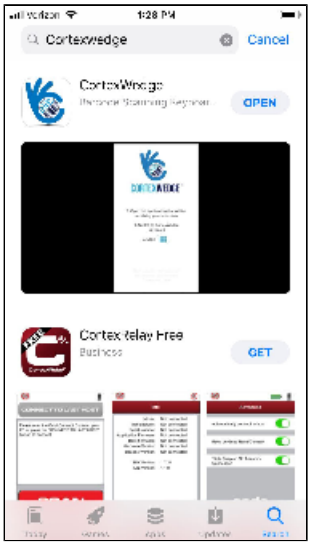
The CortexWedge app from TachyonIQ (Code) makes scanning barcodes from your smart device simple and easy.

Below are directions on installing, configuring and using the CortexWedge app:

Installing on Apple IOS Device Steps 1-2

Step #1:

Download the CortexWedge software from the Apple App Store on your IOS device.



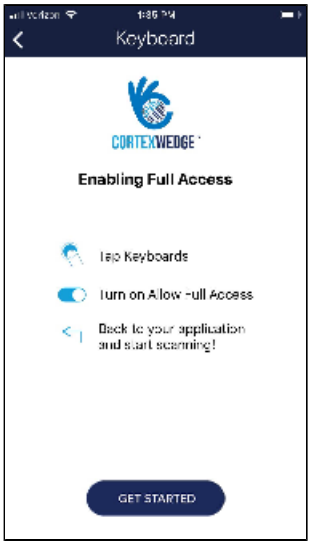
Step #2:

Launch the CortexWedge app on your IOS device.

You will be prompted to "Enable Full Access."

Click on the "Get Started" button at the bottom of the screen. This will take you to the CortexWedge portion of the IOS Settings app.





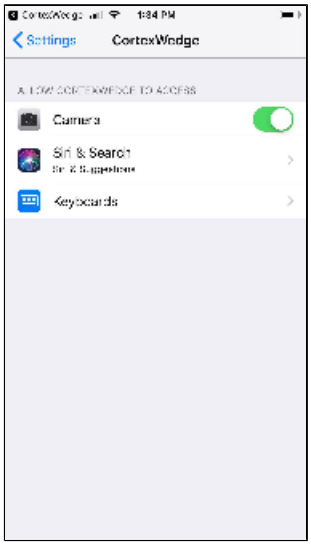
Installing on Apple IOS Device Step 3

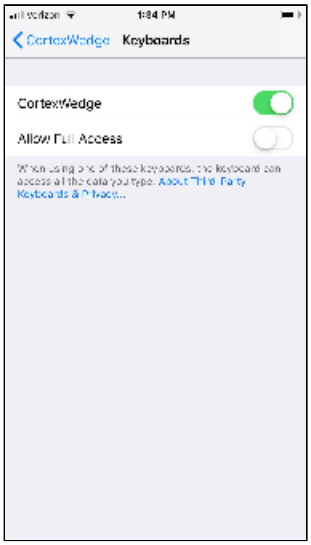
Step #3:

At this screen, make sure access to the camera is enabled.

Next, click on the Keyboards option at the bottom of the screen. In the Keyboards screen, make sure both "CortexWedge" and "Allow Full Access" are both enabled.

At this point, you can choose to close the IOS Settings app and return to the CortexWedge app.





Installing on Google Android Device Steps 1-2

Step #1:

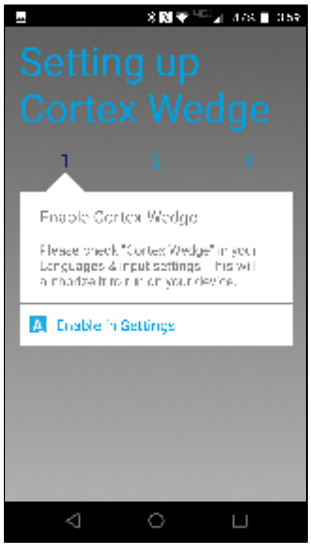
Download the CortexWedge software from the Google Play Store on your Android device.

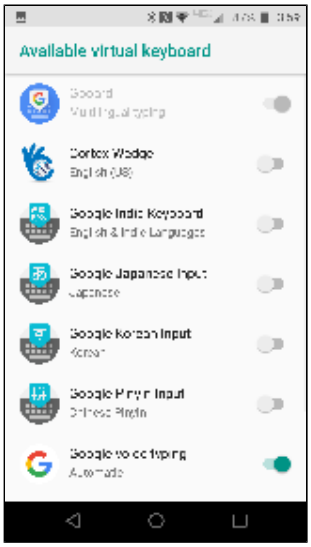


Step #2:

Launch the CortexWedge app on your Android device. You will be prompted to complete the setup process.

Click the "Enable in Settings" option at the bottom of the screen. This will take you to a selection of available virtual keyboards on your Android device. Click on the Cortex Wedge option to enable it.



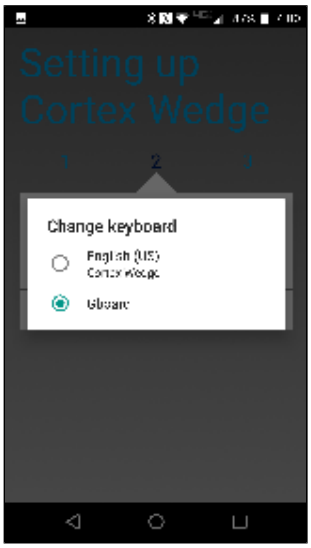


Installing on Google Android Device Steps 3-4

Step #3:

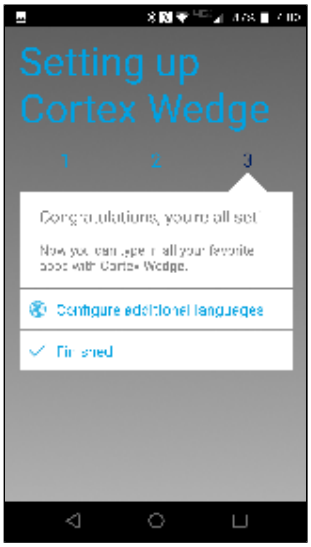
Click on the "Switch Input Methods" option at the bottom of the screen. This will take you to a screen where you can select which keyboard you would like to switch to. Click on the English (US) Cortex Wedge option to enable it.





Step #4:

If you need to adjust any additional language settings you can click on the "Configure Additional Languages" option at the middle of the screen. Otherwise, click "Finished". You should be returned to the main CortexWedge application screen.



Activation on Apple IOS Device

Step #1:

Launch the CortexWedge app on your IOS device. At this main screen, you will need to scan the QR code that came with your CortexWedge license document.

Point your IOS device's camera at the QR code in the center of the screen and click on the "Scan Barcode" button at the bottom of the screen.



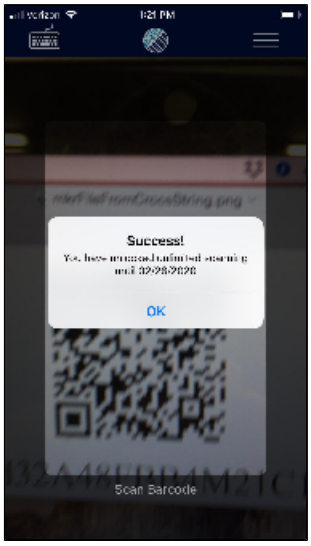


(Example of a QR code)

Step #2:

Your software should now be activated. Click "OK" to return to the main screen of the CortexWedge app.

If you click on the top center icon button of the main screen, you will be taken to the About screen, where you can see the license expiration date.





Activation on Google Android Device

Launch Modern Suite. Next, instead of scanning one of your store item barcodes, instead, scan the QR code that came with your CortexWedge license document.

A message prompt will appear indicating that the software is now activated.





(Example of a QR code)

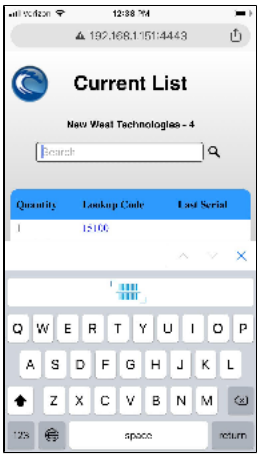
Using CortexWedge Scanning Software

Now that the CortexWedge app has been activated and configured as a keyboard on your smart device, using the app is very simple.

Step #1:

Launch Mobile Suite, login, and start a new count.

When you are ready to scan a barcode, press the barcode icon directly above the keyboard.



Step #2:

In the scan window, align the barcode you wish to scan in the middle of the screen and press "Scan Barcode" at the bottom of the screen.

If the Quick Scan option in MS is not enabled, then you should be prompted to enter the quantity of the item you just scanned. Otherwise, if Quick Scan is enabled, then the item will simply be added to the current list in MS.

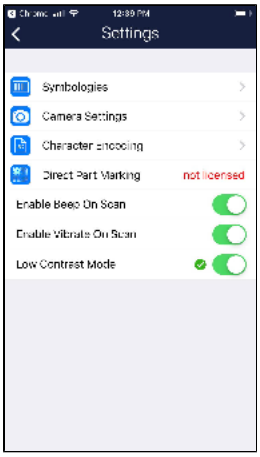


Step #3:

Optionally you may want to adjust settings within the CortexWedge software. At the scan screen, press the Settings button at the top right corner of the screen to enter the Settings menu.

Here you can make adjustments such as:

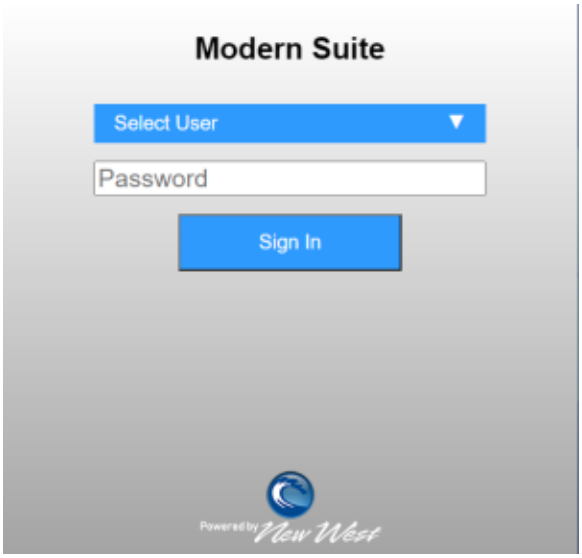
- Symbologies - This allows you to make, enable, or adjust the different barcode types you can scan. For example, Code128 or EAN13
- Camera Settings - This allows you to adjust how the CortexWedge app utilizes your smart device camera.
- Character Encoding - This option allows you to choose the specific encoding you wish to use. The default is US-ASCII.
- Enable Beep On Scan
- Enable Vibrate On Scan
- Low Contrast Mode



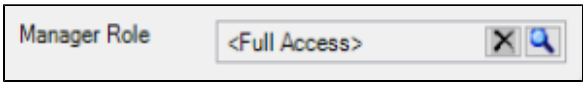
User Accounts

The User Accounts used to log into Modern Suite are the same as the user accounts used to log into your point of sale software. This is the same for both RMS and RMH users.

However, the passwords used to log into Modern Suite depend on if you are using RMS or RMH point of sale software. RMH users will find that the passwords match what they use in the RMH software.



The RMH version of Modern Suite has Administration functionality that will only be accessible by RMH user accounts with a Manager Role - Full Access. Otherwise, a user may log into Modern Suite, but the Administration functions will be absent.

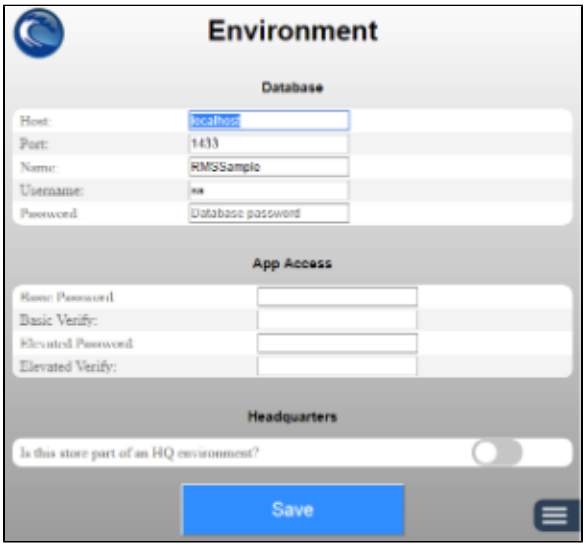


Microsoft RMS users must assign an App Access Password at the end of the MS installation process.

If an Administrator at your store needs to modify the App Access Password, this can be accomplished by accessing the Environment wind ow in the MS Administration section.

Important Note: If you are using the RMS version of MS and cannot log into MS using the passwords previously assigned in the Environment window, there is a file you can delete to force MS to prompt you to re-enter the Environment settings. Delete the file named ".ENV" in path:

C:\ProgramData\New West Technologies\Modern Suite

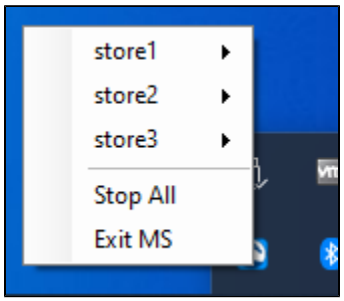


MS Process Manager

The MS Process Manager task tray icon will appear on the server computer desktop screen after the installation is completed. Right-click on the icon in the Windows task tray.

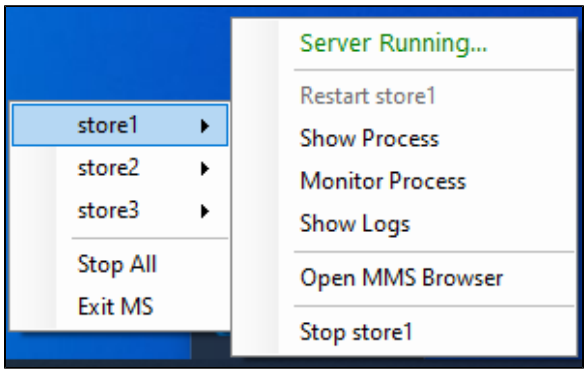
The menu that appears will show any MS Store instances installed on this computer. Click on a store to see further options.

You also can click on Stop All, which will stop all MS store instance services, or you can click on Exit MS to close the MS Process Manager.



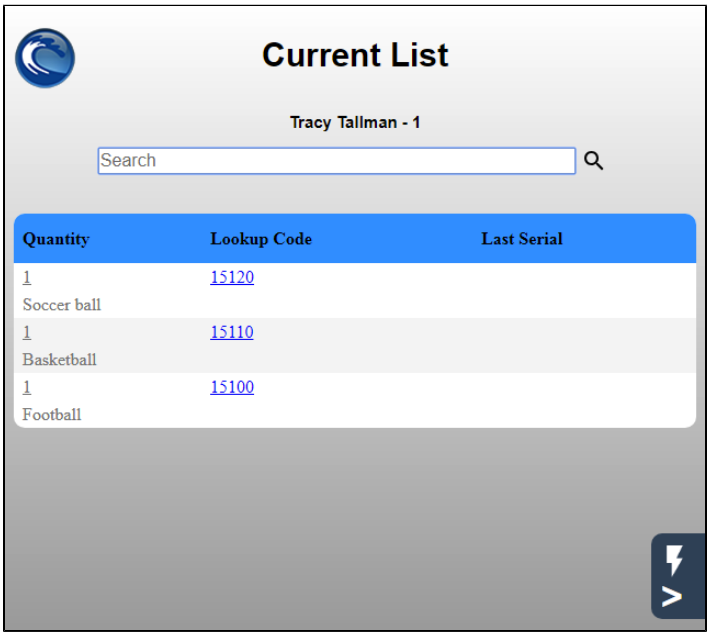
When you click on one of the MS stores installed on the computer, you will see the following options:

- Server Status: Simply shows if the store service is actively running or stopped.
- Restart (Store Name) To be used if the server was stopped for any reason.
- Show Process: Shows window indicating the status of the web server running MS.
- Monitor Process: Shows PM2 dashboard window with version numbers and resource information.
- Show Logs: Shows the latest PM2 server logs.
- Open MS Browser: This launches the MS web client from the server web browser
- Stop (Name of Store) This will stop only the MS store instance selected. Any other store instances will remain running.



MS Client Functions

The Modern Suite client makes taking Inventory Count (Stock Take) and Item Management on the go easy and convenient. Below you will find in-depth information regarding the current functions:



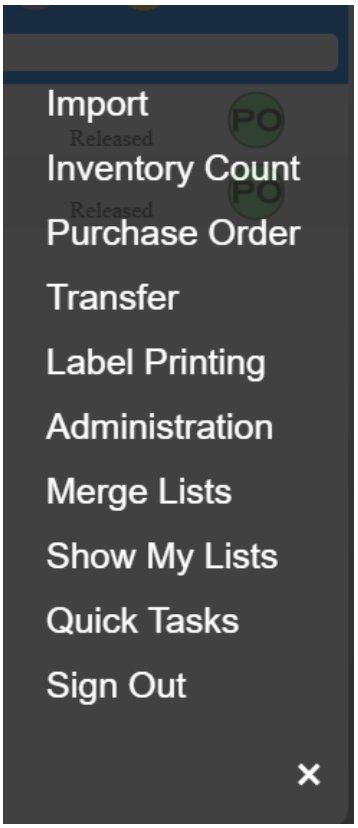
MS Menu

At the bottom right corner of the MS client screen, you will find three icons.



- Quick Print icon (This allows you to scan/search for a standard item and print a label quickly without first creating a list. Click Label Printing for more information)
- Binoculars (This takes you to the Item Management Window)
- Plus Sign (This starts a new List)
- Pencil (This allows you to delete lists from the window if allowable)
- Menu button

The Menu button will open the main menu screen. Here you will find the following options:



- **Import**: This option allows you to import various types of information into an MS list. **Note:** This option will only appear if MS is licensed.
- **Inventory Count**: Click this option to begin selecting a scope for an Inventory Count list.
- **Purchase Order**: Click this option to begin selecting a scope for a Purchase Order count list.
- **Transfer**: Click this option to begin selecting a scope for a Transfer Count list.
- **Label Printing**: Click this option to begin selecting a scope for a Label Printing list.
- **Administration**: This option brings you to the Administration window. **Note**: This option will only appear if the user has Manager rights/full access permission in RMH.
- **Show All Lists:** By default, when you log into MS you will see all current lists from all users at this store. This option will show in the menu if you are currently looking at your own user's lists.
- **Merge Lists**: This option allows you to merge two or more Lists into a single combined List. For more information click Here.
- **Show My Lists**: The default view is All Lists, but if you want to filter the lists to see only your own, click this option.
- **Quick Tasks**: (This option takes you to the Quick Tasks functions: Quick Tasks
- **Sign Out** (This will sign the user account out of the MS Client)

List Menu Icons:

In most lists you will see the following menu icons.



- **AutoComplete** (AutoComplete will automatically enter the item you entered into the search field provided it correctly matches an item. If this option is disabled then you will instead see a list of similar items to the value you entered into the search bar and you must manually select the item of your choice.
- **Pencil** (Toggle this setting to see the option to delete items in the current list)
- **QuickScan** (Toggle this setting to automatically enter a quantity of 1 for the item you just entered)
- **Arrow** (View menu options for the current list you are viewing)

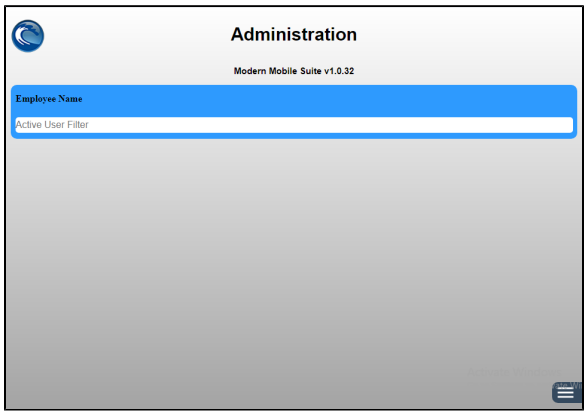
Administration

Administration Main Page:

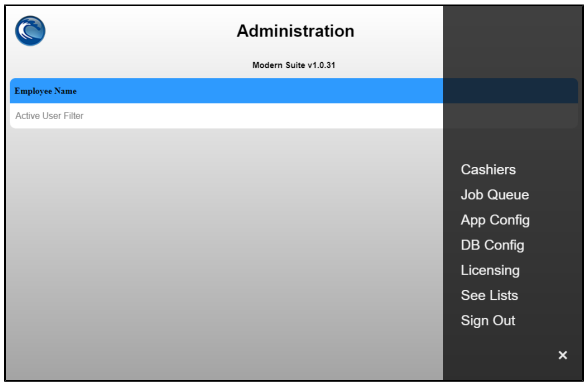
Only user accounts with administrative privileges are able to see and enter the Administration window.

Here you can see which user accounts are currently logged into the MS Client and manually sign them out if you wish.

Click on the button right Menu button to see further Administration options

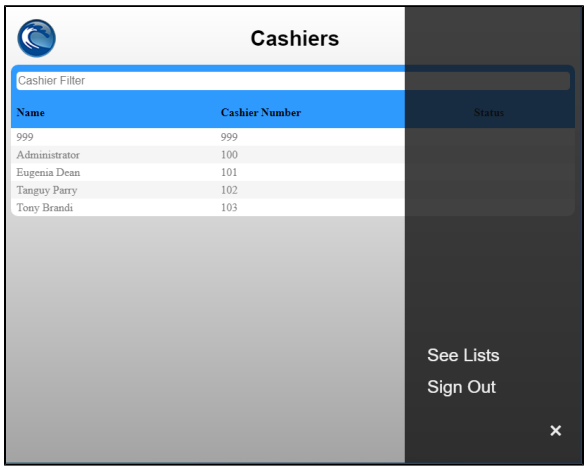


The Administration Menu has additional options available:



- **Cashiers** (This option allows you to edit cashier-specific permissions. **Please Note:** This option will only appear in this menu if Modern Suite is installed on a single-store environment. If MS is installed on a multi-store/Central environment, then you must use Modern Suite Central to edit Cashier properties)
- **Job Queue** (This option allows you to see the current status of jobs, such as Inventory Count Commits
- **App Config** (This option allows you to change specific application settings as well as changing MS passwords when using Microsoft RMS)
- **DB Config** (This option allows you to configure or change the SQL database connection settings)
- **Licensing** (This option takes you to the Licensing screen)
- **Certificate Upload** (This option allows you to upload custom certificates for security concerns)
- **See Lists** (This option returns you to the main MS lists window)
- **Sign Out** (This option allows the current account to log out of MS

Cashiers



In the Cashiers window you will see a list of cashiers in your store database.

Click on the cashier's name to view the different settings that are configurable.

There are five expandable tabs that contain much of the same settings you would see in a cashier's profile in RMH Central Manager.

- **User Details**
- **Mobile Suite Privileges**
- **Registers Properties**
- **Roles**
- **Over/Short Limits**

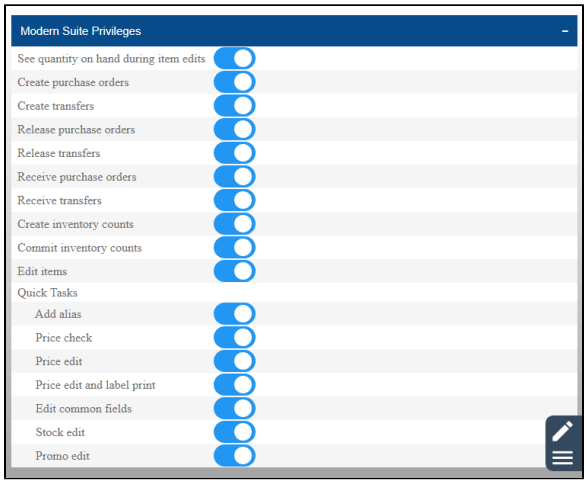


To start editing the Cashier settings first click on the Pencil button at the bottom right of the screen. The pencil button will change to an yellow color and the different fields can now be changed. Once you have made the desired changes click on the pencil button again to save your work.

User Details:

Here you can edit the following

- **User Name**
- **Telephone**
- **E-Mail**



Mobile Suite Privileges: Privileges specific to Modern Suite functionality.

Please note: A cashier with a Manager Role with **Full Access** (or equivalent) will already have full access to the functions outlined in this tab. This Privileges tab allows for a more granular approach to Modern Suite permissions for non-managers or people without full access rights.

- **See quantity on hand during item edits:** This privilege allows the user to see quantity on hand in the product details page, whether or not the app config setting is set.
- **Create purchase orders:** This privilege allows the user to create purchase orders. This involves scoping from the main menu, as well as converting a generic list. This privilege also grants access to non released PO pages.
- **Create transfers:** This privilege allows the user to create transfers. This involves scoping from the main menu, as well as converting a generic list. This privilege also grants access to non released transfers pages.
- **Release purchase orders:** This privilege grants the ability to release PO's once they have been created. This is found in the nav menu of the PO Create screen.
- **Release transfers:** This privilege grants the ability to release transfers once they have been created. This is found in the nav menu of the Transfer Create screen.

Quick Tasks:

Quick Tasks grant the user to use the various quick tasks. The following Quick Task options can be enabled/disabled:

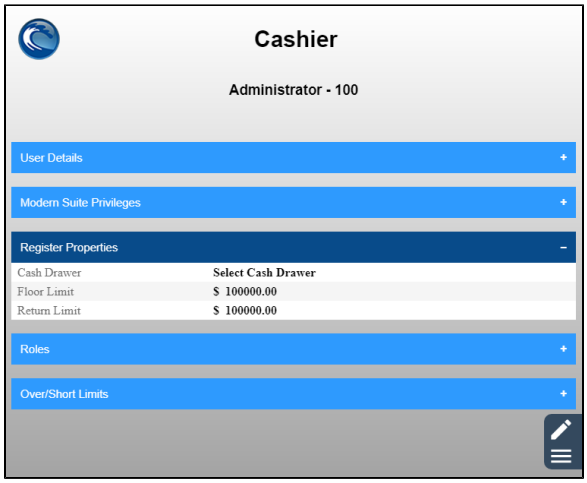
- **Receive purchase orders:** This privilege grants the user to the PO receive screen. This involves all functionality with this page too. If a user has the release privilege but not the receive privilege, they will be redirected to the product lists screen after they release the order.
- **Receive Transfers:** This privilege grants the user to the Transfer receive screen. This involves all functionality with this page too. If a user has the release privilege but not the receive privilege, they will be redirected to the product lists screen after they release the transfer.
- **Create inventory counts:** This privilege grants the user to create ICs. This involves scoping from the main menu, as well as converting a generic list. (Note accessing the IC page has no restriction once created).
- **Commit inventory counts:** This privilege grants the user to commit ICs. This includes full commits (when permitted from app config) and cycle commits. These can be found in the nav menu of the IC review screen.
- **Edit items:** This privilege grants the user to edit items in the Product Details screen.

- **Add Alias**
- **Price Check**
- **Price Edit**
- **Price Edit and Label Print**
- **Edit Common Fields**
- **Stock Edit**
- **Promo Edit**

Please Note: **Quick Tasks** are independent from the regular privileges. For example, if the Price Edit Quick Task were enabled, the user would be able to use that specific Quick Task regardless of whether the Edit Items option was enabled in general.

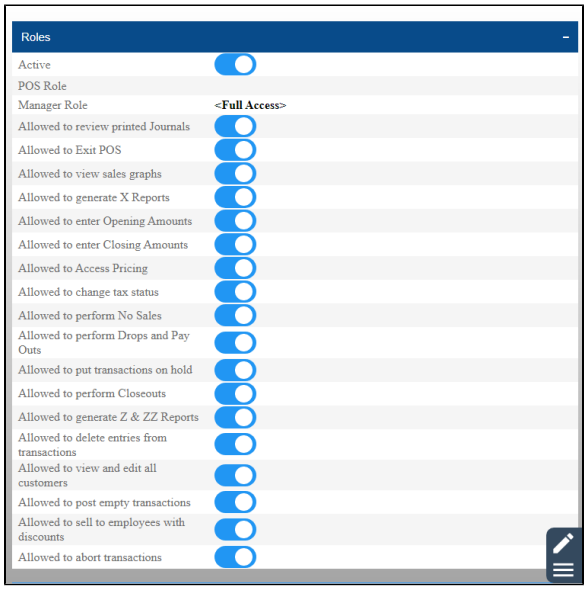
Register Properties:

- **Cash Drawer:** Select the cash drawer that the cashier will use.
- **Floor Limit:** Select the dollar limit for a transaction.
- **Return Limit:** Select the dollar limit for a return transaction.



Roles:

This tab contains the same POS cashier permissions found in RMH Store/Central Manager.



Over/Short Limits:

Just like in RMH Store/Central Manager; set the amount of over/short error allowed for the cashier when closing batches (generating Z or ZZ reports).



Job Queue

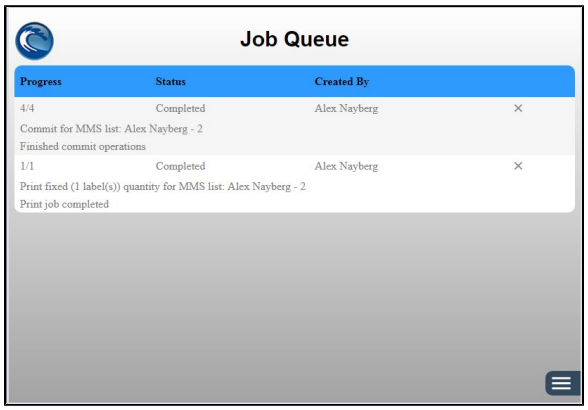
The Job Queue window allows you to see the status of Jobs that are still in the queue. Currently, there are two types of jobs that can appear here:

- Inventory Count Jobs
- Label Print Jobs

The job status might indicate the following:

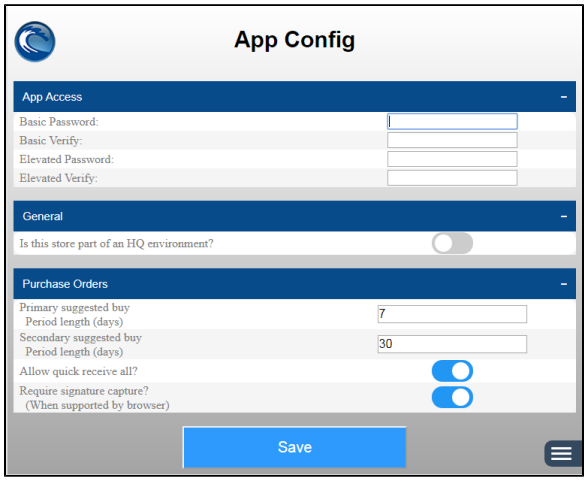
- Running
- Completed
- Paused (Label printing jobs can be paused and resumed)
- Error Status

You can remove jobs from the queue by clicking on the X icon to the right of each Job.



App Config

RMS:



App Access

- Basic Password (This password does NOT grant users elevated /manager privileges)
- Elevated Password (This password DOES grant users elevated /manager privileges)

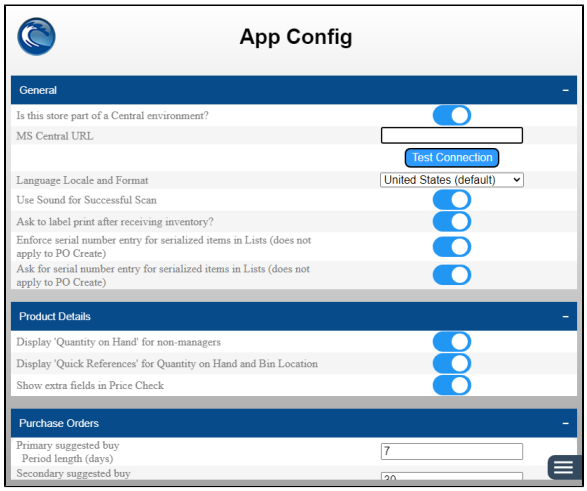
General

- Is this store part of a HQ environment? (Please contact your point of sale administrator if you are unsure if you are using a Headquarters environment with your point of sale software)
- **Please Note:** RMS Headquarters is **not** required to use MS. This is entirely optional.

Purchase Orders

- Primary Suggested Buy Period Length (Days)
- Secondary Suggested Buy Period Length (Days)
- Allow quick receive all for POs? (This option will allow you quickly receive all items in a PO by automatically confirming that all items in the PO were received)
- Require signature capture for POs? (When supported by browser)

RMH:



App Access

- MS for RMH uses the same passwords used to log into RMH.
- Manager rights/privileges are also recognized in MS.

General

- Is this store part of a Central environment? (Please contact your point of sale administrator if you are unsure if you are using a Headquarters environment with your point of sale software)
- MMS Central URL (Address to point MS to the MSC server) **Ple ase Note:** RMH Central is **not** required to use MS. This is entirely optional.
- Language Local and Format: Select from the available list of locations to adjust the language and format of your choosing. The default is United States (English).
- Use Sound for Successful Scan: Enable this option to have MS make a small noise every time there is an item added to a list.
- Ask to label print after receiving Inventory?: Enable this option if you want to be prompted to print labels during the receive process for Purchase Orders or Transfers. **Please note:** This only takes effect if the option for Require Signature is disabled.
- Enforce serial number entry for serialized items in Lists (does not apply to PO Create): Enabled by default. This option allows you to force MS to require a serial number when scanning /entering serialized items.
- Ask for serial number entry for serialized items in Lists (does not apply to PO Create): Enabled by default. This option allows the user to be prompted to enter a serial number when scanning/entering serialized items. **Please Note:** This option will automatically be enabled if the above Enforce option is enabled. Likewise, this option cannot be disabled until the above Enforce option is first disabled. However, this option can be enabled by itself if you wish.

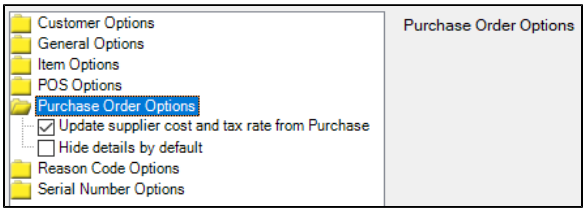
Product Details:

- Display 'Quantity on Hand' for non-managers: Enable this option if you want to allow non-managers to see an item's quantity on hand.
- Display 'Quick Reference' for Quantity on Hand and Bin Location: Enable this option if you would like to see an item's

quantity on hand and bin location at the top of the Product Lookup page for easy reference.
- Show extra fields in Price Check: Enable this option to see extended properties during Quick Task Price Check. If this option is disabled, the Quick Task Price Check function will only display Description, ILC, and Price.

Purchase Orders

- Primary Suggested Buy Period Length (Days)
- Secondary Suggested Buy Period Length (Days)
- Allow quick receive all for POs? (This option will allow you quickly receive all items in a PO by automatically confirming that all items in the PO were received)
- Require signature capture for POs? (When supported by browser)
- If RMH Store Manager has been configured to allow Purchase Orders to update the supplier cost then MS will respect that setting.



Import Item Records

- Create Item if Item does not exist?
- Create Department if Department does not exist?
- Create Category if Category does not exist?
- Create Supplier if Supplier does not exist?
- Create Alias if Alias does not exist?

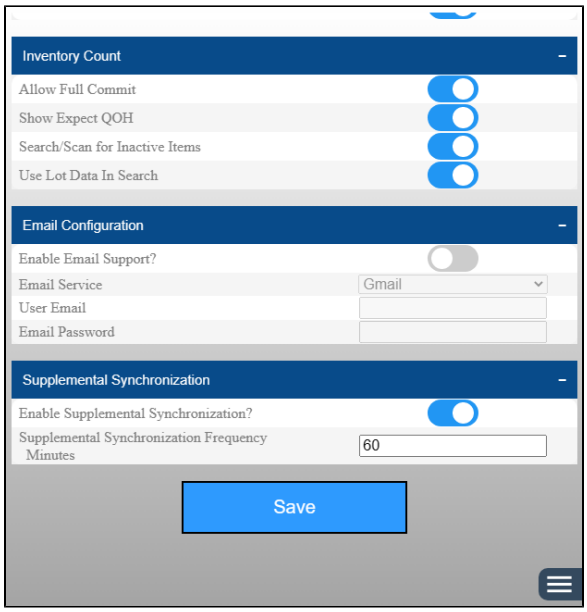
Special Order

- Send Email to customer when Special Order is Received: When enabled, if a MS Special Order is generated there will be a prompt asking the cashier if an email should be sent to the customer alerting them that the special item they ordered is available for pickup.
- Do not generate Purchase Order with Special Order: When enabled, a purchase order will not be generated during the Special Order workflow. These could then be manually added to a purchase order later on if desired.

Email Configuration

- Enable Email Support?: Toggle on or off the email function in Modern Suite.
- Email Service: Select from drop down list the email service you will use.
    - Options: GMail, Hotmail, Outlook365, Yahoo or Other
- User Email: Enter the email address you will use.
- Email Password: Enter the email password you will use.

For Google Gmail, you might need to enable both 2-factor authentication and an App Password (16 digit). See example image to the right:

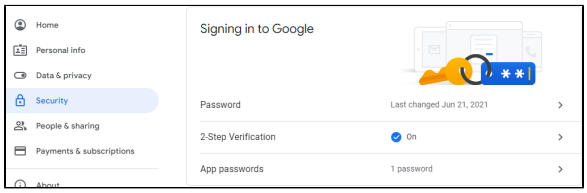


Inventory Count

- Allow Full Commit: This option will show or hide the Full Commit function during the inventory count process
- Show Expect QOH: Enable to show the expected quantity on hand of an item during the inventory count process. If disabled then the column will be completely absent.
- Scan/Search for Inactive Items: Enable to include inactive items when adding items or searching for items in a list.
- Use Lot Data in Search: This setting isoff by default. When this option is off, the item lookup query will not include the lot related tables in the search, and may speed up the search performance.

Supplemental Synchronization Frequency (Minutes):

- Connection to RMH Central DB required for this option to be functional.
- Select number of minutes between automatic supplemental sync from store and Central.
- The default value is 60 minutes and the minimum value allowed is 10 minutes.

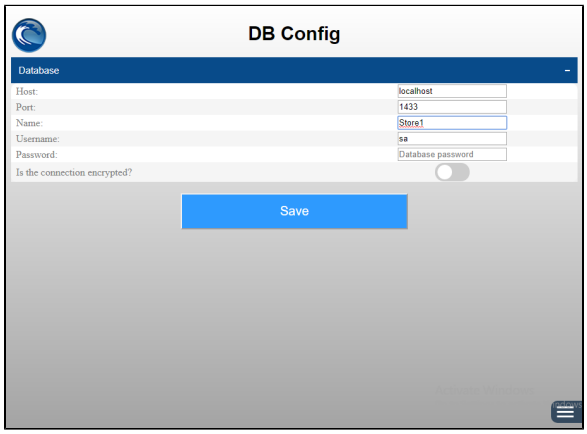


DB Config

When you initially run MS for the first time you are prompted to enter the SQL database configuration settings. However, if you need to make a change to these settings you can do so in the DB Config window.

Enter the:

- Host: The address of the SQL server on the network. You may need to specify the SQL instance name if it is unique.
- Port: The port used by the SQL server on the network. You may need to specify the port number if it is unique. (often it is 1433).
- Name: The database name.
- Username: The user name being used on the SQL server.
- Password: The password being used on the SQL server.
- Is the connection encrypted? Only select this option if your SQL server is encrypted. Please contact your SQL admin if you are unsure if your SQL server is encrypted.

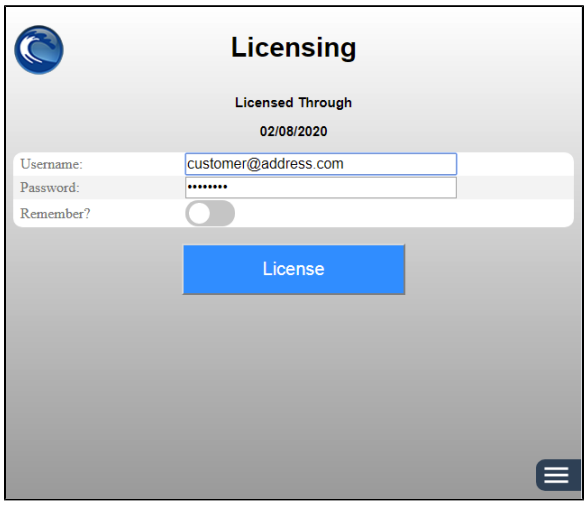


License

The Licensing section in the Administration menu allows you to enter or modify the license associated with the Modern Suite installation.

If you have purchased a License for Modern Suite to fully unlock all its features then enter the **Username** (email address) and **Password** here in this window.

Click on the **Remember** button to save the license information and then click on the blue **License** button to officially license the software.

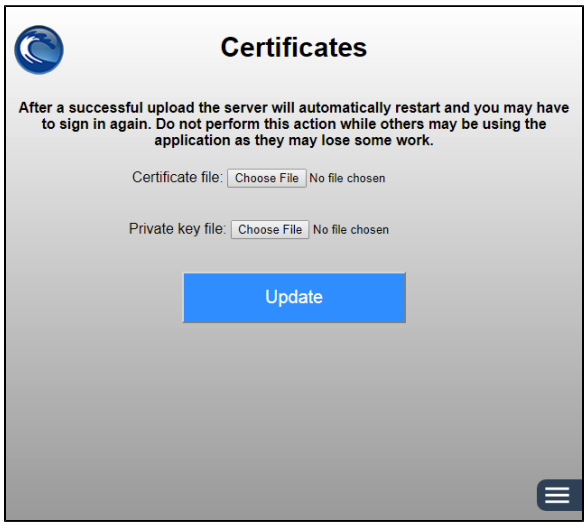


Certificate Upload

The MS Client allows both Certificate Files and Private Key Files to be uploaded to the MS server for added security.

Depending on which file you wish to use, simply click on the Choose File button, manually select the file and then click Update.

After a successful update, the server will automatically restart, and you may have to sign in again. Do not perform this action while others may be using the application as they may lose some work.



Item Management

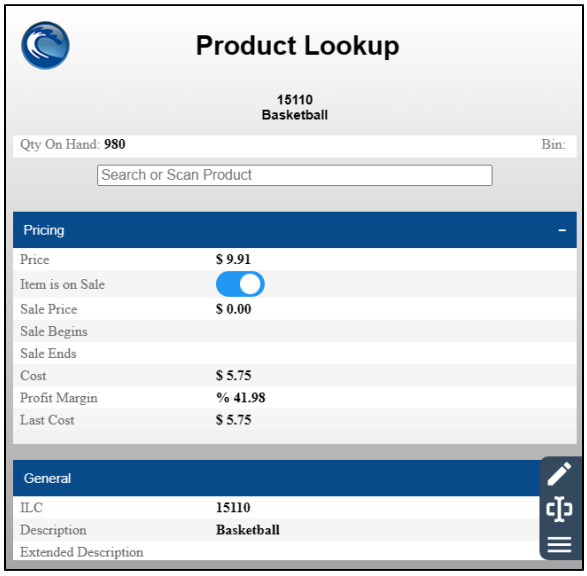
Item Edit

Clicking on the Binoculars icon at the main MS window brings you to a Product Lookup screen where you can review and make changes to items in your point of sale database.

First, enter a product lookup code or alias in the search field at the top of the screen. Then press Enter or click on the Magnifying Glass button.

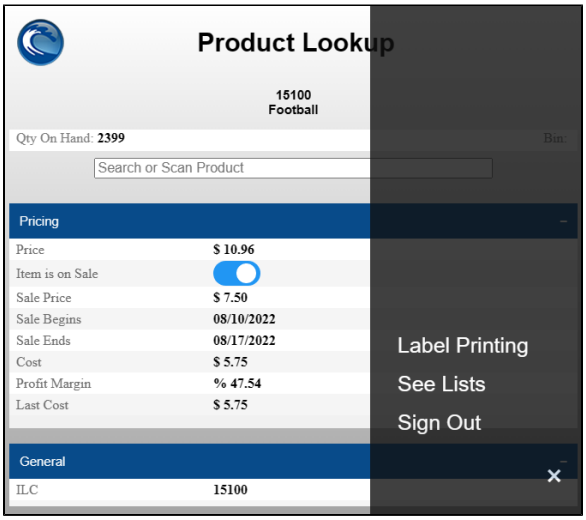
- Pencil Icon: Click this icon to allow editing of item properties. When active the icon will be appear with a yellow color. Press Enter to commit the changes, or press the Pencil button a second time.
- Auto Complete Icon: Click toggle auto complete when searching /scanning items. When disabled you will have to manually select an item from a list of similar items.

Please Note: An Item may have an Alias/Serial number OR a Lot Code but cannot have both.



Label Print

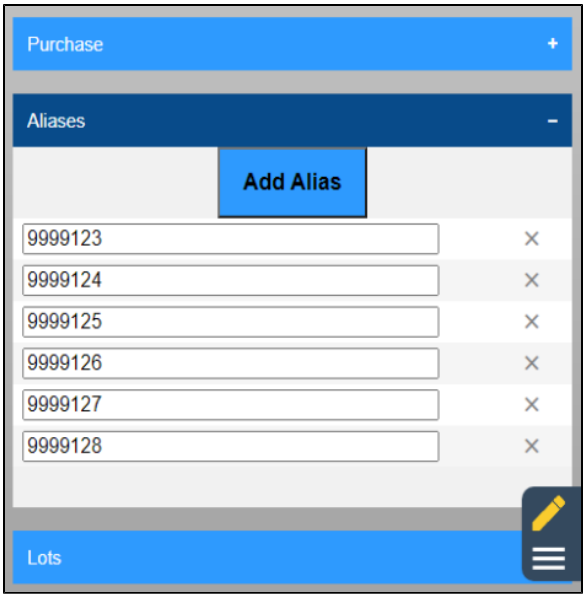
To print labels from this window, click on the menu button and select **Label Printing**.



Alias:

This feature allows you to create a second or different item number for your items. An example would be to give frequently purchased items a shorter or more memorable identifier or perhaps match a manufacturer's UPC number.

To add an Alias, click on the Pencil button to edit the fields and then expand the Aliases tab. Here you can enter an alias and then press Enter or Tab to enter the next alias. Once you have finished adding and removing aliases, click on the Pencil icon once more to stop editing.



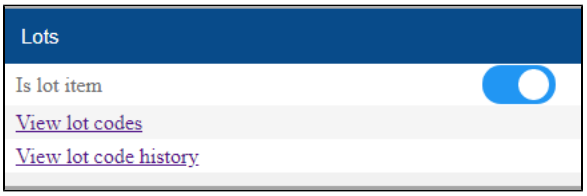
Lot Codes:

Lot numbers help identify products that were manufactured at the same time. An example where you might use lot numbers is meat products. Lot numbers would help identify which batch of meat the individual package came from. This lot information could also include the individual item's weight and date (such as expiration date).

To add a Lot Number, click on the Pencil button and click on the button to enable the "Is Lot Item" setting. From there, you click on the View Lot Codes button to add the different Lot Codes.

Note: Lots are not supported in the RMS version of Modern Suite.

Note: Serialized items cannot have Lot numbers assigned to them.

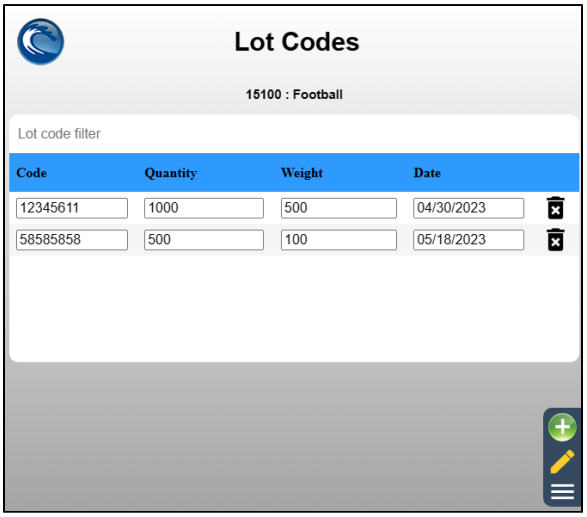


In this Lot Codes window, create, delete, and edit Lot Codes. Lot code details include quantities, weight, and date (IE: expiration).

If the item is weighted, then you will see the attributes of Weight and Date. These two attributes must be filled out before you can save the lot code for the weighted item. A valid Weight value must be higher than zero, and decimal numbers are permitted.

If the item is not weighted, then there are only two fields, the Lot Code and Quantity.

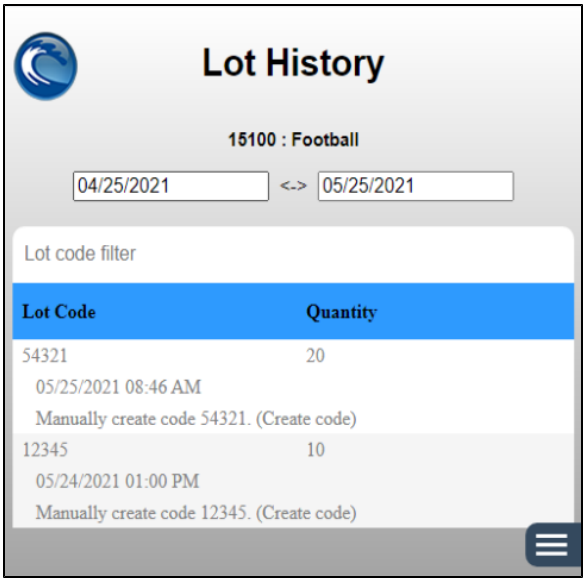
Once you have finished adding and editing Lot Codes, click on the Pencil icon once more to stop editing.



Lot History:

From the Product Lookup window, you also can view the Lot Code History for the individual item.

Click on the date fields to select the date range you wish to view.



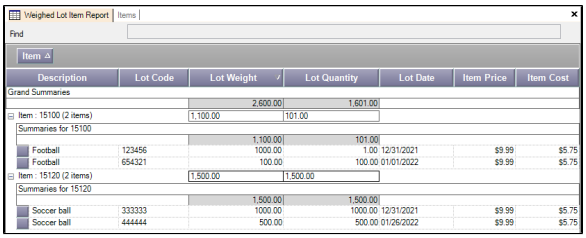
Weighted Lot Item Report:

When Modern Suite Central or MSforPOS are installed, an extra active report named Weighted Lot Item Report will be added. It can be viewed from the RMH Manager or RMH Central Manager.

This report shows all weighted items with lots associated with them. It breaks down the following information:

- Description
- Lot Code
- Lot Weight
- Lot Quantity
- Lot Date
- Item Price
- Item Cost.

This allows you to see the current quantity and weight of individual lots as well as the sum of the lots for that item.

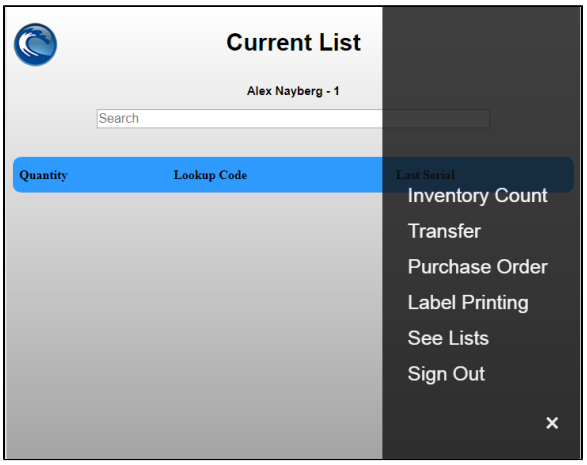


List Scope

Selecting a Scope for your list:

When you create a new list in MS you are free to scan or add items to the list right away. However, you may wish to configure a scope before adding items.

After a new list has been created click on the Menu button at the bottom right corner of the screen before adding any items to the list. In the Menu select the type of list you wish to create a scope for. Depending on the type of list you are creating, the scope options may differ.

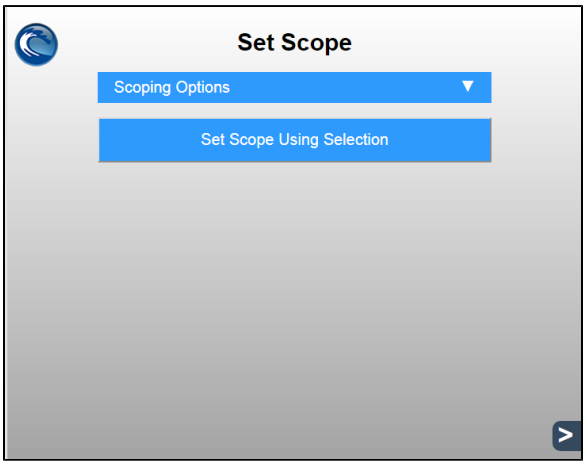


Scoping options:

All list scopes will will show a drop down menu labeled **Scoping Options** . From this drop down menu select from the following options

- **Category** - From the secondary drop down menu select the category you wish to use.
- **Department** - From the secondary drop down menu select the department you wish to use.
- **Search Term** - From the secondary search field type in the search term you wish to use.
- **Supplier** - From the secondary drop down menu select the supplier you wish to use.

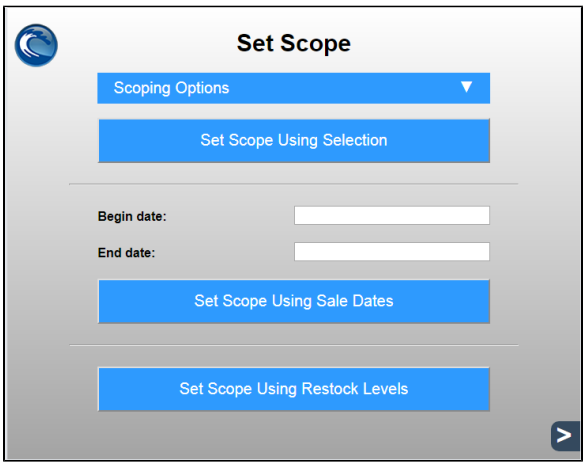
After selecting one of these options additional fields may appear. Click the **Set Scope Using Selection** button to save the scope settings.



Additional Scope Options:

If you choose either the Transfer or Purchase Order options from the Menu button you will see additional scope options.

- Set Scope Using Sales Dates - Enter begin and end date and then click Set Scope Using Sale Dates button to continue.
- Set Scope Using Restock Levels - Next click on either the Primary Supplier or the Lowest Cost Supplier buttons to continue.



Important Note:

If you create a Scoped List for Inventory Count, the options for Cycle Commit or Full Commit will not be available. The options for Cycle Commit and Full Commit are available only for Inventory Count lists that were converted from general lists. You can still merge Inventory Count lists, whether they were scoped lists or not. If you merge a scoped Inventory Count list with a converted Inventory Count list, you will then be able to select either the Cycle Commit or Full Commit options.

Item Creation

Step #1

If you scan or enter an Item Lookup Code that doesn't exist in your database, MS provides the ability to create a new item. Click on the "create one" link to enter the New Product window.



Step #2

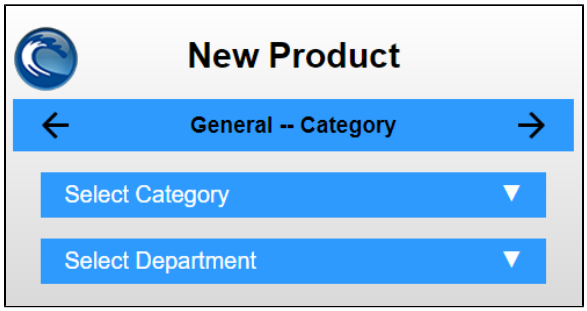
Fill out the fields in the New Product window. Click on the Left and Right Arrow buttons to cycle through the different available options. Click on the Green Check Mark button when you ready to save the new product.

Under the General tab enter the Item Lookup Code, Description and Quantity.



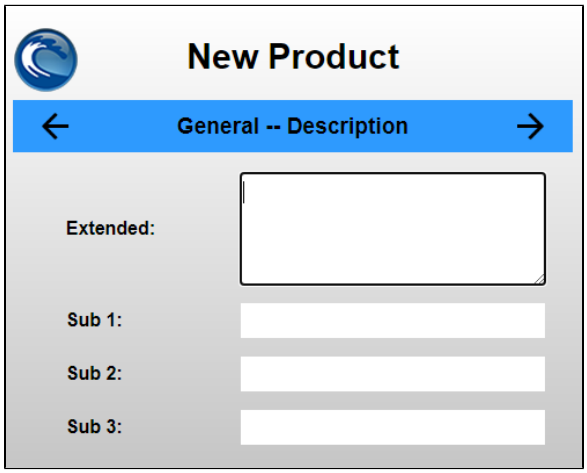
Step #3

Under the Category tab you can fill out the item Category and Department from the drop down lists.



Step #4

Under the Description tab you can fill out the Extended Description as well as the 3 separate Sub Descriptions if required.



Step #5

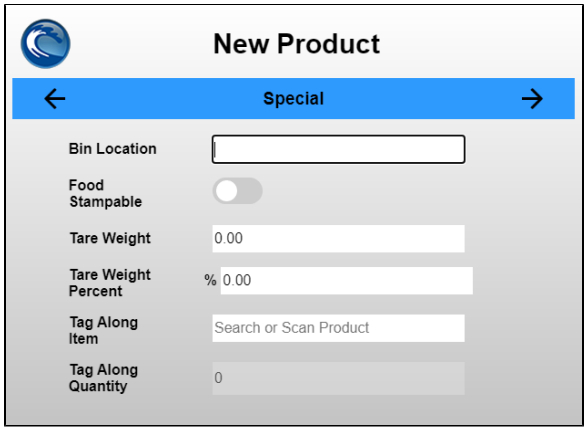
Under the Pricing tab you can enter the item Price and Cost.



Step #6

In the Special tab you can assign the following:

- BIN location
- Food Stampable (toggle to enable)
- Tare Weight
- Tare Weight Percent
- Tag Along Item (Search for item)
- Tag Along Quantity (This value can only be assigned if a Tag Along Item is added)



Step #7

Under the Purchase tab you can select the item Supplier from the drop down list.



Step #8

Under the Alias tab you can enter any Aliases that might exist for the new item.

When you are done entering the new item details you can click on the Green Check Mark button to save the item to your list.

Important: If you add an Alias you will not be able to add a Lot number to the item later.



Inventory Count (Stock Take)

Modern Suite makes performing Inventory Counts or Stock Takes easy and convenient. This section of the user guide will walk you through the inventory count process from start to finish.

Adding Items To A List

Converting a List to an Inventory Count:

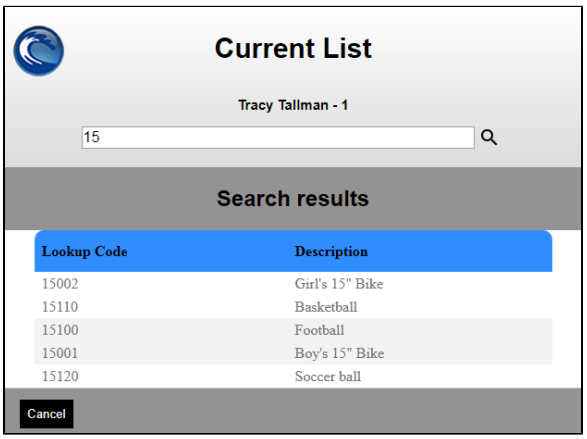
Step #1

Click on the Green Plus sign button at the bottom right of the screen to create a new list.



Step #2

Scan or type an Item Lookup Code, Alias, or Lot Number into the Search field at the top of the List screen. If you do not know the exact ILC or Alias, you can enter a partial value and select from similar results.



Step #3

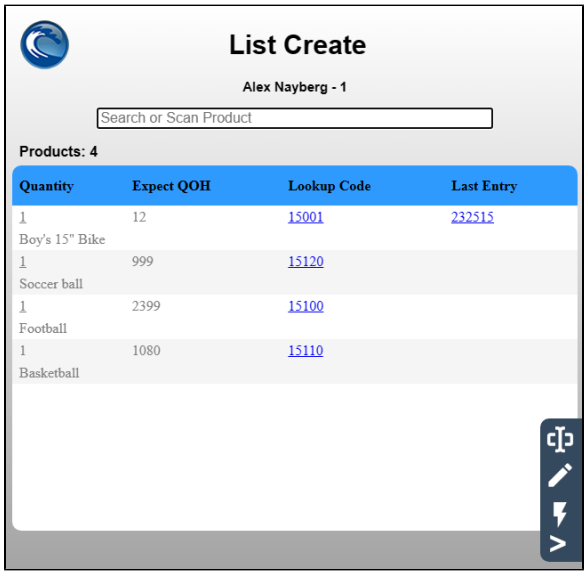
As items are added to your List, you will see:

- Quantity/Item Description
- Expected QOH (Quantity On Hand)
- Lookup Code
- Last Entry (Last serial number or Lot Code number entered)

If you need to adjust the quantity for a specific item in your List, you can click on the current Quantity number and adjust it manually.

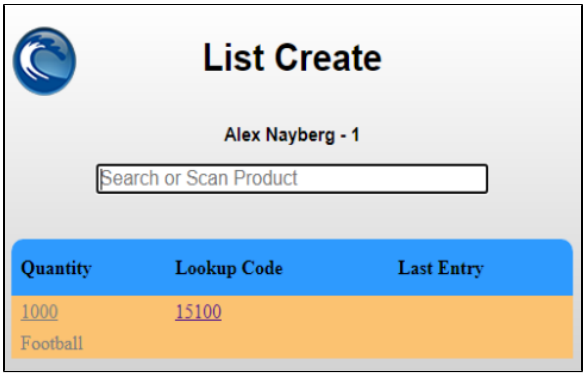
- Auto Complete: Toggle this icon to enable auto complete while searching/scanning items. If disabled, you will see a list of all similar items to what has been typed/scanned into the search field.
- Pencil Icon: Toggle this icon to see trash icon next to each item in the list. Click on the trash icon to remove an item from the list.

Note: When creating a scoped inventory count list, the pencil icon is removed, and the individual items cannot be removed from the list.

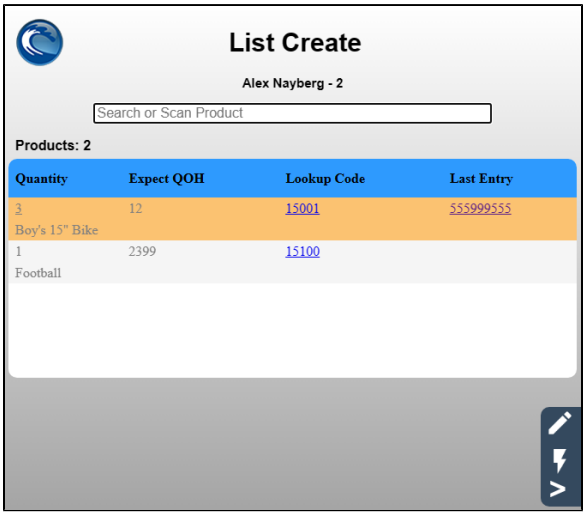


When adding items and quantities to your list, you may see an item row that is orange in color. This is a visual indication that the item's quantity is above a reasonable or expected difference. For instance, in the example to the right, a football has been added to a list. The quantity counted is 1000, but in the store database, it shows there should only be 1. This means the quantity entered into MS was beyond a threshold amount that was configured by default. This default value is a threshold of 150% (1.50).

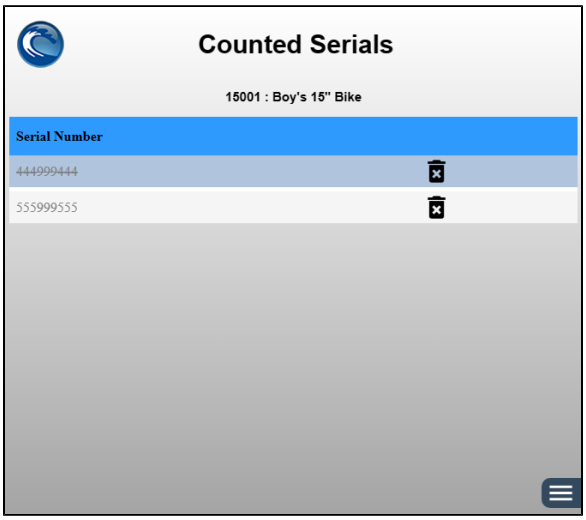
If you wish to adjust this threshold value manually, click **here** for directions.



You may also see a row highlighted in orange when the serial item has one or more of the serial numbers belonging to this item are "not available." To see which serial numbers are unavailable, click on the serial number under the Last Entry column.



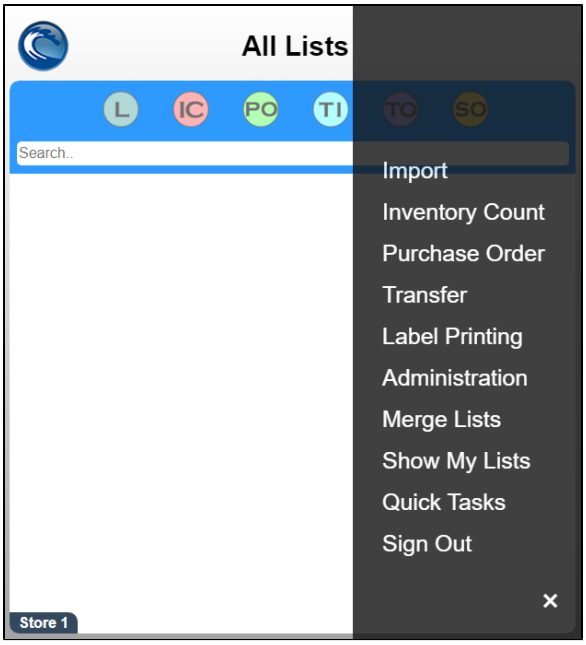
This will take you to the Counted Serial number window. The serial numbers that are not available will have a line through them.



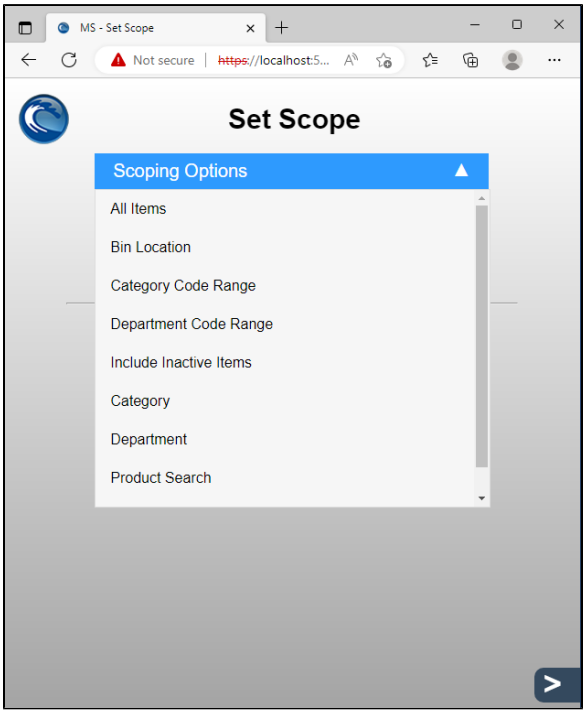
Scoped List:

Alternatively, you can start an Inventory Count using a Scoped List instead of converting a generic list to an Inventory Count list.

First, from the Modern Suite Main Menu, select Inventory Count.



Select the preferred Scope options from the drop-down menu. Once the list is generated with the items you wish to use, continue on to the next step.

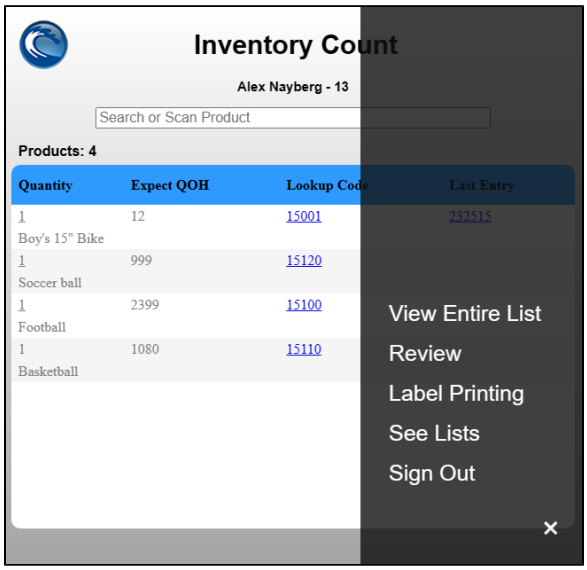


Step #4

When you are satisfied with the items on your list, the next step is to begin the Commit process. Click on the Arrow button at the bottom right of the screen to begin the Commit process.

Starting The Commit Process

Step #1

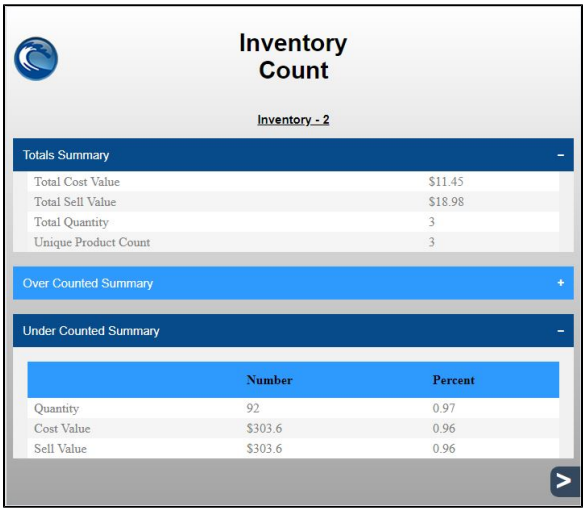


From the inventory count list, click on the menu icon.

Here you can select from the following options:

- View Entire List: Click this button to see the entire list of items in the list. This is helpful if the total number of items in the list is beyond the current 250 item view limit. Items cannot be edited while viewing entire list.
- Review: Click this option to continue with the Inventory Count process.
- Label Printing: Click this option to print labels for the items in the current list.
- See Lists: Click this option to return to the main MS menu where all current lists are viewable.
- Sign Out: Click this option to sign out of MS and return to the log in screen.
- X icon: Click this to return to the list without selecting one of the menu options.

Step #2



This screen shows you a summary of what has been counted in the current List.

Totals Summary:

This displays the Total Cost Value, Total Sell Value, Total Quantity, and Unique Products Counted from the current Inventory list.

Over-Counted Summary and Under-Counted Summary:

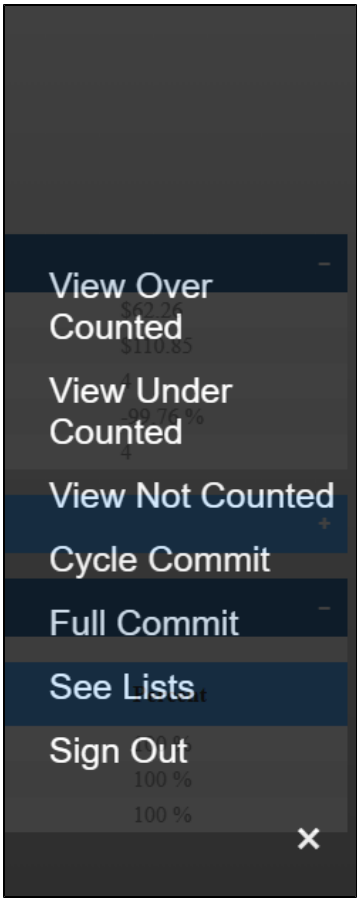
Here you can see summaries of the total Quantity, Cost Value, and Sell Values for items that were either over-counted or undercounted according to what your database had on record at the time of the count.

Click the Arrow **>** button at the bottom right of the screen again to view the next menu.

Step #3

Choose the type of Commit to complete for this List.

- **View Over Counted** (Click this option to see a detailed list of items that were over counted)
- **View Under Counted** (Click this option to see a detailed list of items that were under-counted)
- **View Not Counted** (Click this option to see what items have not been counted as 0 quantity but have a positive quantity on hand.
- **Cycle Commit** (Click this option for Cycle Counts. Commonly used for Category, Department, or small counts for a certain portion of your inventory.
- **Full Commit** (Click this option is for store/warehouse-wide count. Every item in the database will be affected. Those items that were not counted will have quantities of zero) Please Note: If you do not see Full Commit listed as an option, then you must first enable the option in Administration>AppConfig. See here: App Config.
- **See Lists** (Click this option to exit your current list and view other existing lists)
- **Sign Out** (Click this option to sign out of the MS Client)
- **X button** (Click this option to close the menu and return to the Inventory summary page)


View Over Counted
View Under Counted
View Not Counted
Cycle Commit
Full Commit
See Lists
Sign Out

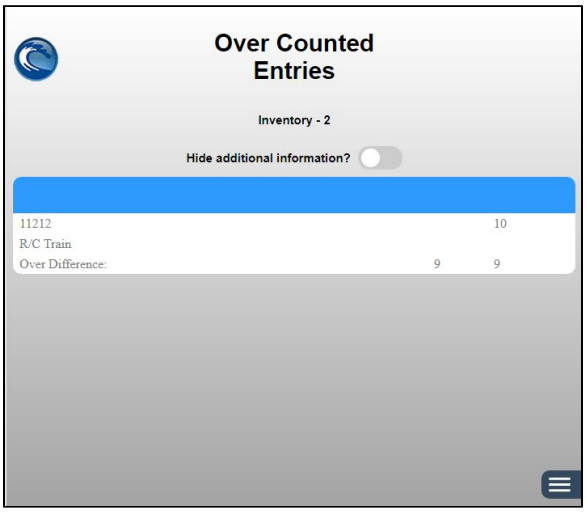
Over and Under Counted Entries

Over Counted Entries

This window will show a breakdown of the different items in the Inventory Count that had a higher quantity counted than what the store database has on record.

This information shows the Item Lookup Code, Description, Quantity, and Over Difference (Delta).

If you are into Modern Suite with manager's rights, you will see an option called Hide Additional Information. If this option is enabled, then standard users will not be able to see the difference between the number of items counted over the total the database has on record.

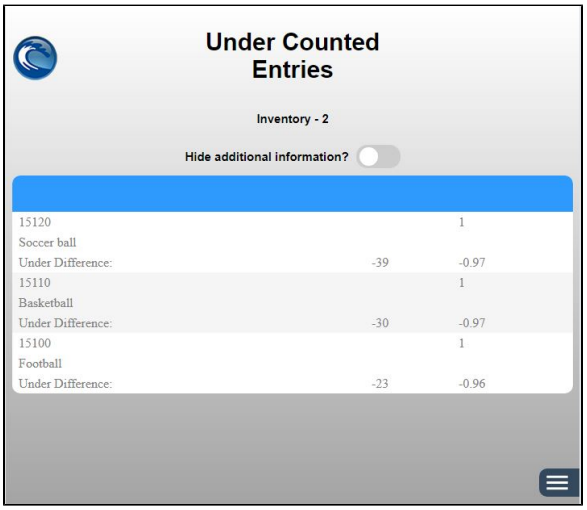


Under Counted Entries

This window will show a breakdown of the different items in the Inventory Count that had a lower quantity counted than what the store database has on record.

This information shows the Item Lookup Code, Description, Quantity, and the Under Difference (Delta).

If you are into MS with manager's rights, you will see an option called Hide Additional Information. If this option is enabled, then standard users will not be able to see the difference between the number of items counted under the total the database has on record.

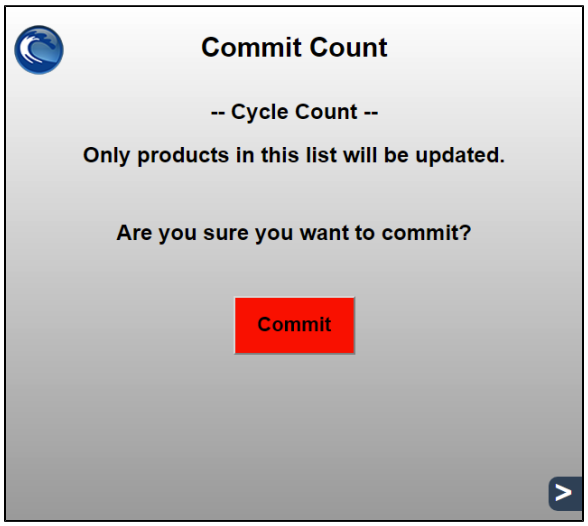


Cycle Commit

When choosing the Cycle Commit option, please note only items in the list will be updated.

Click the red Commit button to finalize the Commit process.

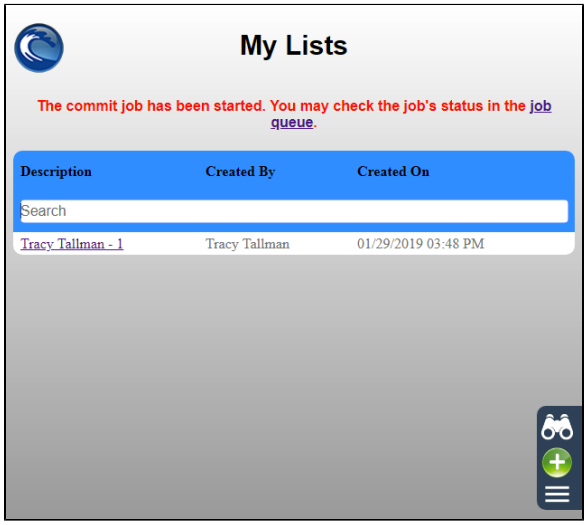
If you need to back out of the Cycle Commit window, you can click on the Arrow button at the bottom right of the screen and either return to the list menu or else log out of the MS client.



After the red Commit button has been pressed, you will be brought back to the My Lists window.

If you would like to view the status of the Commit job status, click on the Job Queue button at the top of the screen.

Important Note: A scoped Inventory Count list will not show the Cycle Commit option. However, a scoped Inventory count list can be merged with a normal inventory count list, and then the cycle commit option will be available.

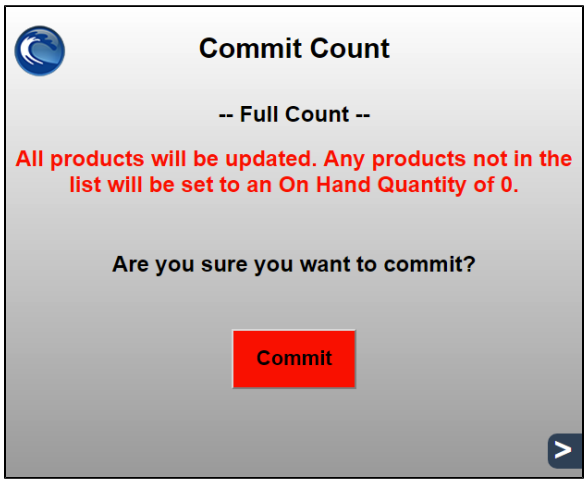


Full Commit

When choosing the Full Commit option, please note ALL Items in the list will be updated. Any items not on the list will be set to an On Hand Quantity of zero.

Click the red Commit button to finalize the Commit process.

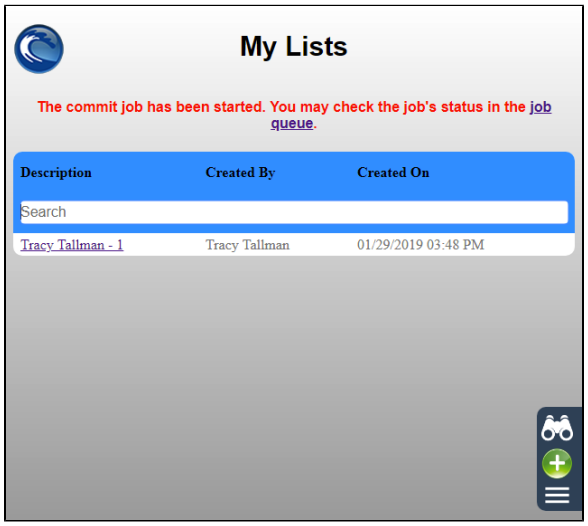
If you need to back out of the Full Commit window, you can click on the Arrow button at the bottom right of the screen and either return to the list menu or else log out of the MS client.



After the red Commit button has been pressed, you will be brought back to the My Lists window.

If you would like to view the status of the Commit job status, click on the Job Queue button at the top of the screen.

Important Note: A scoped Inventory Count list will not show the Full Commit option. However, a scoped Inventory count list can be merged with a normal inventory count list, and then the full commit option will be available.

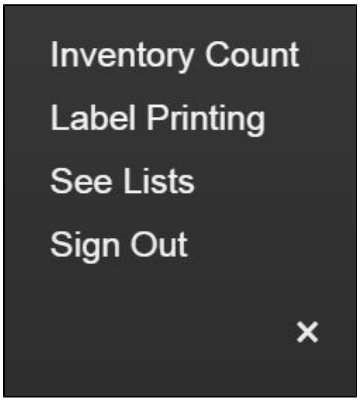


Label Printing

Important Note: Modern Suite Label Printing will work with any ethernet or wifi (IP-based) printer that supports ZPL. Common brands are Zebra, Citizen, O'Niel, Brother, and Seiko.

Step #1: Current List

From the current list you are working on, click the menu icon at the bottom right. Select Label Printing from the menu.



Step #2: Label Templates

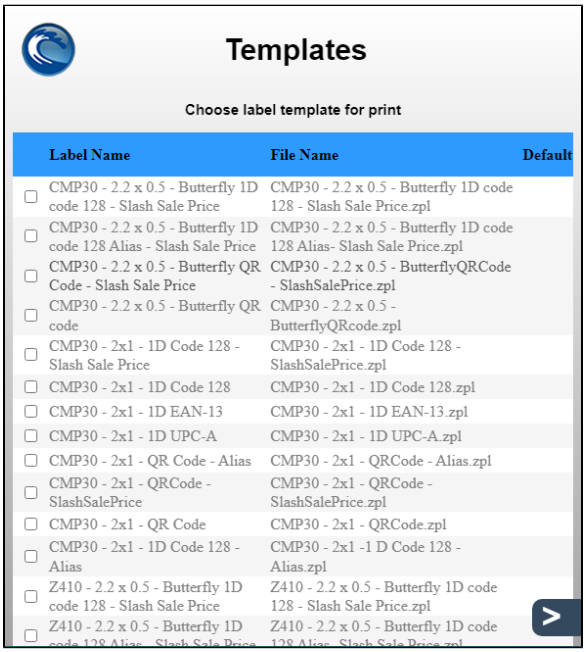
Modern Suite is designed to use Zebra (ZPL) label template files. Label template files need to be stored in a file directory of the server hosting MS:

C:\ProgramData\New West Technologies\Modern Suite\Printer Labels

Appropriate label template files will then show up in this menu.

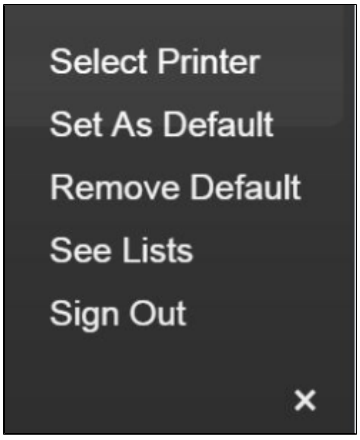
Important Note: These are the fields available for printing in Label Printing templates:

ITEMLOOKUPCODE
BINLOCATION
DESCRIPTION
SUBDESCRIPTION1
SUBDESCRIPTION2
SUBDESCRIPTION3
EXTENDEDDESCRIPTION
PRICE
PRICEA
PRICEB
PRICEC
SALEPRICE
WEIGHT
WEIGHTPRICE
MSRP
CATEGORY
DEPARTMENT
COMPANYNAME
ALIAS
DISCOUNTPERCENTAGE
SALEENDDATE



Default Label Template

You are also able to set a default label template from the Menu button at the bottom right of the screen. If you wish to remove the default template, it can be removed here as well.



2 Up labels

MS can print "2 Up" labels. A label template must be modified manually for this to take place. The picture on the left shows an example of a label template that has been modified so 2 Up labels will print properly.

- A 2up label is defined in MS as a label with a label placeholder appended with "_2". This includes all of our current supporting placeholders, such as ItemLookupCode, Price, Description, etc. **If a label has any of these tags appended with _2, it will be treated as a two-up label.**
- Two-up offset is based on the print quantity of an item in a list. Such as, if you had a print quantity of 3 for the item "Football," 5 print quantity for "Baseball," and a print quantity of 2 for "Soccer Ball," then the football item and baseball item will have a blank label on one side for **one** of their labels because it has an odd print quantity.

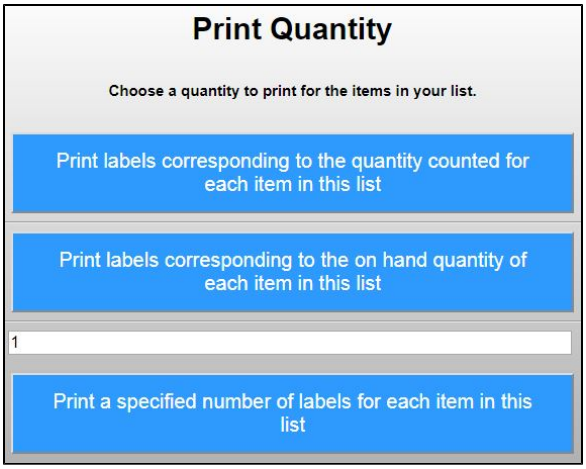
Z410 - 2x1 - 1D Code 128 - Test 2Up.zpl

```
26
27  ^FX Start Of 2UP
28
29  ^FX ItemLookupCode Field
30  ^FO195,20
31  ^A0,15,13
32  ^FD<<ItemLookupCode_2>>^FS
33
34  ^FX Price Field
35  ^FO195,60
36  ^A0,15,13
37  ^FD<<Price_2>>^FS
38
39  ^FX Description Field
40  ^FO195,90
41  ^A0,15,13
42  ^FD<<Description_2>>^FS
43
44  ^FX Barcode Field
45  ^FO200,125^BY1
46  ^BCN,30,N,N
47  ^FD<<ItemLookupCode_2>>^FS
48  ^XZ
```

Step #3: Choose Quantity

Click on the menu button again, and this time select Choose Quantity. At the Print Quantity window, you have three options to choose from:

- Print labels corresponding to the quantity counted for each item in the list. This will ignore the current on-hand quantity and only print the number of labels counted in the list.
- Print labels corresponding to the on-hand quantity of each item in the list. This will ignore the quantity of the item in the current list and instead print labels for the on-hand quantity in the database.
- Print a specified number of labels for each item in this list. This will simply print the number of labels specified by the number entered into the field above the button.



Step #4: Add Printer

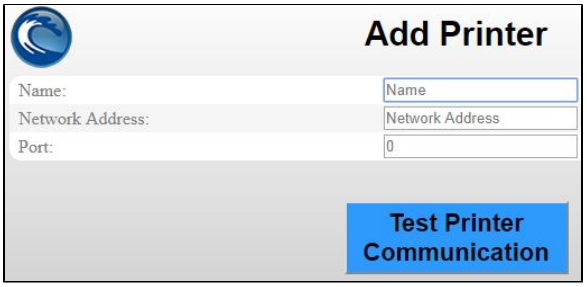
In the Printers window, if you do not already have a printer in this list, then click on the Menu button at the bottom right of the screen and click on Add Printer.

Here you will need to enter the following:

- Printer Name (The name you would like to assign to this printer)
- Network Address (The IP address of the WIFI printer)
- Port (Enter value '9100')

Now click on the Test Printer Communication button and verify a test page printed out.

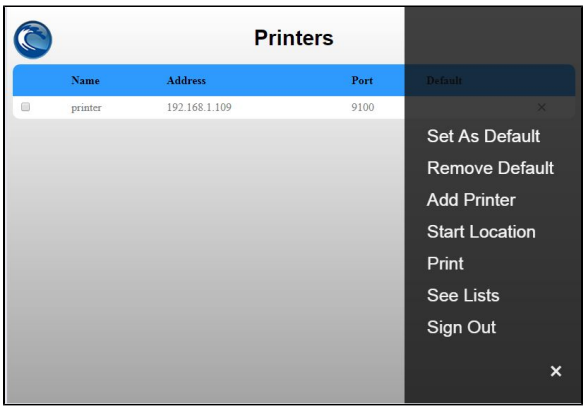
Finally, click on the Menu button once more and select Add Printer to finalize the selection.



Step #5: Printing

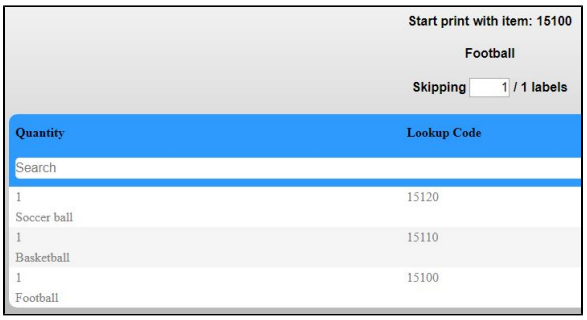
Place a checkmark on the box next to the printer listed.

You can also choose to select a default printer or remove a default printer if one has previously been selected.



Print options:

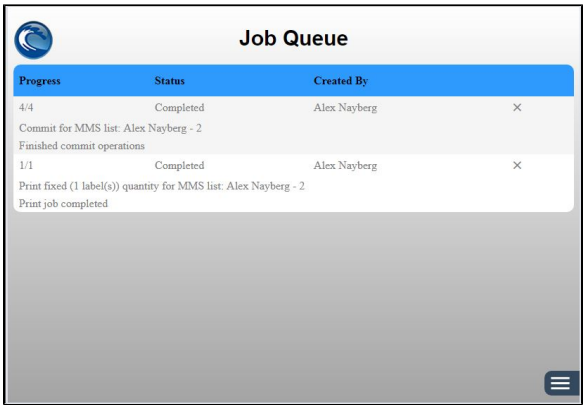
- Print: The print job will start as soon as the Print button is pressed.
- Start Location: This option brings you to a window where you have the ability to skip passed a specified number of item labels before it starts printing the rest. From there, click on the menu again and click on Print.



Step #6: Job Queue

At the end of a print job, you can click on a link that takes you to the Job Queue if you wish to see the status of your print job. This Job Queue window also shows the status of Inventory Counts.

If the label print job includes several labels, you can pause and resume from this window if needed.

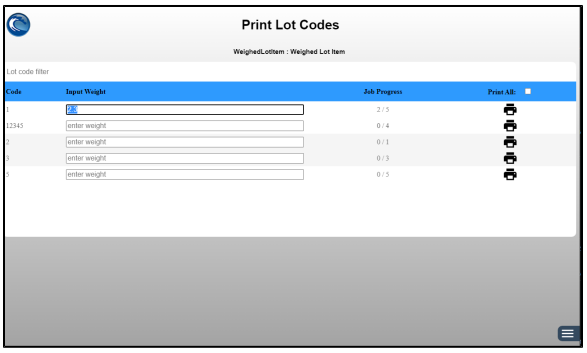


Printing Lot Codes:

If printing labels for an item that has Lot Codes assigned to it, the Print Lot Codes window will appear. Click on the Printer icon to the right of each row to print a corresponding label.

Weighted Item Lot Codes

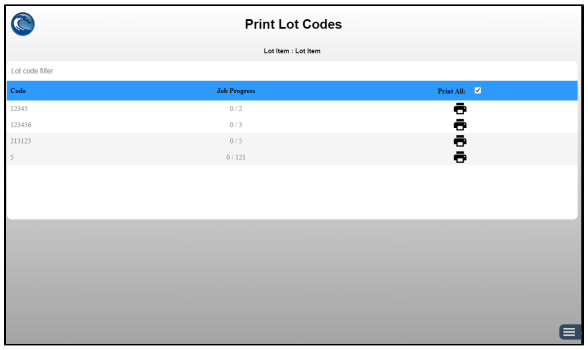
If the Product is weighed, you will have the option to input and print the partial weight of the lot; pressing enter or the print button will refocus the weight input of that code until the entire quantity is printed. The job progress column denotes this. Once the job progress is filled, it will un-focus the weight input. This is to deter people from over-scanning.



You will notice there is a print-all checkbox above the printer column. When selecting this on a weighted product, it will disable and clear all weight input and print the total remaining quantity left for that lot. This is a feature mainly used when users are not concerned with the partial weight of the lot.

Non-Weighted Item Lot Codes

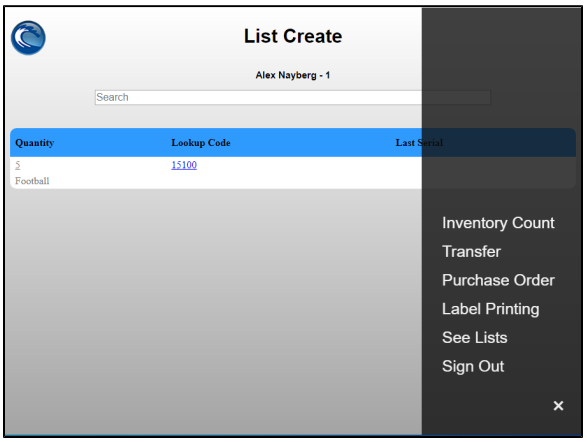
On non-weighted lot products, there will be no weight input, and the print all checkbox is defaulted to on.



Purchase Order

Step #1: Convert List into a Purchase Order

After adding items to your current list click on the Menu button at the bottom right of the screen. Select option: Purchase Order.

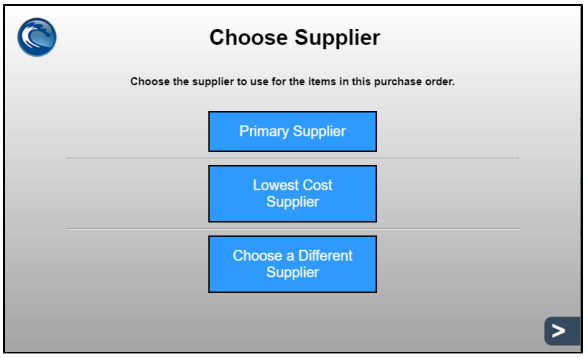


Step #2: Choose a Supplier

There are two options to select in this menu:

- Primary Supplier
- Lowest Cost Supplier
- Choose a Different Supplier

Important Note: If your list contains items with differing assigned suppliers then the list will automatically be broken up into multiple POs, one for each supplier represented in the original list.



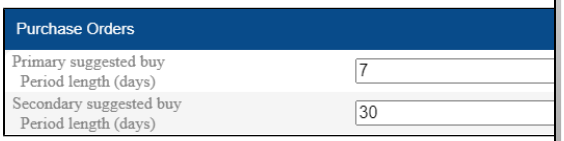
Step #3: PO Create

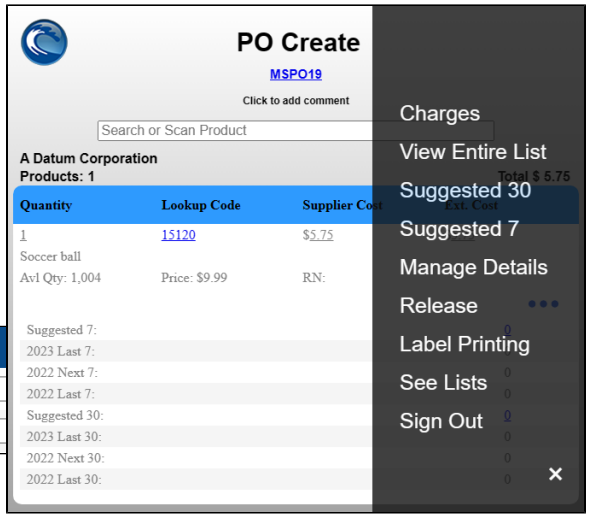
From the All Lists/My Lists window you can open the new Purchase Order/s you created.

Suggested Values:

Adjust the quantity of the items manually or by choosing one of the Suggested values. The default values are Suggested(30) or Suggested (7).

The values associated with the BuySuggested options can be modified in: Administrator>App Config





Suggested Formula:

LastPrimaryLastYear = Quantity of Item Sold Last Year Between Dates: (Today's Date Last Year - Primary Period Length) And (Today's Date Last Year)

NextPrimaryLastYear = Quantity of Item Sold Last Year Between Dates: (Today's Date Last Year + Supplier Lead Time) And (Today's Date Last Year + Supplier Lead Time + Primary Period Length)

LastPrimaryThisyear = Quantity of Item Sold This Year Between Dates : (Today's Date - Primary Period Length) And (Today's Date)
PrimarySuggestedBuy = (NextPrimaryLastYear / LastPrimaryLastYear) * (LastPrimaryThisYear)

PrimarySuggestedBuy = (NextPrimaryLastYear / LastPrimaryLastYear) * (LastPrimaryThisYear)

If the Items in the purchase order have an assigned Unit of Measure, this will be reflected in the PO details during the creation and the receiving process.

In this example, a cola beverage has two units of measure; cans and cases (100 cans per case). If you enter a quantity of 50 cans, the quantity will be set to 1 case. If you enter a quantity of 150 cans, that is 50 over the 100 cans per case value, so the case quantity will be set to 2.

Minimum order values from the supplier will also be reflected.

Please Note: This feature is for the RMH version of MS.



Manage Details screen:

If you need to make any changes to Shipping, Other Fees, or add a general comment, you can do that here. Click on the Pencil icon to make changes and click it again to save.

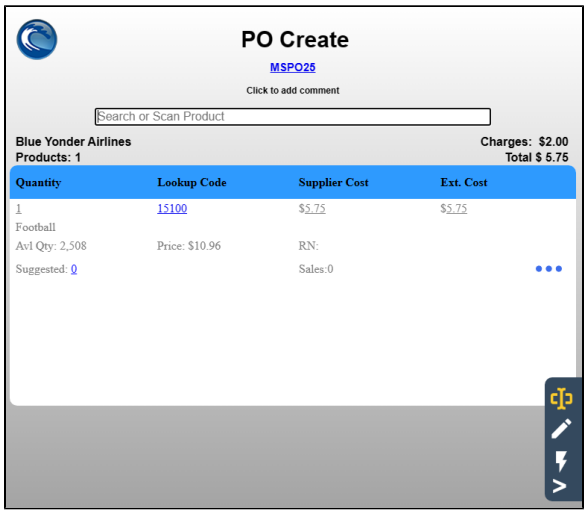
If you are ready to Release the Purchase Order, then click Back on the browser and once again click Menu and choose Release.



PO Charges:

Charges can be applied to the PO at PO Create and PO Receive. To the right you can see an example PO where a charge has been applied. The charge amount shows up at the top right corner next to Total.

To add a charge, click on the menu button and select Charges.

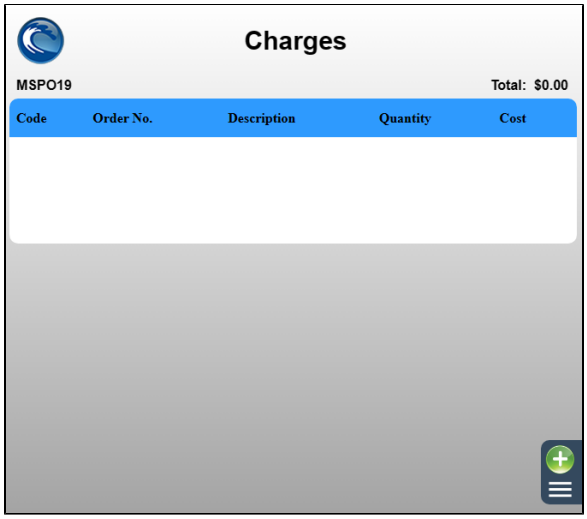


Clicking the Charges menu item will bring you to the charge listing area. Here it will display each charge associated with a PO, or none if there is not an associated one. Here it will display information about the charges including the PO Number in the top left, the total cost of all the charges in the top right, and the table which lists out each charge including the charge code, order no, description, quantity, and cost. These charges are ordered by line number.

Adding a charge
To add a charge to the PO click the Green plus icon. This will take you to the charge workflow area.

Editing a charge
To edit a charge click the associated charge in the table. This will take to the charge workflow area.

Removing a charge
To remove a charge click the trashcan icon in the list.



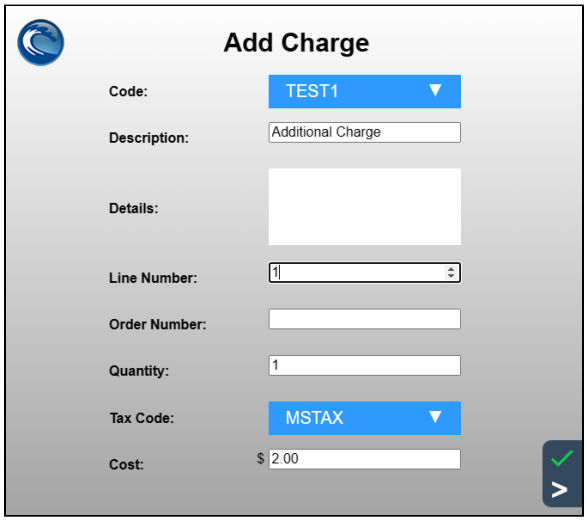
Adding a Charge

Clicking on the plus icon will allow you create a charge for a PO.

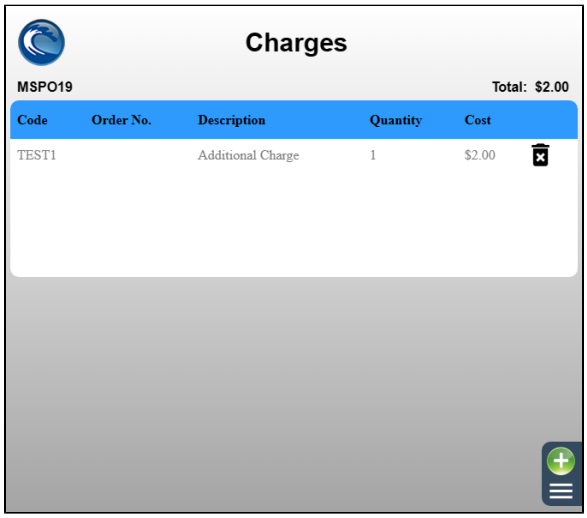
When adding a charge you must select a charge code. When you select a charge code, it will auto fill fields associated with that charge. This includes Description, and Tax Code. The line number will be automatically determined by the number of charges, note that this number starts at 0. So the first charge will have a line number of 0. Please note that even though Ext. Description exists on a Charge in RMH this does not associate to the Detail's of the charge.

The available charge codes can also be viewed in RMH Store Manager and Central Manager. In Store or Central Manager, navigate to Setup, Inventory/Purchasing, Charges.

Click the green arrow to save the charge window.



Now you will see a list of the charges that are now assigned to the Purchase order. To return to the PO simply click Back or else navigate back to the PO via the Menu button.



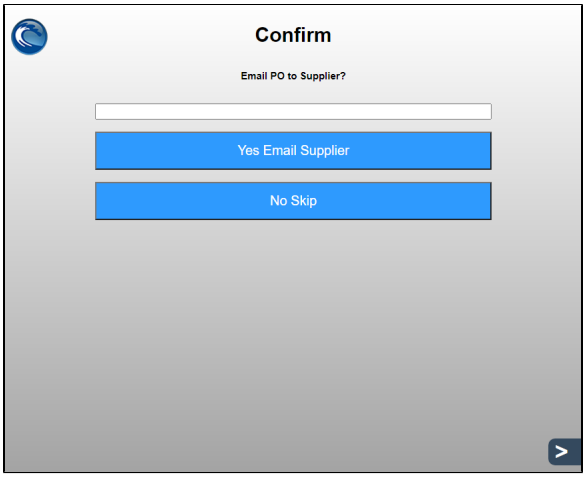
Please Note:

- Charges will only be synced to central when the order is released or in the receiving phase.
- Charges are not associated with a Purchase Order Entry table.

Email PO to Supplier (MS for RMH Feature)

If the email settings have previously been enabled and configured in the MS App Config window, then you will be prompted to email the Purchase Order details to the address of your choice. Enter the email address of the supplier and click the "Yes Email Supplier" button. Otherwise, click on the "No Skip" button to continue with the Purchase Order Receive process.

Please Note: This feature is for the RMH version of MS.



The email sent to the supplier will show:

Subject
(PO Number)-(Store name)

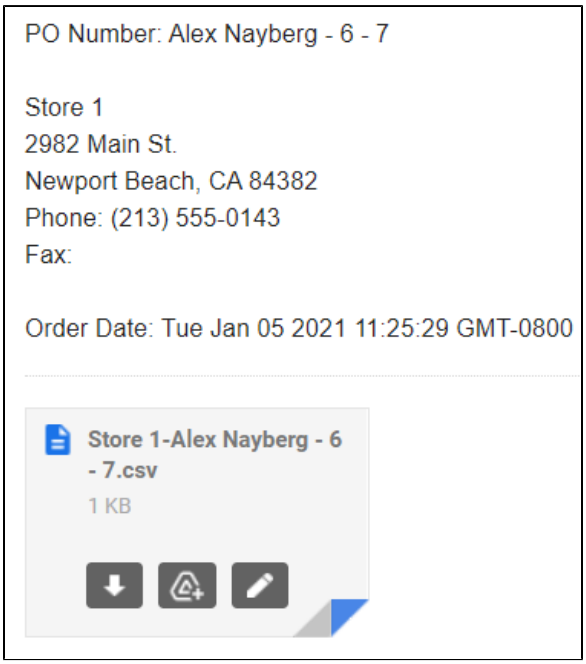
Body
PO Number: (PO Number)

(Store Name)
(Store Address)
Phone: (Store Phone Number)
Fax: (Store Fax Number)

Order Date: (PO Order Date)

CSV Attachment
(Store Name) - (PO Number).csv

This info is supplied by the store configuration and the newly created PO.



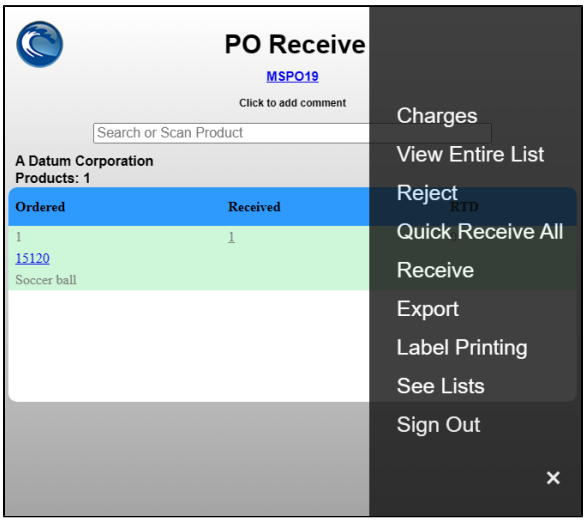
Step #4: PO Receive

When you are ready to receive the new product, re-open the Purchase Order you created earlier.

Enter the quantity of the items you have received here

From the Menu, you can select Charges, View Entire List, Reject, Quick Receive All, Receive, Export, and Label Printing.

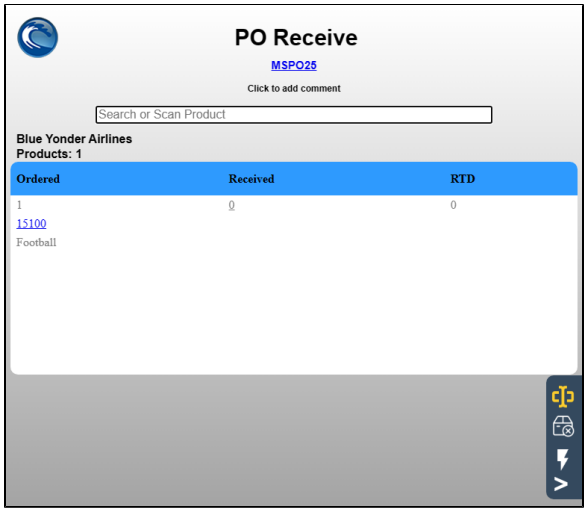
The Export option will generate a CSV file with the same name as your PO List name. The CSV file will contain the contents of the PO and will be downloaded automatically.



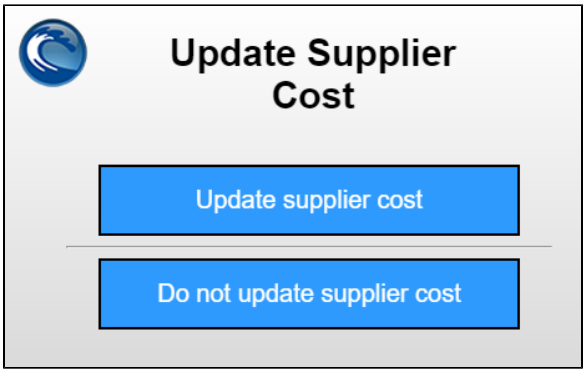
Filtering of unreceived items:

While receiving a PO, you will see an icon in the bottom right of the window that looks like a box. This is the unreceived button, and when you click on it, you will only see the items in the list that have yet to be fully received.

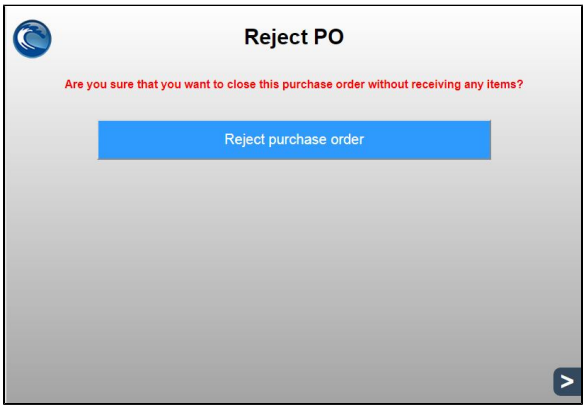
This means that if an item has been fully received and the filter is turned on, those fully received items will disappear from view. If you turn off the filter, then you will once again see all items in the list, whether they have been fully received or not.



If the option to Update Supplier Cost was enabled in App Config and set to Ask User First, then you will be prompted with this option during Purchase Order Receive.

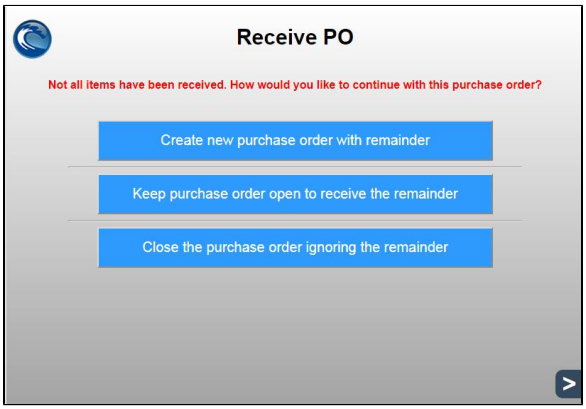


To wish to close the Purchase Order without receiving any Items, then click Reject, and at the next window, click Reject Purchase Order.

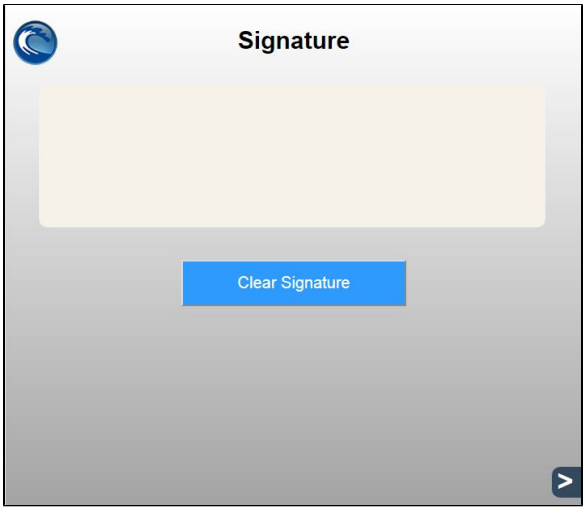


If you have entered a partial amount of the items from the Purchase Order and you click the Receive option, you will be given three new options.

- Create New Purchase Order With Remainder
- Keep the Purchase Order Open To Receive The Remainder
- Close The Purchase Order Ignoring The Remainder

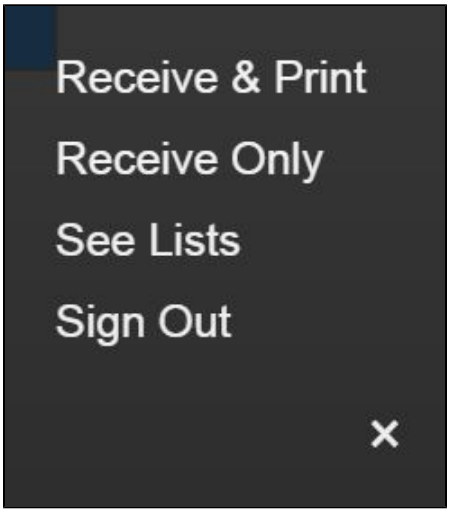


If the **Require Signature Capture for POs** option was enabled in the **Environment** section of the **Administration** page, then after choosing the Receive option, the user will be prompted to sign. See **Environment**.



After signing, click the menu button at the bottom right of the screen. Here you can select the following options:

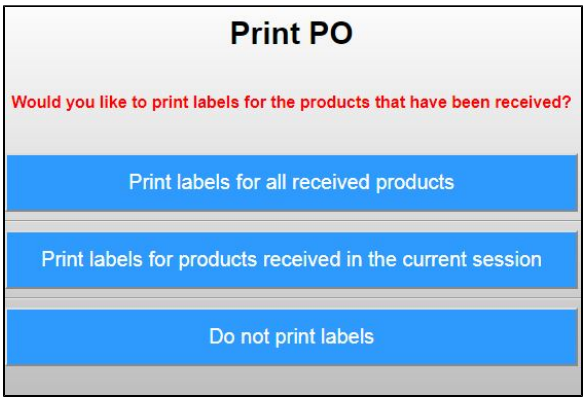
- Receive and Print, which will complete the PO process and take you to the label printing options.
- Receive Only (This option will skip any label printing and simply complete the PO process)
- See Lists
- Sign Out



Step #5: PO Label Printing

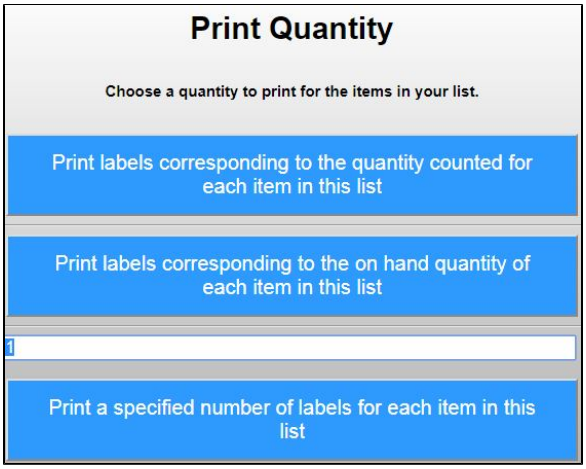
MS allows you to print labels for the new product you receive in your Purchase Orders. This Print PO screen will appear at the end of the Receive process. You can choose from the following options:

- Print Labels For All Received Products
- Print Labels For Products Received In The Current Session (partial receive)
- Do Not Print Labels



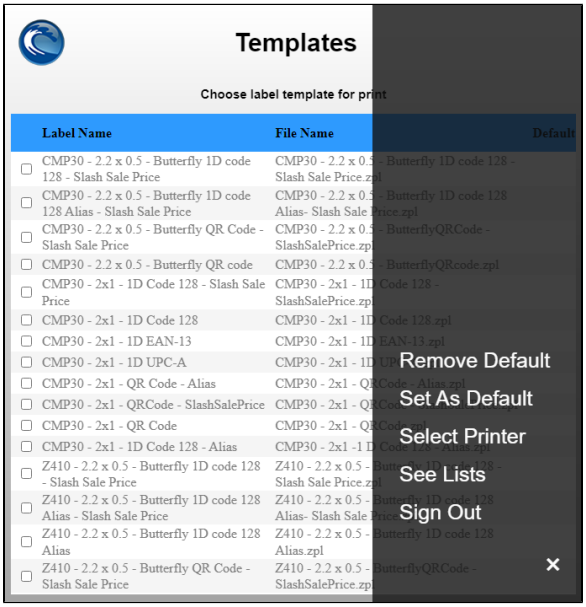
If you chose one of the Print options, then next, you will choose from the Print Quantity options.

- Print Labels Corresponding To The Quantity Counted For Each Item In The List
- Print Labels Corresponding To The On Hand Quantity Of Each Item In This List
- Print A Specified Number Of Labels For Each Item In This List. (manually enter the number of labels to be printed)



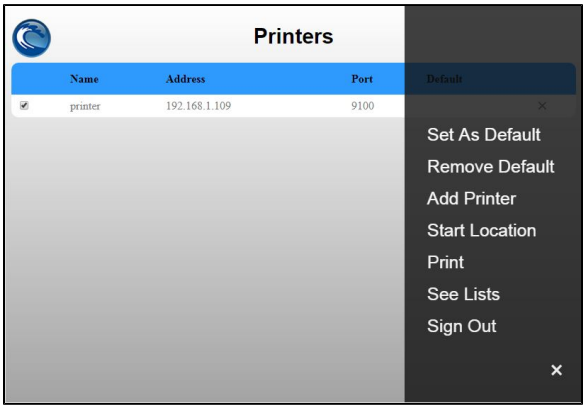
Choose a label template and the click Select Printer.

(For further information about label printing please see: Label Printing.)

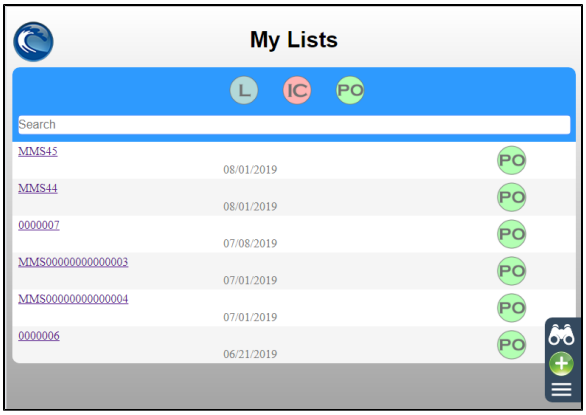


Choose a printer and then click on Print.

(For further information about label printing, please see: Label Printing.)



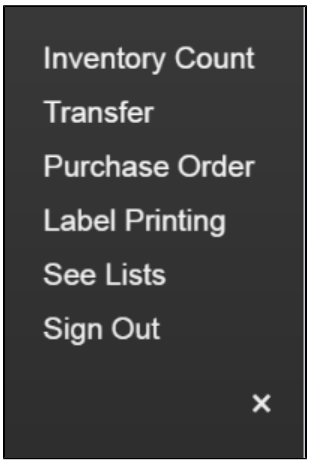
As the labels are printing, MS will return you to the All Lists/My Lists screen. Click the Job Queue option at the top of the window if you wish to check the print job status.


My Lists
L
IC
PO
Search
MMS45
08/01/2019
PO
MMS44
08/01/2019
PO
0000007
07/08/2019
PO
MMS00000000000003
07/01/2019
PO
MMS00000000000004
07/01/2019
PO
0000006
06/21/2019
PO

Transfers

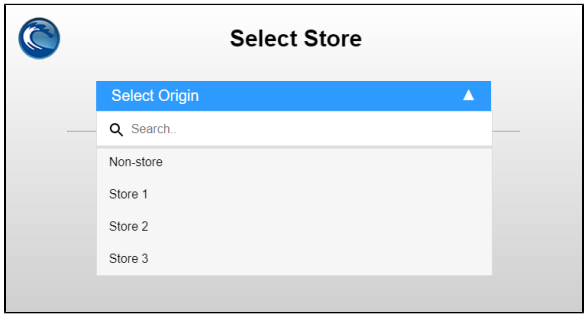
Step #1

If you need to create a transfer using MS then create a new list and add items to it. Click on the Menu button at the bottom right of the window and select the option **Transfer**.



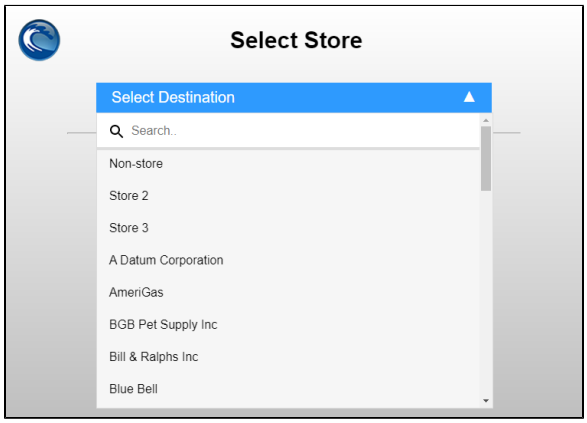
Step #2

In this window you will be required to **Select Origin**. The stores that are available in your POS environment will be options in the drop down menu. However, there is another option called **Non-Store** that you can use if the items you want to transfer are from a source outside of your POS software.



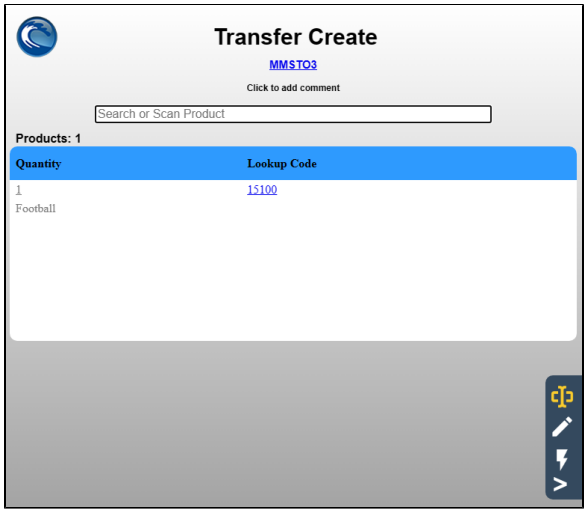
Step #3

In this window you will be required to **Select Destination**. The stores that are available in your POS environment will be options in the drop down menu. You can also choose to transfer out to a **Non-Store** or even a **Supplier**.



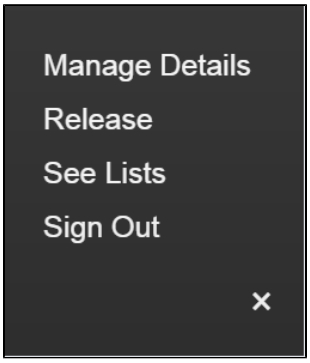
Step #4

The transfer has been created.



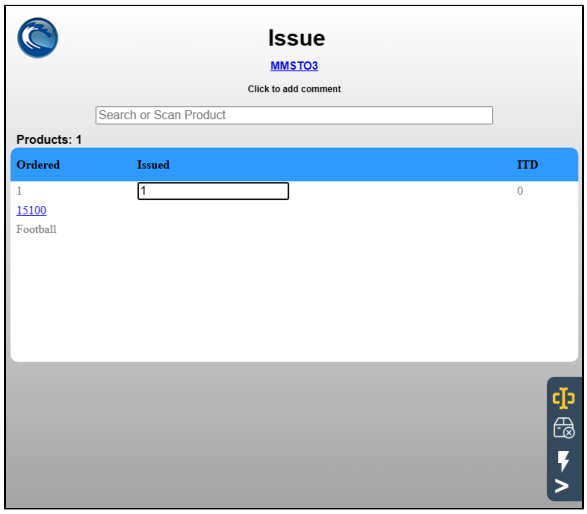
Step #5

If you are ready to release the transfer then select the **Release** option from the menu at the bottom right of the screen.



Step #6

To issue items from the Transfer click on the item and enter the quantity you will be issuing. If the quantity of the item is less than specified by the transfer then the item will be highlighted in **Pink**. If the quantity of the item is more than specified by the transfer then the item will be highlighted in **Yellow**. Finally, if the quantity of the item matches the quantity specified in the transfer then the item will be highlighted in **Green** .

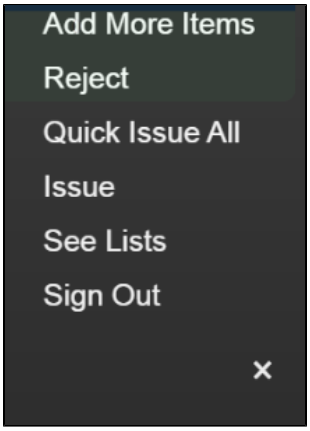


Step #7

Select one of the following options:

- **View Entire List:** This option allows you to easily scroll through the entirety of the list of items.
- **Add More Items**: This options allows you to add more items to the current transfer.
- **Reject**: This option allows you to cancel the transfer instead of issuing.
- **Quick Issue All**: If you already know you have the exact number of items in the transfer you can select this option and it will automatically fill in the quantities for you and then Issue.

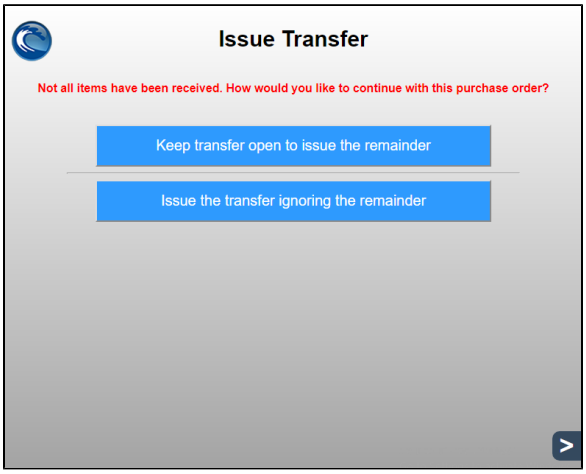
- **Issue**: Use this option after manually entering in the quantities for the items in the Transfer.
- **See Lists**: Use this option to exit out of the Transfer and return to the Lists menu.
- **Sign Out**: Use this option to sign out of the MS software.



Step #8

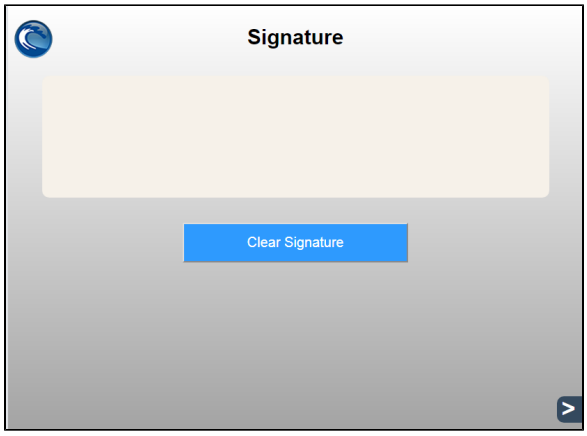
However, if you proceed with the Issue command and you have recorded a quantity less than originally specified in the transfer you will be prompted to select an option from the following:

- **Keep transfer open to issue the remainder**: This option allows you to return to the transfer so you can update the quantities after the items are available.
- **Issue the transfer ignoring the remainder**: This option allows you to continue with the Issue process despite not having the quantities originally specified in the transfer.



Step #9

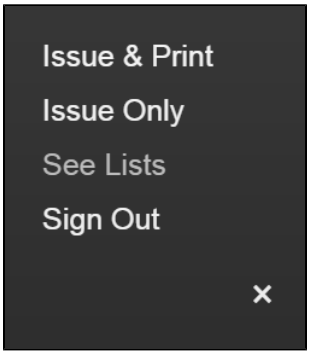
Next you will be prompted to sign before you can continue with the Transfer process.



Step #10

Finally, from the menu at the bottom right of the screen select from the following:

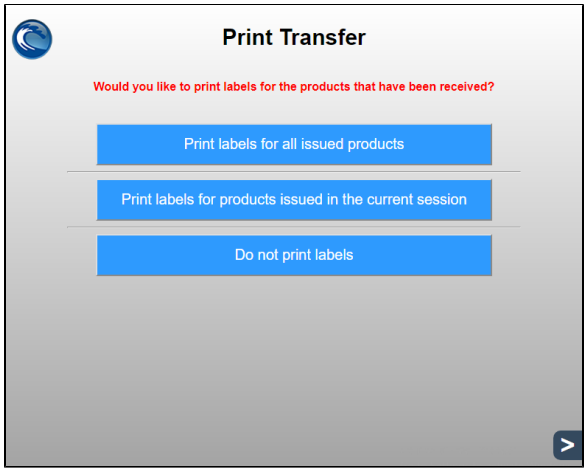
- **Issue & Print**: This option will complete the Issue process but also bring you to the Print Transfer screen where you can select options for printing labels for the transfer items.
- **Issue Only**: This option will complete the Issue process ignoring and skip label printing.
- **See Lists**: This option will return you to the Lists screen.
- **Sign Out**: This option allows you to sign out of MS.



Step #11

When choosing the Issue & Print option you will be sent to this window where you can choose the following options:

- **Print labels for all issued products**: This option will allow you to print labels for all the items in the issued transfer.
- **Print labels for products issued in the current session**: This option will allow you to print labels only from the current session of the transfer.
- **Do not print labels**: This option will complete the Issue process and forgo printing of labels.

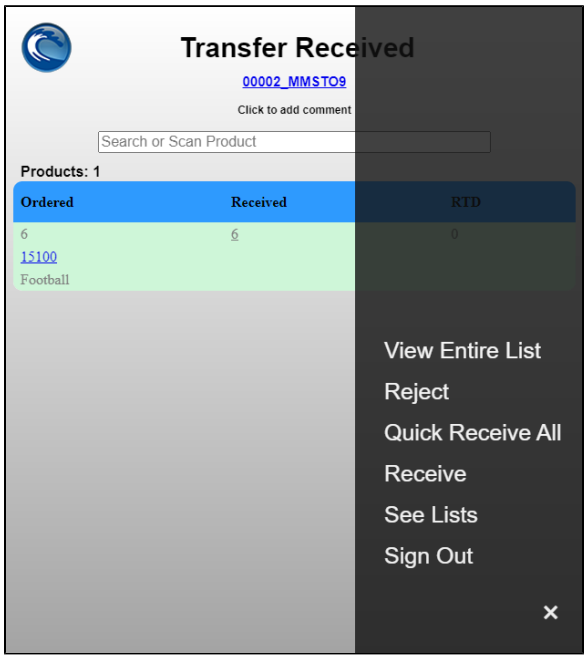


Step #12

Transfer Receive

During a transfer receive you have the options to:

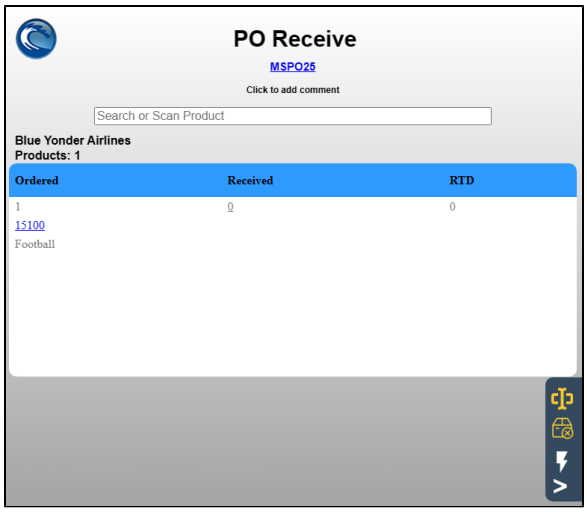
- View Entire List (This option enables you to see all the items in a continuous scrolling list)
- Reject (This option allows you to reject and close the transfer without receiving any items)
- Quick Receive All (This option allows you to quickly receive the entire quantity of all items at once)
- Receive (This option allows you to receive the quantity of items that have been manually adjusted)
- See Lists (This option allows you to go back to the main All Lists menu)
- Sign Out



Filtering of unreceived items:

While receiving a transfer you will see an icon in the bottom right of the window that looks like a box. This is the unreceived button and when you click on it you will only see the items in the list that have yet to be fully received.

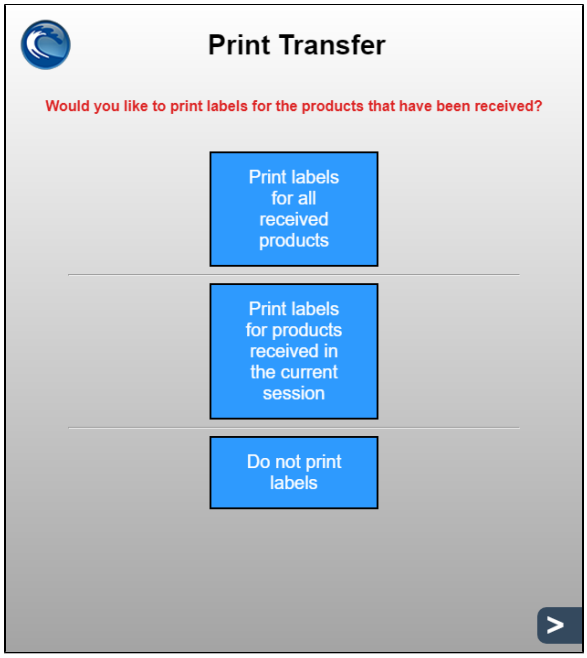
This means that if an item has been fully received and the filter is turned on, those fully received items will disappear from the view. If you turn off the filter then you will once again see all items in the list, whether they have been fully received or not.



Next you will be prompted with the option to print labels for the items you have just received.

You can choose to:

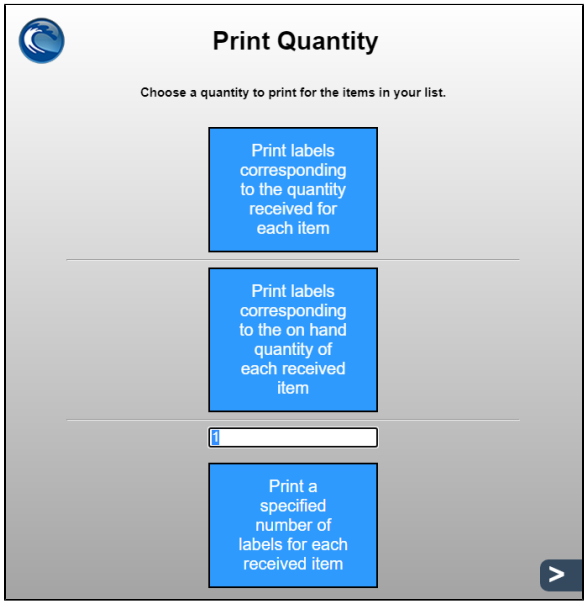
- Print labels for all received products (Prints labels for all items in the list)
- Print labels for products received in the current transaction (Prints labels for only items that had quantity received)
- Do not print labels (Skips printing labels)



If you did choose to print labels, you must now chose the quantity.

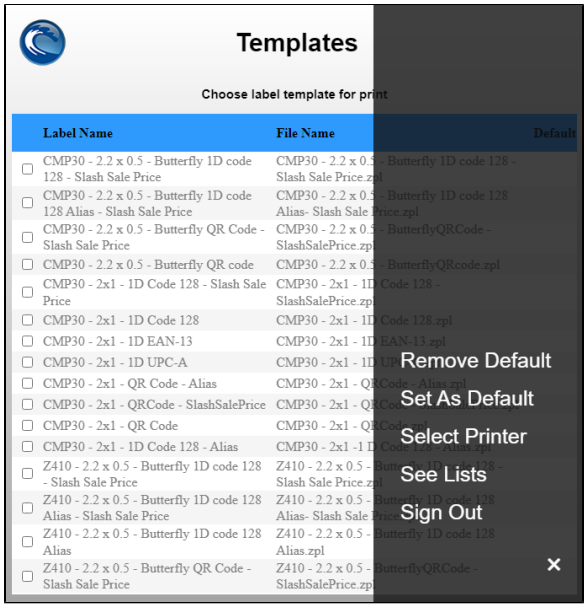
Select from:

- Print labels corresponding to the quantity received for each item
- Print labels corresponding to the on hand quantity of each received item
- Print a specified number of labels for each received item (Manually enter a number value)



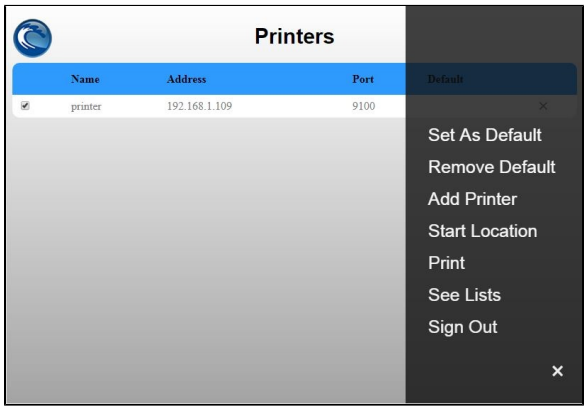
Choose a label template and the click Select Printer.

(For further information about label printing please see: Label Printing.)



Choose a printer and then click on Print.

(For further information about label printing please see: Label Printing.)



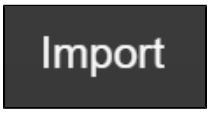
Importing Options

Modern Suite allows the importing of CVS files for importing items, purchase orders, transfers, customers and vouchers.

To start the import process, click on the menu button at the bottom right of the screen.

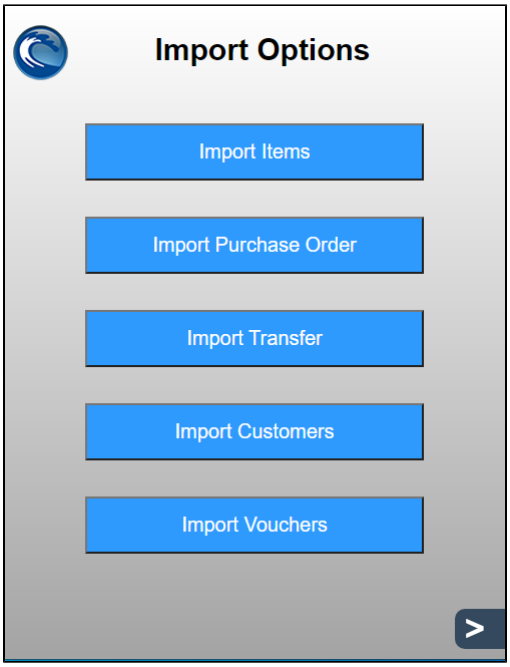


From the menu list, select Import.



In the Import Options menu you can select from:

- Import Items
- Import Purchase Order
- Import Transfer
- Import Customers
- Import Vouchers

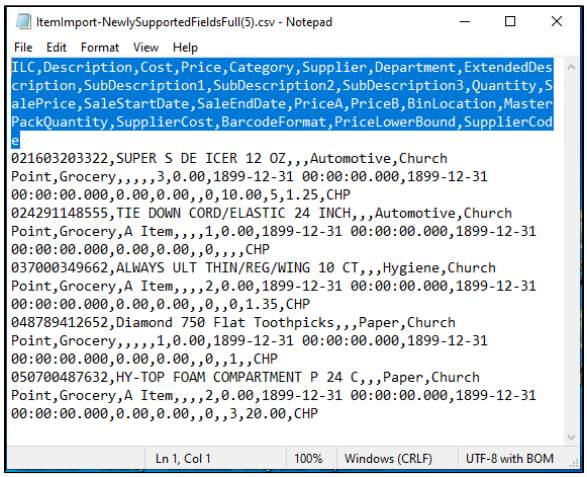


CSV Example:

To the right we have an example of what a CSV import file might look like. The different column headers have been highlighted in this example so you can easily see which header column types can be successfully imported.

Bellow that are a series of values separated by commas (comma-separated values = CSV). Each of these values has it's corresponding column header. You will see that in the first example we have a value of '021603203322'. This will be imported as the ILC (Item Lookup Code) because it matches the first column header which is ILC. From then on each of the comma separated values will be matched up to their column headers until the cycle starts again with the next Item in the list. In this example the next item starts with ILC '024291148555'.

You will also see in the example picture that there are some commas with no values between them. Those values that are left blank will be skipped over until there is another matching value and column header.



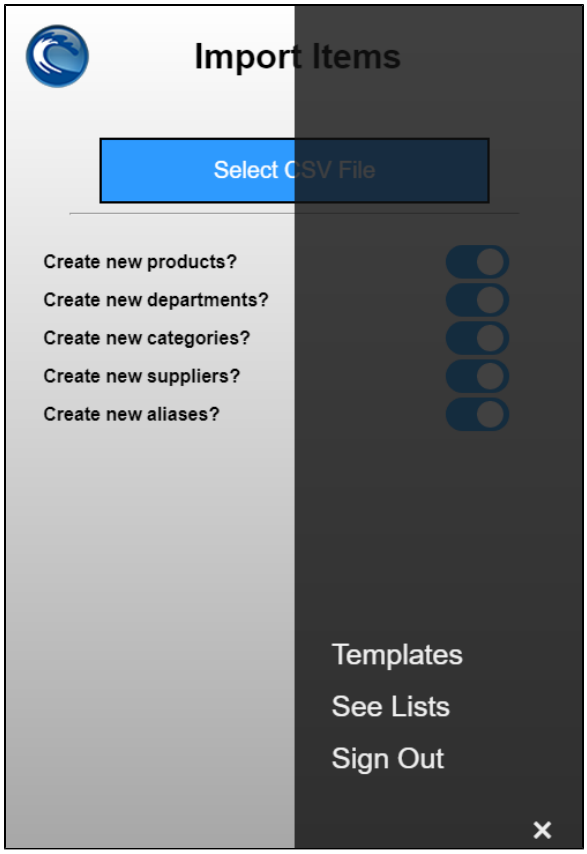
Important: While you **can** import a Supplier Code, a Supplier's Code **ca n not** be updated through the CSV file import functionality. If a user wishes to update/change a supplier code, they will have to do this through their Point of Sale software or through SQL.

Optional Import CSV Templates:

Modern Suite comes with Import CSV Template files. These files are located in directory: "C:\ProgramData\New West Technologies\Modern Mobile Suite\Import Templates".

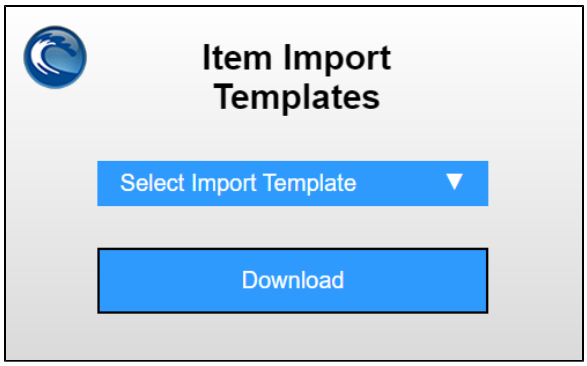
To access these template files click on the following:

- Import
- Select the type of Import function, such as: Import Items, Import Purchase Order, Import Transfer, Import Customers or Import Vouchers.
- While at the "Select CSV File" window, click on the Menu button and select Templates.



Next, select the following:

- Select Import drop down menu: Select the specific Import CSV file you wish to download. The download location will depend on your internet browser settings. Once the file is downloaded you can click the Back button on your browser to return to the main Import window.

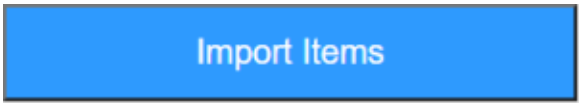


Import Items

MS allows you to import a CSV file containing item data into a list. You can import a CSV file to update existing items or create whole new items in your store database.

Step #1

From the Importing Options window, click on **Import Items**.



Step #2

In the Import Items window you will find the following options:

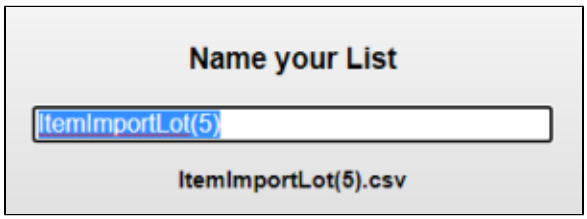
- Create New Products?
- Create New Departments?
- Create New Categories?
- Create New Suppliers?
- Create New Aliases?

Click on the **Select CSV File** button. A file browser window will open and from there you can select the CSV file you wish to import.



Step #3

A new list will be created during the import process. You will be prompted to select a name for the list or else use the auto generated name.



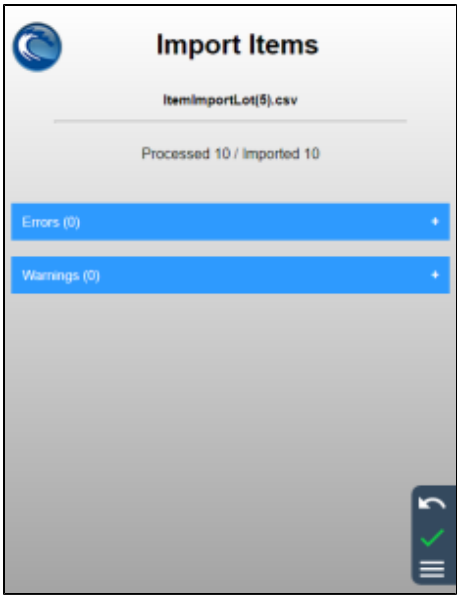
Step #4

Click on the Cloud/Arrow button to start the import process.



Step #5

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

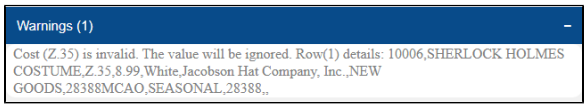


Here are two examples of what you might see if there were **Errors** or **Warnings** when attempting to import a CSV file.

In the **Error** to the right you can see that the ILC (Item Lookup Code) was too long. It exceeded the 25 character length. The result of this error is that the item will not be imported.

In the **Warning** to the right you can see that an invalid value for the item Cost was used. An item's cost must be numeric only. The result of this warning is that the Cost will be skipped over.





Step #6

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.



Note: Importing Serial numbers

- To import a serial item, the row must contain the header IsSerial = true. If a Quantity is not supplied and a Serial Number is not supplied then it will either create or change an existing item to type serialized.
- If a quantity is supplied and a serial number is not, then the row will be skipped. You cannot import serial items without an associated serial number, an error should appear in the error drop down box notifying you of this.
- If a quantity is supplied and a serial number is supplied (Serial = "some serial number") then the row will always be treated as 1 serialized item. If the quantity is greater than 1, then a warning will be supplied that the quantity will be set to 1. To import multiple serial numbers for an item, you will need to duplicate the row except change the serial number each time. Importing serials **DOES NOT** affect the QOH directly unlike a standard item. Modern Suite will only add 1 serial, or change the item type, or create a serialized item. You will see the QOH increase by how ever many serials you have imported for that item.
- You can not have an item that is both serialized and is lot.

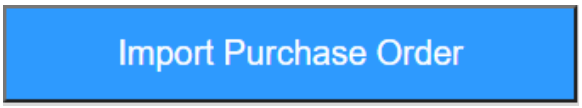
Note: Importing Lot numbers

- To import a lot item, the row must contain IsLot = true. If a Quantity is not supplied and if a LotCode is not supplied, then it will either create an item and set it as a lot item, or update an item and set it as a lot item.
- If a Quantity is supplied and a LotCode is not then the row will be skipped, you need the associated quantity to determine where to apply the quantity. An error message will be produced if these conditions are met.
- If Quantity is supplied and a LotCode is supplied, then it will create the associated lot code for that item with the associated quantity, or it will replace a matching lot code with the associated quantity. You should see the QOH be modified depending on the case, such as if you are creating a lot code then the QOH will increase by that quantity amount, and if you are replacing a matching lot code, then the QOH will be adjusted from (new quantity - previous quantity) for that code.
- You can not have an item that is both serialized and is lot.
- In addition you should see these codes and serial numbers sync up to central in tables [dbo].[Serial] and [mms].[ItemLotCode] if you are working in a central environment. The associated item ID will be the one that lies at central, not store level.

Import Purchase Order

Step #1

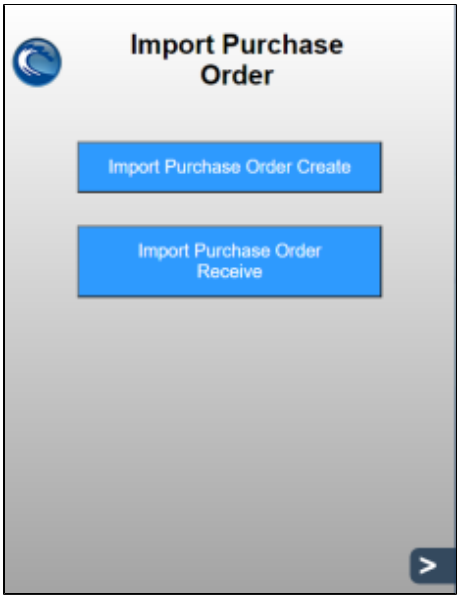
From the Importing Options window, click on **Import Purchase Order.**



Step #2

Here you can select between two options:

- **Import Purchase Order Create** - Allows you to import the contents of a CSV file into a Purchase Order that has not been released yet.
- **Import Purchase Order Receive** - Allows you to import the contents of a CSV file into a Purchase Order that has not been received yet.



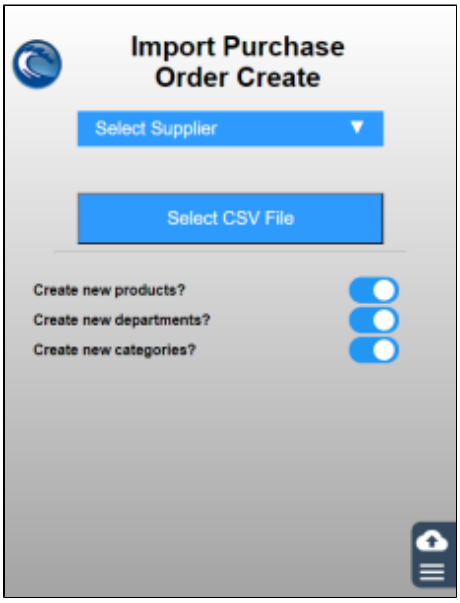
Step #3

Import Purchase Order Create:

In this window you will need to select the **Supplier** from the drop down menu and then click on the **Select CSV File** button to browse for the CSV file you wish to import into the PO list.

The following options are available as well:

- Create New Products?
- Create New Department?
- Create New Category?



Step #4

After you have selected the Supplier and CSV file, next you will be prompted to enter a name for the new Purchase Order list you are creating.



Step #5

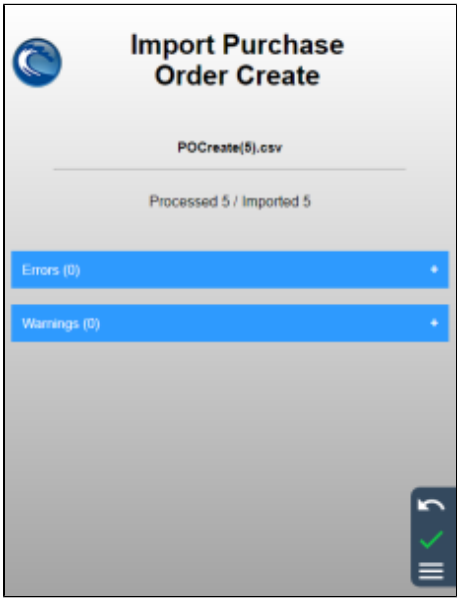
Click on the **Cloud/Arrow** button to start the import process.



Step #6

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.



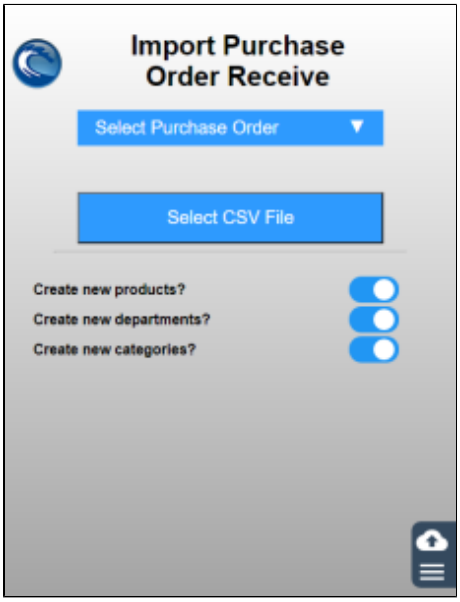
Step #7

Import Purchase Order Receive:

From the drop down menu select the Purchase Order you wish to receive. Then click on the Select CSV File button to browse for the CSV file you wish to import into the PO list.

The following options are available as well:

- Create New Products?
- Create New Department?
- Create New Category?



With the Purchase Order and CSV file selected, you can continue



Step #8

Click on the **Cloud/Arrow** button to start the import process.



Step #9

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.



PO Create Notes:

- The CSV file formats should be:

ILC, QuantityOrdered, SupplierCost (Optional), Description (Optional), Department (Optional), Category (Optional), IsLot (Optional), IsSerial (Optional)

- This process does not update Items except that it may add a SupplierList entry to associate the item with the Supplier with the supplied supplier cost, if the supplier cost is not supplied default to zero.
- If an item does not exist and if Description, Department, and Category are also supplied and if the correct config option to create items during import is enabled, then the item should be created (with a Quantity On Hand of zero and with the Supplier set from what was selected in the UI) with the supplied supplier cost, if the supplier cost is not supplied default to zero.
- Normal restrictions on the file should exist such as they cannot supply both IsLot and IsSerial. For PO Receive, if you don't supply a LotCode for an Item that is a Lot Item then it won't be received. Similarly, for PO Receive, if you don't supply a Serial for a Serial Item then it won't be received.

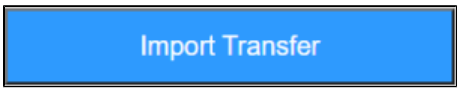
PO Receive Notes:

- The CSV file format should be:
  ILC, QuantityReceived, SupplierCost (Optional), Description (Optional), Department (Optional), Category (Optional), IsLot (Optional), LotCode (Optional), Weight (Optional), Date (Optional), IsSerial (Optional), Serial (Optional)
- This process does not update items except that it may add a SupplierList entry to associate the item with the Supplier with the supplied supplier cost, if the supplier cost is not supplied default to zero.
- If an item does not exist and if Description, Department, and Category are also supplied and if the correct config option to create items during import is enabled, then the item should be created (with a Quantity On Hand of zero and with the Supplier set from what was is attached to the PO) with the supplied supplier cost, if the supplier cost is not supplied default to zero.
- Normal restrictions on the file should exist such as they cannot supply both IsLot and IsSerial. For PO Receive, if you don't supply a LotCode for an Item that is a Lot Item then it won't be received. Similarly, for PO Receive, if you don't supply a Serial for a Serial Item then it won't be received.

Import Transfers

Step #1

From the Importing Options window, click on **Import Transfer.**



Step #2

Here you can select between two options:

- **Import Transfer In** - Allows you to import the contents of a CSV file into a Transfer In list.
- **Import Transfer Out** - Allows you to import the contents of a CSV file into a Transfer Out List



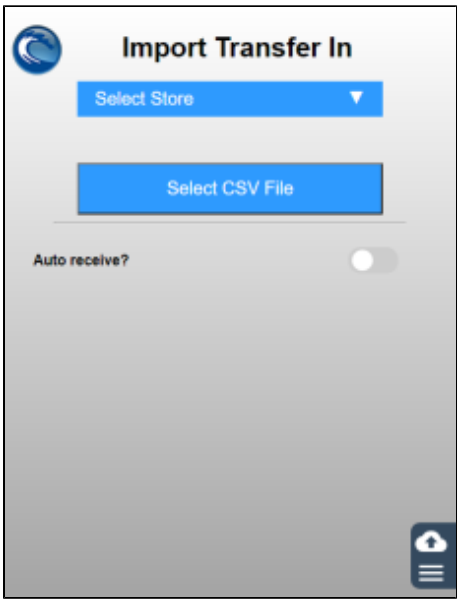
Step #3

Import Transfer In:

In this window you will need to select the **Select Store** drop down menu and select either the origin store or non-store options. Then click on the **Select CSV File** button to browse for the CSV file you wish to import into the TR list.

The following option is available as well:

- Auto Receive? - This option will automatically set the Transfer In to Received status once the import is completed.



Step #4

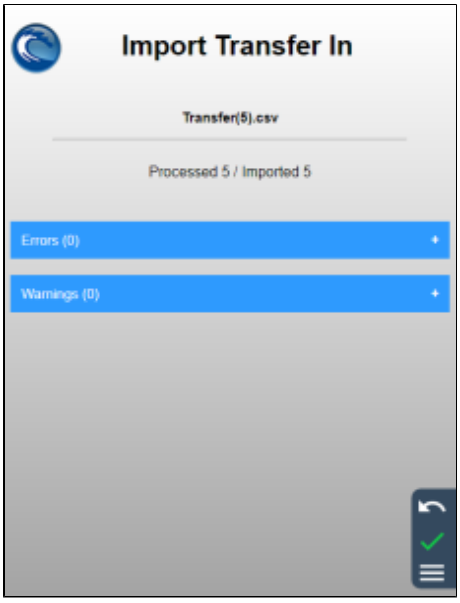
Click on the **Cloud/Arrow** button to start the import process.



Step #5

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.

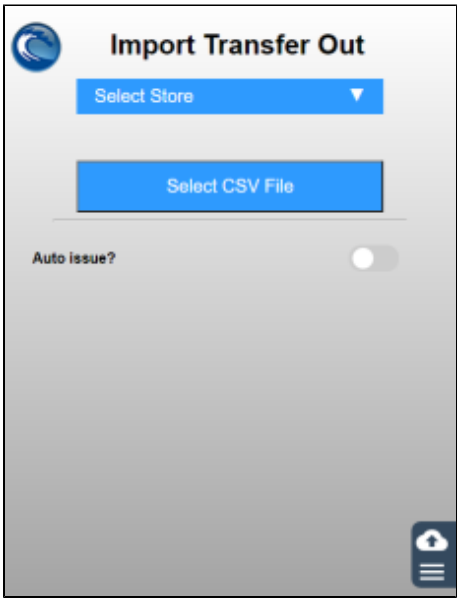


Step #6

In this window you will need to select the **Select Store** drop down menu and select either the destination store or non-store options. Then click on the **Select CSV File** button to browse for the CSV file you wish to import into the TR list.

The following option is available as well:

- Auto Issue? - This option will automatically set the Transfer Out to Issued status once the import is completed.



Step #7

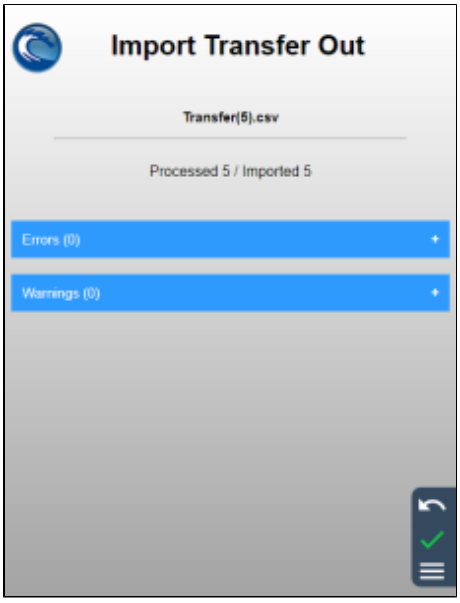
Click on the **Cloud/Arrow** button to start the import process.



Step #8

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.



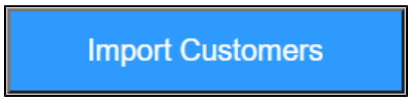
Transfer In/Out Notes:

- If auto receive is not enabled, then all that needs to be supplied is the ILC, Quantity. After the import is finished it should take you to the transfer receive/issue page. The user will have to fill out this page manually, but the the quantity orderered/issued should already be filled.
- If auto received/issue is enabled the user will automatically issue and or receive these items.
- If there are lot and or serialized items in the CSV, then they must be supplied with associated serial number or lot code for them to receive/issue the item. If they do not supply these but have a quantity associated with any of these items then they will have to manually insert these associated lot codes and serial codes on the transfer receive/issue page. If the user supplies a lot or serialized item, where some quantities are associated with a lot code and or serial number, the quantity "ordered" will always increase.
- For standard items, all that needs to be supplied is the ILC, Quantity to auto receive/ issue

Import Customers

Step #1

From the Importing Options window, click on **Import Customers** button.



Step #2

Click on the Select CSV File button and use the file manager window to locate and select the CSV file containing the customer information you wish to import.



Step #3

Click on the **Cloud/Arrow** button to start the import process.



Step #4

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.



Customer Import Notes:

- Customer import supports the following fields:

If Payment Account Is Supplied:

- In a single store environment AR accounts will be created and updated at the store level.

AccountNumber, PaymentAccount, AccountGroup, AccountTypeID, Address2, AssessFinanceCharges, Company, Country, CustomDate1, CustomDate2, CustomDate3, CustomDate4, CustomDate5, CustomNumber1, CustomNumber2, CustomNumber3, CustomNumber4, CustomNumber5, CustomText1, CustomText2, CustomText3, CustomText4, CustomText5, GlobalCustomer, HQID, LastStartingDate, LastClosingDate, LastUpdated, LimitPurchase, LastClosingBalance, PrimaryShipToID, State, StoreID, LayawayCustomer, Employee, FirstName, LastName, Address, City, Zip, AccountBalance, CreditLimit, TotalSales, AccountOpened, LastVisit, TotalVisits, TotalSavings, CurrentDiscount, PriceLevel, TaxExempt, Notes,Title, EmailAddress, TaxNumber, PictureName, DefaultShippingServiceID, PhoneNumber, FaxNumber, CashierID, SalesRepID, Vouchers

This excludes the DBTimeStamp, ID, and SynGuid fields from the [dbo].[Customer] table.

However, the more likely fields to be imported are:

- AccountNumber - The Customer Account Number
- PaymentAccount - The Customers AR (AccountsReceivable) Account Number
- AccountGroup - The Customers AR Account Group
- AccountBalance
- CreditLimit
- FirstName
- LastName
- Address
- City
- State
- Zip
- PhoneNumber
- EmailAddress

- In a central environment AR accounts will be created and updated at central database **ONLY** though they will appear at store manager.

- In a Central environment, all imported customers are pushed to all stores. They will be either updated or created depending on if the account number exists. You should be able to access them from the POS as well as the Store Manager. If a customer has a associated AR account then their Account Balance will be placed on their AR Account and their Customer account balance will be 0. You will need to create your own AccountGroup before you start using this import field.

- If PaymentAccount is supplied and that account doesn't exist then an AR_Account will be created with the associated fields. If an AccountGroup is also supplied and that account group exists then some of the fields above will be updated based on that account groups settings as well as some additional fields will be supplied

- You can either supply the AccountGroup name or code in the import process. But is completely optional.

- If PaymentAccount is supplied and the AR account already exists. Then it will link the imported customer to that AR account. The account group will be ignored.

If Payment Account Is Not Supplied:

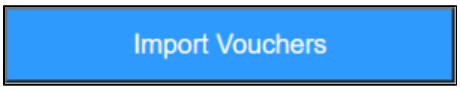
- If PaymentAccount is not supplied and the associated customer does not exist or the is not already associated with an account. Then it will just import the customer and set the associated account balance in the customer table.

- If the customer does exist, and that customer is already associated AR account, then it will update the AR account account balance and the customer, otherwise it will just update the customer.

Import Vouchers

Step #1

From the Importing Options window, click on **Import Vouchers**



Step #2

Click on the Select CSV File button and use the file manager window to locate and select the CSV file containing the voucher information you wish to import.



Step #3

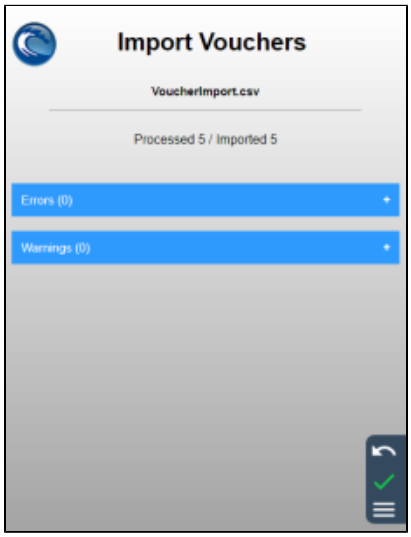
Click on the **Cloud/Arrow** button to start the import process.



Step #4

The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.

If you are satisfied with the items imported you can click on the Green Check Mark button. Or you can click on the Back Arrow that will take you back so you can select a different CSV file.



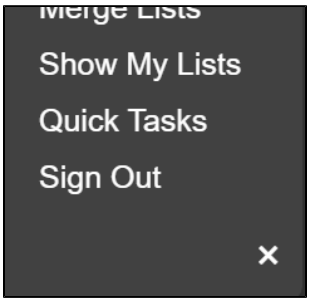
Voucher Import Notes:

- If you are in a single store environment then the tables that will be inserted into are [dbo].[Voucher] and [dbo].[Serial]. The voucher number and the serial number will be the same.
- If you are in a central environment the tables that will be inserted into are [dbo].[VoucherOnline], [dbo].[Voucher], and [dbo].[Serial] and **ONLY** at the Central DB.
- Make sure that in a central environment you have your voucher item Global config option on, this can be found under the "Voucher" tab when clicking the item in RMH Central Manager.

Quick Tasks

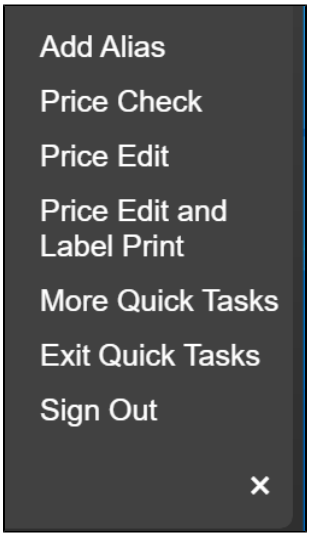
Quick Tasks, as the name implies, are tasks that can be performed quickly and without having to create a new list. These tasks are designed to be fast, simple and performed in loops. This way you can repeat the task over and over as needed.

To begin, first select Quick Tasks from the main menu:



Within the Quick Task menu, you have the following options to choose from:

- Add Alias
- Price Check
- Price Edit
- Price Edit and Label Print
- More Quick Tasks
- Exit Quick Tasks (to return to main menu options)
- Sign Out

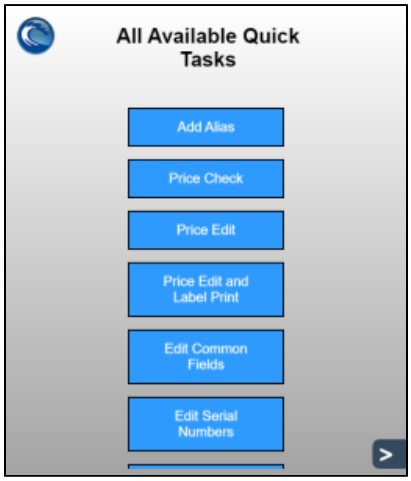


If you click on **More Quick Tasks** option then you will be brought to a window that has the full list of available Quick Tasks.

All Available Quick Tasks window

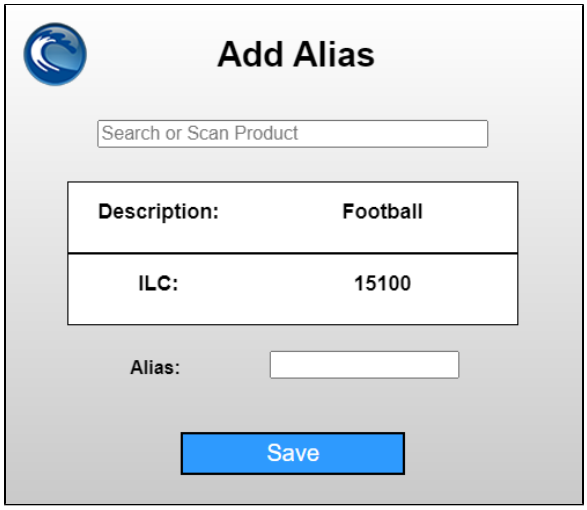
Here you can scroll through the following options:

- Add Alias
- Price Check
- Price Edit
- Price Edit and Label Print
- Edit Common Fields
- Edit Serial Numbers
- Promo Edit
- Stock Edit



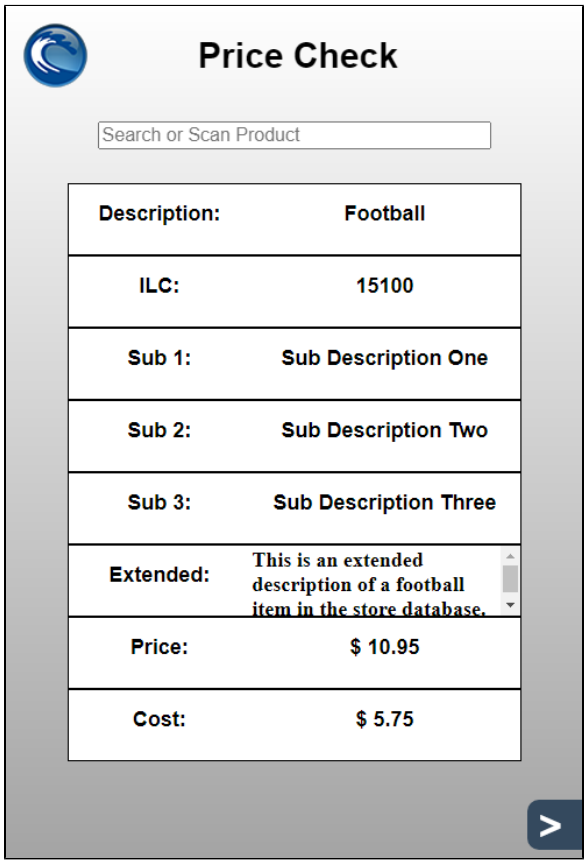
Add Alias:

- Scan or search for an item.
- Enter a new Alias value and click Save.
- Scan or search for a new item or else click on the Menu button to exit.



Price Check:

- Scan or search for an item.
- View the commonly used item details
  - If the user is allowed/disallowed to view cost information in RMH then it should be reflected in the Quick Task Price Check as well.
  - By default you will see extra fields beyond Description, ILC and Price. This can be toggled in the App Config window.
- Scan or search for a new item or else click on the Menu button to exit.



Price Edit:

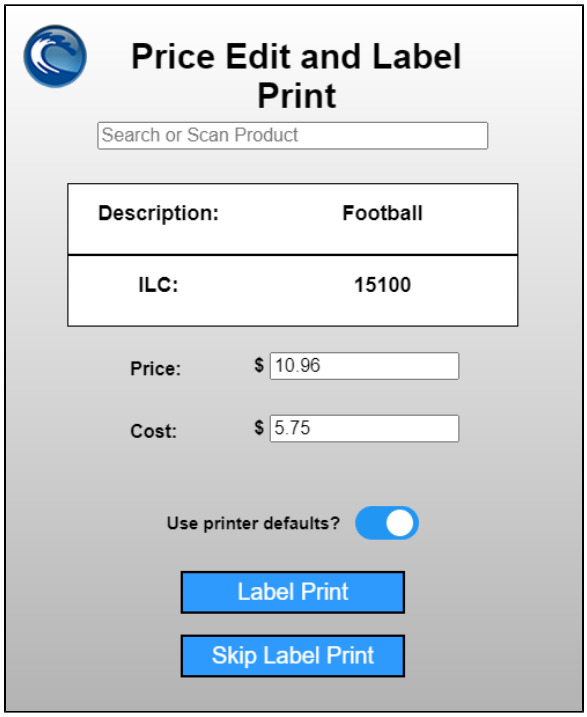
- Scan or search for an item.
- Make adjustment to item Price or Cost and click Save.
- Scan or search for a new item or else click on the Menu button to exit.



Price Edit and Label Print:

- Scan or search for an item.
- Make adjustment to item Price or Cost and click Save.
- Click on Label Print or Skip Label Print.
    - Enable/Disable User Printer Defaults (**Note:** This option only appears if Label Template and Printer defaults are currently saved).
- Scan or search for a new item or else click on the Menu button to exit.

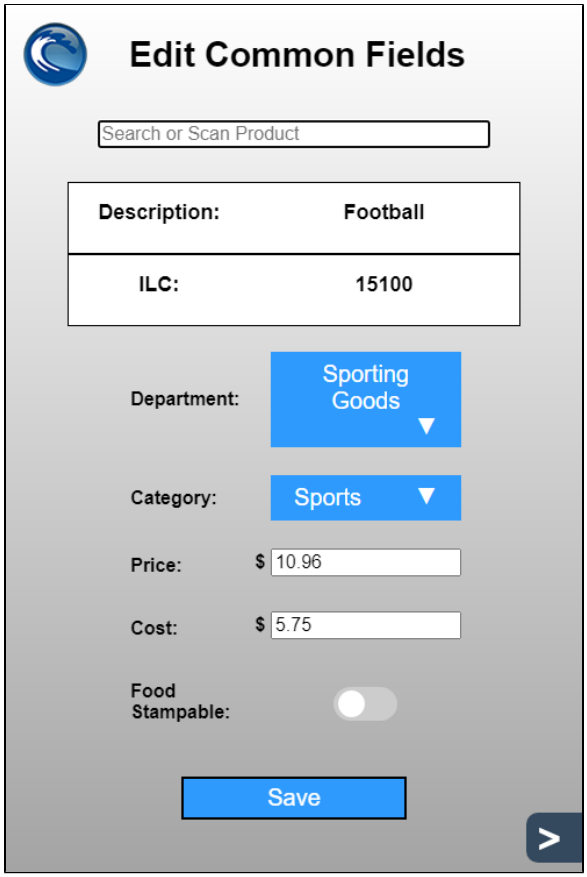
Please Note: If there are no Label Template or Printer defaults saved in the system then when you click on the Label Print button you must manually select the Label Template and Printer.



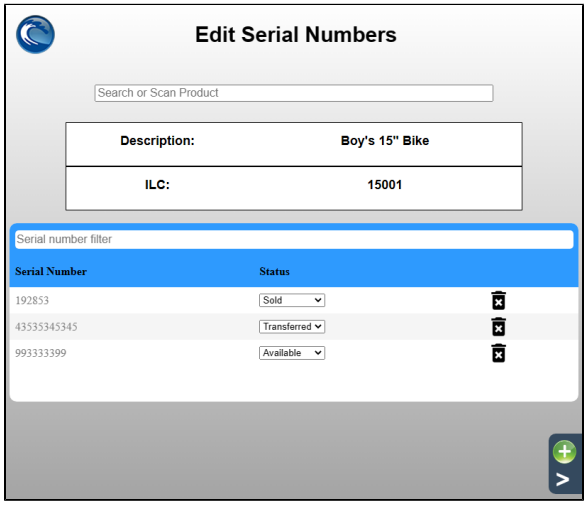
Edit Common Fields:

- Scan or search for an item.
- Editable fields include: Department, Category, Price, Cost, Food-Stampable (Toggle Switch) When finished editing click Save.
- Click on Label Print or Skip Label Print.
    - Enable/Disable User Printer Defaults (**Note:** This option only appears if Label Template and Printer defaults are currently saved).
- Scan or search for a new item or else click on the Menu button to exit.

Please Note: If there are no Label Template or Printer defaults saved in the system then when you click on the Label Print button you must manually select the Label Template and Printer.



Edit Serial Numbers:



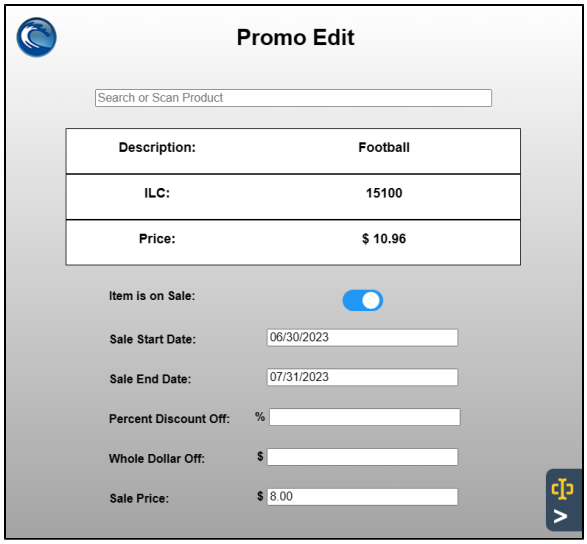
- Scan or search for an item
- Highlight existing serial number and delete by clicking on the trash icon
- Click on Green Plus Icon to add a new serial number to the selected item
- Click on the drop down menu of any serial number shown in the window and change its status between the following options:
    - Available
    - Sold
    - Offline
    - Transferred

Promo Edit:

- Scan or search for an item.
- Turn on/off option: Item is on Sale.
- Click on Sale Start Date field to select a day from the calendar.
- Click on Sale End Date field to select a day from the calendar.
- Select one of the following Sale options:
    - Percent Discount Off
    - Whole Dollar Off
    - Sale Price
- When finished editing, click Save.
- Click on Label Print or Skip Label Print.
    - Enable/Disable User Printer Defaults (**Note:** This option only appears if Label Template and Printer defaults are currently saved).

- Scan or search for a new item or else click on the Menu button to exit.

Please Note: If there are no Label Template or Printer defaults saved in the system then when you click on the Label Print button you must manually select the Label Template and Printer.



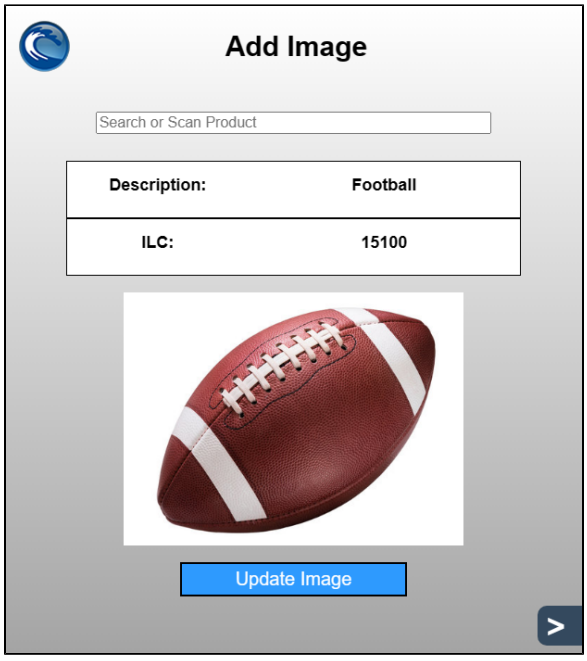
Stock Edit:

- Scan or search for an item.
- Adjust the Quantity field and then click Save.
- Scan or search for a new item or else click on the Menu button to exit.

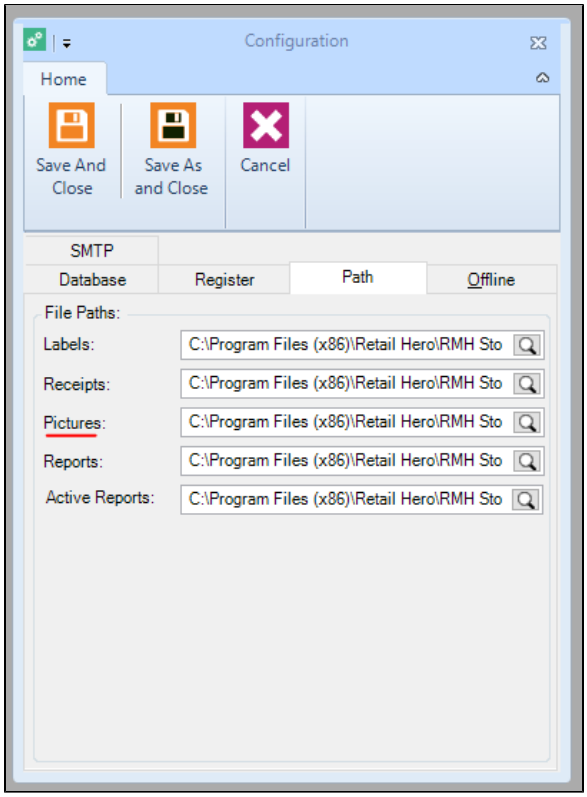


Add Image:

- Scan or search for an item.
- Click on Add Image Button to open file browser window. Select the desired image.
- Click on Update Image Button to open file browser window. Select the desired image to replace the old one.
- Scan or search for a new item or else click on Menu button to exit.



Please Note: Modern Suite must have permission to write to the RMH picture folder for this feature to work correctly. If the Pictures directory has been modified, please make sure you have Admin rights for the new directory.



MS For POS Integration

MS For POS Integration is a small add-on for RMH POS that allows you to scan barcodes that contains the following traits:

- Item Lot Number
- Item Weight

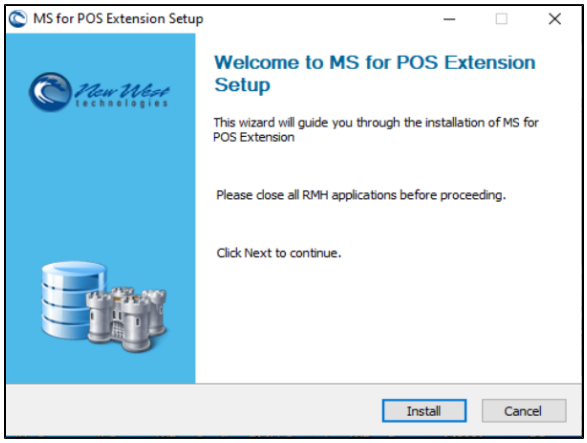
This add-on will not impact the scanning of standard item lookup codes or aliases.

Installation

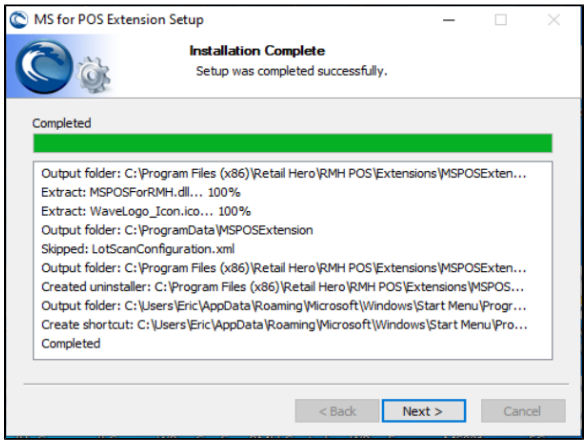
Locate the **MSPOSExtension.exe** icon. Right click and choose Run As Administrator.



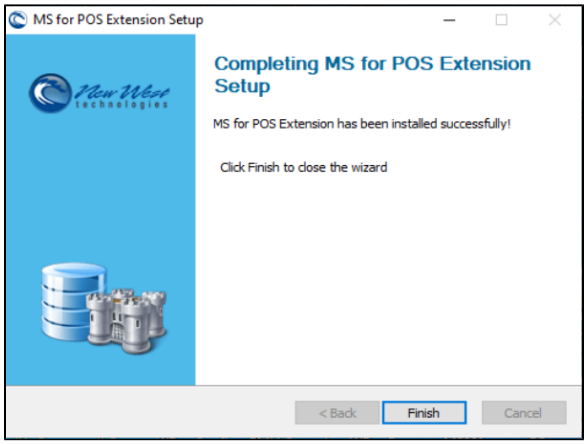
Click **Install** to continue.



Click **Next** to continue.



Finally, click **Finish** to end the installation process.



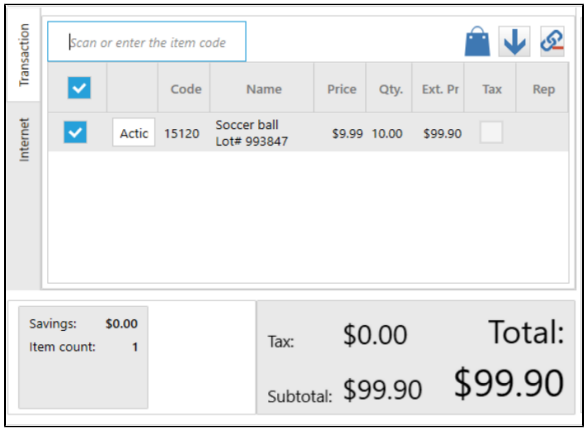
Using MS For POS Integration

In the example to the right you can see that the item **15120 (Soccer Ball)** was scanned into the RMH POS Transaction screen.

The barcode scanned contained the following: **993847,10**

- Lot#: 993847
- Qty: 10

In the RMH POS transaction screen you can see that the line item indicates which lot number was used while the quantity is reflected in the QTY column.



Special Order Tracker

MS has the ability to create a new, unique item and then order it from a supplier in the form of a Purchase Order.

This custom item is tracked through the PO process. When the item received by the store, MS will email the customer associated with the work order/ quote.

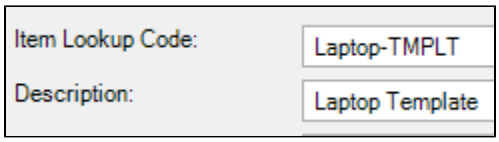
Note: This process requires **MSPOSExtension** be installed as well.



Special Order Items

Special Order items are based off the idea of Item **Templates**. Item templates have predefined item fields such as Category, Department, Supplier, Price, ect. When creating a Special Order item, the item created will take on the predefined fields from the item template as well as required fields filled out in the Special Order Process.

Item Templates are defined by having the designator "-TMPLT" at the end of their ILC.

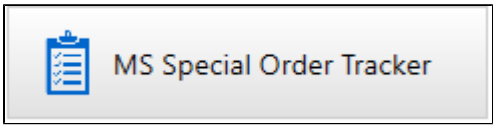


Special Order Workflow

Step #1

Open RMH POS and start a Work Order or Quote, select a customer and click the custom button **"MS Special Order Tracker"**.

- This will automatically log the cashier in and start the special order workflow. The special order workflow will list the customers name at the top
- Alternatively you can click on the MS Special Order Tracker button, complete the special order process and a Work Order will automatically be created in RMH POS. Note: Creating a SO from a Quote will still require that a Quote be created manually in POS before starting the SO process.

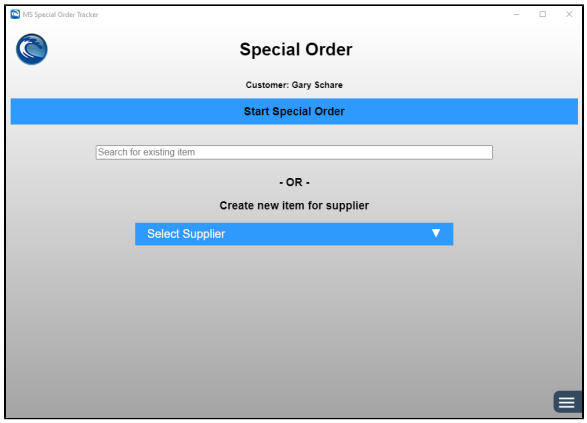


Step #2

Start Special Order

Complete one of the following options:

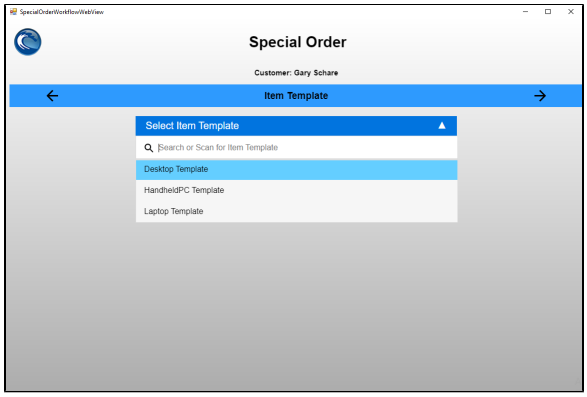
- **Search for existing item:** This will create a Special Order for an item that is already in your database.
- **Create new item for supplier:** This will create a **new** item based on supplier and templates you previously created.
    - Only suppliers that have item templates will be listed. If any item template does not have a supplier, then all suppliers will be listed.
    - You will not be able to continue if a supplier is not selected



Step #3

Choose an Item template from that supplier.

- You should be able to scan an Item Template as well. To test this, copy and paste the ILC associated with that item template.
- Only item templates that belong to that supplier will be available. If an item template is not assigned a supplier then that template will be shown as well.
- You will not be able to continue if an item template is not selected.

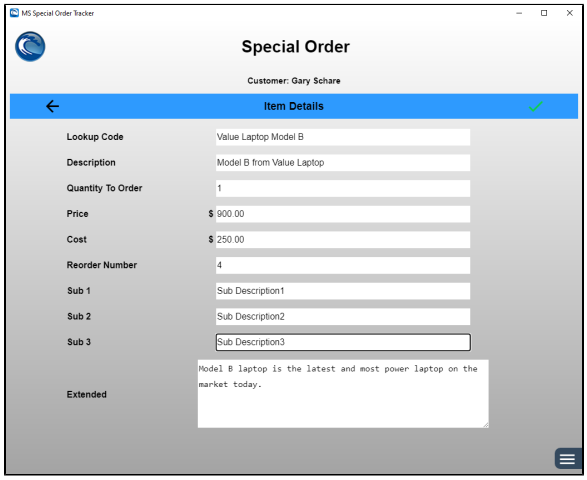


Step #4

Fill Out Item Details.

- Only the lookup code, description and Reorder Number are required, all other fields are optional.
- Note: The Price and Cost do not allow negative values.
- These fields will also be populated from the item template if they are defined.
- Quantity To Order field will determine the amount of items to order
- Reorder Number will determine the quantity for subsequent reorders.
- Normal data validation should occur on submit, such as no duplicate ILC's, negative price and cost values, or data is too long for field

- Clicking the **green checkmark** will create the special item. It will also sync this item up to central and push to all other stores.

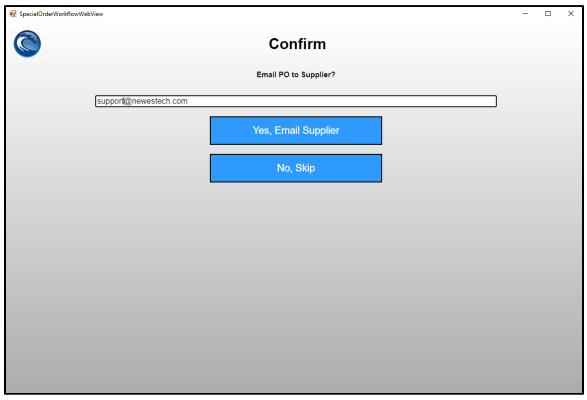


Step #5

Prompt Email Supplier

- You can email the supplier the special order PO or skip.
- This option is only available when enabled in the MS Administration>App Config window.





Step #6

Prompt Release PO

- You can release the Special Order or choose to release at a later time.

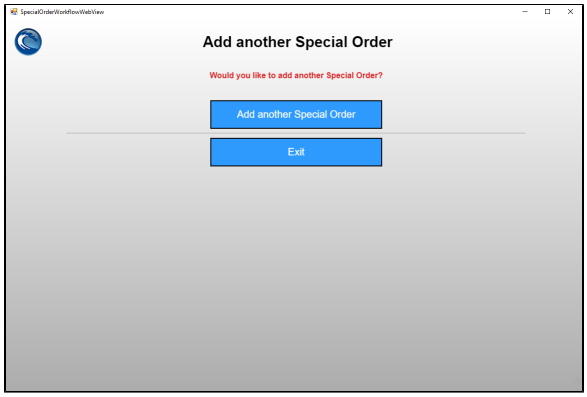
Please Note: If the option titled: "Do not generate Purchase Order with Special Order" has been enabled in the Administration, App Config settings, then there will be no corresponding Purchase Order created with the Special Order.



Step #7

Add another Special Order

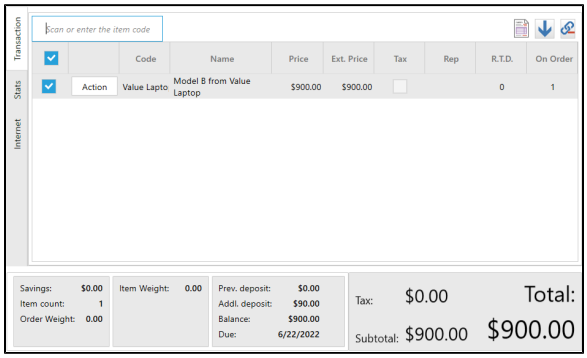
- You can add another item which will repeat the process over again or click Exit which will return you to the RMH POS window.



Step #8

Work Order/Quote

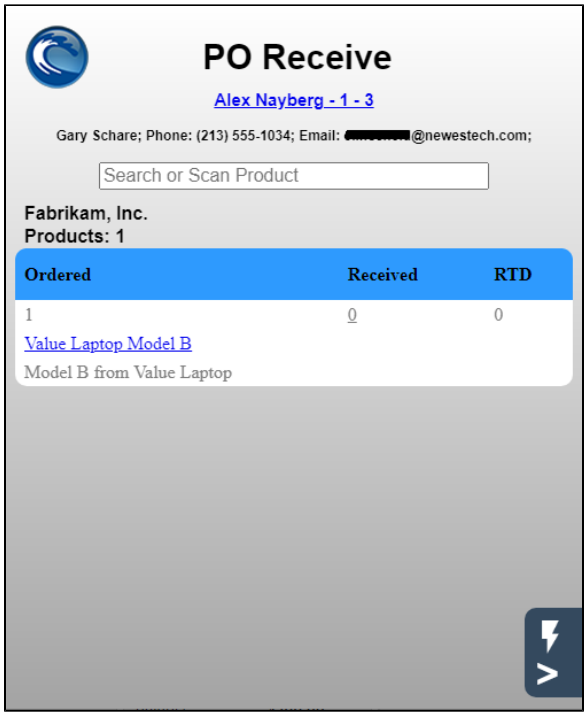
- Exiting the view will add all your created special order items onto the work order, where the customer can pay the deposit and complete the work order or quote.
- Customer can then recall the work order or quote. The line item when recalled will have the special order PO number and status of PO. If their special item was received they should be able to purchase and pick up the item.



Special Order Purchase Order

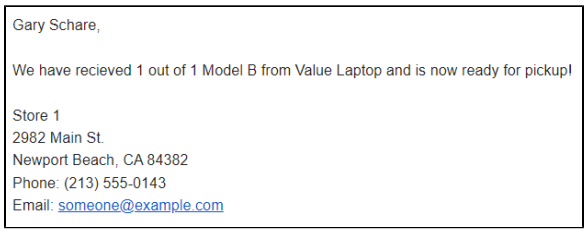
Each special order item will be associated with a purchase order in MS. These purchase orders are created when the special order is created.

The comment in the PO should include the customer's name, phone number, and email.



Customer Notification Email:

When the item is received in the purchase order, Modern Suite will email the customer notifying them that their special item has been received.



Sales Rep Notification Email:

If a Sales Rep was either assigned to the Special Order, either the entire order or a specific item, the sales rep will also receive a notification email.

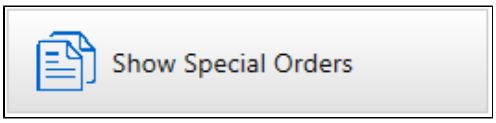
Eric Linscheid,

We have recieved 1 out of 1 Ceramic House Cat and is now ready for pickup!

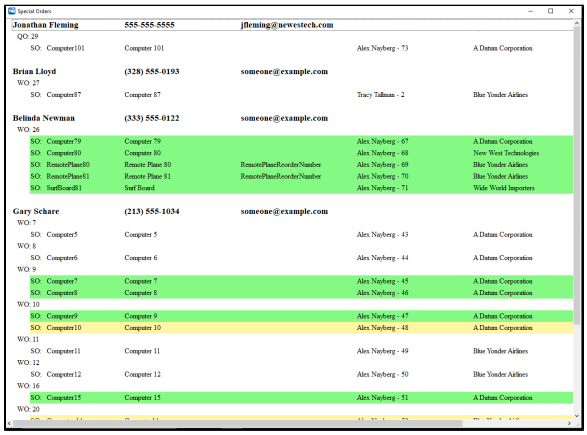
Customer Name: Brian Lloyd
Customer Phone: (328) 555-0193
Customer Email: elinscheid@newestech.com

Store 1
2982 Main St.
Newport Beach, CA 84382
Phone: (213) 555-0143
Email: someone@example.com

Show Special Orders button: This custom button will allow you to see the current history of Special Orders at your store.



Special Orders window:



- Clicking the button with no customer selected will bring up all the available special orders.
- Clicking the button with a customer selected will bring up all available special orders for that customer only.
- An available special order is one that has been placed but not picked up entirely.
- If a customer is selected but has no available special orders then a warning will appear indicating there are no special orders to view for that customer.
- If no customer is selected and there are no available special orders then pushing the custom button will warn the cashier that there are no special orders to view at all.
- if you double click on a row in this window the order will be opened up in POS transaction screen. Then the cashier can pay any remaining balance for the order and complete the transaction.

The format is:

- Customer
  - Name, phone, email
  - Sorted by Customer Name
- WO (Work Order Number) or QO (Quote Number)
  - Sorted numerically.
- SO (Special Order Number)
  - ILC, Description
  - Reorder
  - PO Number
  - Supplier
  - PO Status

The color of the special order will indicate the status of the PO (open=white, yellow=released, green=received)

Uninstalling Modern Suite

Modern Suite can be uninstalled from two locations:

- Control Panel/Programs and Features
- MMSUninstaller.exe file located in the MS installation directory: C:\Program Files (x86)\New West Technologies\Modern Mobile Suite For RMH.



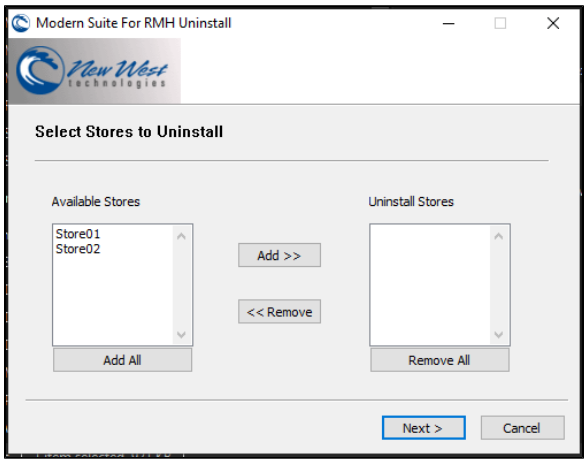
Note: If multiple Modern Suite stores are installed on a single computer you are able to choose which stores will be uninstalled.

The Available Stores window shows which stores can be uninstalled.

The Uninstall Stores windows shows which stores will be uninstalled once you click Next.

Click on the specific store and then click on Add to move the store from the Available Stores window over to the Uninstall Stores window.

Or if you wish to remove all the available Modern Suite stores from this computer, click on Add All and click Next.



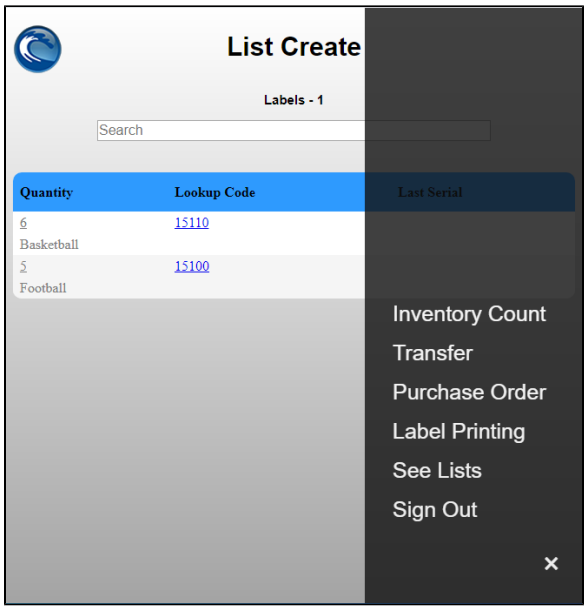
Use Cases



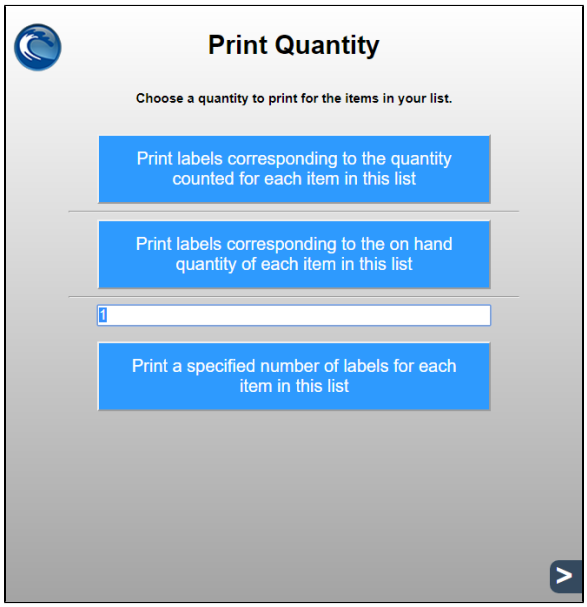
Adding a label template and assigning the printer

Adding a label template and assigning the printer

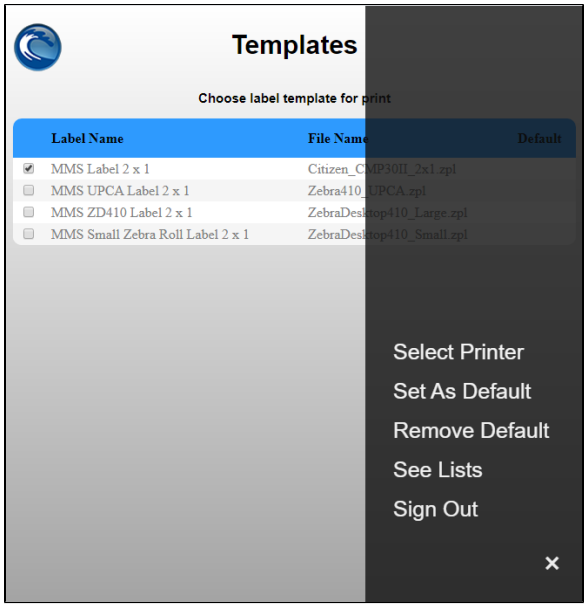
After creating a list the manager will click on the Menu button at the bottom right of the screen and select Label Printing.



The manager selects the top option on the next screen: Print labels corresponding for the quantity counted for each item in the list.

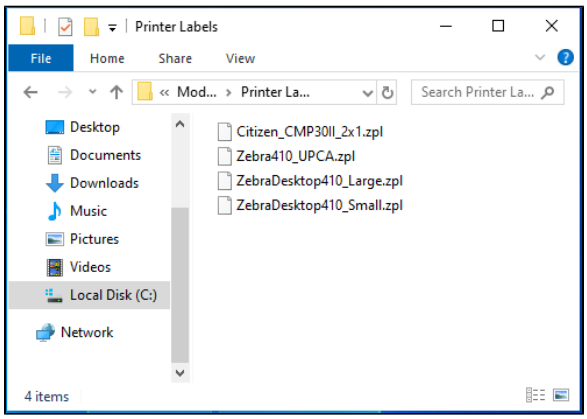


Now the manager is prompted to select the label template they wish to use. Normally they would place a check mark next to the template and then press Select Printer. However the template they wanted to use was not on the list.

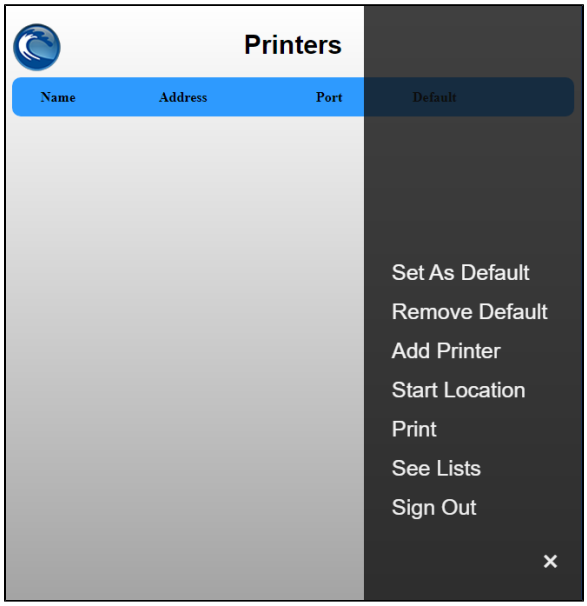


The manager was able to copy the .ZPL file into the correct file directory on the computer running the Modern Suite software. After copying over the file the new template was visible and could be selected in the Templates screen in MS.

Path: C:\ProgramData\New West Technologies\Modern Mobile Suite\Printer Labels

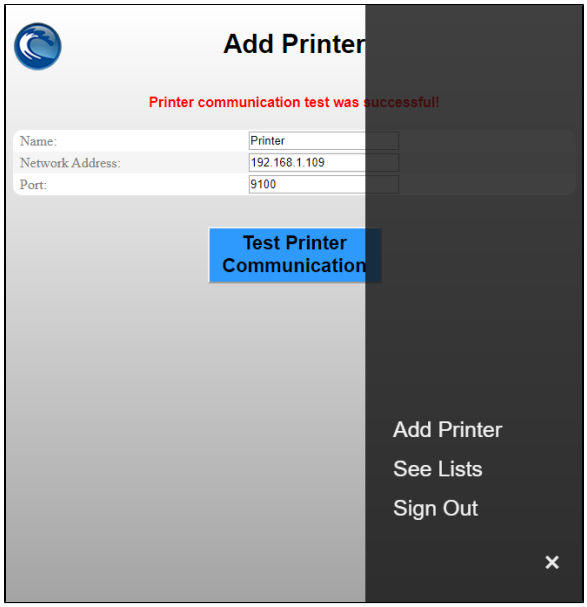


The Printer window is empty at first. The manager clicks on the Menu button and selects Add Printer.

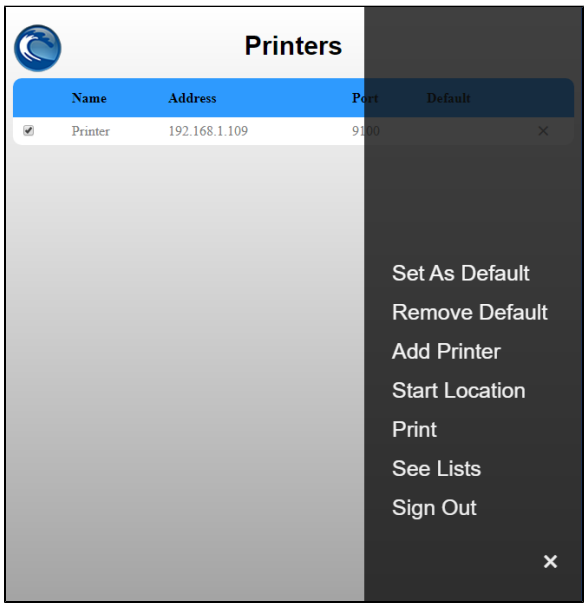


In the Add Printer window the manager has to enter a Name for the printer as well as the Network IP Address and Port number. After entering this information the manager clicks Test printer Communication to make sure it works and then selects Add Printer from the menu.

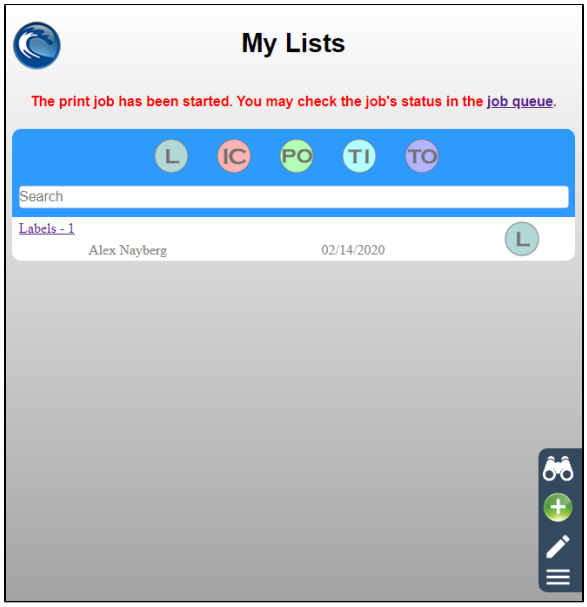
Note: If you are unable to locate the IP Address of your printer please contact your RMH or RMS support representative for assistance.



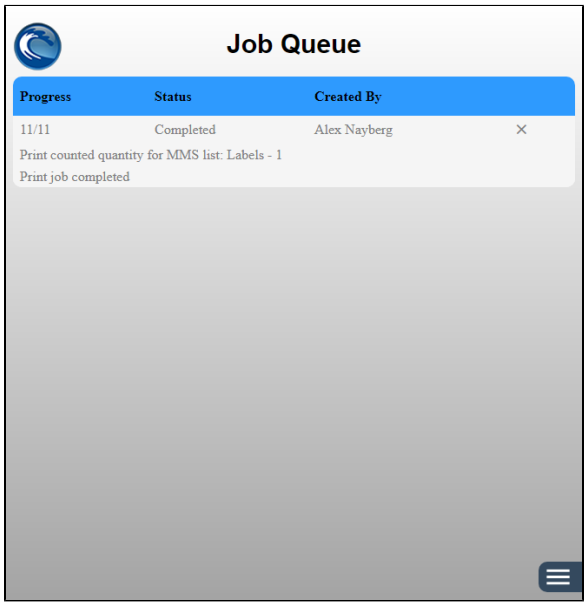
Once the printer has been added the manager is now ready to start printing. They either select Print or Start Location from the menu to start printing.



As the labels are printing MS will return back to the My Lists page where the manager is notified that they can view the status of the print job by clicking on the link at the top of the page called Job Queue.



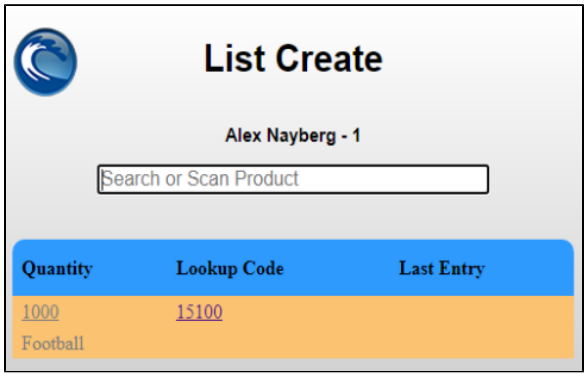
The manager clicks on the Job Queue button and at the Job Queue window the can see that the print job just completed successfully.



Adjusting the Item Count Threshold

When creating a generic list or and Inventory Count list, if the item quantity you just entered is above the threshold amount configured in MS then the item will be flagged with an orange color.

This threshold amount can be configured by the user but does require modifying a View in Microsoft SQL. Please contact New West Technologies support for further support.



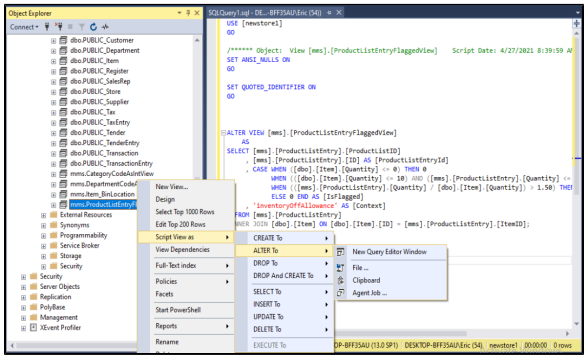
To alter the threshold value, launch MS SQL and click on the plus sign next to your store database. From there click on the plus sign next to Views and locate MMS.ProductListEntryFlaggedView. Right click on it and then select Script View as, Alter To, New Query Editor Window.

Pay attention to the line that says:

WHEN (([mms].[ProductListEntry].[Quantity] / [dbo].[Item].[Quantity]) > **1.50**)

The **1.50** value means that quantityOnHand > 150% is true then the entry will be flagged. If an items count is 151 and the Quantity on hand for that item is 100, that count entry will be flagged orange.

You can change the **1.50** value to a different amount and then click on the Execute button at the top of the query window to make the change to the view.



Change the supplier and cost of an item

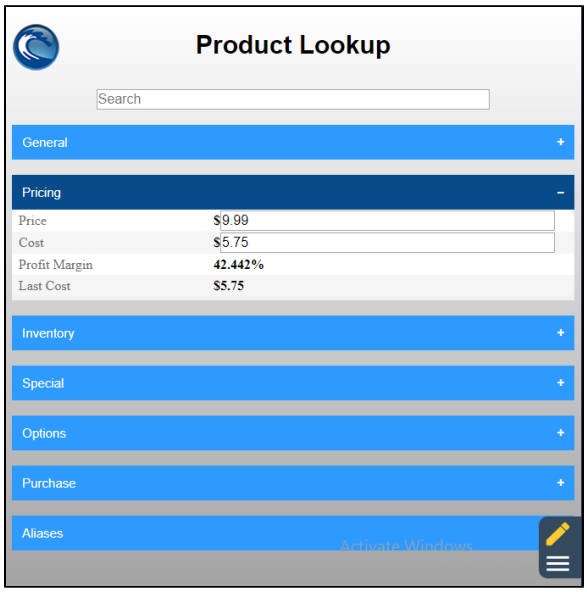
Manager clicks on the Menu button at the bottom right corner of the screen and then clicks on the Binoculars button.



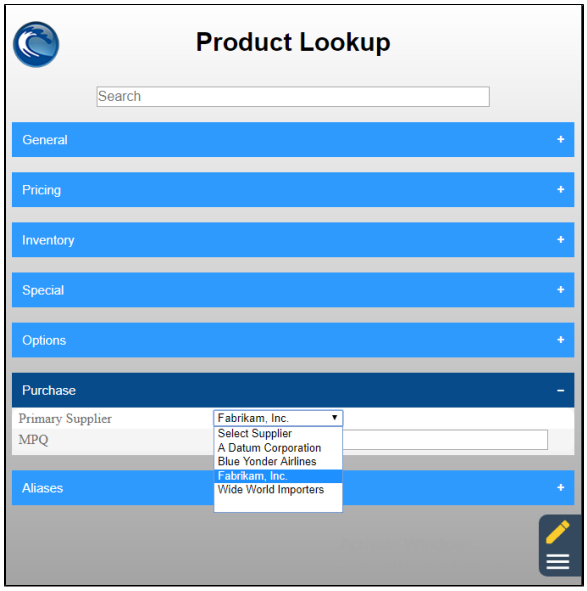
Once at the Product Lookup page the manager enters an item lookup code or alias into the Search field at the top of the window.



To change the Cost of the item the Manager expands the Pricing tab and clicks on the Pencil icon at the bottom right of the screen. Now the Manager is able to enter the new Cost. To finalize the change the Manager clicks on the Pencil button a second time.

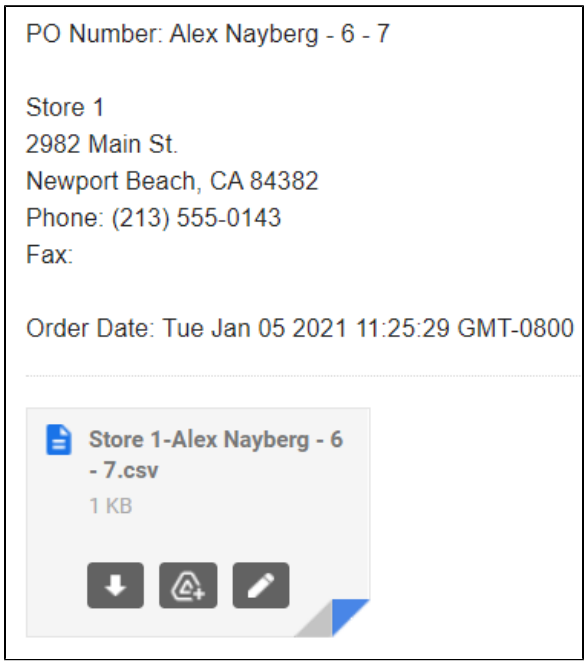


To change the Supplier of the item the Manager expands the Purchase tab and clicks on the Pencil icon at the bottom right of the screen. Now the Manager is able to enter the new Supplier. To finalize the change the Manager clicks on the Pencil button a second time.


Product Lookup
Search
General
Pricing
Inventory
Special
Options
Purchase
Primary Supplier
Fabrikam, Inc.
MPQ
Select Supplier
A Datum Corporation
Blue Yonder Airlines
Fabrikam, Inc.
Wide World Importers
Aliases

Editing the Purchase Order CSV file sent to a Supplier

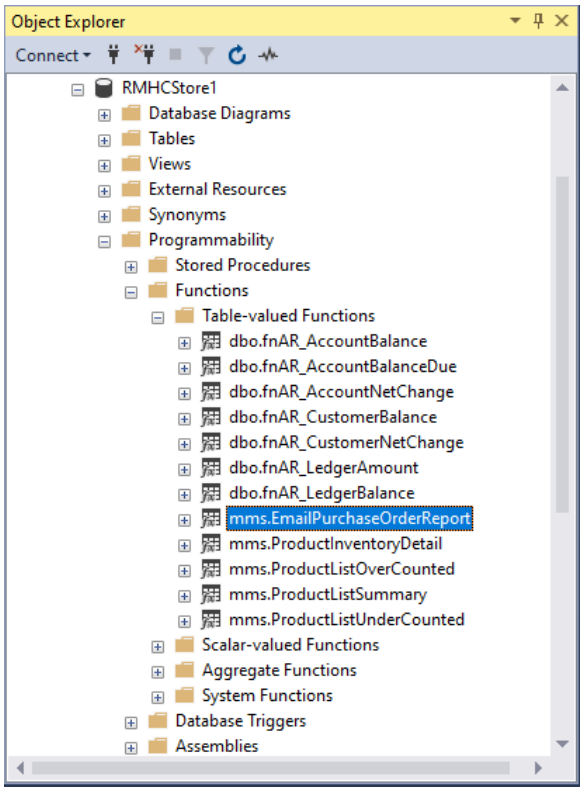
MS can be configured to send an email to a supplier when a Purchase Order is submitted. The email contains a CSV attachment and you have the ability to adjust what information is contained in that CSV file.



Removing information from the generated CSV file:

First launch **Microsoft SQL Server Management Studio**. Locate your store database under the **Object Explorer** and click the plus symbol to expand the list of options. Next expand **Programmability** and then expand **Functions** as well.

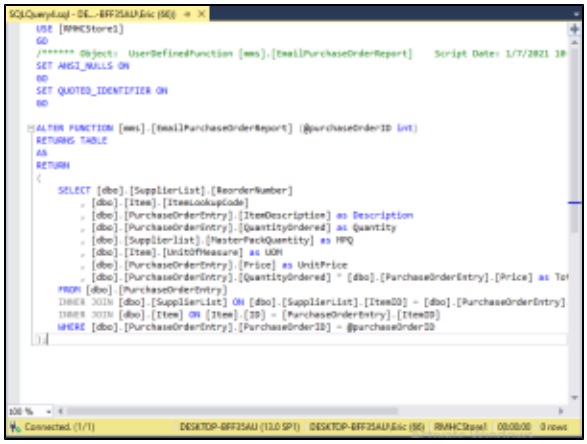
Right click on **[mms].[GeneratePurchaseOrderReport]** and choose **Modify**.



Lets say you wanted to remove the Master Pack Quantity from the resulting CSV file.

Remove the line "**, [dbo].[SupplierList].[MasterPackQuantity] as MPQ** " from the query window. Then click the **Execute** button above the Object Explorer.

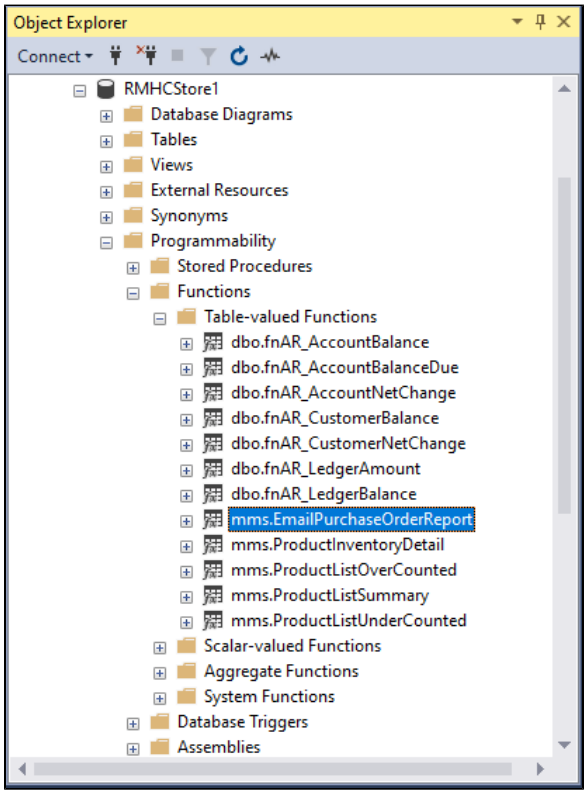
The next time a Purchase Order email is sent to the Supplier it will not include the Master Pack Quantity.



Adding information from the generated CSV file:

First launch **Microsoft SQL Server Management Studio**. Locate your store database under the **Object Explorer** and click the plus symbol to expand the list of options. Next expand **Programmability** and then expand **Functions** as well.

Right click on **[mms].[GeneratePurchaseOrderReport]** and choose **Modify**.



Code:

Add Tax and Discount

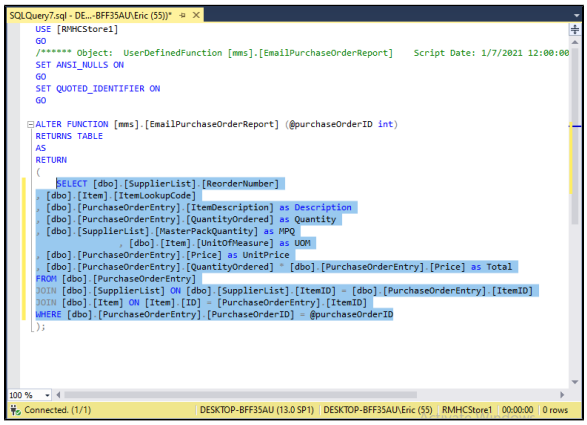
```
SELECT [dbo].[SupplierList].[ReorderNumber]
        , [dbo].[Item].[ItemLookupCode]
        , [dbo].[PurchaseOrderEntry].
[ItemDescription] as Description
        , [dbo].[PurchaseOrderEntry].
[QuantityOrdered] as Quantity
        , [dbo].[SupplierList].
[MasterPackQuantity] as MPQ
        , [dbo].[Item].[UnitOfMeasure] as UOM
        , [dbo].[PurchaseOrderEntry].[Price] as
UnitPrice
        , ([dbo].[POD_OrderEntry].[LineDiscRate] *
100) AS 'Discount %'
        , ([dbo].[PurchaseOrderEntry].
[QuantityOrdered] * ([dbo].[PurchaseOrderEntry].
[Price] - ([dbo].[PurchaseOrderEntry].[Price] *
[dbo].[POD_OrderEntry].[LineDiscRate]))) as Total
```

If you wanted to include information such as "**Discount %" and "Tax Info**" you could do the following:

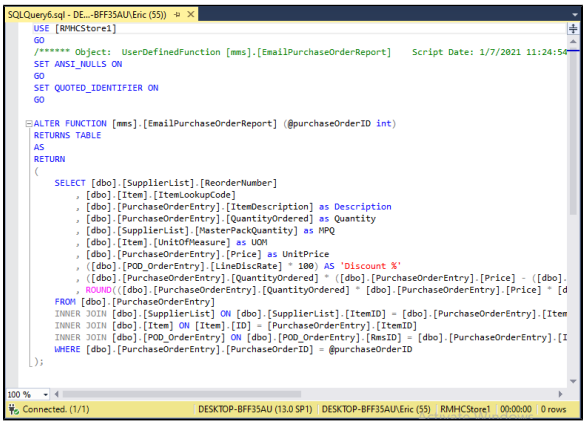
Copy the text in the code block on to the right:

```
        , ROUND(([dbo].[PurchaseOrderEntry].
[QuantityOrdered] * [dbo].[PurchaseOrderEntry].
[Price] * [dbo].[POD_OrderEntry].[TaxRate]),2) AS
Tax
    FROM [dbo].[PurchaseOrderEntry]
    INNER JOIN [dbo].[SupplierList] ON [dbo].
[SupplierList].[ItemID] = [dbo].
[PurchaseOrderEntry].[ItemID]
    INNER JOIN [dbo].[Item] ON [Item].[ID] =
[PurchaseOrderEntry].[ItemID]
    INNER JOIN [dbo].[POD_OrderEntry] ON [dbo].
[POD_OrderEntry].[RmsID] = [dbo].
[PurchaseOrderEntry].[ID]
    WHERE [dbo].[PurchaseOrderEntry].
[PurchaseOrderID] = @purchaseOrderID
```

Next **highlight** only the portion of the query window you are going to replace. This is what you see between the two parentheses on the example below:



Now you can **paste** the text from the code block into the query window. It should only replace the part of the window that was highlighted. See the example below:



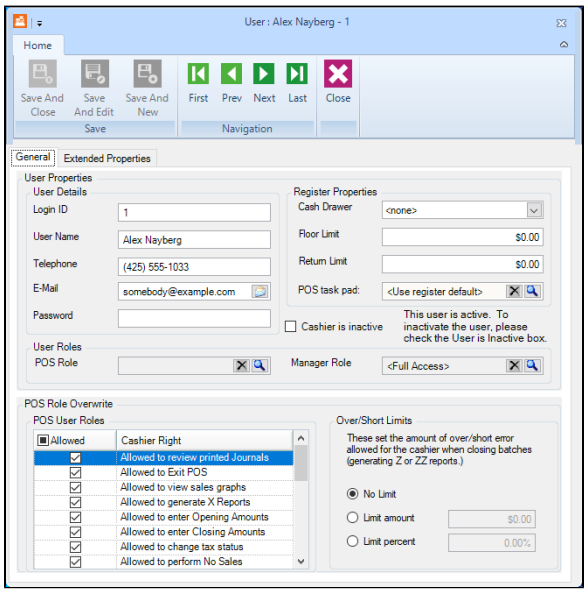
Now click the **Execute** button above the Object Explorer.

The next time a Purchase Order email is sent to the Supplier it will include "**Discount %" and "Tax Info**".

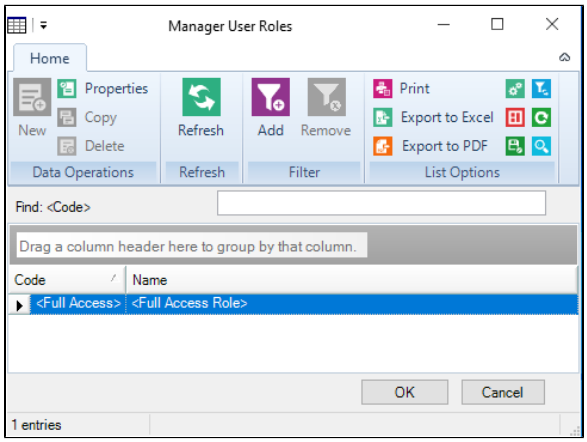
Employee needs manager rights in RMH to access the Administrator options in MS

Employee needs manager rights in RMH to access the Administrator options in MS.

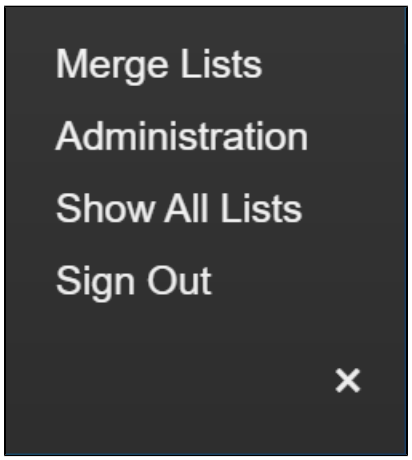
The ability to access the Administration options in MS depend on whether the user has the proper Manager Role configured in RMH Manager. By default RMH will have a Manager Role called <Full Access> but other Manager Roles may be configured at your store. To select a Manager Role click on the magnifying glass to the right of Manager Role.



In the Manager Role window select the Manager Role you wish to assign to the user account. Press OK.

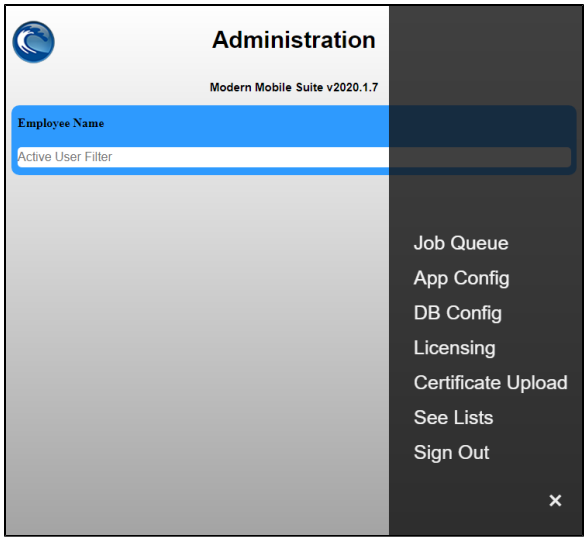


When the user logs into MS and clicks on the Menu button at the lower right corner of the window they will now see Administration as an option.



After clicking on the Administration option several sub-options will appear including:

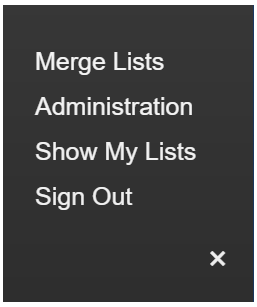
- Job Queue
- App Config
- DB Config
- Licensing
- Certificate Upload



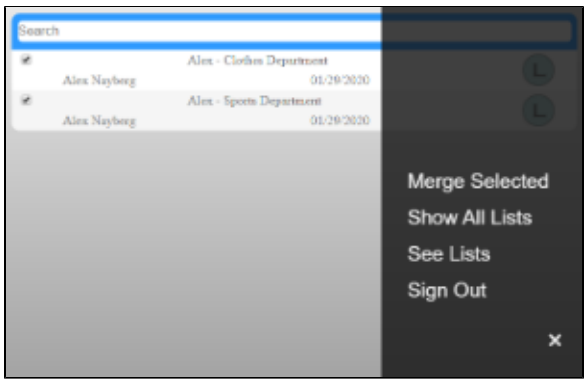
Inventory Count requires merging of multiple lists from different counters

Supervisor wants to merge two lists and then complete them as an inventory count.

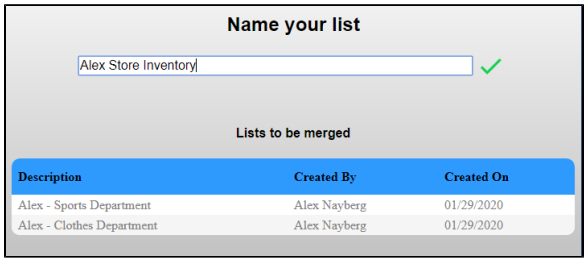
Having completed two lists, Alex would like to merge both lists into one. He clicks on the Menu button and selects the option Merge Lists.



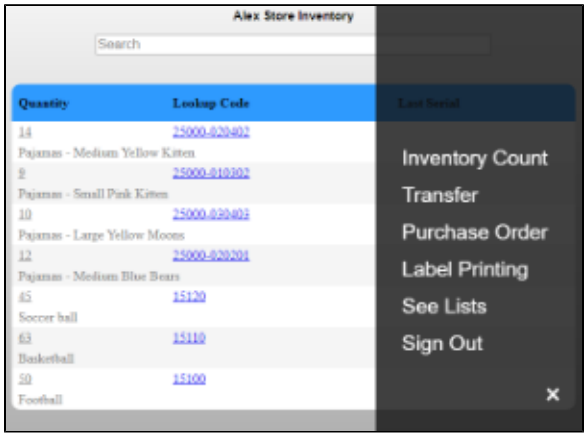
Next Alex places a check mark next to the lists he would like to combine. Then he clicks Menu and selects Merge Selected.



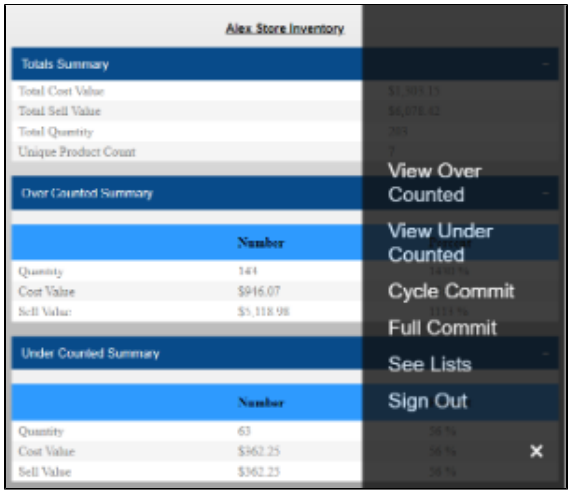
Alex assigns a new name to the merged list.



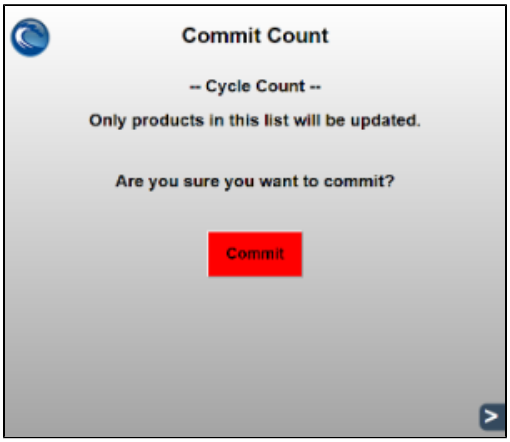
Now that the list has been merged Alex clicks on the Menu button and selects Inventory Count.



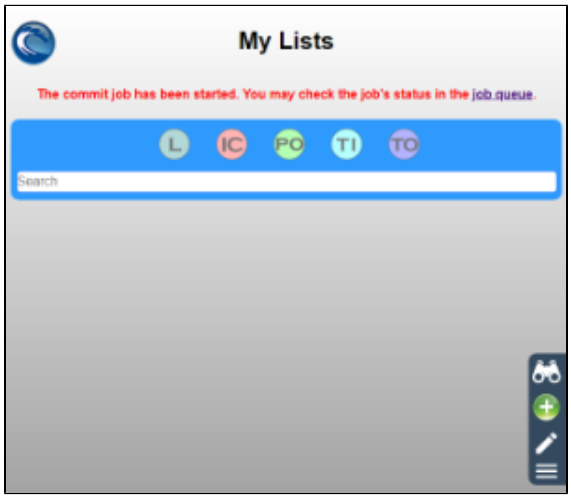
Alex reviews the Inventory Count Summary information. Because Alex wants to complete a Cycle Count, he selects Cycle Commit from the Menu.



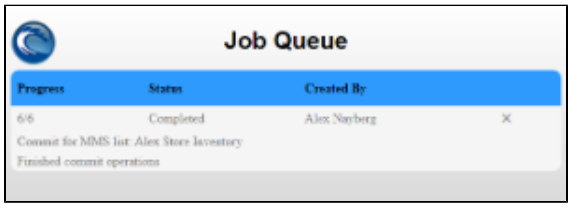
Modern Suite warns Alex that items in this list will be updated in the store database. Alex presses Commit to continue.



Modern Suite returns to the My Lists window. Alex can see the notification at the top of the window suggesting he view the status of the job he just committed. Alex clicks on the Job Queue button.

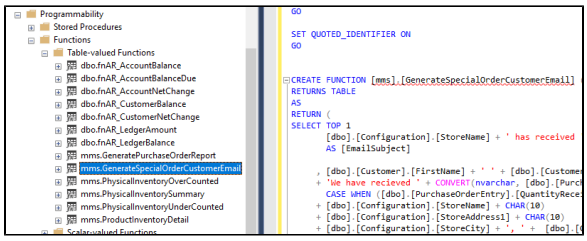


In the Job Queue window Alex is able to see that his inventory count job has already completed successfully.



Modifying Special Order Tracker Customer Notification Emails

The generated customer email comes from a new MS SQL function called "Generate Special Order Customer Email". This function can be modified. To the right is a screenshot example when viewed from Microsoft SQL Server Management Studio:



The default email is as follows:

Email Subject:
(Store Name) has received (Item Description) from your special order

Email Body:
(Customer First Name) (Customer Last Name),

We have received (Quantity Received) out of (Quantity Ordered) (Item Description) and is/are now ready for pickup!

(StoreName)
(Store Address)
(Store City)
(Store Phone)
(Store Email)

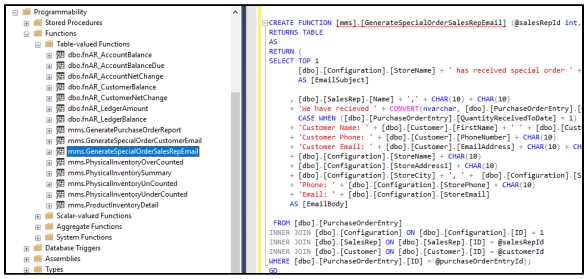
The statement before AS [EmailSubject] will be what is returned in the Email Subject to the customer, and the statement before AS [EmailBody] will be what is returned in the Email Body to the customer.

The purchase order entry id is the id associated with that special order item. The customer id is the id of the customer associated with the special order.

If you do modify this function make sure that alias [EmailSubject] and [EmailBody] are text values.

Modifying Special Order Tracker Sales Rep Emails

The generated Sales Rep email comes from a new MS SQL function called "Generate Special Order Sales Rep Email". This function can be modified. To the right is a screenshot example when viewed from Microsoft SQL Server Management Studio:



The default email is as follows:

Email Subject:
(Store Name) has received (Item Description) from your special order

Email Body:
(Sales Rep Value),

We have received (Quantity Received) out of (Quantity Ordered) (Item Description) and is/are now ready for pickup!

(Customer Name)
(Customer Phone)
(Customer Email)

(StoreName)
(Store Address)
(Store City)
(Store Phone)
(Store Email)

The statement before AS [EmailSubject] will be what is returned in the Email Subject to the customer, and the statement before AS [EmailBody] will be what is returned in the Email Body to the customer.

The purchase order entry id is the id associated with that special order item. The customer id is the id of the customer associated with the special order.

If you do modify this function make sure that alias [EmailSubject] and [EmailBody] are text values.

Modify label template to use international currency symbols

Modern Suite label templates can be modified to use international currency symbols such as a British Pound or a Euro. Label templates used in Modern Suite use Zebra ZPL language. The ZPL code uses the US dollar symbol by default. In the following example we will modify a template to be used with the Euro.

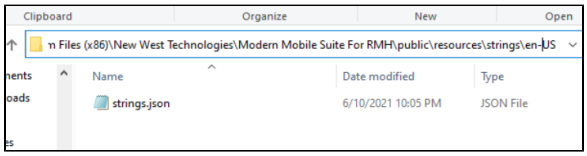
NOTE: International characters are supported in .zpl using their own codeset (CI27).
The characters in this codset are reference by a 2-digit hexadecimal value.
The customer MUST include an underscore in front of the 2-digit hexadecimal value.
ex: "_a3" is the British Pound (£).

The full list of international characters can be found here: (page 1401-1402) https://www.zebra.com/content/dam/zebra/manuals/printers/common/programming/zpl-zbi2-pm-en.pdf

Step #1

Locate file **strings.json** in directory: Program Files (x86) > NWT > MMS for RMH > publc > resources > strings > en-US

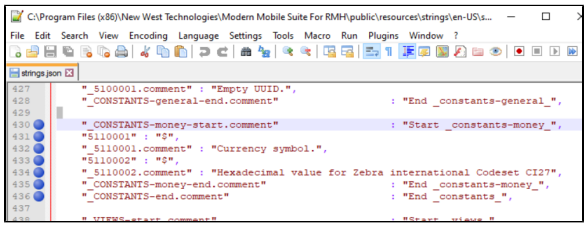
Open this file using Notepad or Notepad++ with **Admin rights** because you will be editing this file.



Step #2

From Notepad or Notepad++, scroll down and locate the following paragraph:

- json Key for browser value: **"5110001"**
  The default value = "$"
- json Key for label value: **"5110002"**
  The default value = "$"

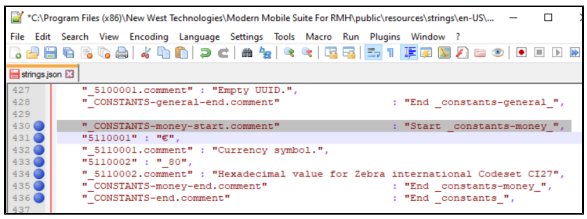


Step #3

Now change the **$** next to "5110001" to: **"€"**

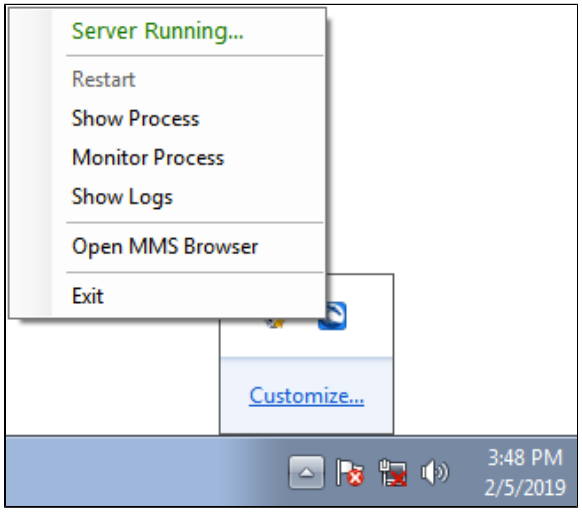
Next, change the **$** next to "5110002" to: **"_80"**

You can see an example of the modified file to the right. Click **Save** in Notepad/++.



Step #4

Save and Restart the MMS service from the (windows) taskbar select "**st op**" then "**restart**" and the string values will update.

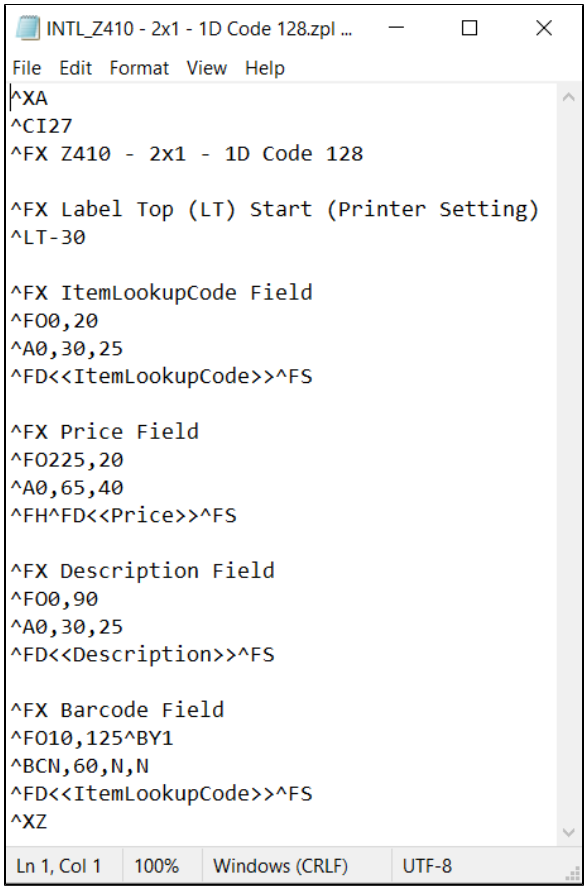


Step #5

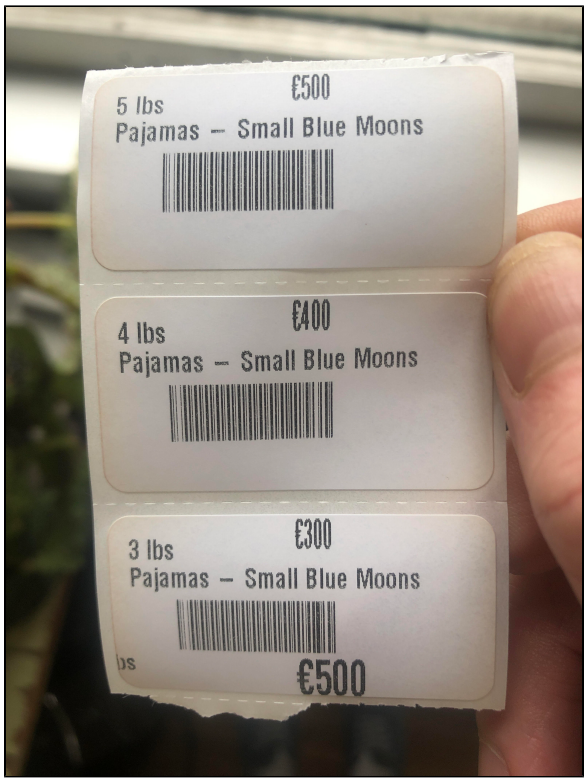
Modify your label template:

- include ^CI27 on line 2 of the label template
- include ^FH before ^FD wherever an international character is used.
  In this case, ^FH should appear before field data (^FD) for all PRICE fields

To the right is an example of a modified template:

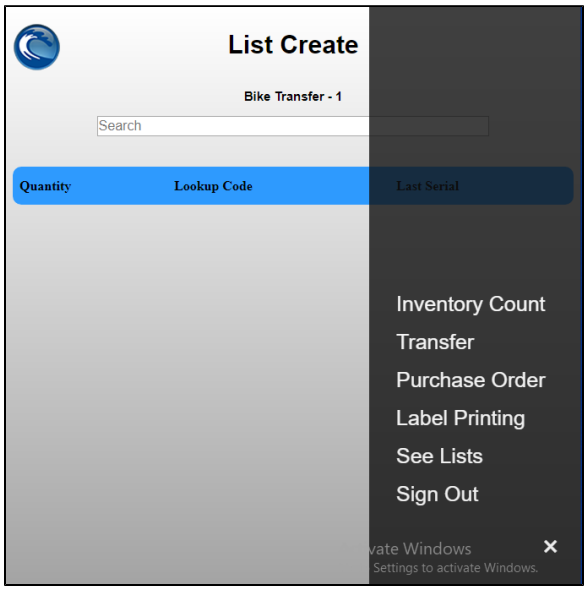


Here is an example of what the printed label would look like:

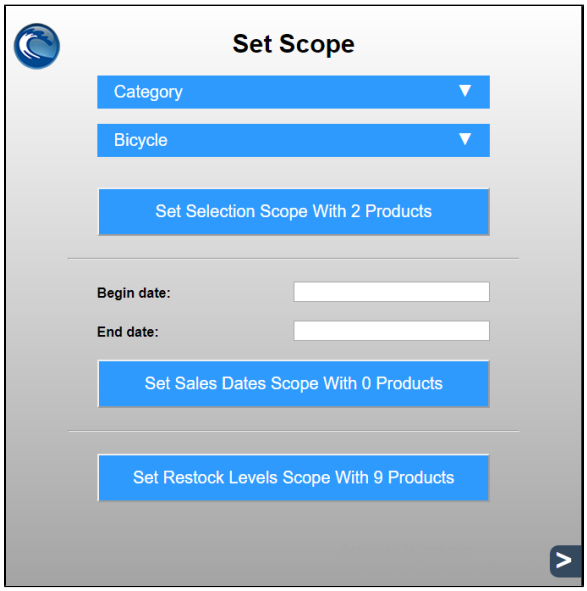


Selecting a Scope for Inter-Store Transfer

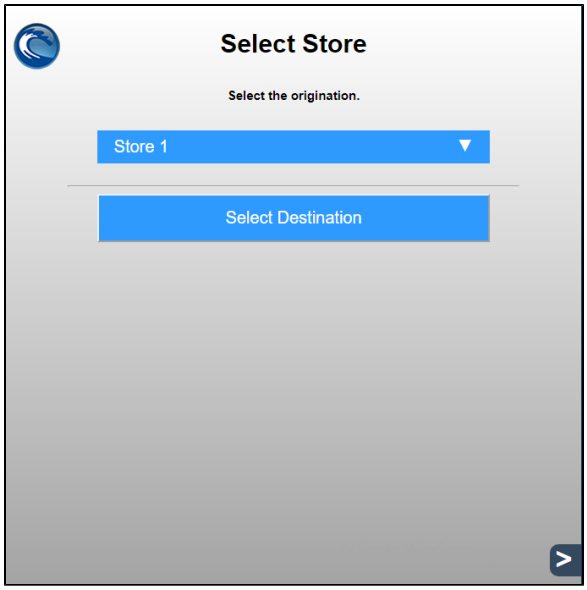
A manager would create a new list and then click on the Menu button at the bottom right of the screen and select the option Transfer.



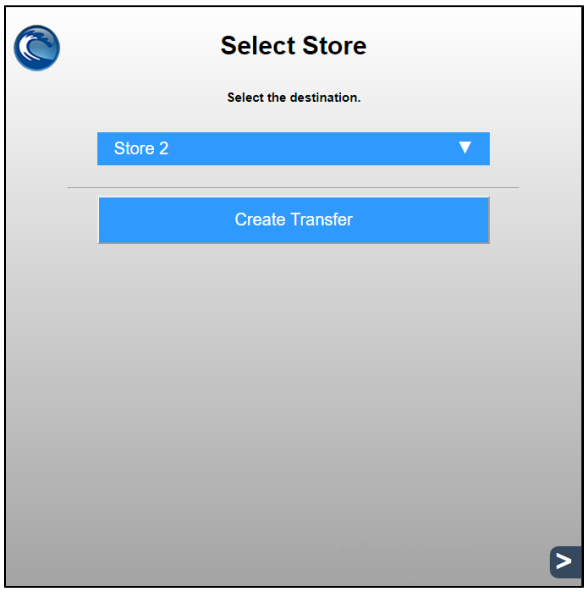
Because no items had been added to the list yet the next screen allows the manager to Set Scope. From the Scoping Options drop down menu the manager would select Category. Then in the drop down menu below that the manager would select Bicycle as the category. Finally, they would click on the Set Selection Scope button.



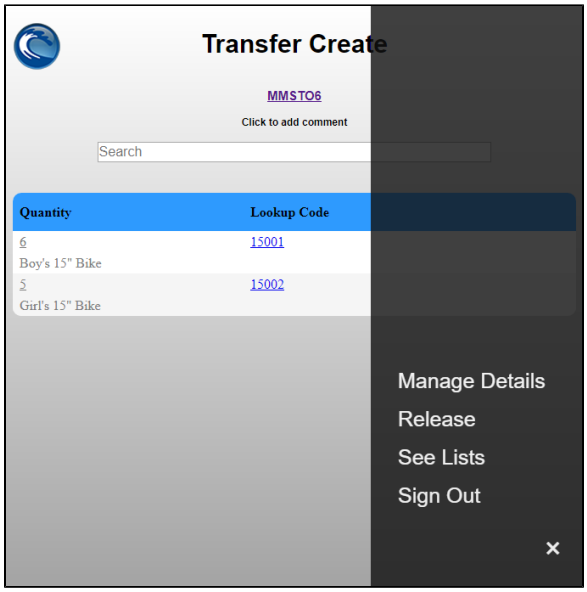
Now the manager would need to select the store to be transferred from. They would choose the store from the drop down menu and click Select Destination.



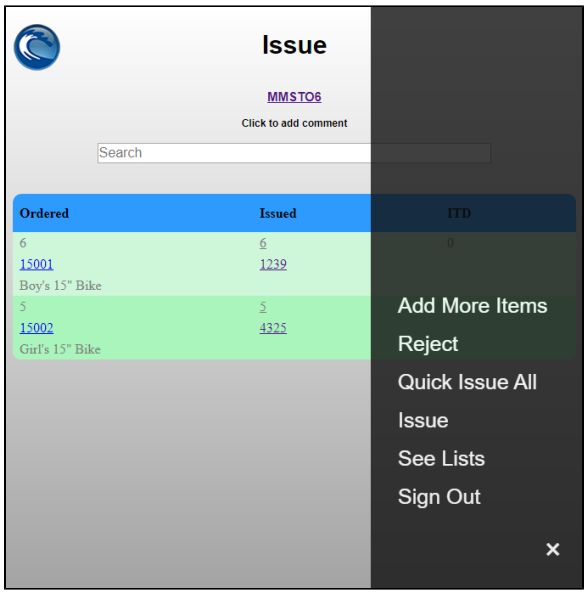
Here the manager would choose the destination store in the drop down list and then click on Create Transfer.



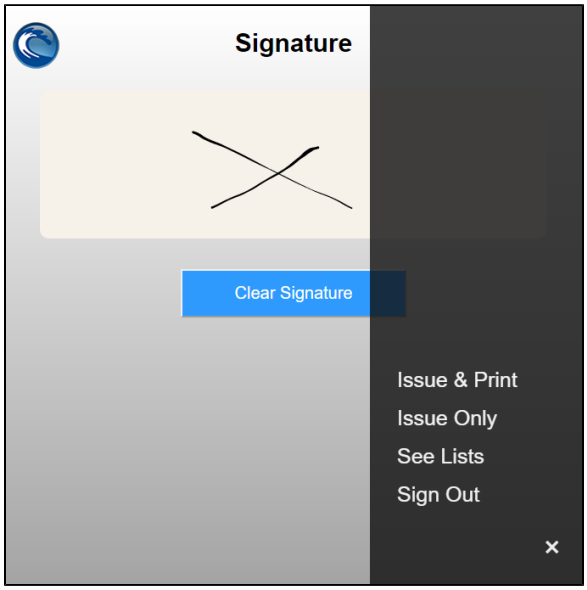
In the Transfer Create window the manager would enter the quantity of each item to be transferred, then click on the Menu button and choose Release.



In the Issue window the manager would enter the quantity of the items being issued. Then they would click on the Menu button and select Issue.



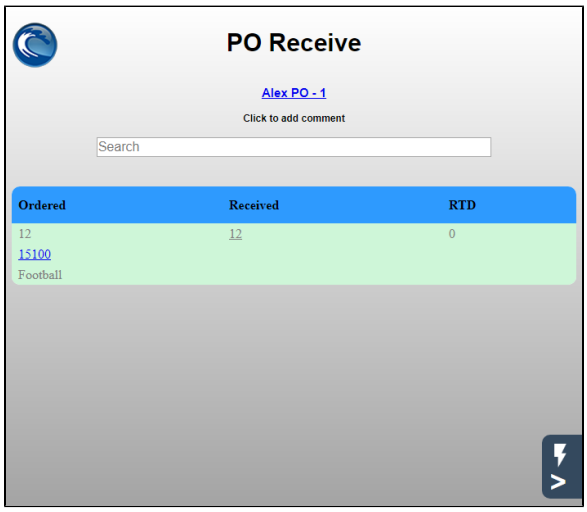
Finally if the Require Signatures for Transfers option is enabled in the MS Administration then the manager would be prompted to sign and choose Issue from the menu.



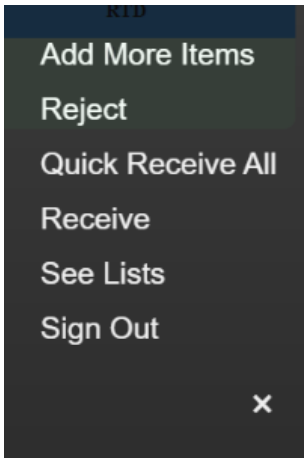
Supplier sends extra inventory for a purchase order

A store opens a shipment from a supplier and finds additional items that were not on the Purchase Order. The manager adjusts the existing Purchase Order to reflect the additional items. At the end of the Purchase Order process the manager prints labels for the items.

Alex receives a shipment from one of his suppliers. The box contains 12 footballs which matches the Purchase Order.



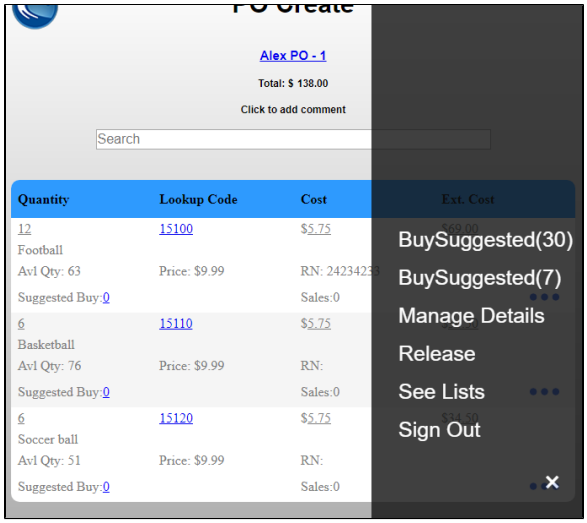
Because 6 basketballs and 6 soccer balls were also in the box Alex clicks on the Menu button and selects Add More Items.



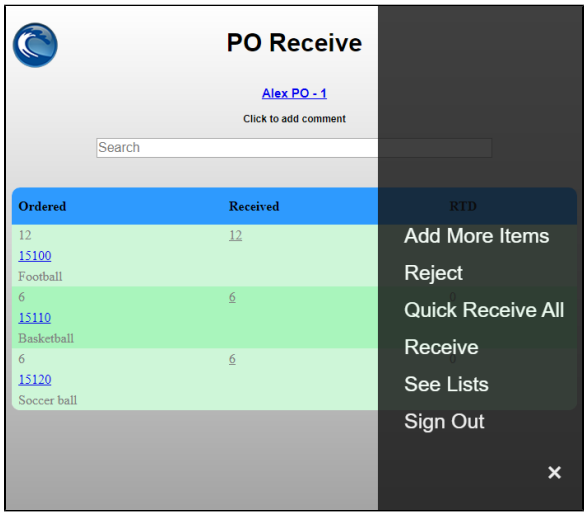
Next Alex adds the item look up numbers and assigns the quantities.



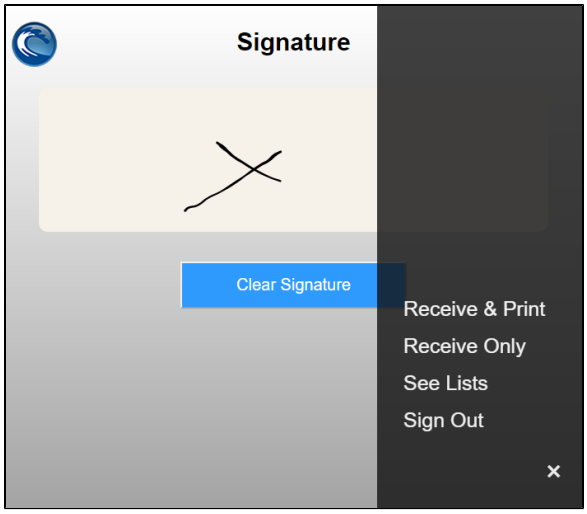
After the basketballs and soccer balls are added Alex clicks on the Menu button and selects Release so that this modified Purchase Order can be Received once more.



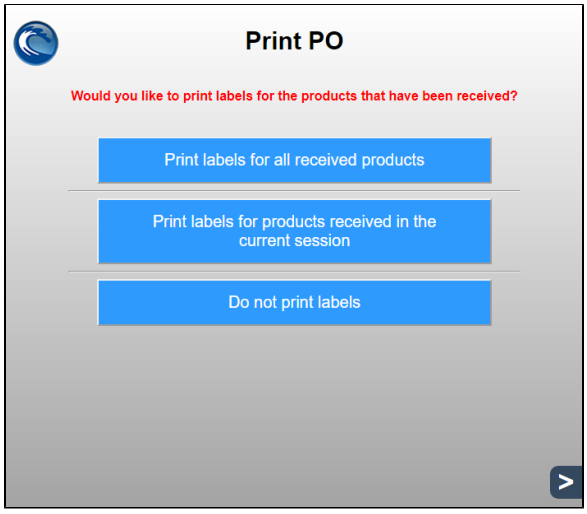
Alex enters the quantities received for the basketballs and soccer balls and then clicks on Menu and selects Receive.



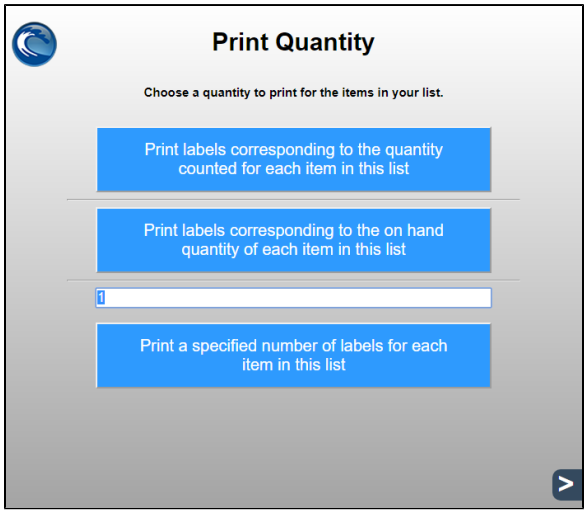
Alex signs to complete the Purchase Order process. He also would like to print labels for the items he received so he clicks on Menu and selects Receive and Print.



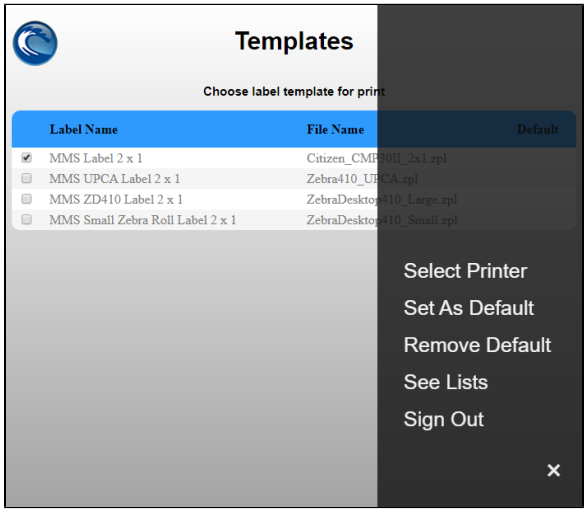
Alex wants to print labels for all the items he received in this Purchase Order so he clicks on 'Print labels for all received products'.



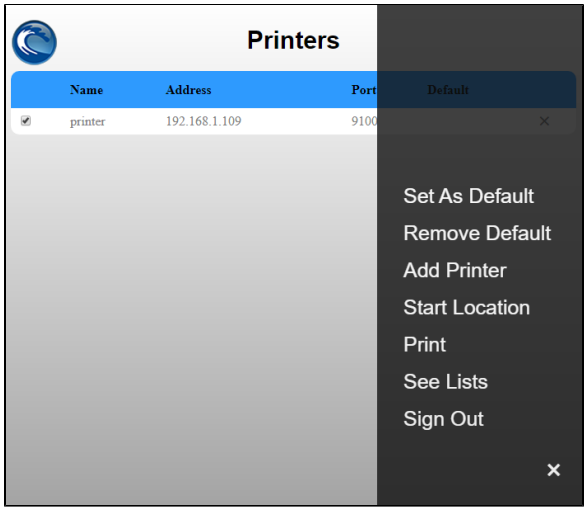
Next Alex clicks on the option 'Print labels corresponding to the quantity counted for each item in the list' so he is sure to have a matching number of labels per items received in the Purchase Order.



Alex places a check mark next to the label template he would like to use and then clicks on Menu and chooses Select Printer.

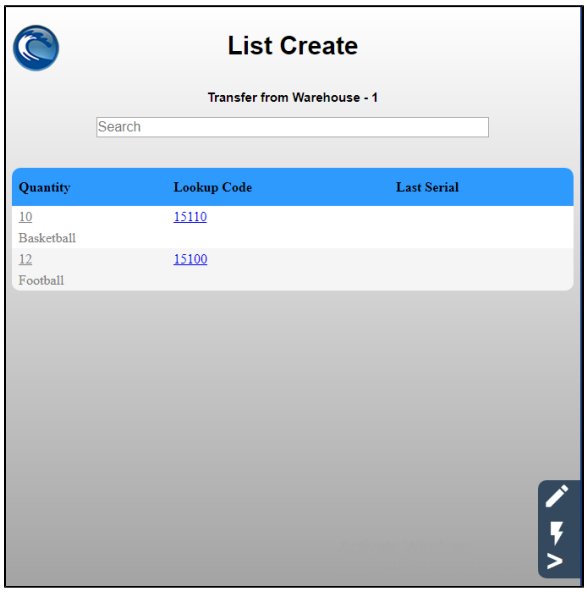


Now Alex is able to place a check mark next to the printer he would like to use. He clicks on the Menu button once more and selects Print to start the printing process.

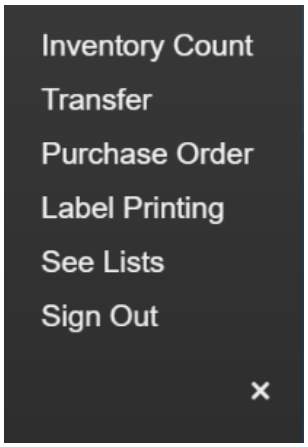

Printers
Name
Address
Port
Default
printer
192.168.1.109
9100
Set As Default
Remove Default
Add Printer
Start Location
Print
See Lists
Sign Out

Transfer in from a Warehouse (non-store)

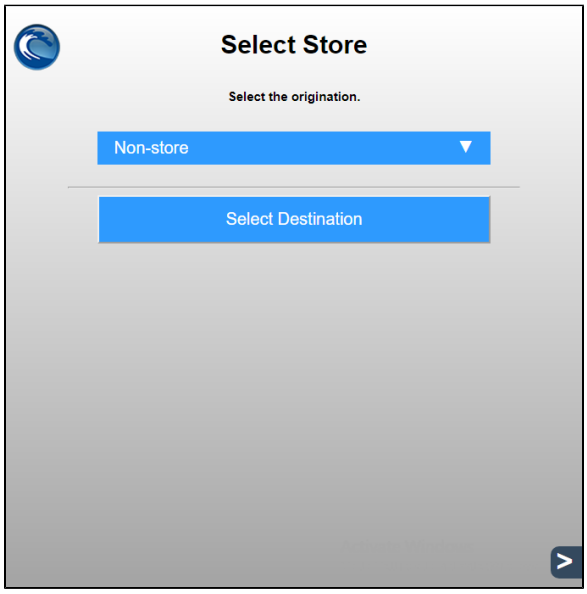
An employee creates a list based on the items the store just received from the warehouse. If the user does not have manager rights then a manager logs into MS, selects the same list and then clicks on the Menu button at the bottom right of the window.



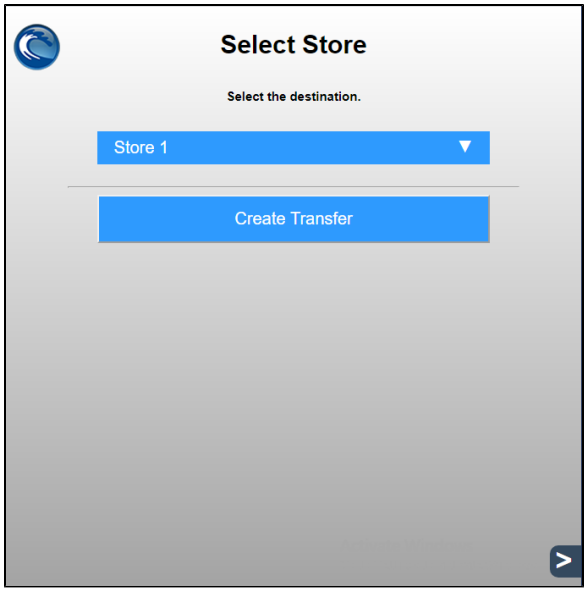
Next the manager clicks on the Transfer option from the Menu.



From the drop down menu the manager selects Non-Store because in this case the warehouse isn't considered an actual store in the point of sale software. Then the manager clicks on Select Destination.



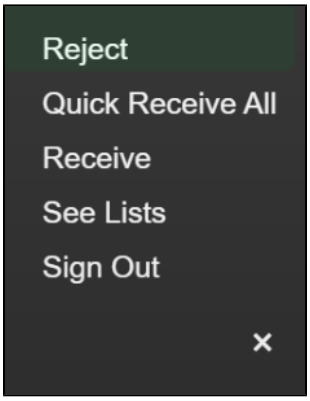
The manager selects the receiving store from the drop down menu and then clicks on Create Transfer.



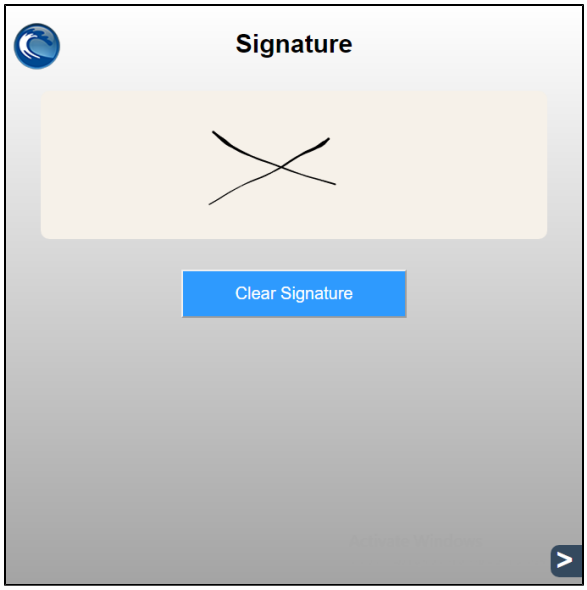
In the Receive window the manager enters in the quantity received fro each of the items. Next they click on the Menu button at the bottom right of the screen.



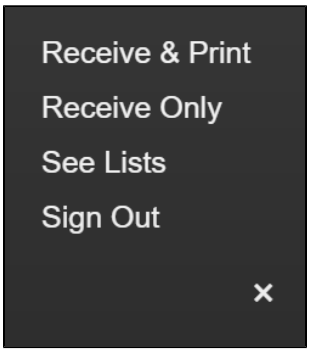
In the menu they click on Receive to continue.



If the option to require signatures is enabled then at this point the manager will be prompted to sign at the end of the Transfer process.



Finally, the manager can now choose whether to print labels for the new items or else choose Receive Only to close out the transfer.



Contact Information



Tailscale VPN

While using Modern Suite you may find the need for a VPN software and one such option is Tailscale. VPN (Virtual Private Network) software allows a computer or device to access a computer that is on a separate local area network safely and securely. Below is a quick guide on installing and using the software.

Please note: This software is NOT required to use Modern Suite.

For pricing and subscription information please visit:

https://tailscale.com/pricing/

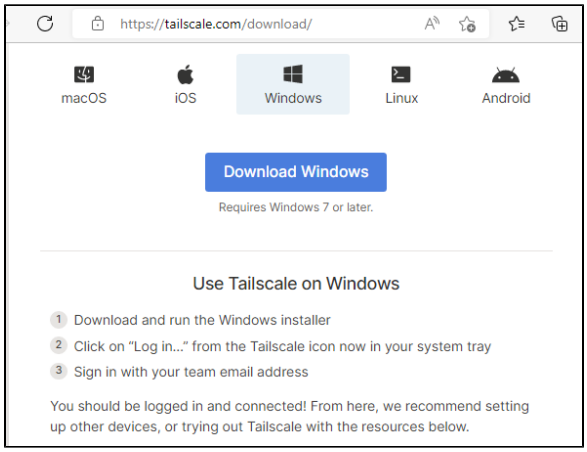
Download:

Windows:

Navigate to the Tailscale website: https://tailscale.com/download/

Here you will find options for downloading the installers for different platforms including Windows, MacOS, Android and IOS.

The Android and IOS versions of Tailscale can be downloaded in their respective app stores. You can also scan the provided QR codes below to take you to the app store download link from your mobile device.



Android:

Scan the QR code or use the link below to download Tailscale for Android.

Download Tailscale for Android

Requires Android 6 or later.

Apple IOS:

Scan the QR code or use the link below to download Tailscale for iOS.

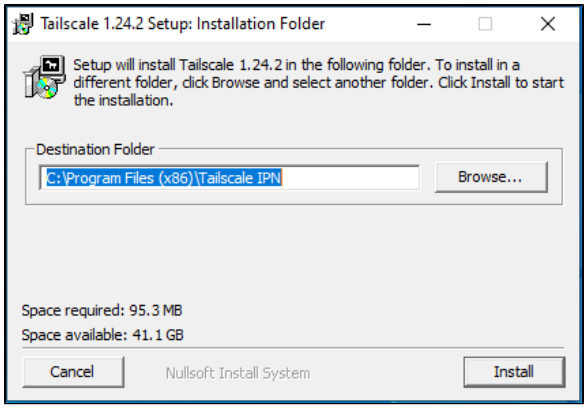
Download Tailscale for iOS

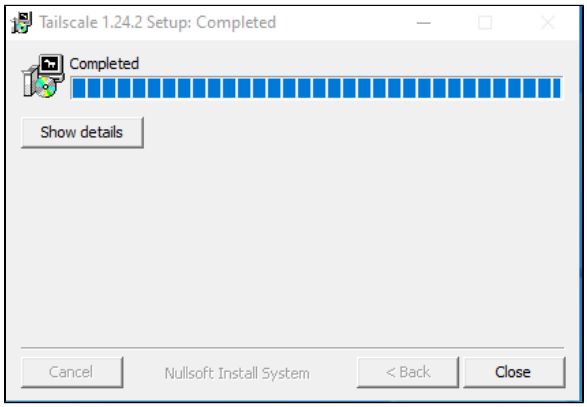
Requires iOS 12 or later.

Windows Installation:

After downloading the Tailscale installer, right click on it and run as Administrator.

Select the installation folder you wish and click Install.

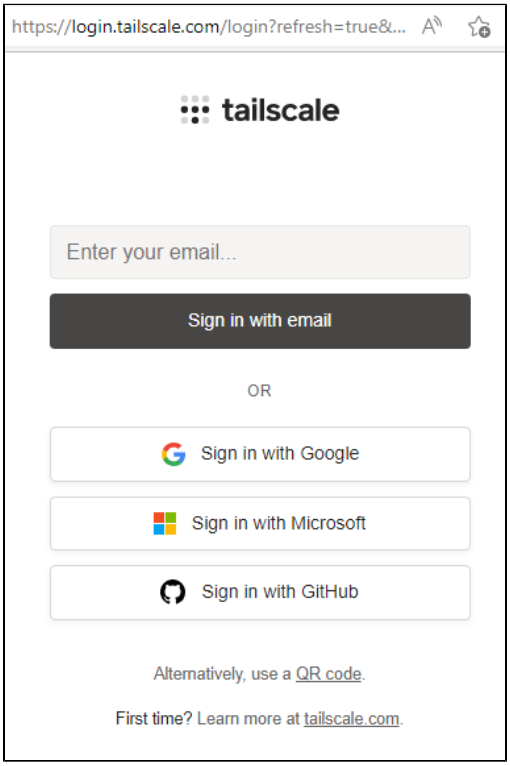




With the installation completed, click on Close.

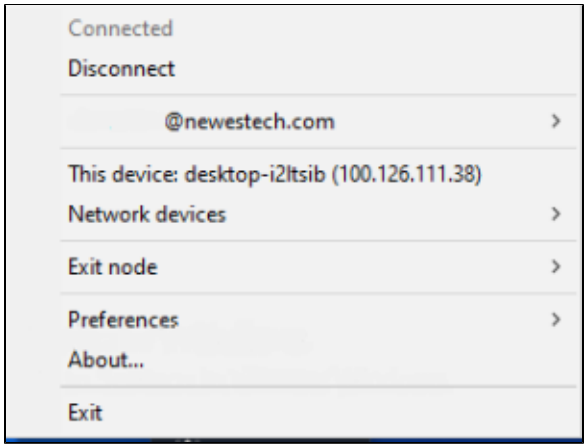
From the Tailscale icon in your Windows task tray, you will find an option to log into Tailscale.

If you have a subscription plan for Tailscale then please use the email address associated with your subscription plan.



Now right click again on the task tray icon and you will see additional options. Locate the email address you logged in with and click on it.

Now you will see the option called: **Admin Console**

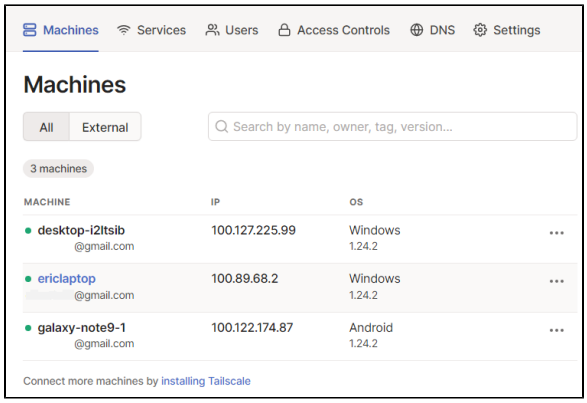


Admin Console:

Machines Tab:

Here you can see all of the different computers/devices that you have installed Tailscale on and logged into using the same account email address. The Tailscale software must be installed on every computer /device that you wish to have access to in the VPN/mesh network. (Tailscale calls this 'Tailnet').

You can see in this example that each of the computers/devices in this list now have a new VPN IP address assigned to them. This IP scheme is used when the computer/devices communicate with each other.

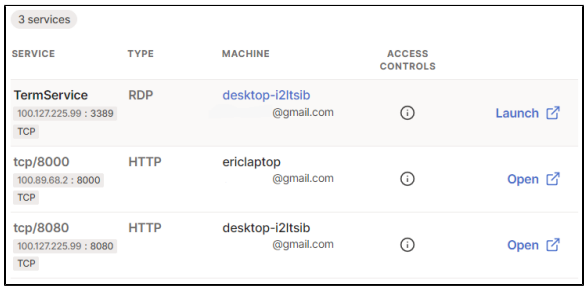


Next, click on the **Services Tab** at the top of the window.

Services Tab:

Here you can see what services each computer/device has available. In the example to the right, you can see a Windows computer that has a RDP service available. It also shows the IP address and port number assigned to the computer.

If you do not see a RDP service listed for your computer then you may need to enable RDP on Windows first. You also will need to ensure a password has been assigned for the Windows User account before a successful RDP connection can be established.



Managed Accounts:

Depending on the subscription tier your company is paying for, there are a limited number of licensed seats for people to log into Tailscale and have their computer/devices listed as being available for remote connection.

Sending invites for Unmanaged Accounts:

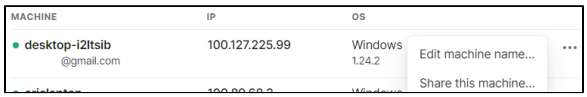
Start by navigating to the Machines tab in the Admin Consol. Locate the computer/device of your choice. Then click on the menu button to the right and choose 'Share this machine'.

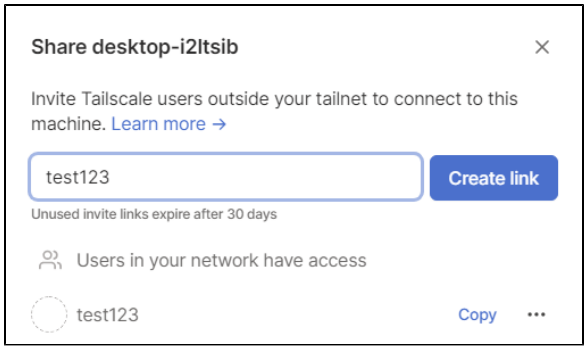
In the share window that appears, enter name for the link and then click on the 'Create link' button. Now you will see all of the links you have created below that.

Click on the Copy button to copy the link URL information. From here you can paste it into an email or text message and send it to the recipient.

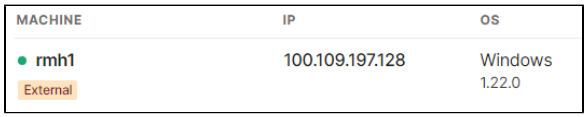
Unmanaged Accounts:

Tailscale allows you to send invites to associates which will allow them to remotely connect to a computer/device without taking up one of the licensed seats. The main difference being that these people will not see their own computer/device listed as being available for others to remotely connect to. These unmanaged accounts will not take up license seats but are for guest connections only.





On the right is a screenshot of what you see when an unmanaged account machine has been added in your Admin Console. Note that you can remove this machine but are unable to edit or share this connection to anyone else.



RDP Example:

On the right is a screenshot from an Android phone showing an active RDP connection that was established using the Tailscale VPN connection.

