

Modern Mobile Suite

User Guide

Modern Mobile Suite User Guide

1. User Guide 4
1.1 Welcome 5
1.2 Requirements 6
1.3 Pre-Installation Check List 7
1.4 Installation Directions For RMH 8
1.4.1 Installing MS for RMH Steps 1-3 9
1.4.2 Installing MS for RMH Steps 4-6 10
1.5 Installation Directions For RMS 11
1.5.1 Installing MS for RMS Steps 1-3 12
1.5.2 Installing MS for RMS Steps 4-6 13
1.6 License Activation 14
1.7 CortexWedge Scanning Software 15
1.7.1 Installing on Apple IOS Device Steps 1-2 16
1.7.2 Installing on Apple IOS Device Step 3 18
1.7.3 Installing on Google Android Device Steps 1-2 20
1.7.4 Installing on Google Android Device Steps 3-4 22
1.7.5 Activation on Apple IOS Device 23
1.7.6 Activation on Google Android Device 25
1.7.7 Using CortexWedge Scanning Software 26
1.8 User Accounts 28
1.9 MS Process Manager 29
1.10 MS Client Functions 30
1.10.1 MS Menu 31
1.10.2 Administration 32
1.10.2.1 Job Queue 33
1.10.2.2 App Config 34
1.10.2.3 DB Config 36
1.10.2.4 License 37
1.10.2.5 Certificate Upload 38
1.10.3 Item Management 39
1.10.4 List Scope 41
1.10.5 Item Creation 44
1.10.6 Import File to List 46
1.10.7 Inventory Count (Stock Take) 48
1.10.7.1 Adding Items To A List 49
1.10.7.2 Starting The Commit Process 50
1.10.7.3 Over and Under Counted Entries 52
1.10.7.4 Cycle Commit 53
1.10.7.5 Full Commit 54
1.10.8 Label Printing 55
1.10.9 Purchase Order 58
1.10.10 Transfers 65
1.11 Use Cases 69
1.11.1 Adding a label template and assigning the printer 70
1.11.2 Editing the Purchase Order CSV file sent to a Supplier 74
1.11.3 Employee needs manager rights in RMH to access the Administrator options in MMS. 78
1.11.4 How to change the supplier and cost of an item 80
1.11.5 Inventory Count requires merging of multiple lists from different counters 82
1.11.6 Selecting a Scope for Inter-Store Transfer 85
1.11.7 Supplier sends extra inventory for a purchase order 88
1.11.8 Transfer in from a Warehouse (non-store) 92
1.12 Contact Information 95

User Guide

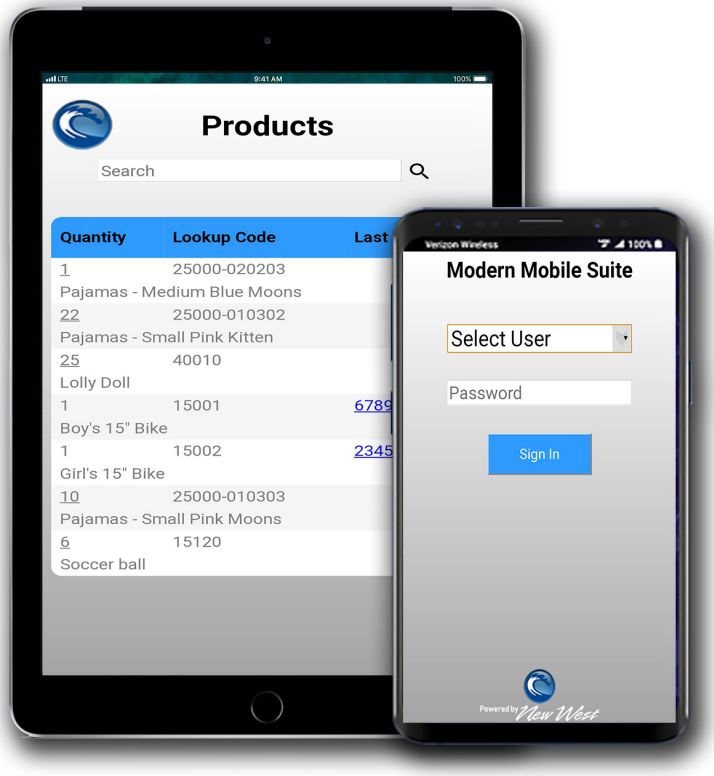


Modern Mobile Suite

User Guide

Welcome

Modern Suite is the newest mobile platform from New West Technologies, Inc. Built to interact with the Retail Management Hero (RMH) and Microsoft RMS environments, Modern Suite is device agnostic, easy to use, and feature packed, with additional modules planned in the roadmap! 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 7 (32-bit/64-bit) Windows 8 (32-bit/64-bit) Windows 8.1 (32-bit/64-bit) Windows 10 (64-bit)

Software

- Microsoft Retail Management System (v2.0.1000 and above) **or** Retail Management Hero (v3.0 and above).
- **Please note:** MMS is capable of interacting with RMS Headquarters or RMH Central but this is not required for base functionality of Modern Suite.
- Microsoft .NET Framework v4.5.1
- SQL 2008 R2 (Express) and above; SQL Browser service should be running.

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 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

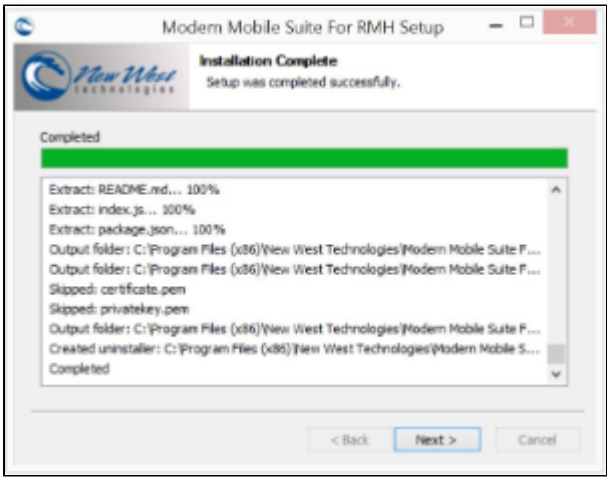
9) Are you running any other RMS or RMH Add-ins?

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

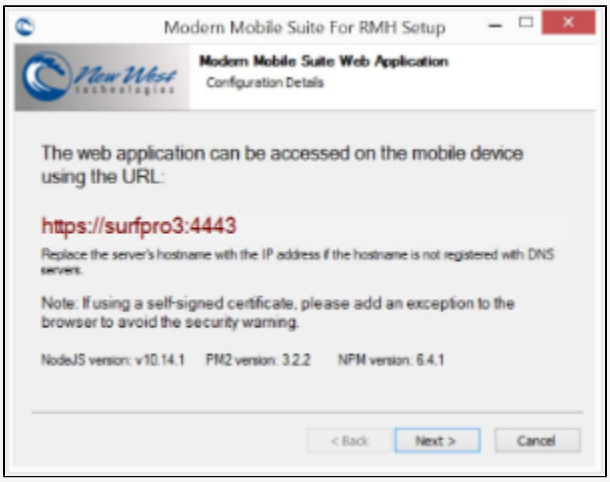
Installing MS for RMH Steps 1-3

Step #1 **Locate and open the installation program. Double- click the icon to begin 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.	

Installing MS for RMH Steps 4-6

Step #4

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



Step #5

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



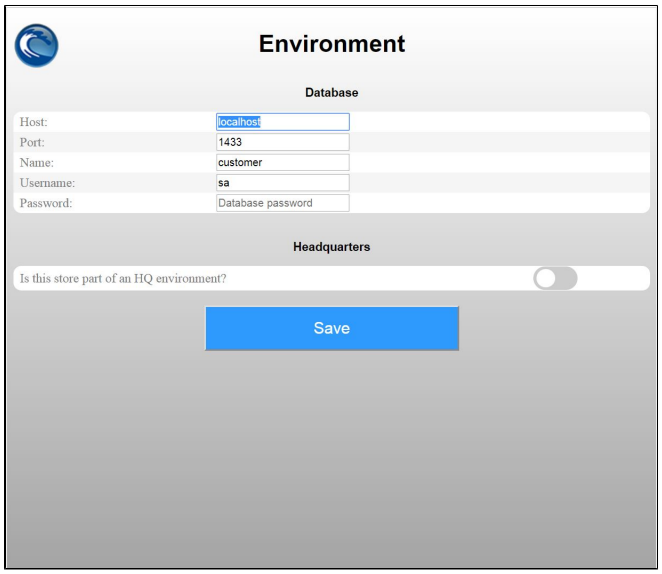
Step #6

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.

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

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

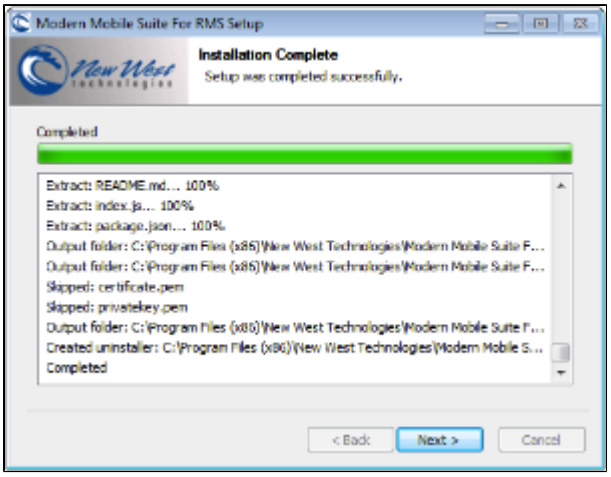


Installation Directions For RMS

The below steps will walk you through a successful installation.

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

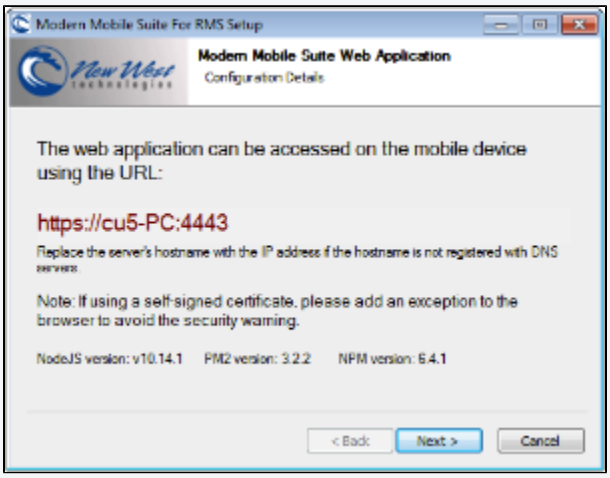
Installing MS for RMS Steps 1-3

Step #1 **Locate and open the installation program. Double- click the icon to begin 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.	

Installing MS for RMS Steps 4-6

Step #4

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



Step #5

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



Step #6

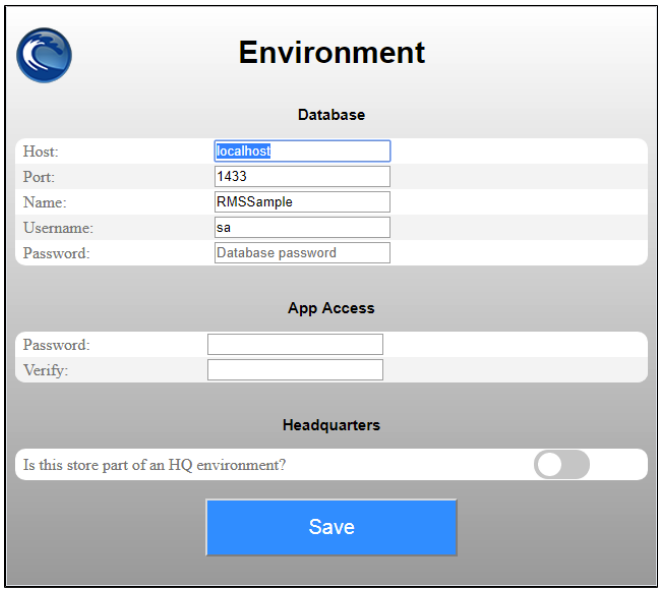
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- Port: The port number of the MS server software. In most cases you can leave "1433" in this field.
- Name: The name of the point of sale database.
- Username: The username used to log into the SQL Server.
- Password: The password for the username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

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



License Activation

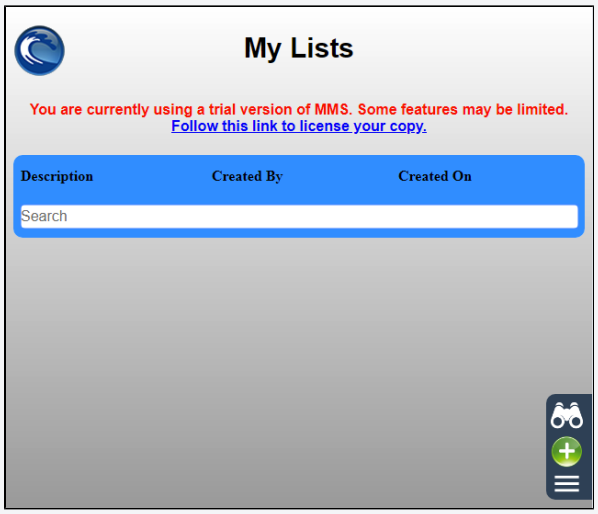
Step # 1:

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

Trial mode has a maximum of:

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

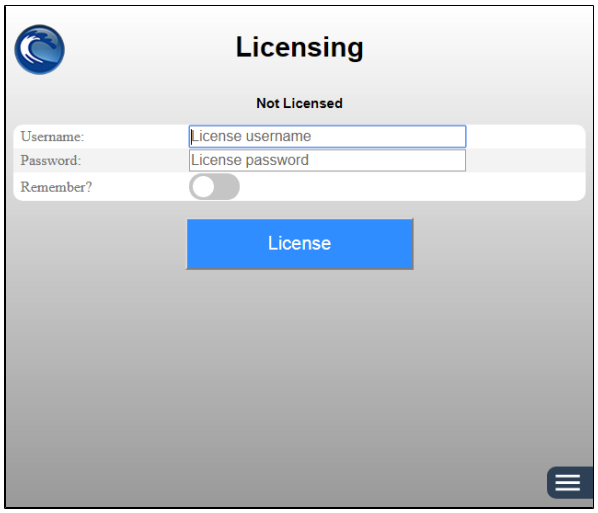
To activate and unlock all the features of Modern Suite click on the "Follow this link to license your copy" button.



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.

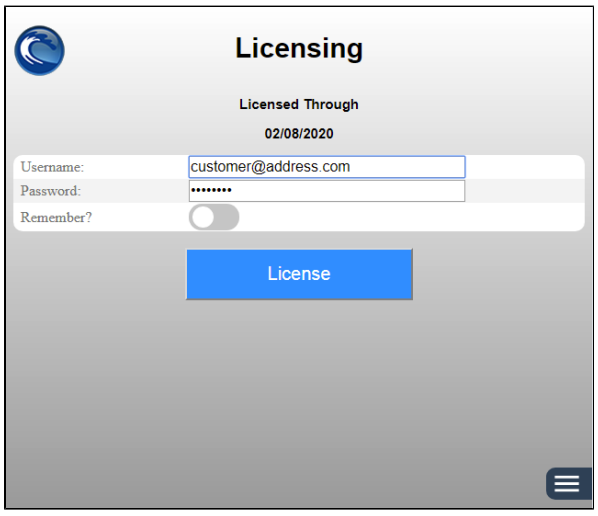
Then click the License button.



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

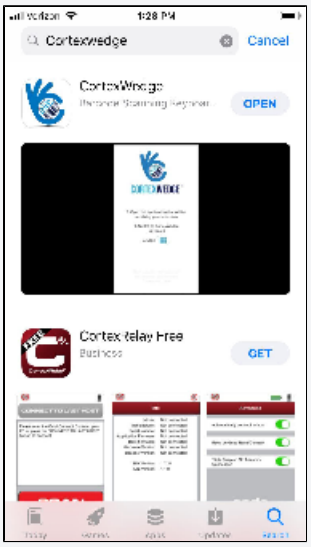
The CortexWedge app from TachyonIQ (Code) makes scanning barcodes from your smart device simple and easy.

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.

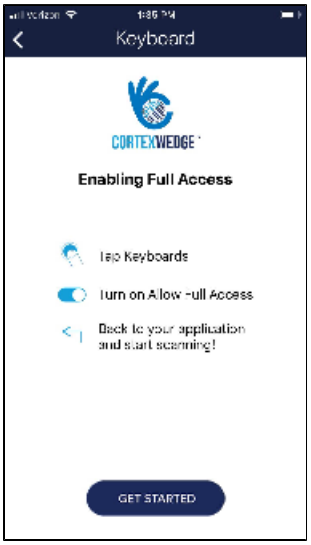


Step #2:

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.





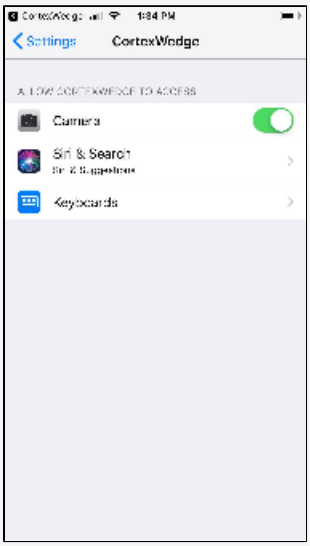
Installing on Apple IOS Device Step 3

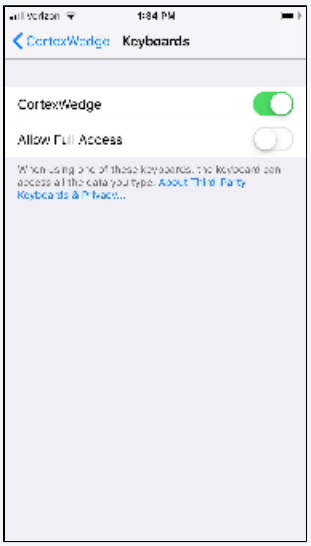
Step #3:

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:

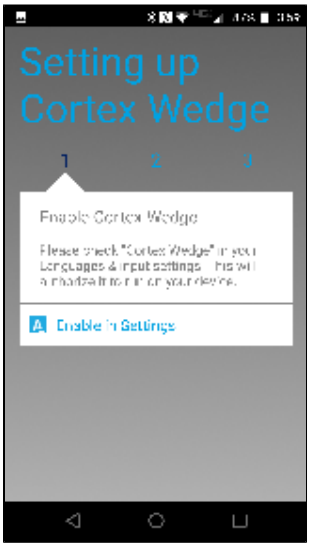
Download the CortexWedge software from the Google Play Store on your Android device.

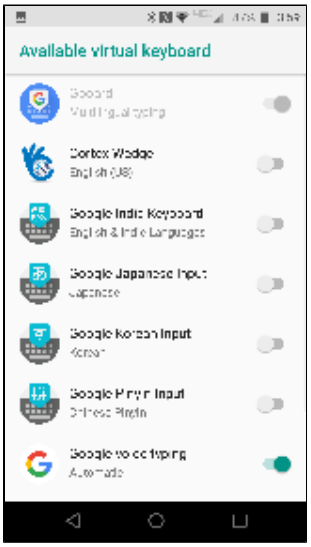


Step #2:

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.



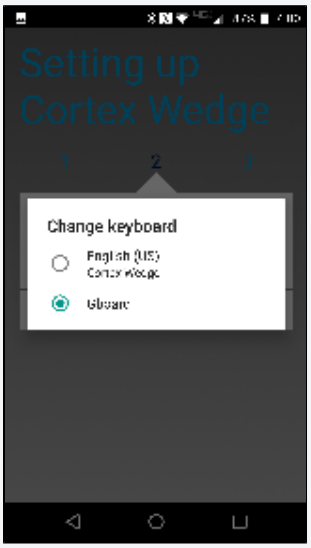


Installing on Google Android Device Steps 3-4

Step #3:

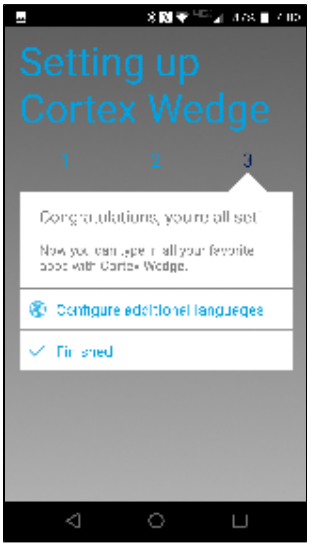
Click on the "Switch Input Methods" option at the bottom of the screen. This will take you to a screen where you can select which keyboard you would like to switch to. Click on the English (US) Cortex Wedge option to enable it.





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.

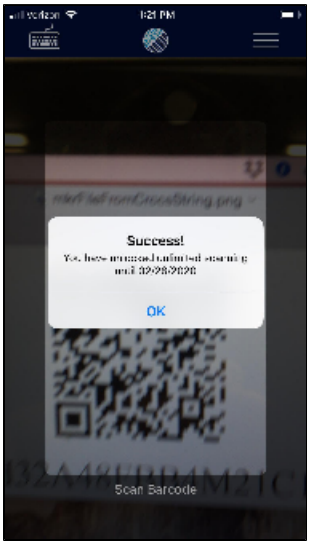


(Example of a QR code)

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.

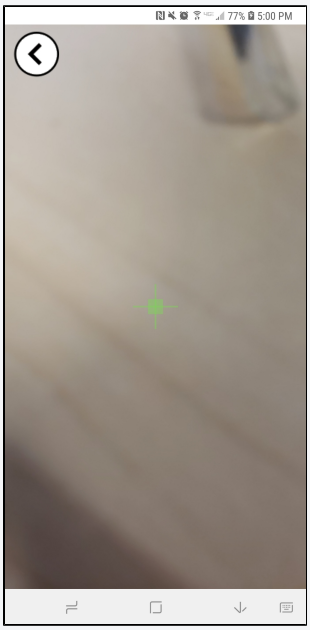




Activation on Google Android Device

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, log in 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.

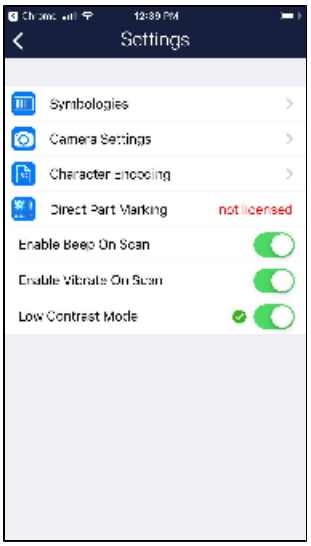


Step #3:

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:

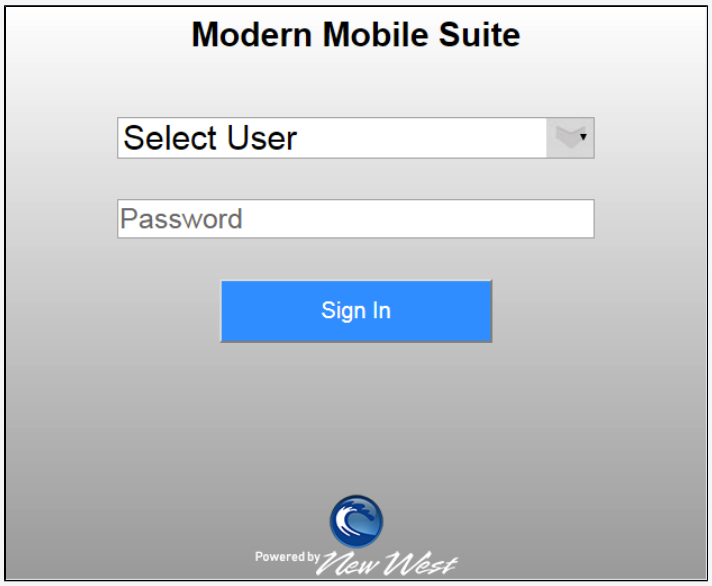
- Symbologies - This allows you to make enable or adjust the different barcode types you can scan. For example: Code128 or EAN13
- Camera Settings - This allows you to adjust how the CortexWedge app utilizes your smart device camera.
- Character Encoding - This option allows you to choose the specific 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.

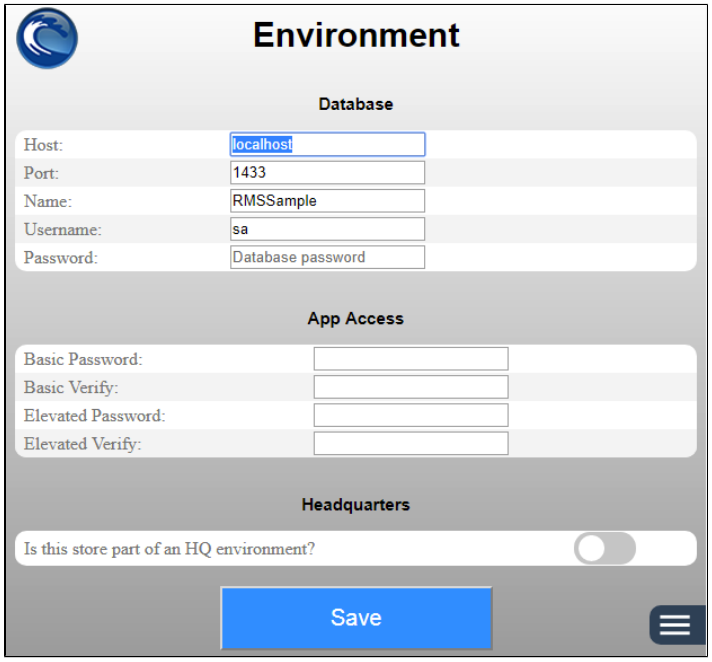


Microsoft RMS users must assign an App Access Password at the end of the MS installation process.

If an Administrator at your store needs to modify the App Access Password this can be accomplished by accessing the Environment window 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 that you can delete to force MS to prompt you to re-enter the Environment settings. Delete the file named ".ENV" in path:

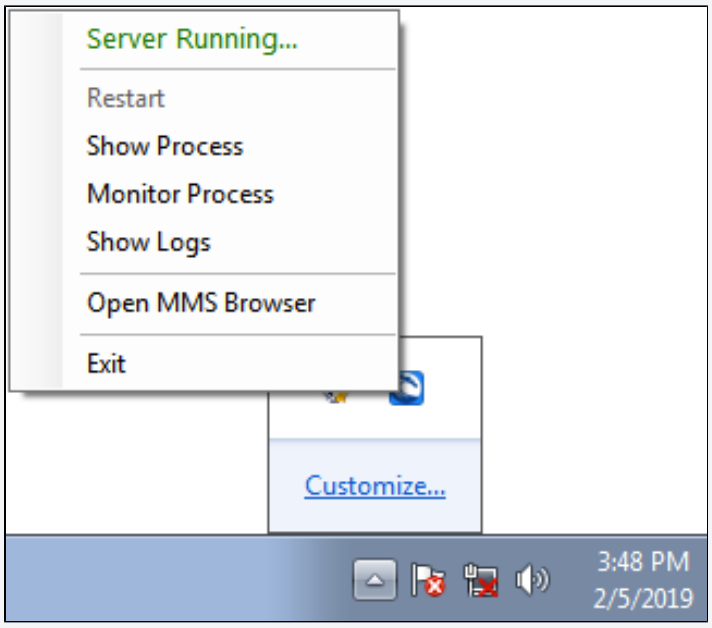
C:\ProgramData\New West Technologies\Modern Suite



MS Process Manager

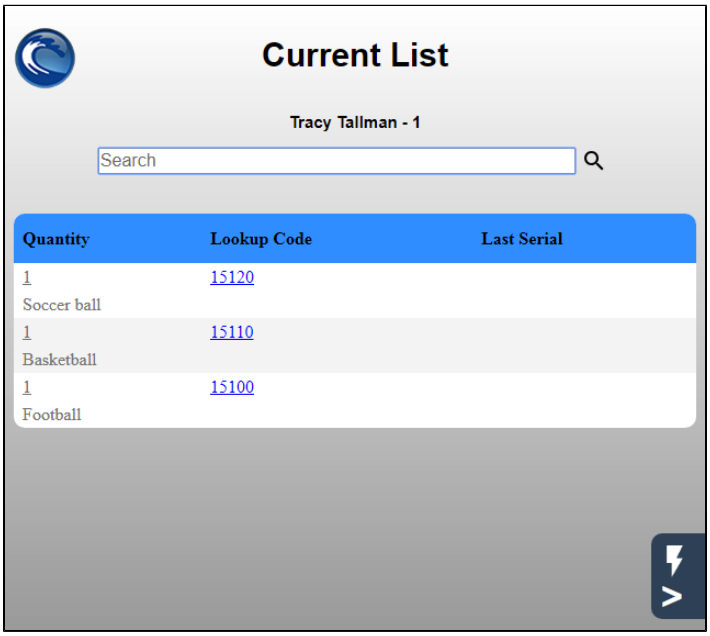
The MS Process Manager task tray icon will appear on the server computer desktop screen after the installation is completed. It provides the following:

- Server status
- Restart Server (To be used if the server were stopped for any reason)
- Show Process
- Monitor Process
- Show Logs
- Open MS Browser (This launches the MS web client from the server web browser)
- Exit (To close the MS task tray.



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

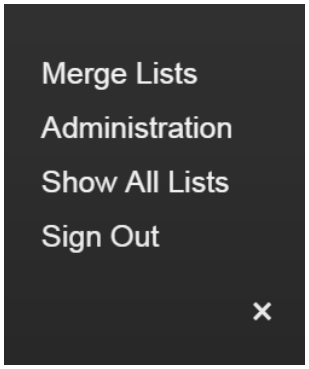
At the bottom right corner of the MS client screen you will find three icons.

- Binoculars (This takes you to the Item Management Window)
- Plus Sign (This starts a new List)
- Menu button



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

- Merge Lists (This option allows you to merge two or more Lists into a single combined List.
- Administration (This option brings you to the Administration window)
- Show All Lists (This will show lists generated from all user accounts)
- Show My Lists (If you are already viewing All Lists you can instead decide to view only the lists of the user account currently logged into the client.
- Sign Out (This will sign the user account out of the MS Client)



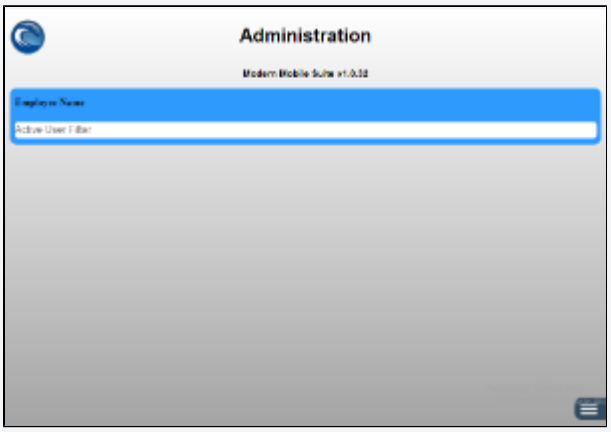
Administration

Administration Main Page:

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

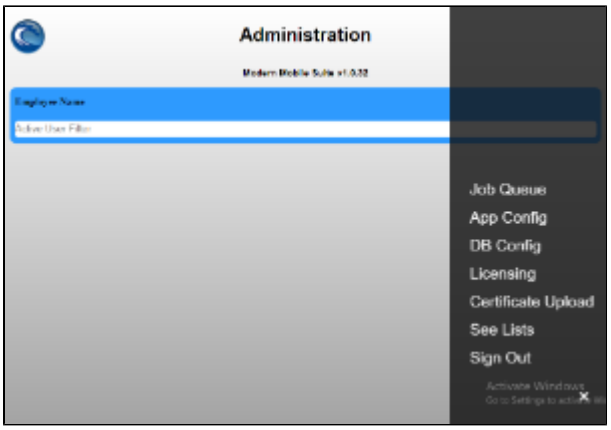
Here you can see which user accounts are currently logged into the MS Client and manually sign them out if you wish.

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



The Administration Menu has additional options available:

- 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 takes you back to the main Lists screen)
- Sign Out (This option allows the current account to log out of MS



Job Queue

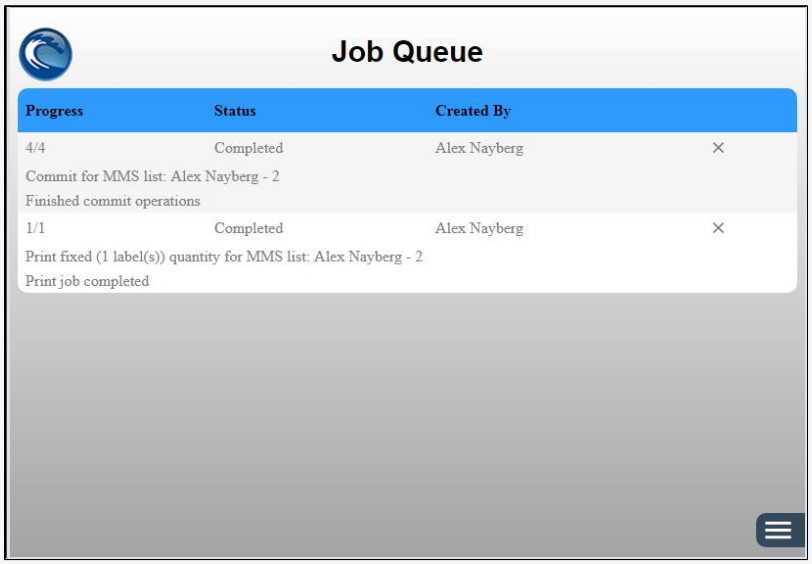
The Job Queue window allows you to see the status of Jobs that are still in the queue. Currently there are two types of jobs that can appear here:

- Inventory Count Jobs
- Label Print Jobs

The job status might indicate:

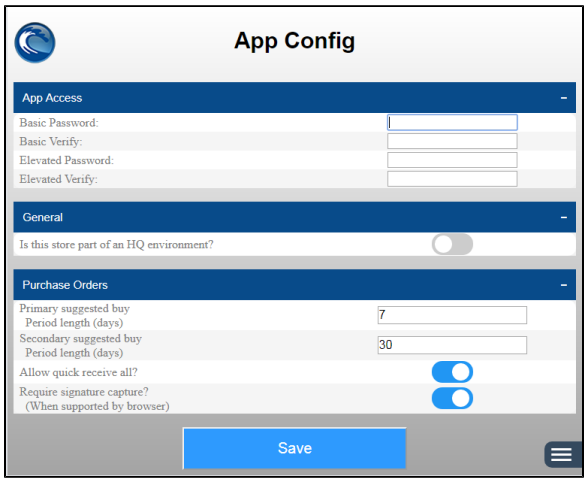
- Running
- Completed
- Paused (Label printing jobs can be paused and resumed)
- Error Status

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 grand users elevated/manager privileges)
- Elevated Password (This password DOES grand 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 MMS. 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

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

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 MMS to the MMSC server)
- **Please Note:** RMH Central is **not** required to use MMS. 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)
- Update Supplier Cost? (If enabled you must choose between Automatic update or Ask User First)

Import Item Records

- Create Item if Item does not exist?

Email Configuration

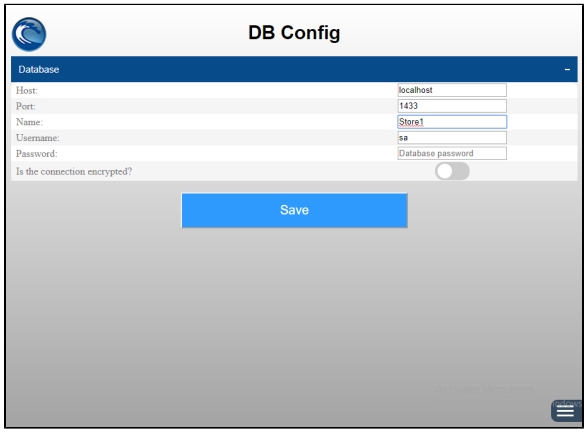
- Enable Email Support? (Click button to enable/disable)
- Select the email service from the drop down menu
- Please Note: Due to security settings, some email accounts may require settings to allow for "Less secure apps" before MMS is able to utilize your email account to send emails.
- User Email (Enter the email address
- User Password (Enter the email password.

DB Config

When you initially run MMS 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.

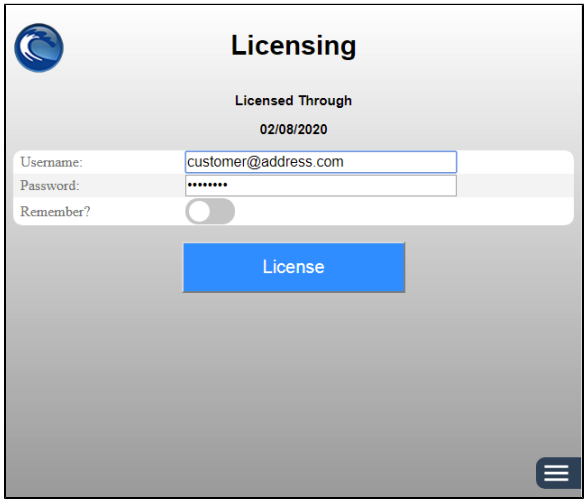


License

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

If you have purchased a License for MMS 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.

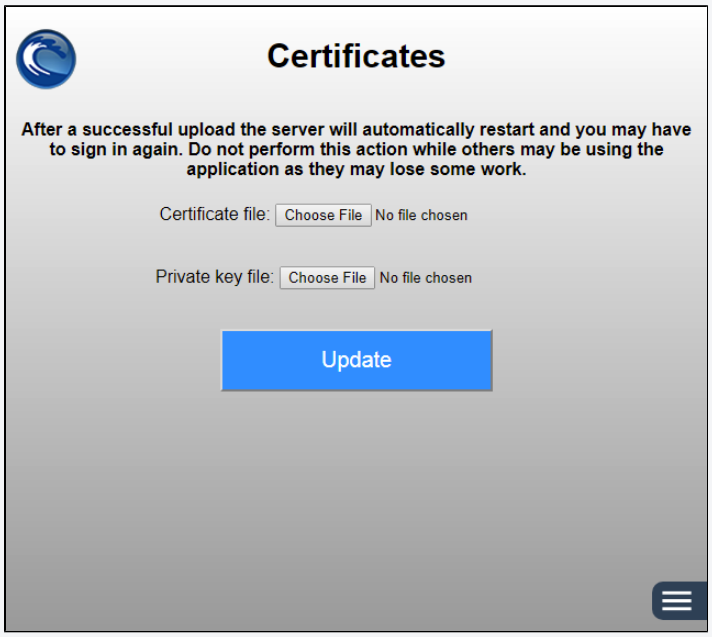


Certificate Upload

The MMS Client allows both Certificate Files and Private Key Files to be uploaded to the MMS 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.



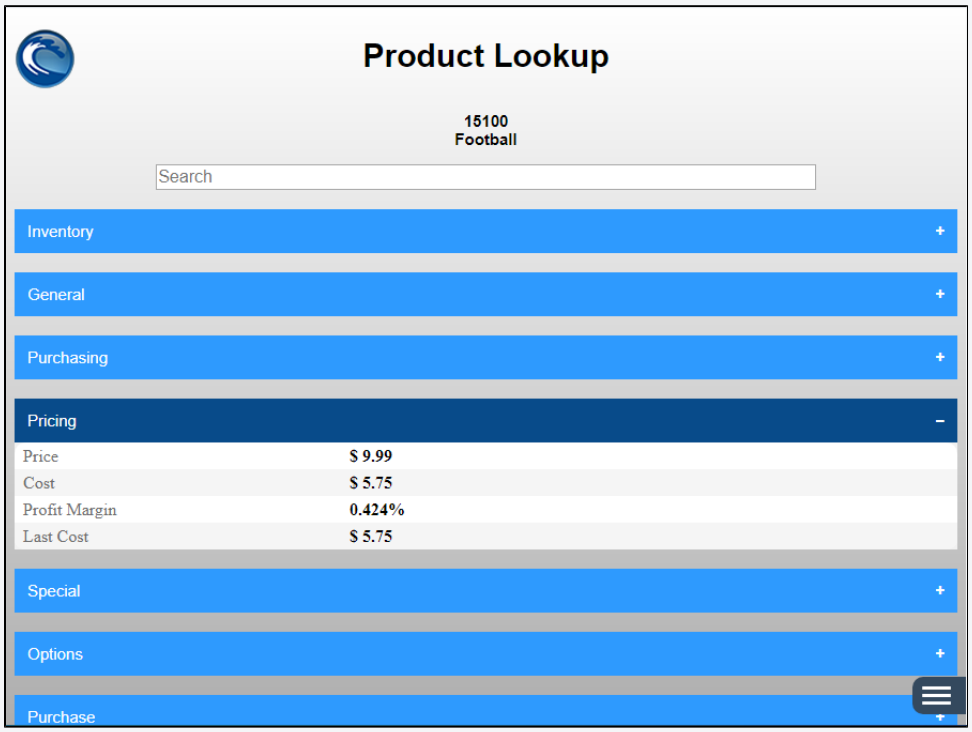
Item Management

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

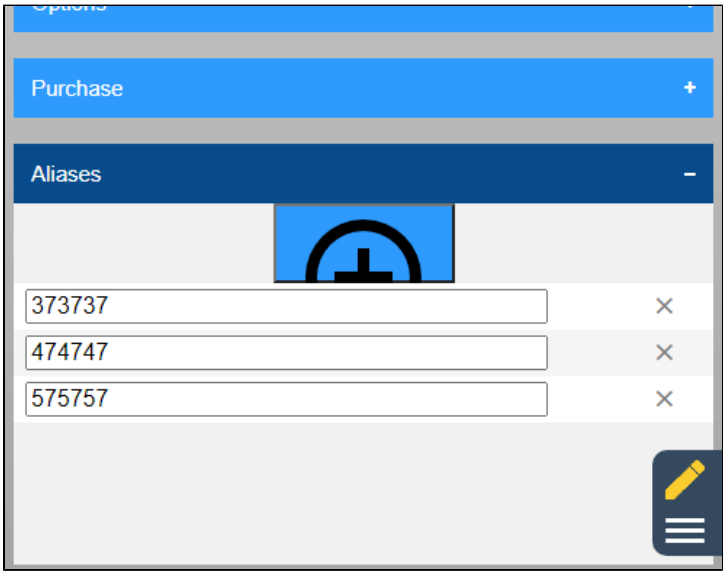
First enter a product lookup code or alias in the search field at the top of the screen. Then press Enter or click on the Magnifying Glass button.

Once you see the properties of the item you were searching for, now click on the Pencil icon at the bottom right of the screen. The Pencil button will turn yellow and the Value Fields can then be edited. Press Enter to commit the changes or press the Pencil button a second time.

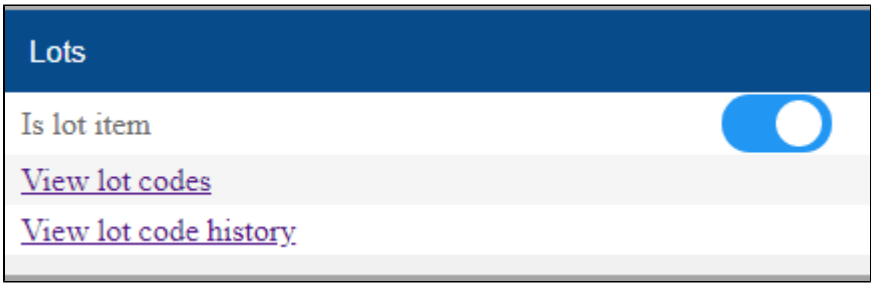
An Item may have an Alias/Serial number OR a Lot Code but cannot have both.

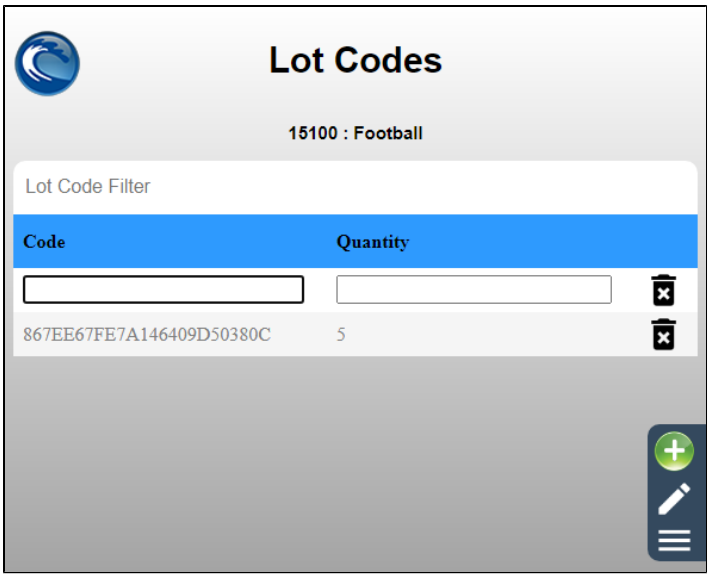
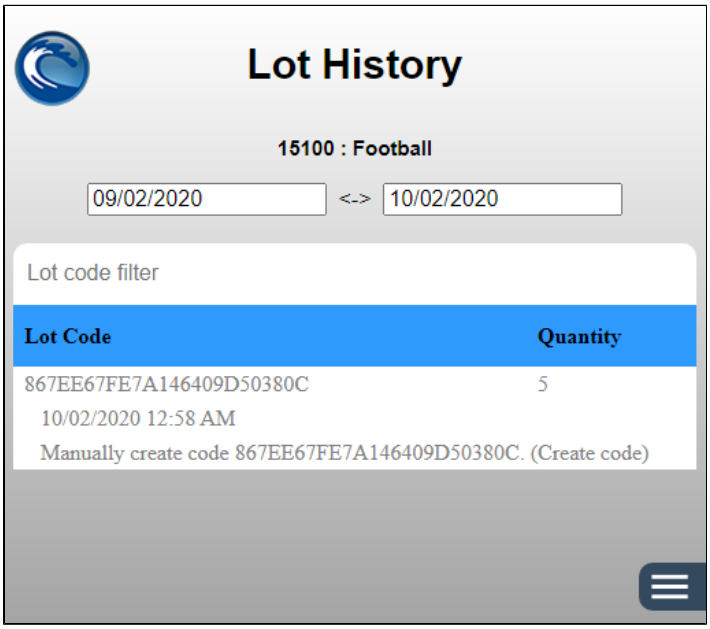


To add an Alias click on the Pencil button to edit the fields and then expand the Aliases tab. Here you can enter an alias and then press Enter or Tab to enter the next alias. Once you have finished adding and removing aliases, click on the Pencil icon once more to stop editing.



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.



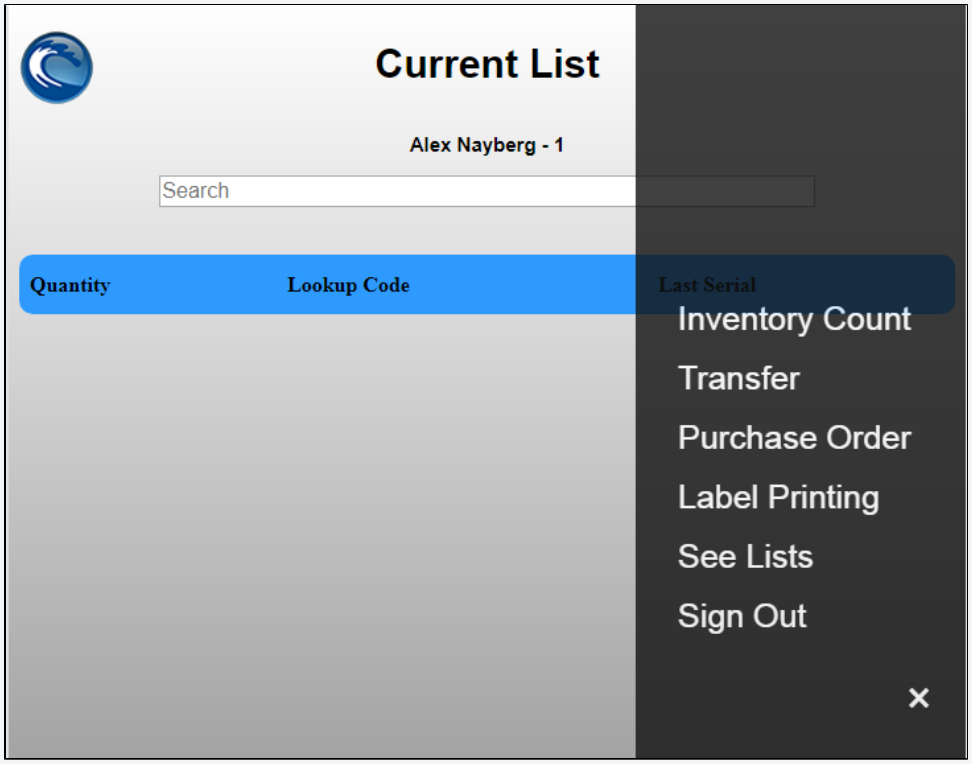
In this Lot Codes window enter the Lot Code value and quantities. **Note that the lot codes must be 24 digit hexadecimal values.** **Once you have finished adding and removing Lot Codes, click on the Pencil icon once more to stop editing.**	
From the Product Lookup window you also can view the Lot Code History for the individual item. **Click into the date fields to select the date range you wish to view.**	

List Scope

Selecting a Scope for your list:

When you create a new list in MMS 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.

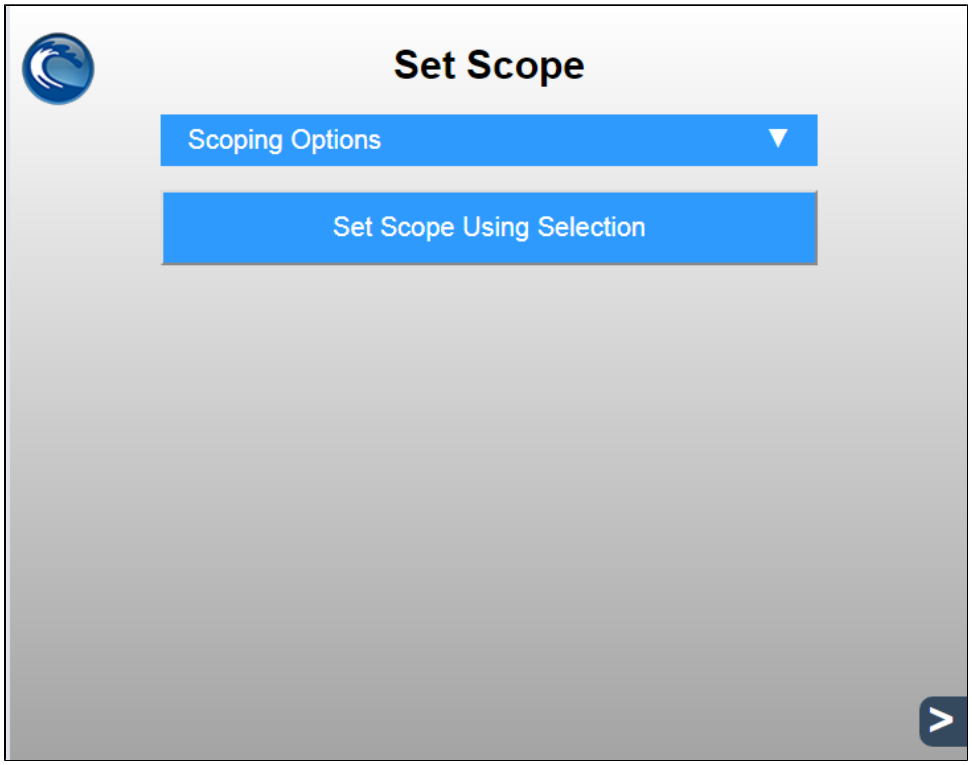


Scoping options:

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.

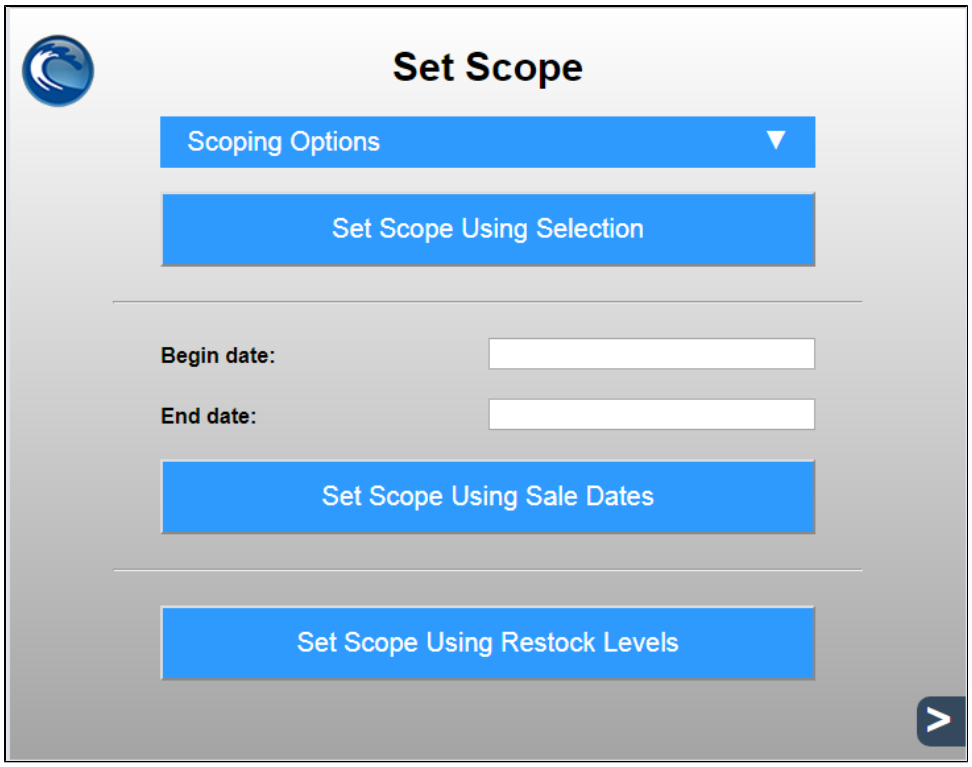
After selecting one of these options additional fields may appear. Click the **Set Scope Using Selection** button to save the scope settings.



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.



Item Creation

Step 1:

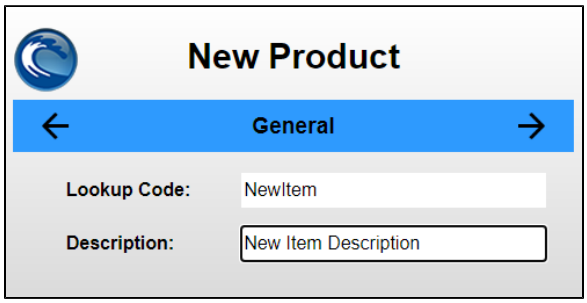
If you scan or enter an Item Lookup Code that doesn't exist in your database, MMS provides the ability to create a new item. Click on the "create one" link to enter the New Product window.



Step 2:

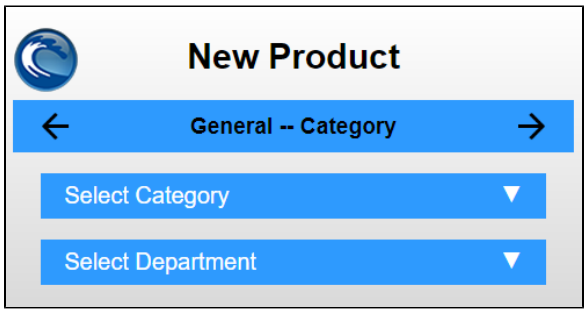
Fill out the fields in the New Product window. Click on the Left and Right Arrow buttons to cycle through the different available options. Click on the Green Check Mark button when you ready to save the new product.

Under the General tab you must enter the Item Lookup Code and Description.



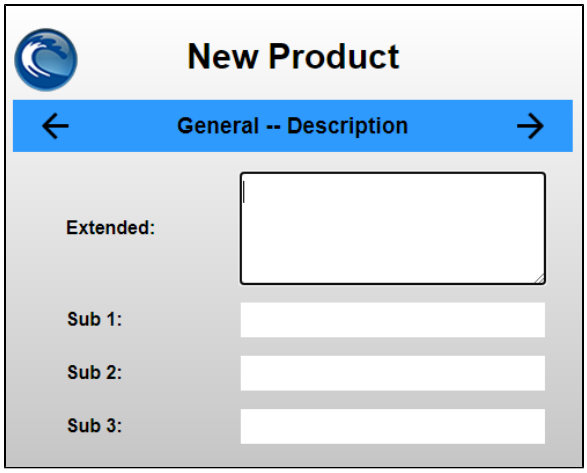
Step 3:

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:

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



Step 7:

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.

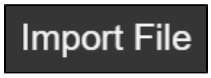


Import File to List

MMS 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.

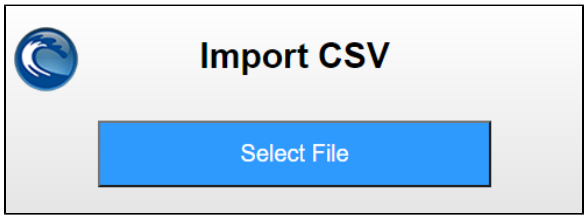
Step 1:

First, create a new List. From the list's menu, click on the Import File option.



Step 2:

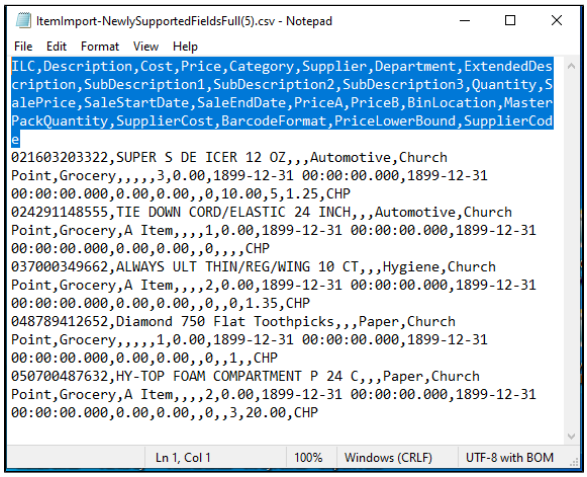
In the Import CSV window click on the Select File button. This will open a file browser window. Select the specific CSV file you wish and click Ok.



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'.

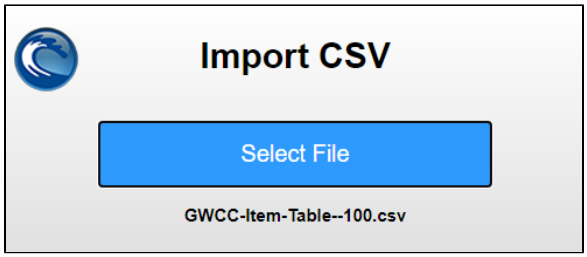
You will also see in the example picture that there are some commas with no values between them. Those values that are left blank will be skipped over until there is another matching value and column header.



Important: A Supplier's Code **can 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.

Step 3:

The CSV file you have chosen will now be shown below the Select File button.



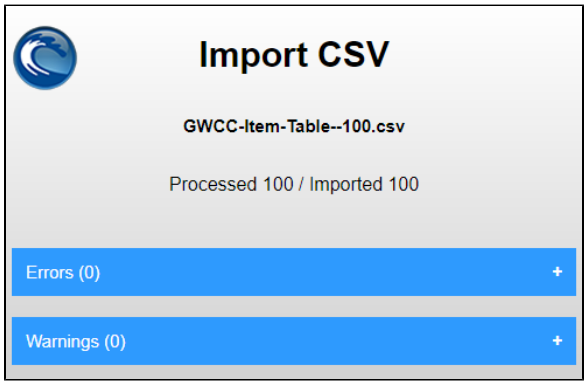
Step 4:

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



Step 5:

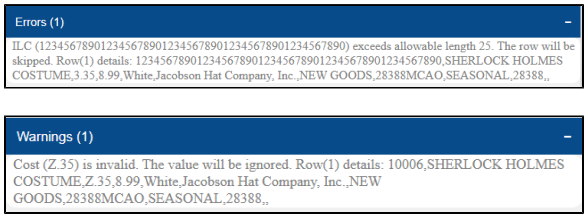
The results of the import process will be shown in this window. If there are any errors or warnings you can view them by clicking on the blue bars.



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 to Step 2 so you can select a different CSV file.



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

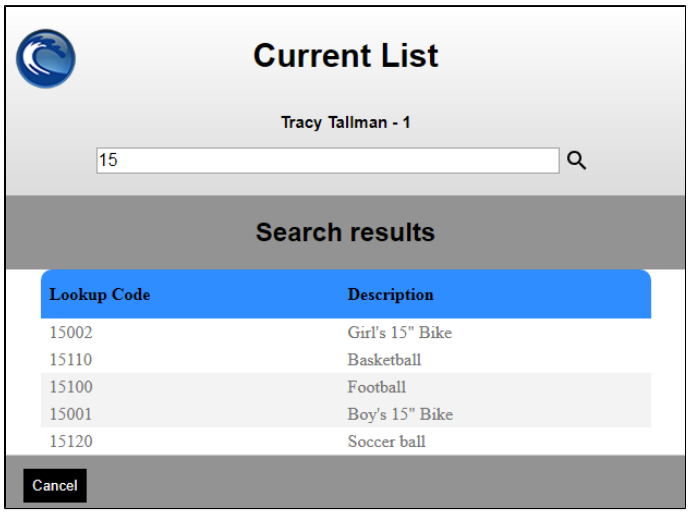
Step #1

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.

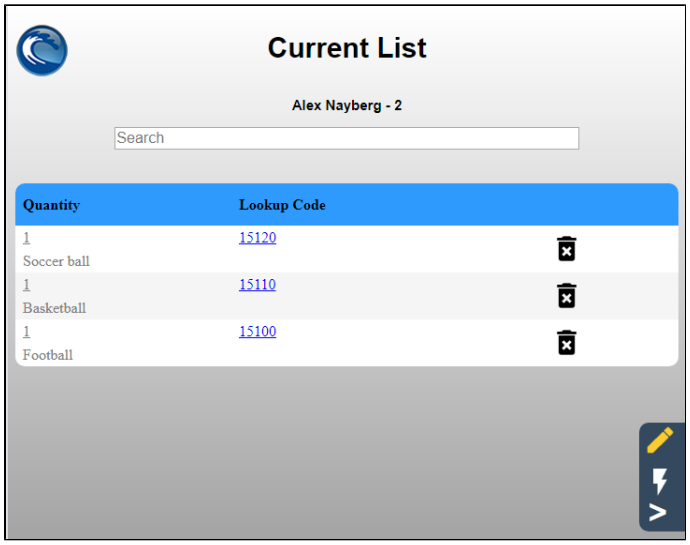


Step #3

As items are added to your List you will see the Item Description, Item Lookup Code, Last Serial and the Quantity. 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.

Optional Quick Scan mode can be enabled if the quantity of the item you are scanning is always one. Depending on the type of item you are counting this can dramatically speed up the inventory count process. To Enable Quick Scan mode click on the Lightning Bolt button at the bottom right of the screen. Click it a second time if you wish to turn it off.

If you wish to delete an item from the list click on the Edit (pencil) Icon and you will see a Trash icon to the right of each item. Click on the Trash icon to remove that item from the list. When you are done removing items click on the Edit button once more to continue.



Step #4

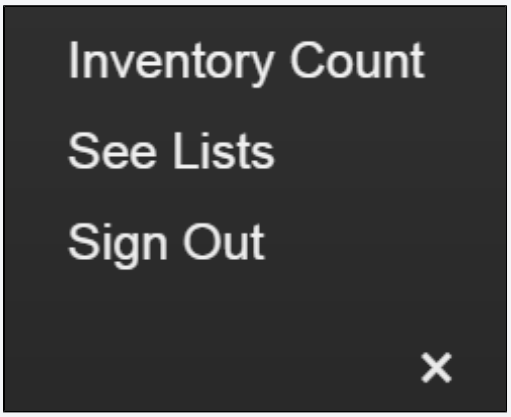
When you are satisfied with the items in your list the next step is to begin the Commit process. Click on the Arrow button at the bottom right of the screen to begin the Commit process.

Starting The Commit Process

Step #1

After clicking on the Arrow button a new menu appears.

- Inventory Count (Click this option to continue with the Commit Process)
- 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 your List)



Step #2

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

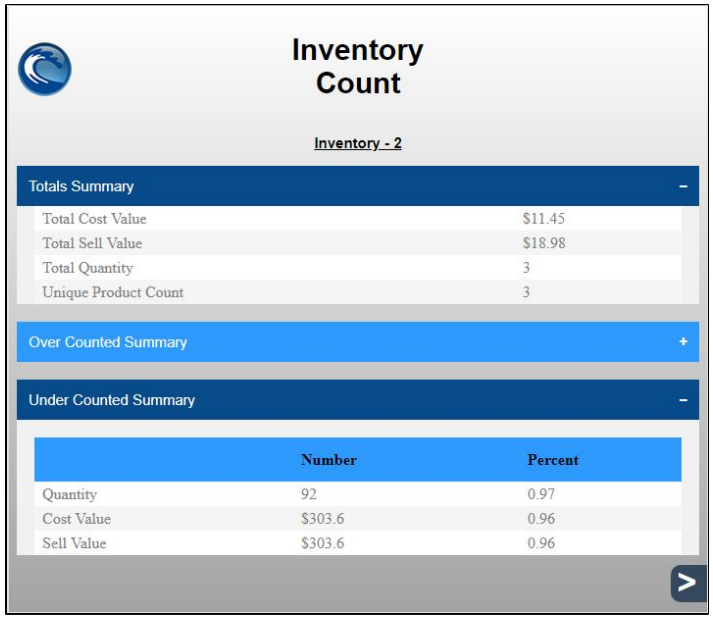
Totals Summary:

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 under counted according to what your database had on record at the time of the count.

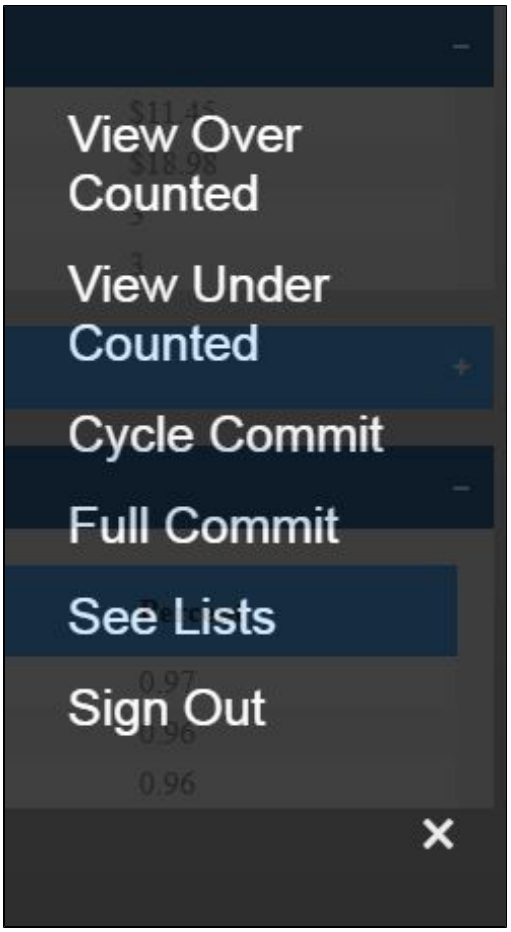
Click the Arrow button at the bottom right of the screen again to view a next menu.



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)
- **Cycle Commit** (Click this option is 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 effected. Those items that were not counted will have quantities of zero)
- **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 the Inventory summary page)



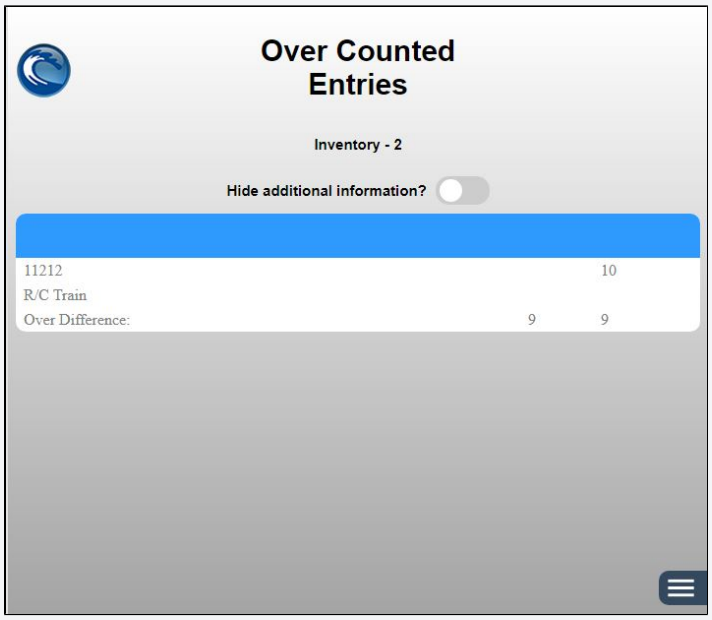
Over and Under Counted Entries

Over Counted Entries

This window will show a break down 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 the Over 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 over the total the database has on record.

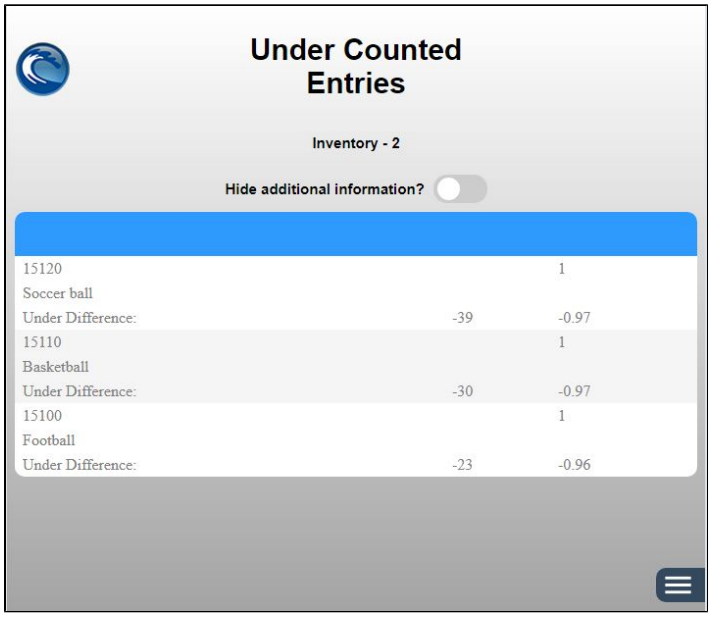


Under Counted Entries

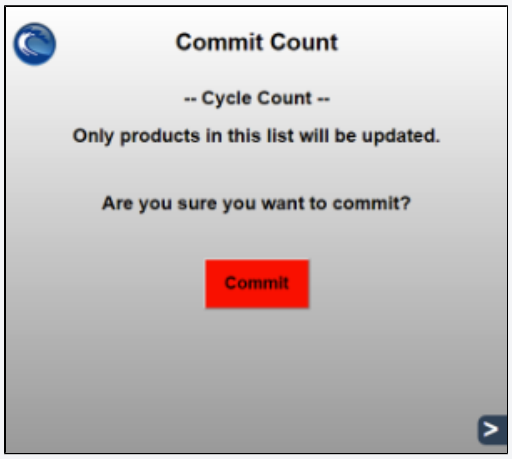
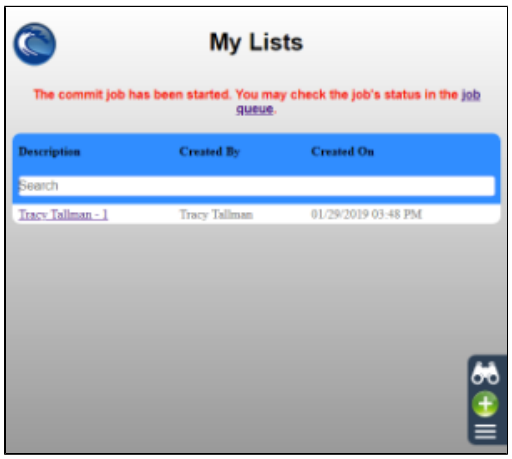
This window will show a break down of the different items in the Inventory Count that had a lower quantity counted than what the store database has on record.

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

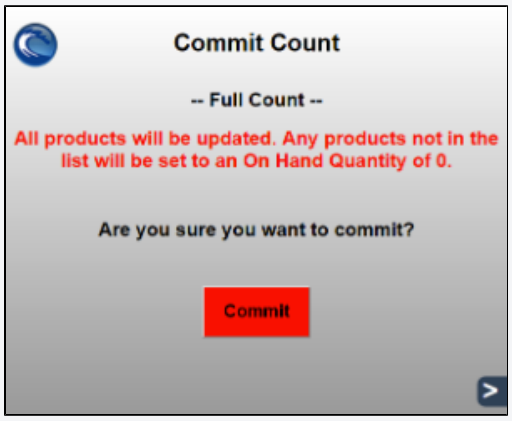
When choosing the Cycle Commit option please note only items in the list will be updated. **Click the red Commit button to finalize the Commit process.** **If you need to back out of the Cycle Commit window you can click on the Arrow button at the bottom right of the screen and either return to the list 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.	

Full Commit

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

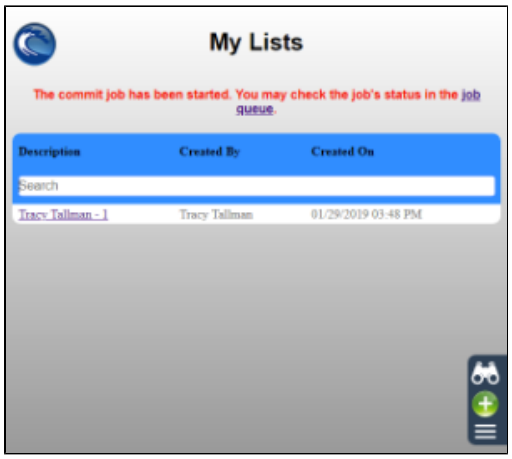
Click the red Commit button to finalize the Commit process.

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.

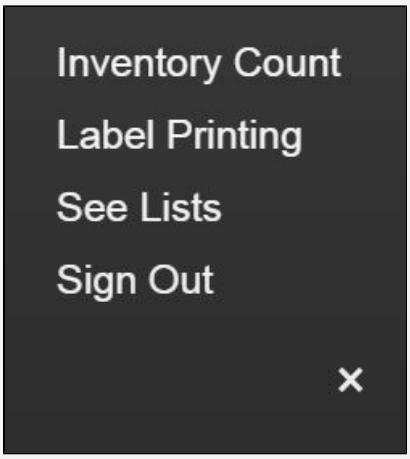


Label Printing

Important: Modern Suite Label Printing requires a **Citizen CMP 30-II WIFI** enabled label printer configured to use **ZPL language/emulation**.

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.

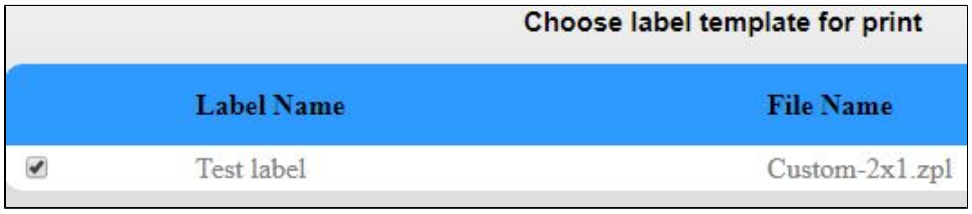


Step #2: Label Templates

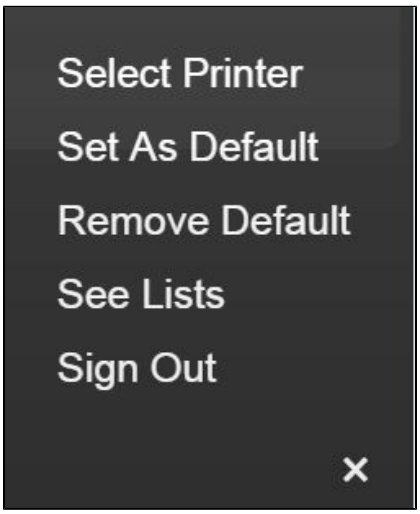
Modern Suite is designed to use Zebra (ZPL) label template files. Label template files need to be stored in a file directory of the server hosting MS:

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

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



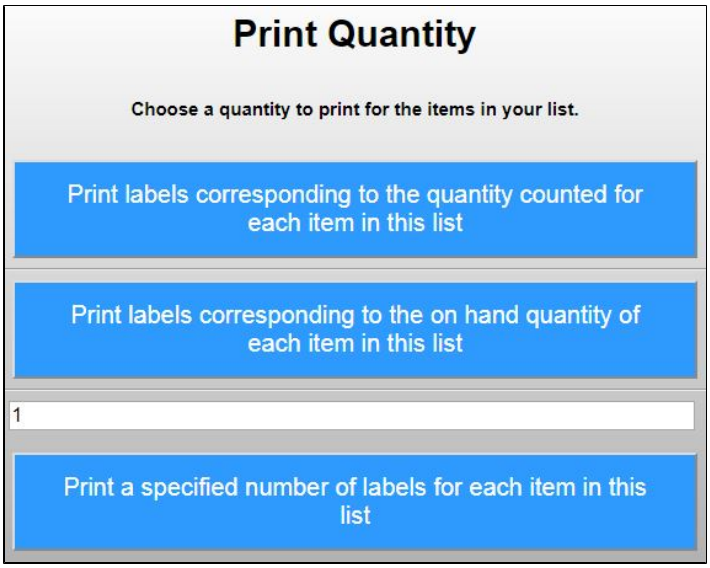
You are also able to set a default label template from the Menu button at the bottom right of the screen. If you wish to remove the default template it can be removed here as well.



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 for 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

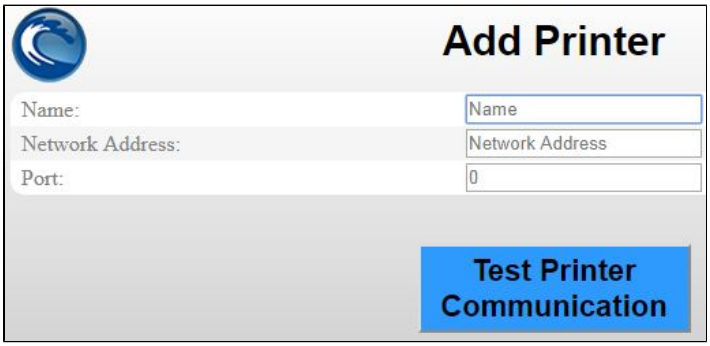
In the Printers window if you do not already have a printer in this list then click on the Menu button at the bottom right of the screen and click on Add Printer.

Here you will need to enter:

- **Printer Name (The name you would like to assign to this printer)**
- **Network Address (The IP address of the Citizen CMP 30-II WIFI printer)**
- **Port (Enter value '9100')**

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

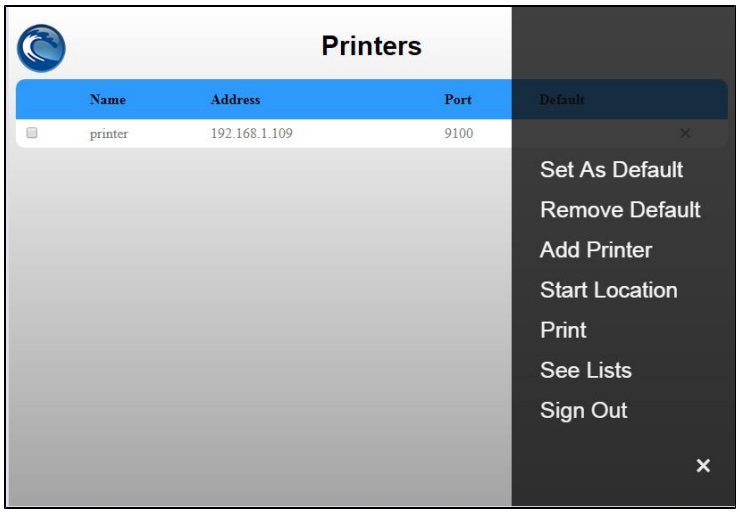
Finally, click on the Menu button once more and select Add Printer to finalize the selection.



Step #5: Printing

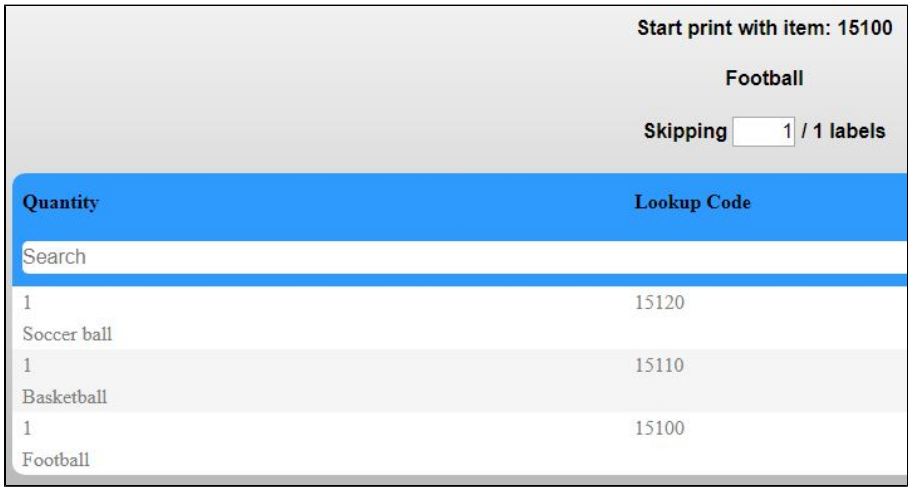
Place a check mark on the box next to the printer listed.

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



Print options:

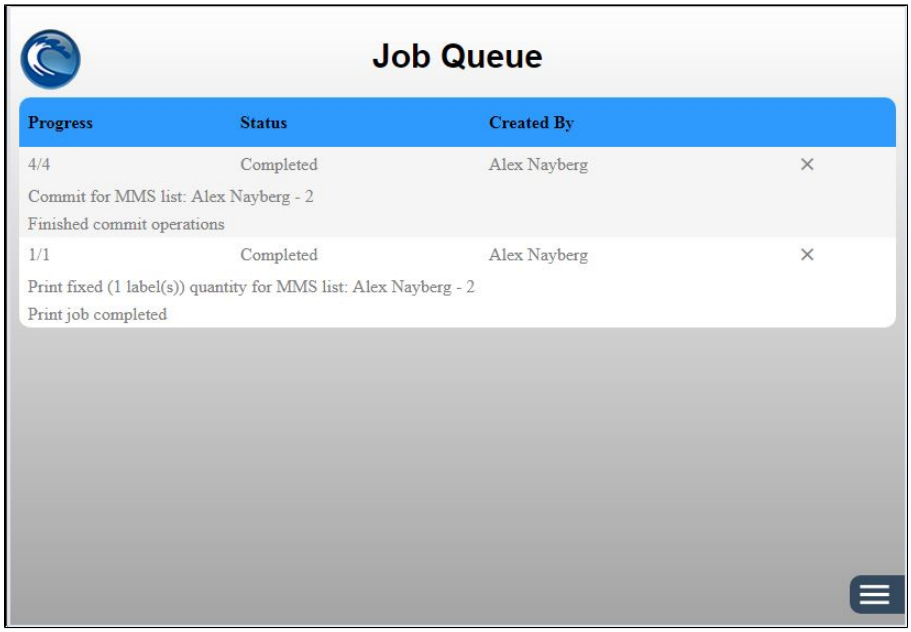
- **Print: The print job will start as soon as the Print button is pressed.**
- **Start Location: This option brings you to a window where you have the ability to skip passed a specified number of item labels before it starts printing the rest. From there click on the menu again and click on Print .**



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.

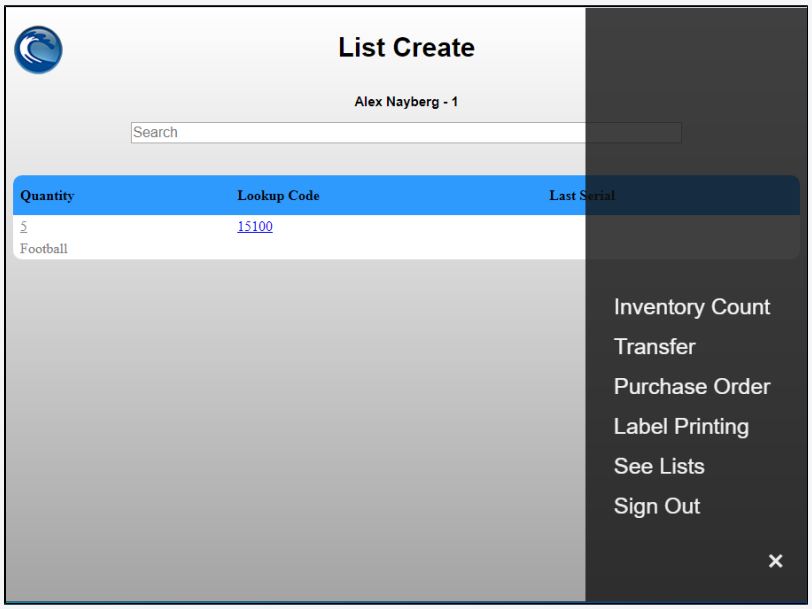
If the label print job includes several labels you can pause and resume from this window if needed.



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.

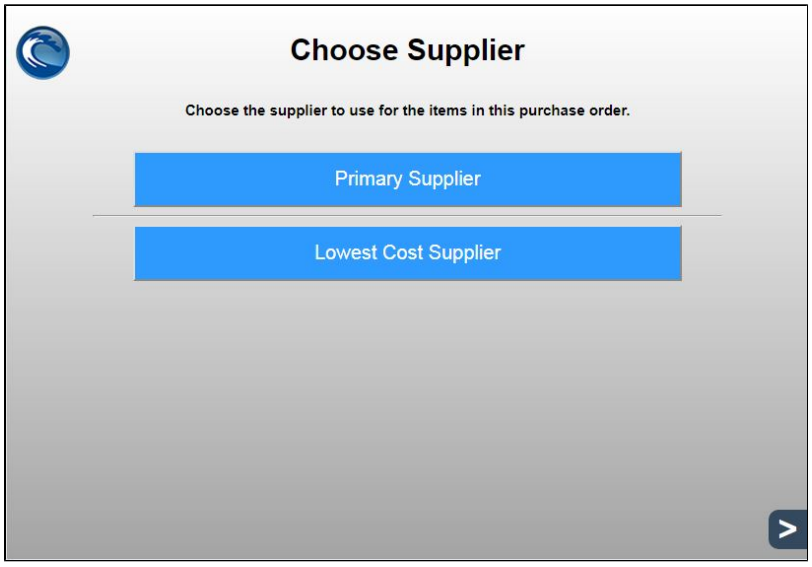


Step #2: Choose Supplier

There are two options to select in this menu:

- **Primary Supplier**
- **Lowest Cost Supplier**

Important: 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.

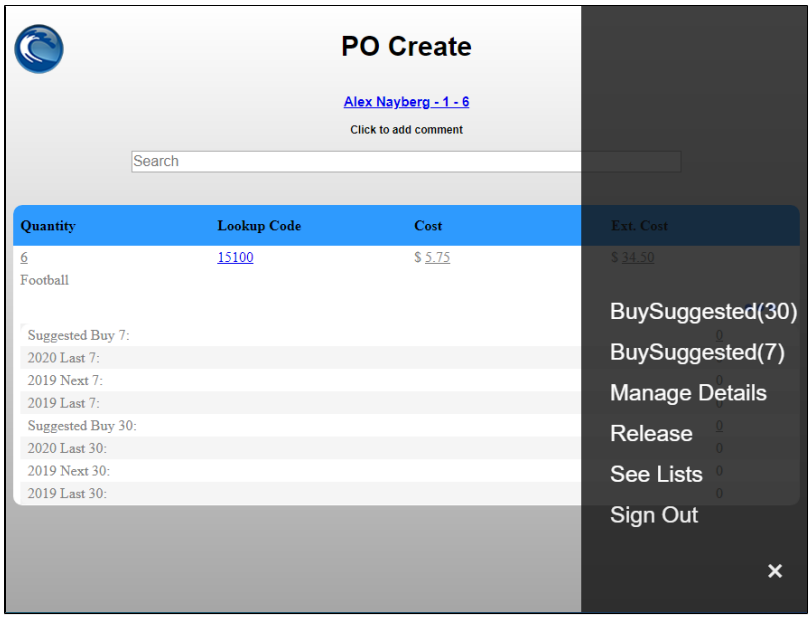


Step #3: PO Create

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

Adjust the quantity of the items manually or by choosing the BuySuggested(30) or BuySuggested(7) options. The BuySuggested options will adjust the quantity of your items by the past 30 day period one year ago or by the past 7 day period one year ago.

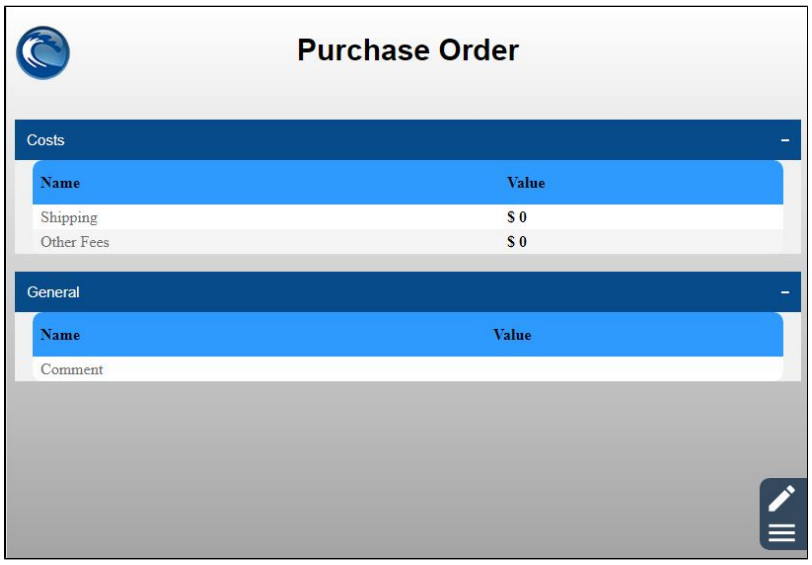
If you do not need to use the Manage Details screen then click Release to continue.



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.

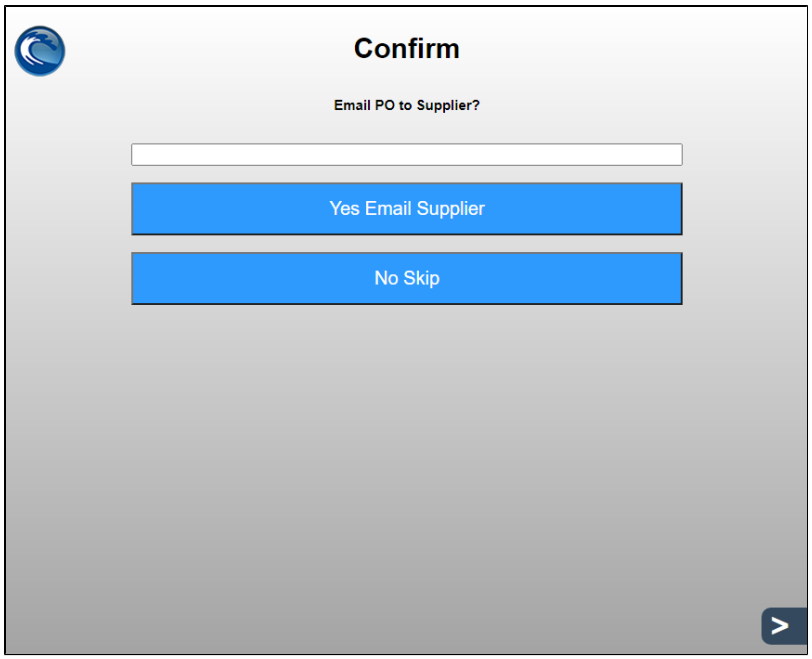
If you are ready to Release the Purchase Order then click Back on the browser and once again click Menu and choose Release.



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)

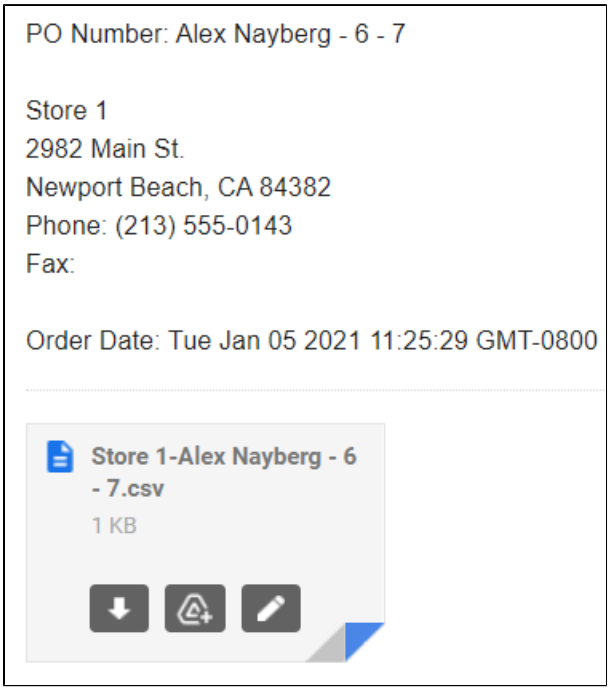
Body
PO Number: (PO Number)

(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

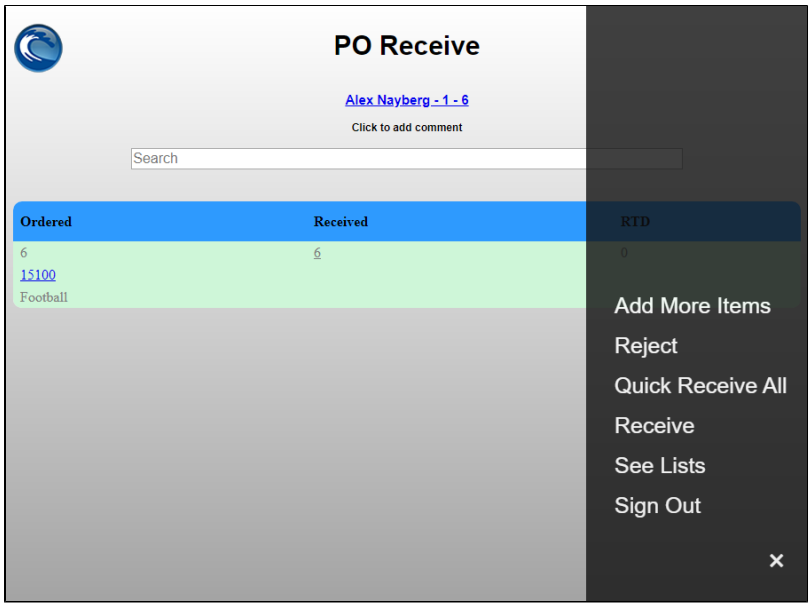


Step #4: PO Receive

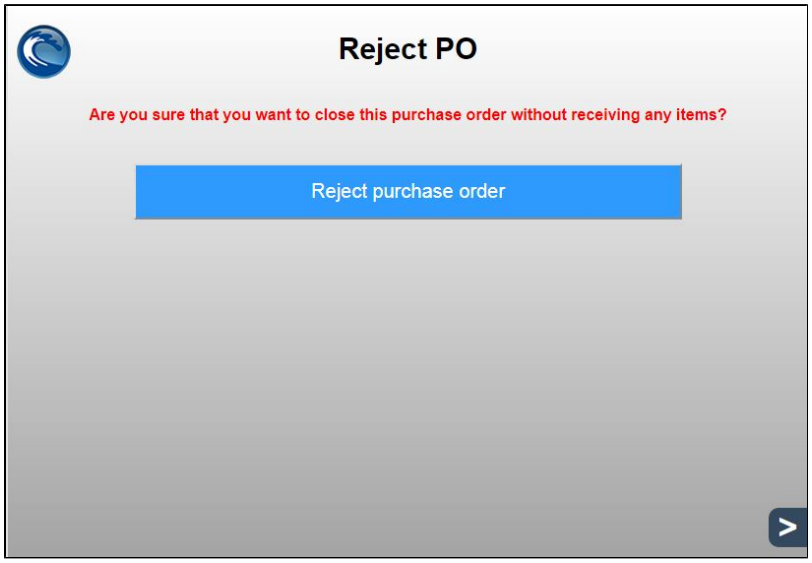
When you are ready to receive the new product re-open the Purchase Order you created earlier.

Enter the quantity of the items you have received here

From the Menu you can select Reject, Receive or Add More Items.

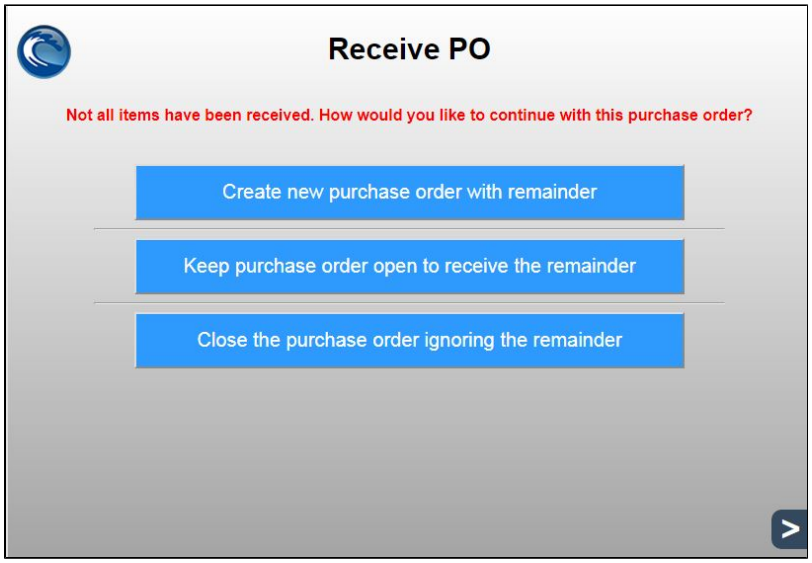


To wish to close the Purchase Order without receiving any Items then click Reject and at the next window click Reject Purchase Order.



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 Purchase Order Open To Receive The Remainder**
- **Close The Purchase Order Ignoring The Remainder**

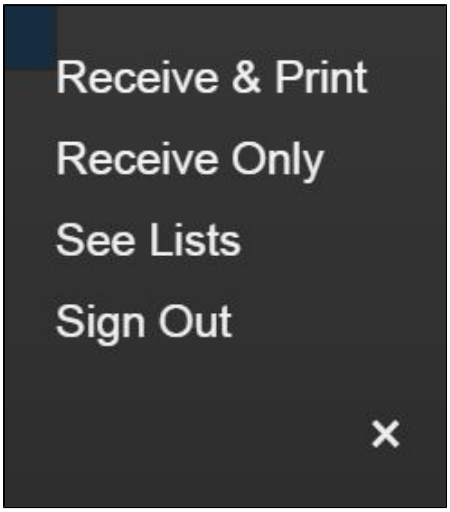


If the **Require Signature Capture for POs** option was enable in the **Environment** section of the **Administration** page then after choosing the Receive option the user will be prompted to sign. See **Environment**.



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

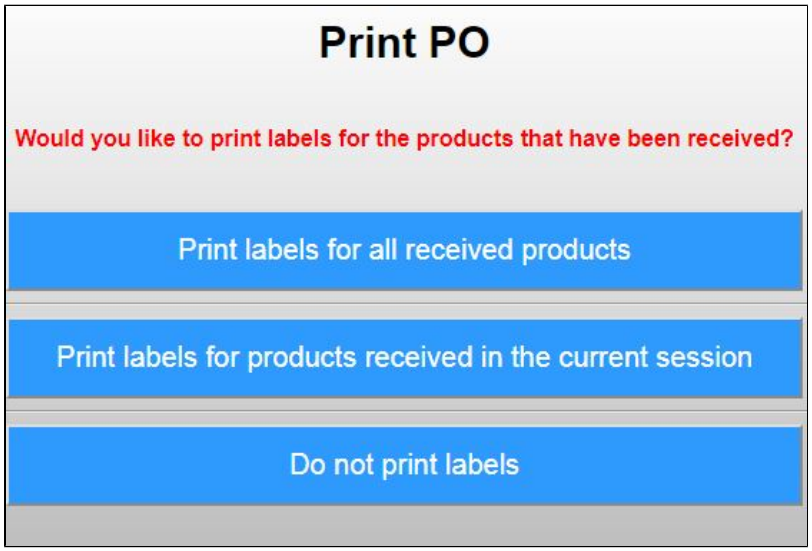
- **Receive and Print which will complete the PO process and take you to the label printing options.**
- **Receive Only (This option will skip any label printing and simply complete the PO process)**
- **See Lists**
- **Sign Out**



Step #5: PO Label Printing

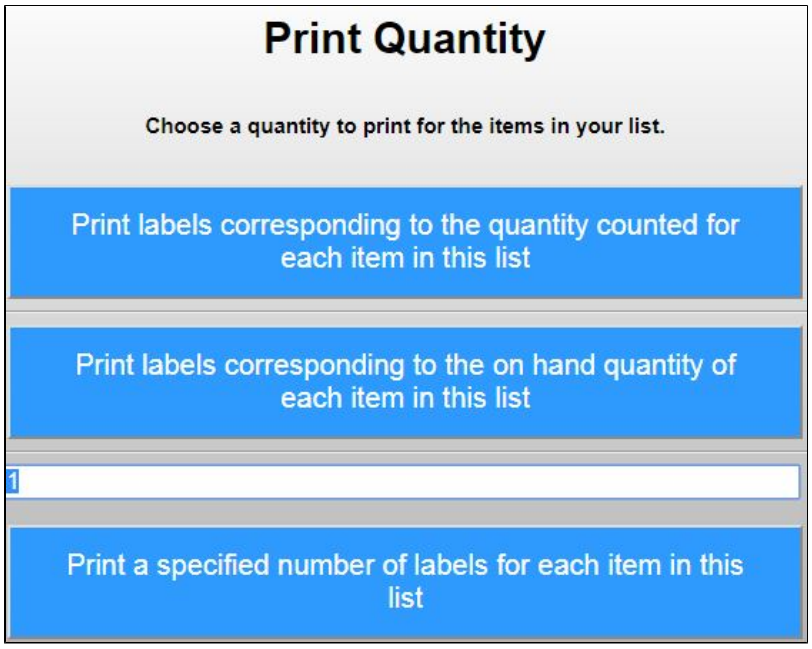
MS allows you to print labels for the new product you receive in your Purchase Orders. This Print PO screen will appear at the end of the Receive process. You can choose from the following options:

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



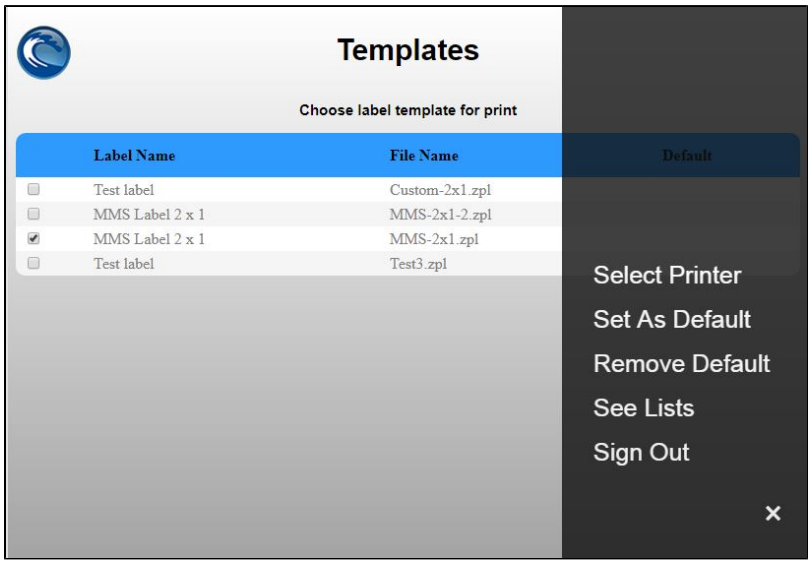
If you chose one of the Print options then next you will choose from the Print Quantity options.

- **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 number of labels to be printed)**



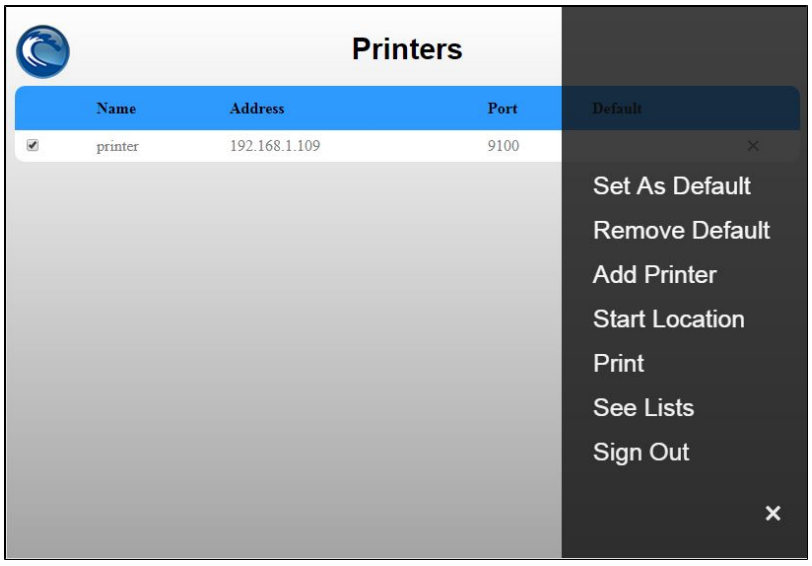
Choose a label template and the click Select Printer.

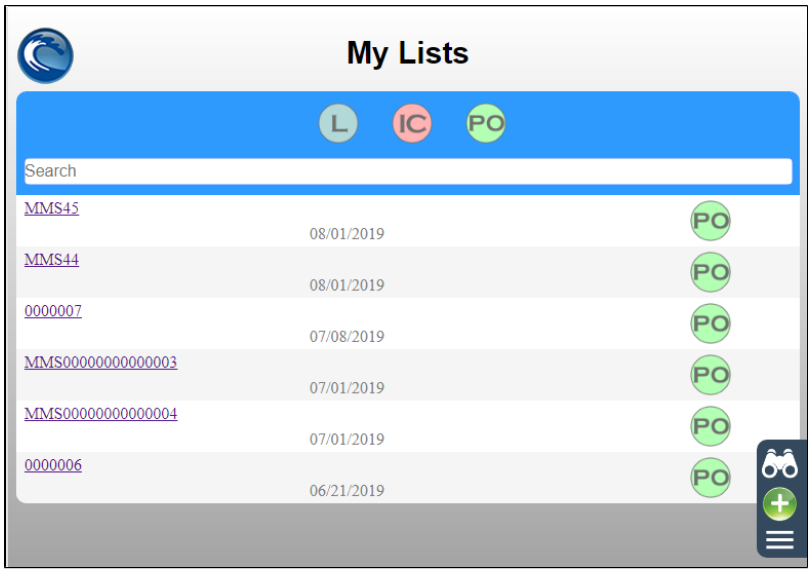
(For further information about label printing please see: Label Printing.)



Choose a printer and then click on Print.

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

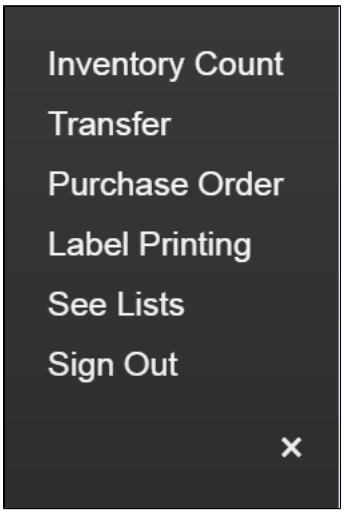


As the labels are printing MS will return you to the All Lists/My Lists screen. Click the Job Queue option at the top of the window if you wish to check the print job status.	

Transfers

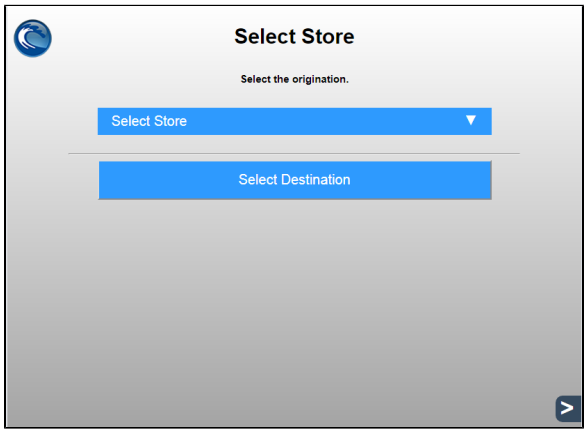
Step 1:

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**.



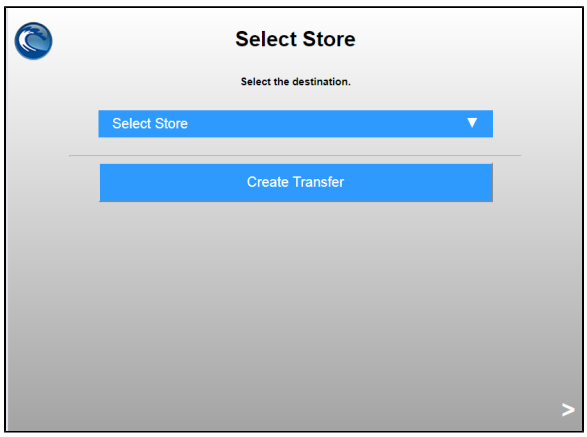
Step 2:

In this window you will be required to select the **Originating Store**. 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.



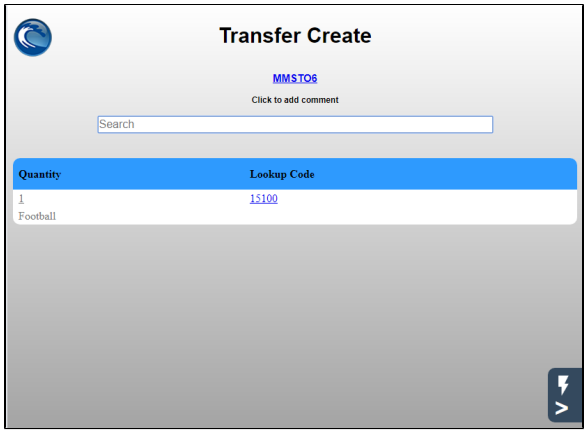
Step 3:

In this window you will be required to select the **Destination Store**. 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.



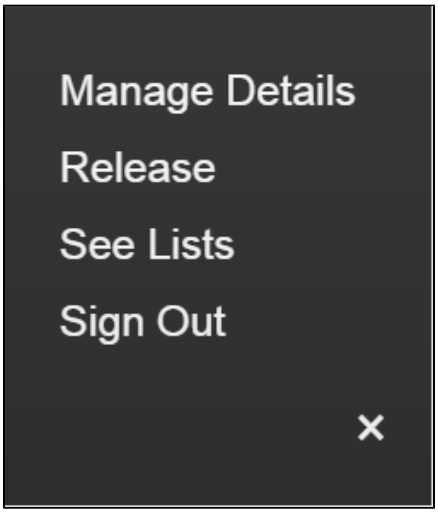
Step 4:

The transfer has been created.



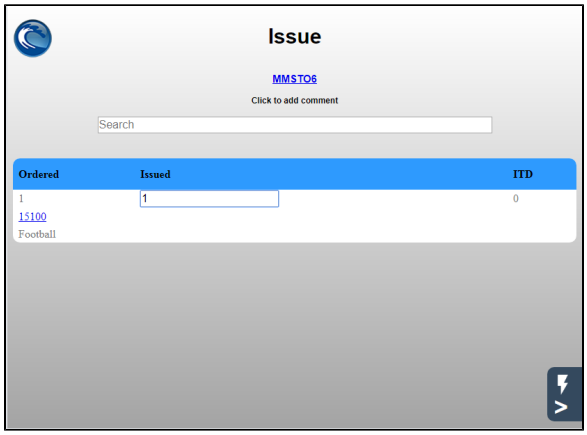
Step 5:

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** .

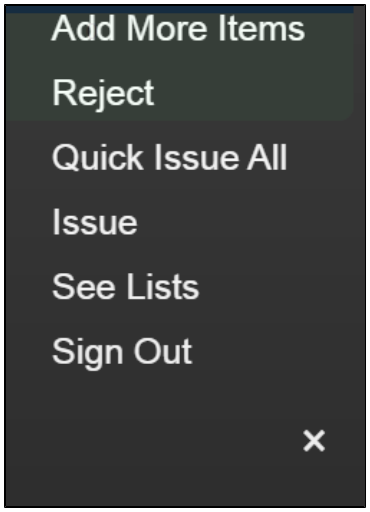


Step 7:

Select one of the following options:

- **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.

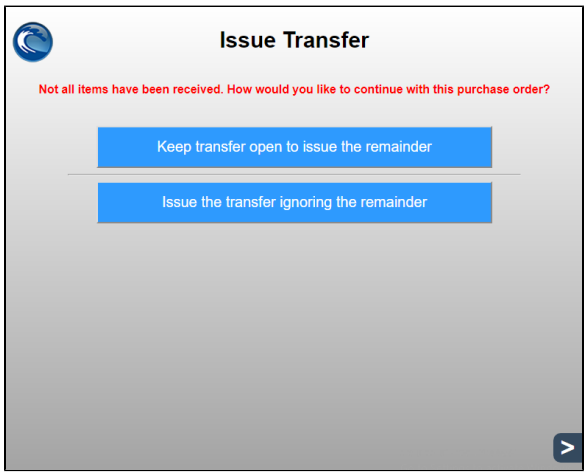
- **Issue**: Use this option after manually entering in the quantities for the items in the Transfer.
- **See Lists**: Use this option to exit out of the Transfer and return to the Lists menu.
- **Sign Out**: Use this option to sign out of the MS software.



Step 8:

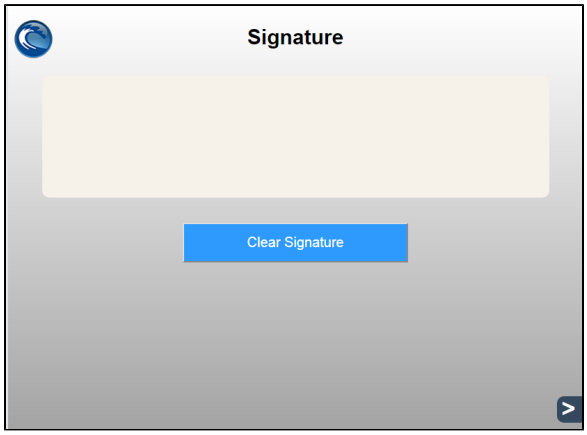
However, if you proceed with the Issue command and you have recorded a quantity less than originally specified in the transfer you will be prompted to select an option from the following:

- **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.

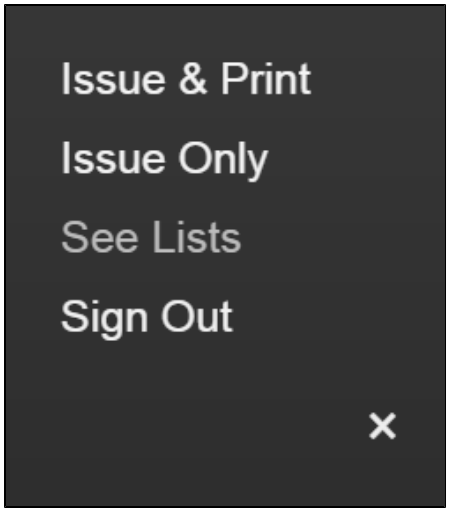


Step 10:

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.

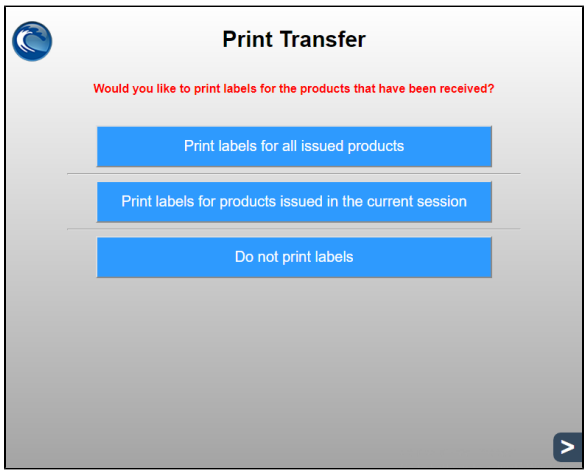
- **Sign Out**: This option allows you to sign out of MS.



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.

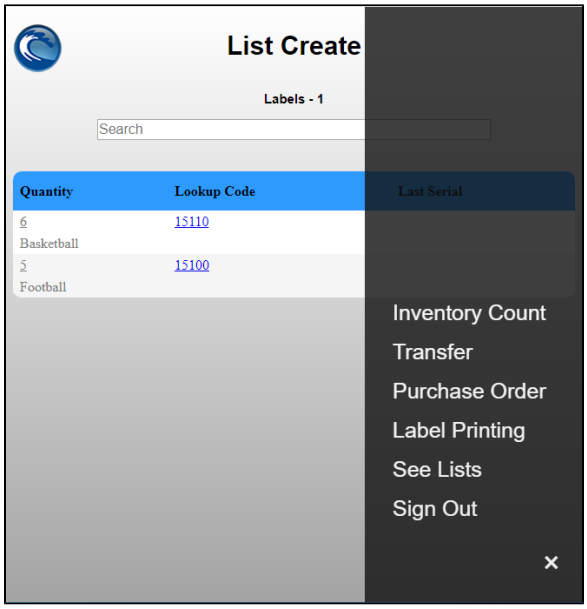


Use Cases

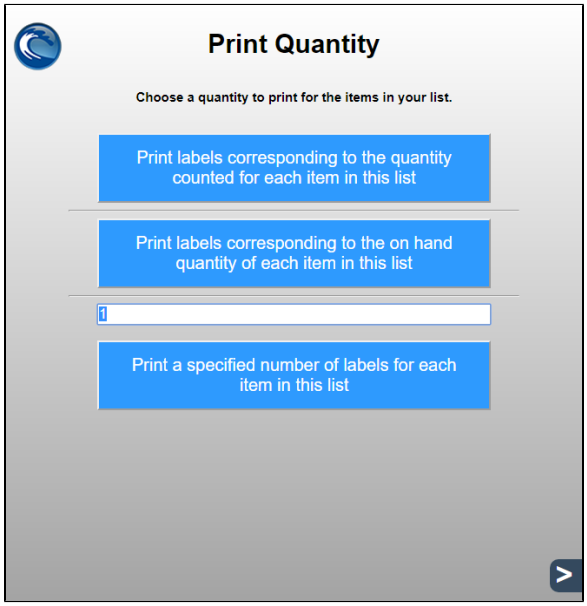
Adding a label template and assigning the printer

Adding a label template and assigning the printer

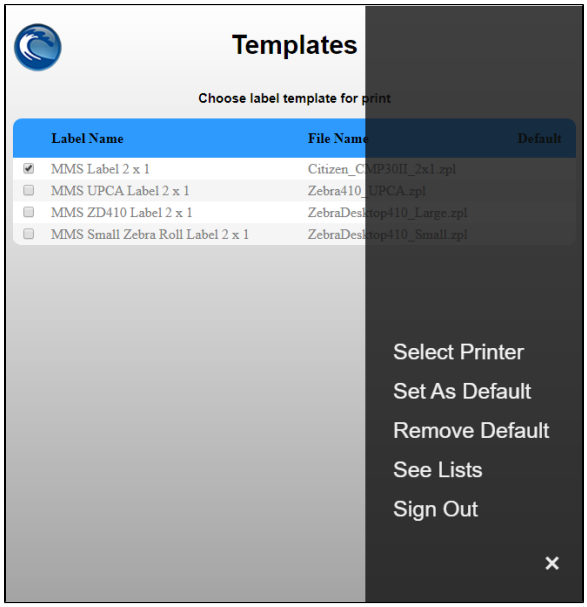
After creating a list the manager will click on the Menu button at the bottom right of the screen and select Label Printing.



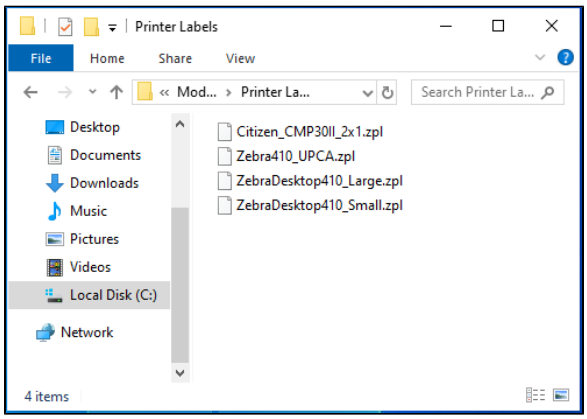
The manager selects the top option on the next screen: Print labels corresponding for the quantity counted for each item in the list.



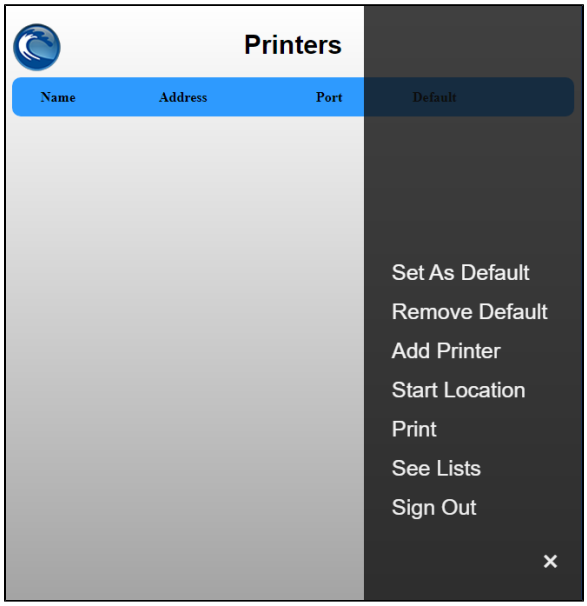
Now the manager is prompted to select the label template they wish to use. Normally they would place a check mark next to the template and then press Select Printer. However the template they wanted to use was not on the list.



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.

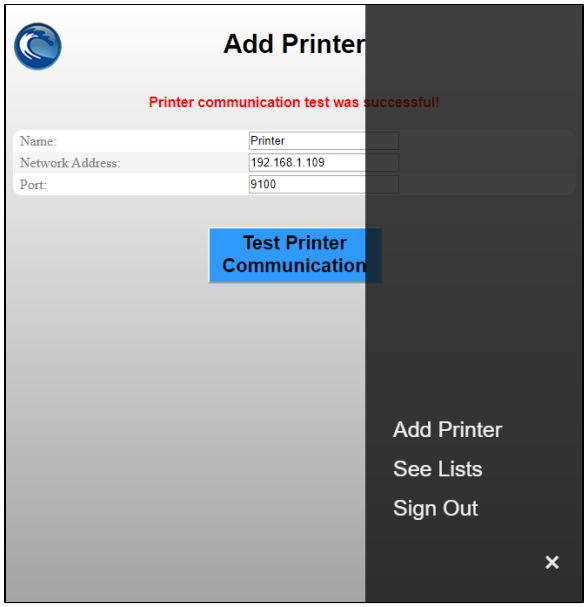


The Printer window is empty at first. The manager clicks on the Menu button and selects Add Printer.

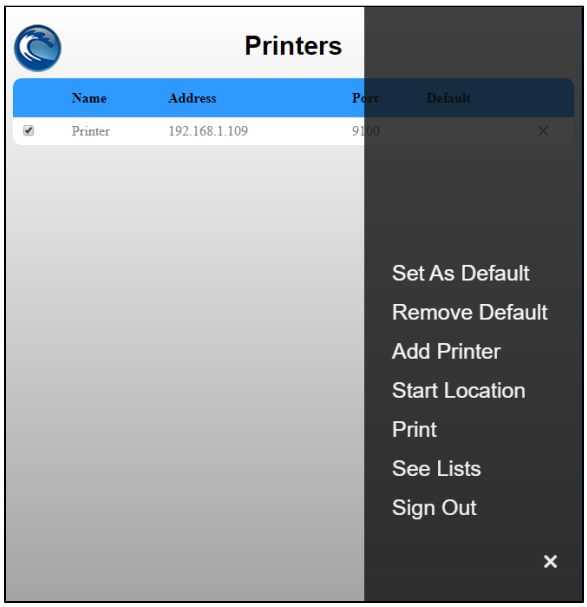


In the Add Printer window the manager has to enter a Name for the printer as well as the Network IP Address and Port number. After entering this information the manager clicks Test printer Communication to make sure it works and then selects Add Printer from the menu.

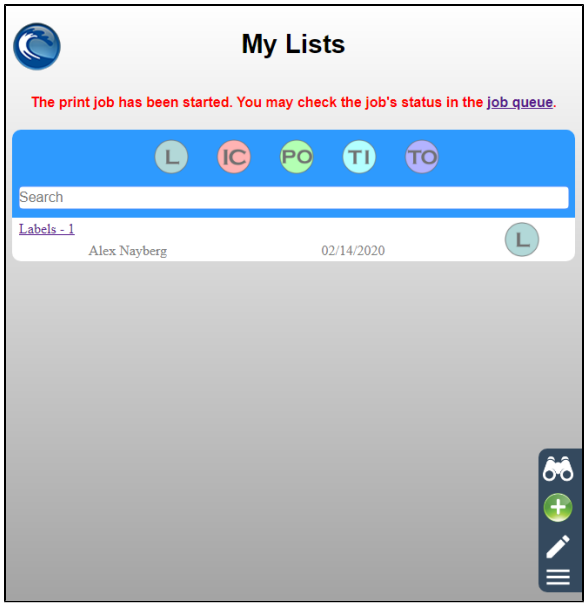
If you are unable to locate the IP Address of your printer please contact your RMH or RMS support representative for assistance.



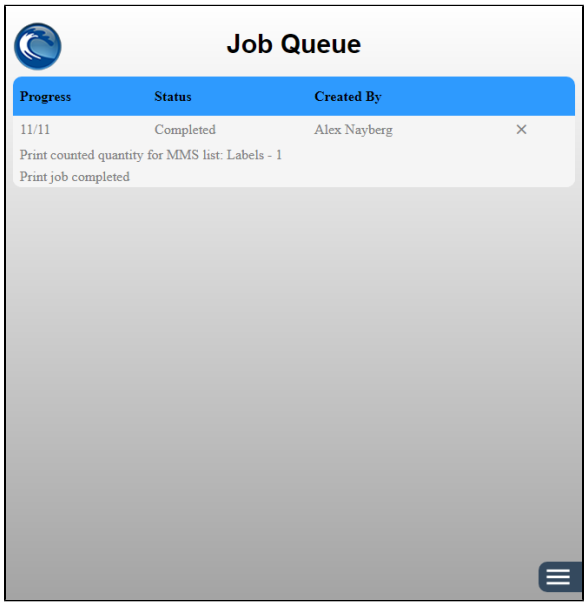
Once the printer has been added the manager is now ready to start printing. They either select Print or Start Location from the menu to start printing.



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.

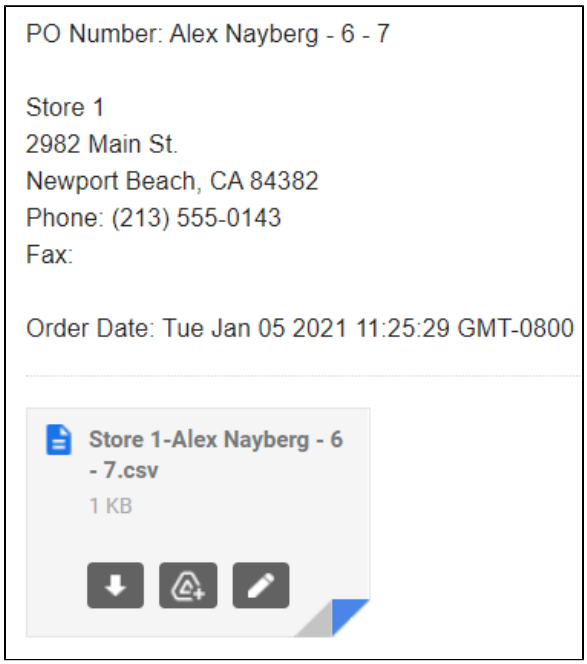


The manager clicks on the Job Queue button and at the Job Queue window the can see that the print job just completed successfully.



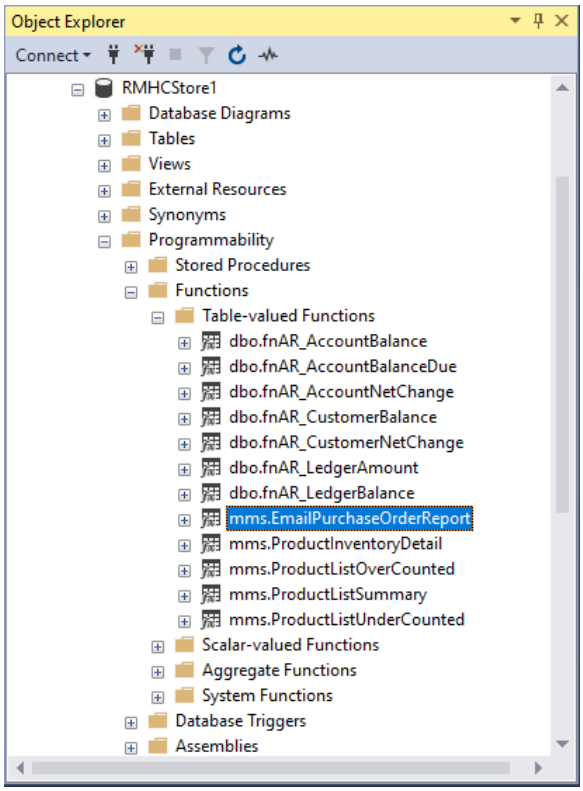
Editing the Purchase Order CSV file sent to a Supplier

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:

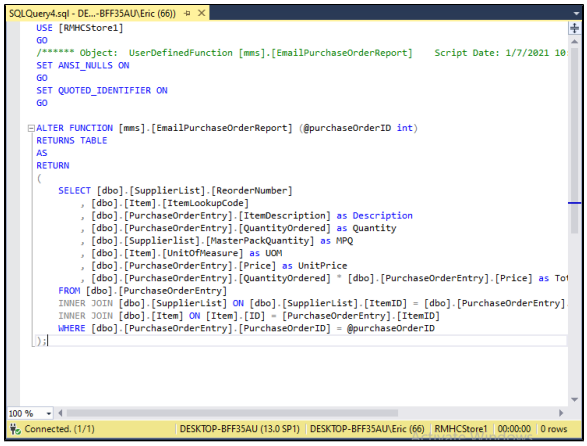
First launch **Microsoft SQL Server Management Studio**. Locate your store database under the **Object Explorer** and click the plus symbol to expand the list of options. Next expand **Programmability** and then expand **Functions** as well.



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

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

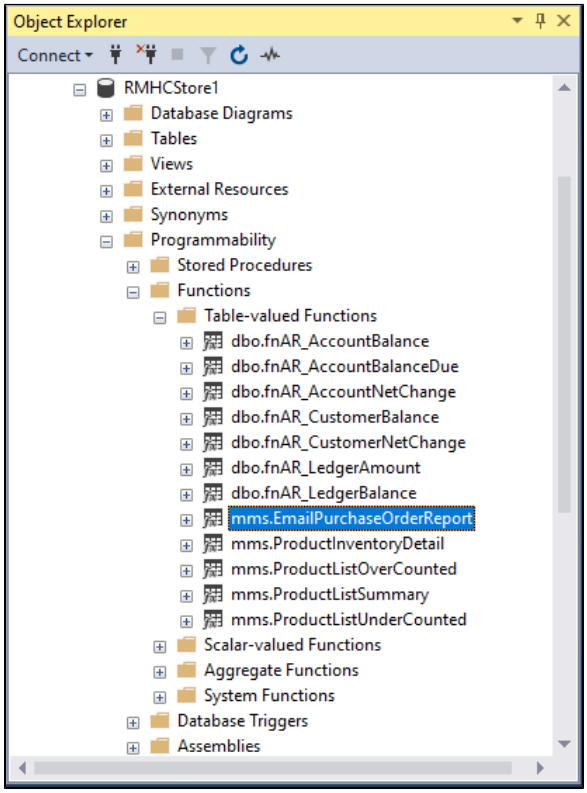
Remove the line "**, [dbo].[SupplierList].[MasterPackQuantity] as MPQ** " from the query window. Then click the **Execute** button above the Object Explorer.



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].[EmailPurchaseOrderReport]** and choose **Modify** .

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

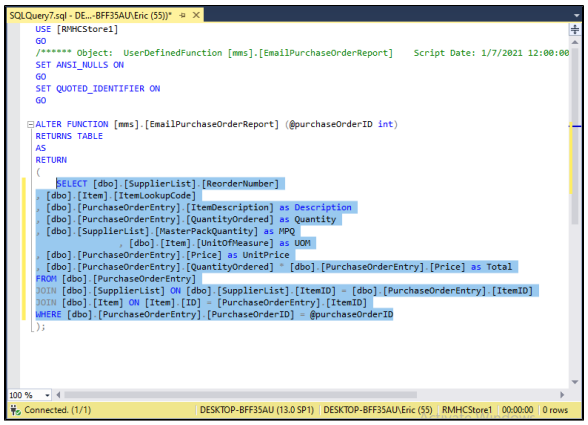
Copy the text in the code block on to the right:

Add Tax and Discount

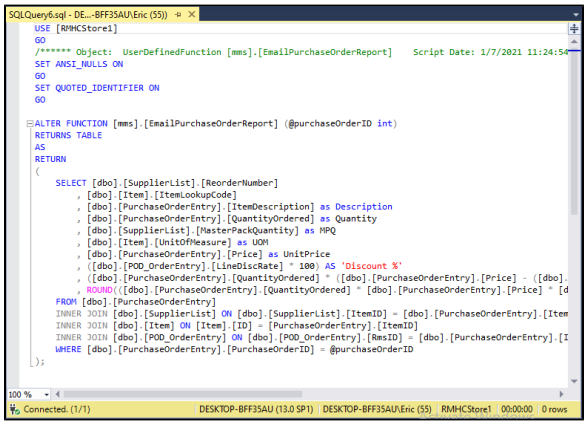
```
SELECT [dbo].[SupplierList].[ReorderNumber]
        , [dbo].[Item].[ItemLookupCode]
        , [dbo].[PurchaseOrderEntry].
[ItemDescription] as Description
        , [dbo].[PurchaseOrderEntry].
[QuantityOrdered] as Quantity
        , [dbo].[SupplierList].
[MasterPackQuantity] as MPQ
        , [dbo].[Item].[UnitOfMeasure] 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
        , 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 to the right:



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 to the right:



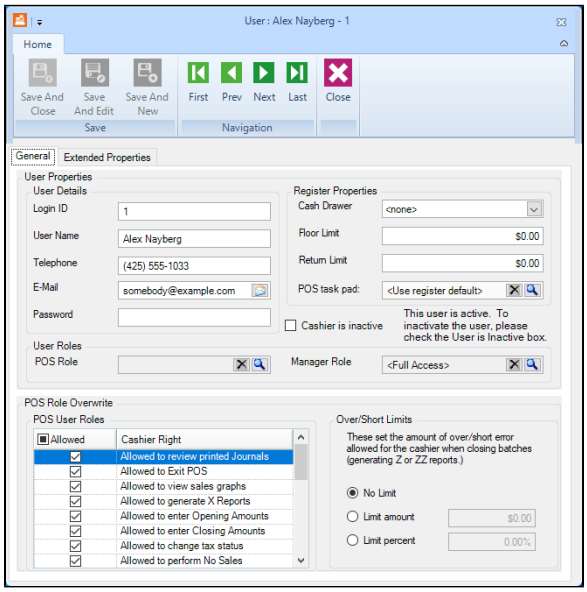
Now click the **Execute** button above the Object Explorer.

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

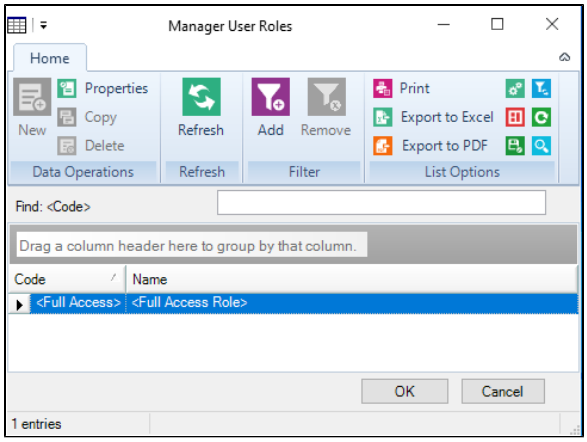
Employee needs manager rights in RMH to access the Administrator options in MMS.

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

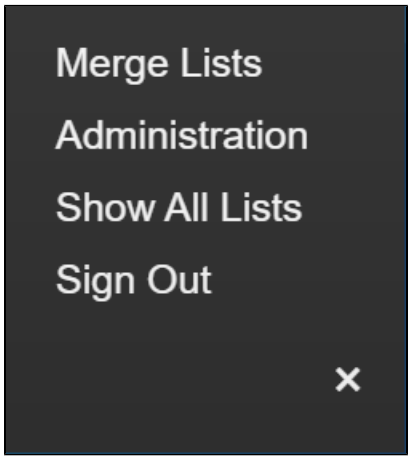
The ability to access the Administration options in MS depend on whether the user has the proper Manager Role configured in RMH Manager. By default RMH will have a Manager Role called <Full Access> but other Manager Roles may be configured at your store. To select a Manager Role click on the magnifying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

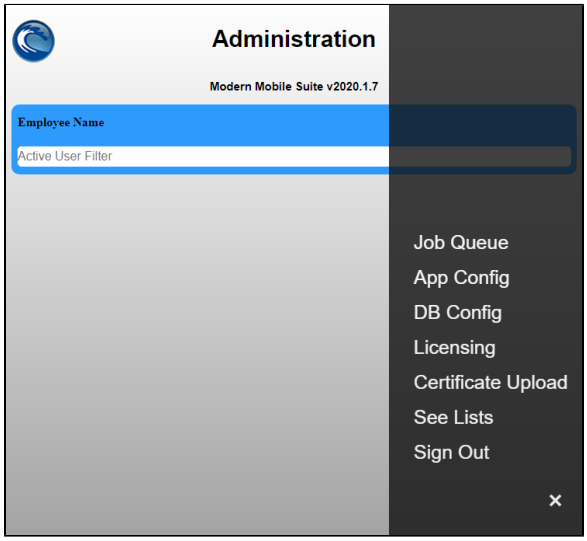


When the user logs into MS and clicks on the Menu button at the lower right corner of the window they will now see Administration as an option.



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

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



How to 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.



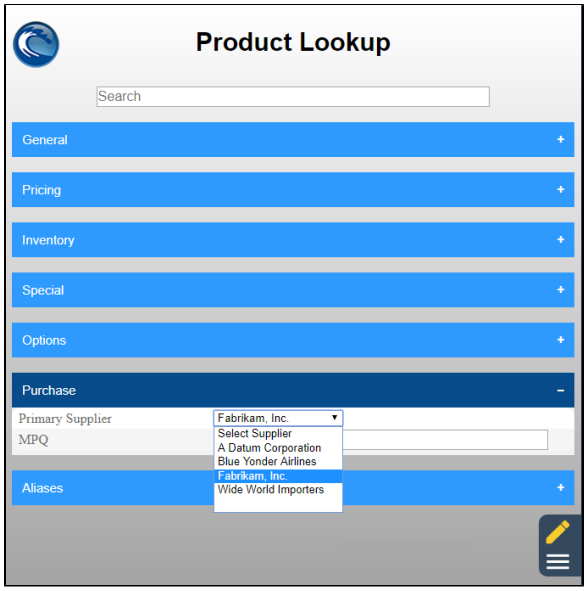
Once at the Product Lookup page the manager enters an item lookup code or alias into the Search field at the top of the window.



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.



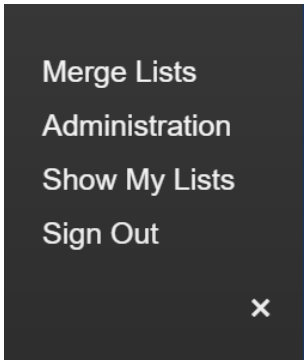
To change the Supplier of the item the Manager expands the Purchase tab and clicks on the Pencil icon at the bottom right of the screen. Now the Manager is able to enter the new Supplier. To finalize the change the Manager clicks on the Pencil button a second time.



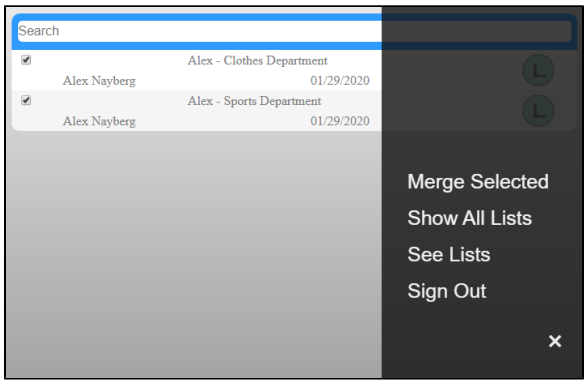
Inventory Count requires merging of multiple lists from different counters

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

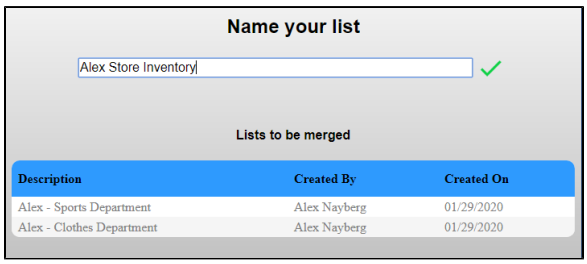
Having completed two lists, Alex would like to merge both lists into one. He clicks on the Menu button and selects the option Merge Lists.



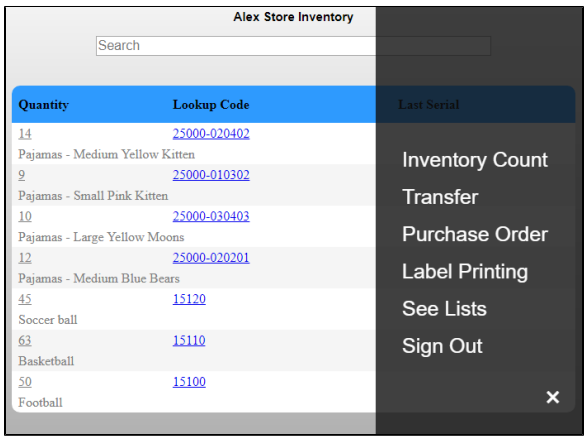
Next Alex places a check mark next to the lists he would like to combine. Then he clicks Menu and selects Merge Selected.



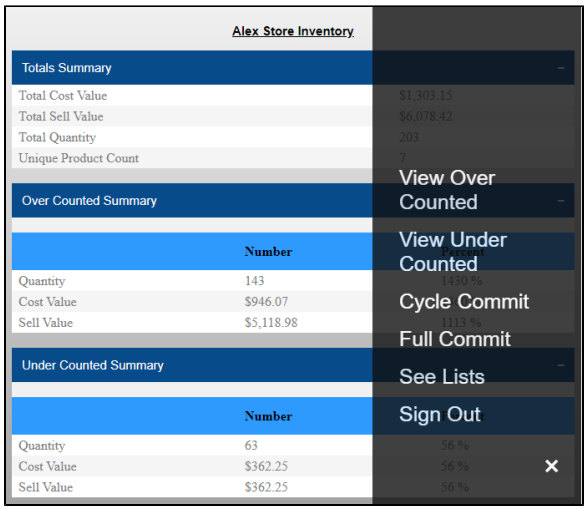
Alex assigns a new name to the merged list.



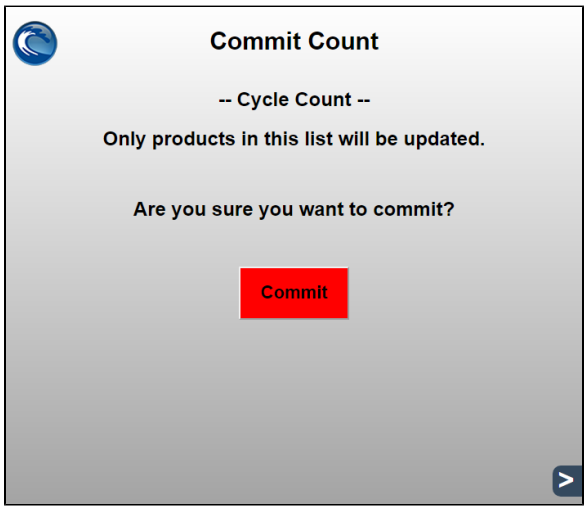
Now that the list has been merged Alex clicks on the Menu button and selects Inventory Count.



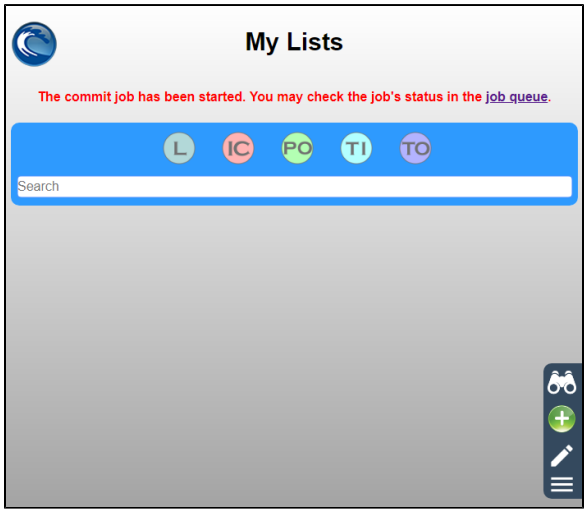
Alex reviews the Inventory Count Summary information. Because Alex wants to complete a Cycle Count, he selects Cycle Commit from the Menu.



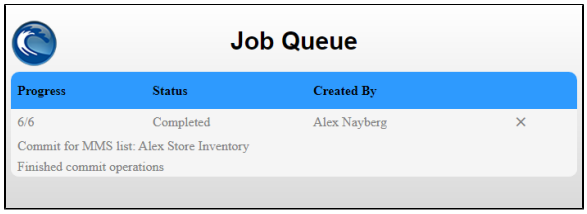
Modern Suite warns Alex that items in this list will be updated in the store database. Alex presses Commit to continue.



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.



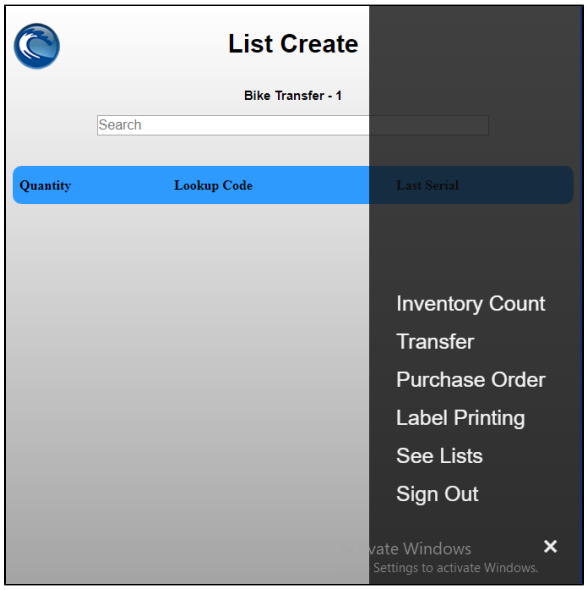
In the Job Queue window Alex is able to see that his inventory count job has already completed successfully.


Job Queue
Progress
Status
Created By
6/6
Completed
Alex Nayberg
Commit for MMS list: Alex Store Inventory
Finished commit operations

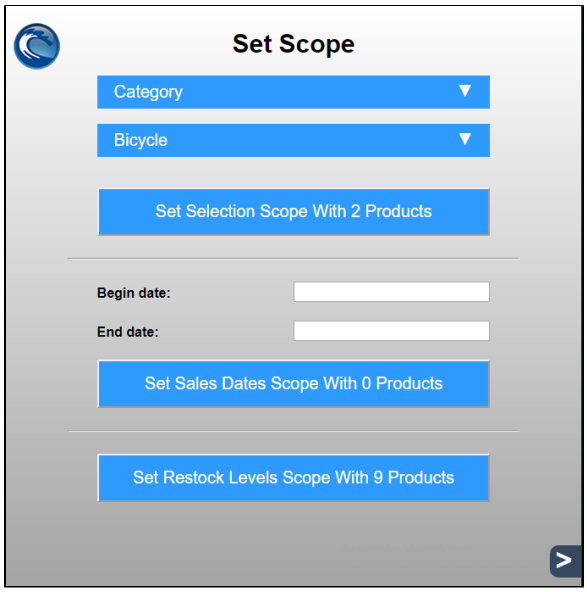
Selecting a Scope for Inter-Store Transfer

Selecting a Scope for Inter-Store Transfer

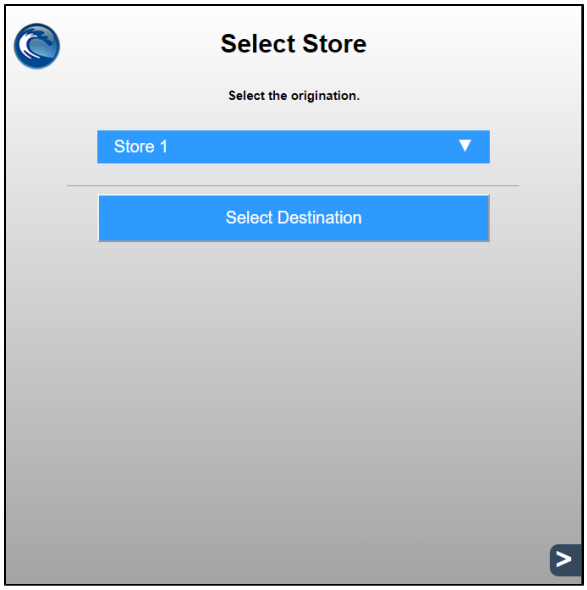
A manager would create a new list and then click on the Menu button at the bottom right of the screen and select the option Transfer.



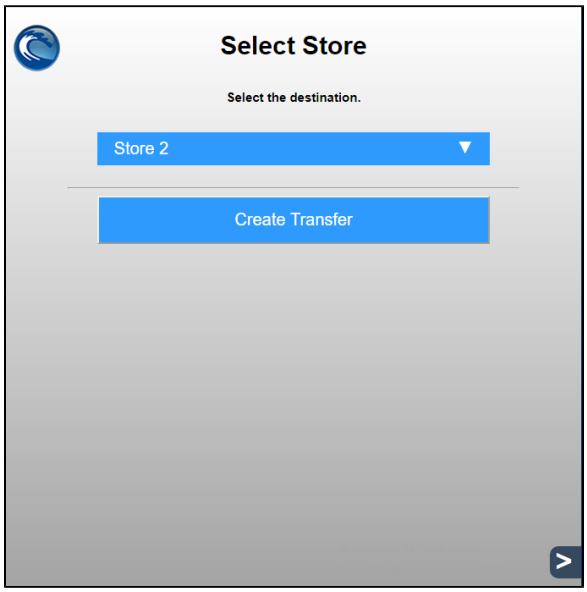
Because no items had been added to the list yet the next screen allows the manager to Set Scope. From the Scoping Options drop down menu the manager would select Category. Then in the drop down menu below that the manager would select Bicycle as the category. Finally, they would click on the Set Selection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



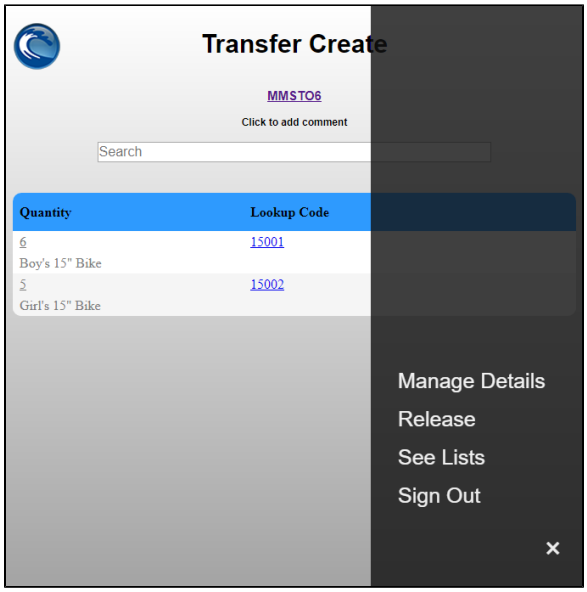
Now the manager would need to select the store to be transferred from. They would choose the store from the drop down menu and click Select Destination.



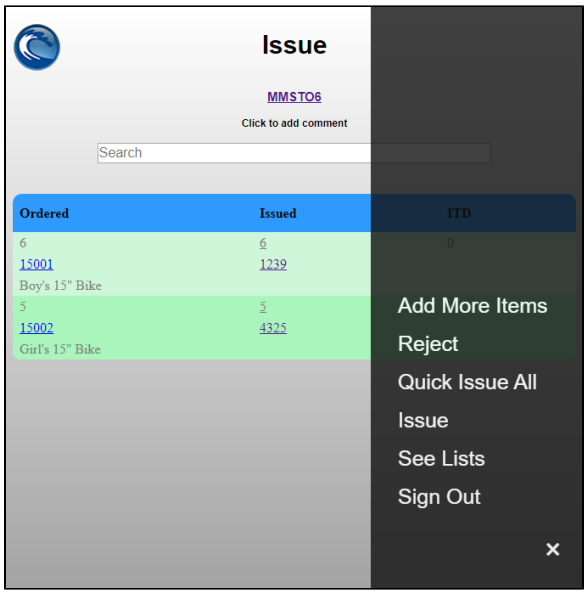
Here the manager would choose the destination store in the drop down list and then click on Create Transfer.



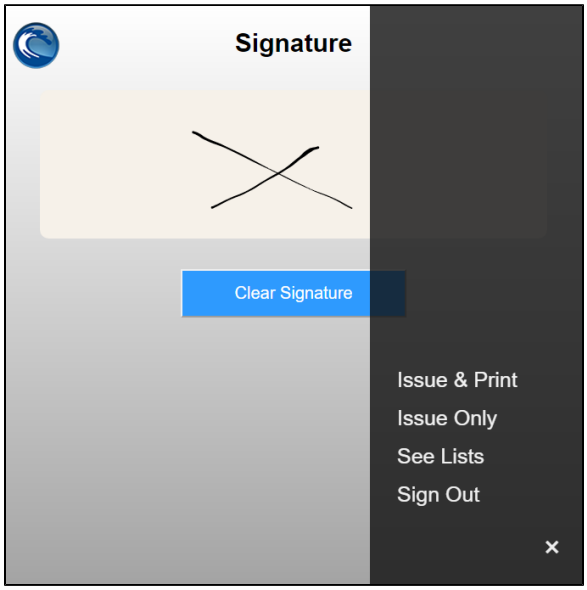
In the Transfer Create window the manager would enter the quantity of each item to be transferred, then click on the Menu button and choose Release.



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.



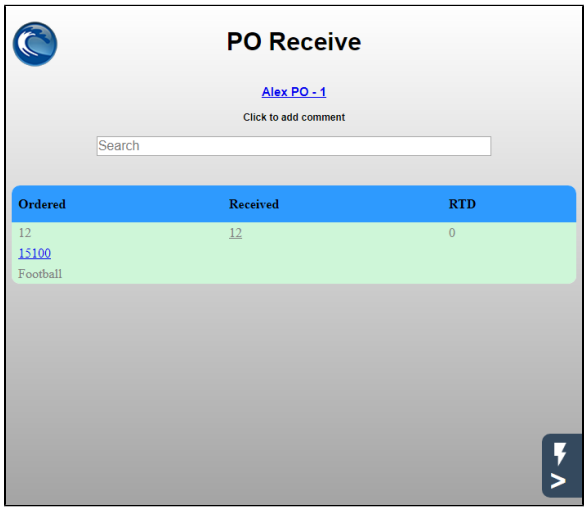
Finally if the Require Signatures for Transfers option is enabled in the MS Administration then the manager would be prompted to sign and choose Issue from the menu.



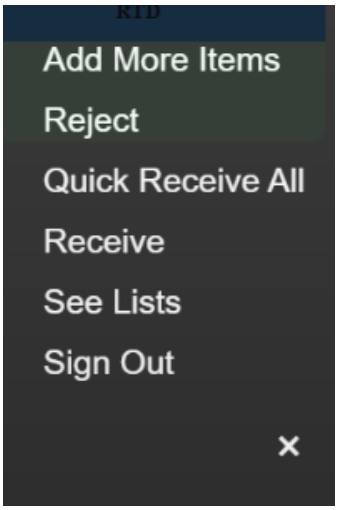
Supplier sends extra inventory for a purchase order

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.



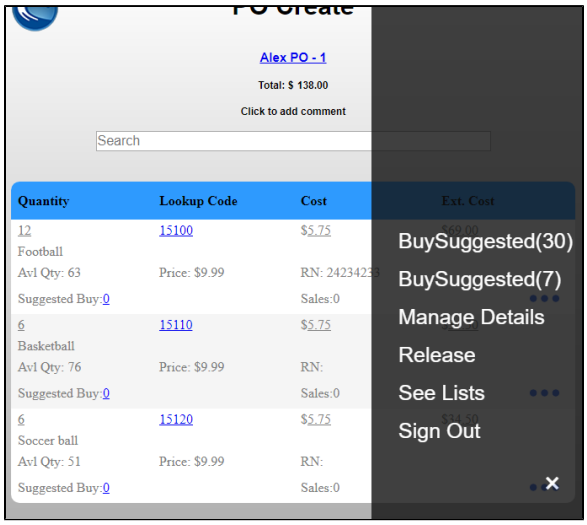
Because 6 basketballs and 6 soccer balls were also in the box Alex clicks on the Menu button and selects Add More Items.



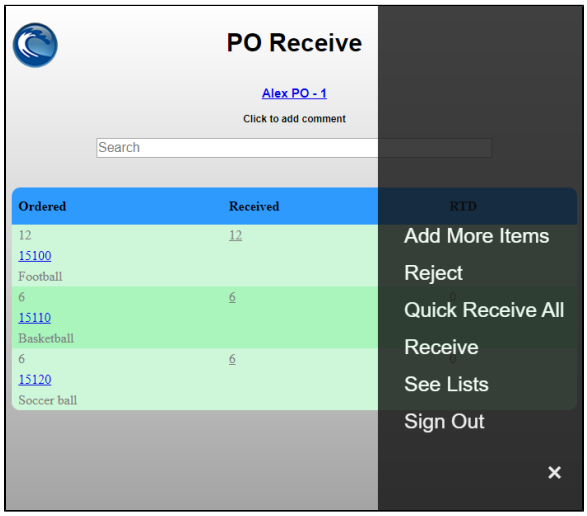
Next Alex adds the item look up numbers and assigns the quantities.



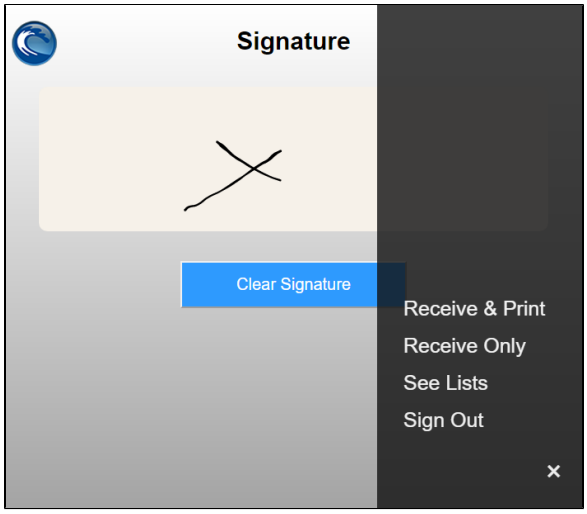
After the basketballs and soccer balls are added Alex clicks on the Menu button and selects Release so that this modified Purchase Order can be Received once more.



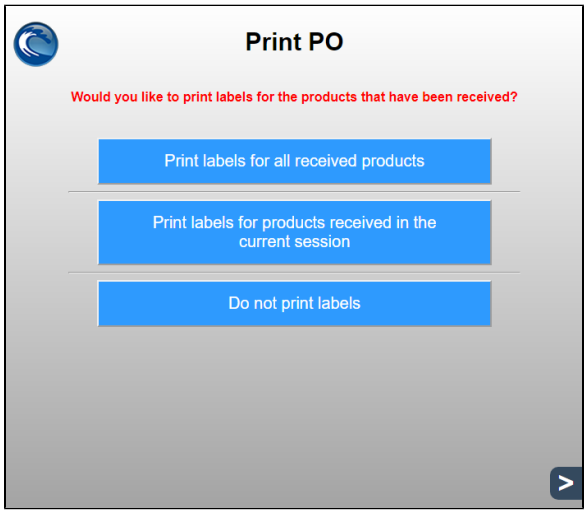
Alex enters the quantities received for the basketballs and soccer balls and then clicks on Menu and selects Receive.



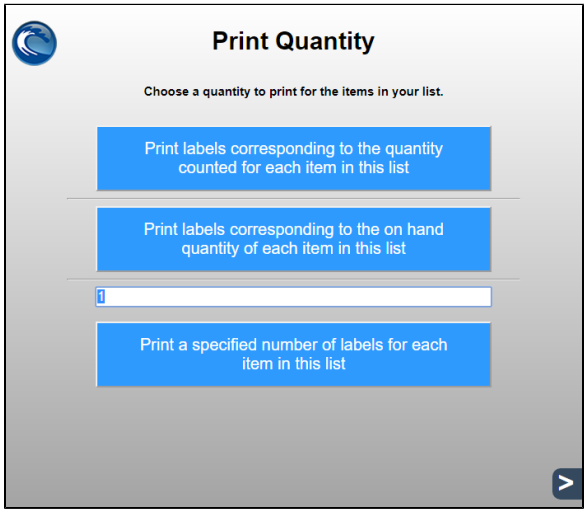
Alex signs to complete the Purchase Order process. He also would like to print labels for the items he received so he clicks on Menu and selects Receive and Print.



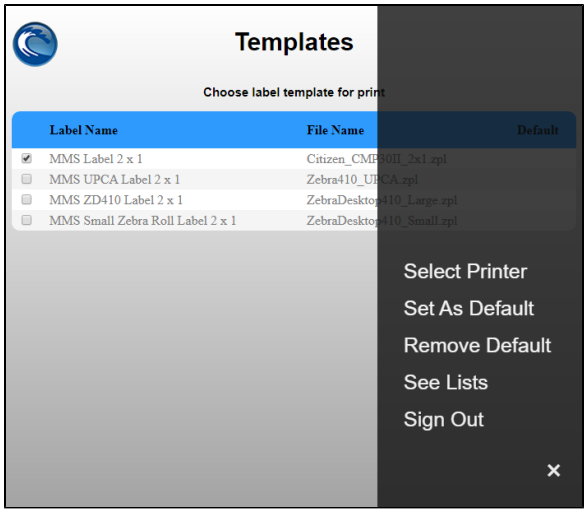
Alex wants to print labels for all the items he received in this Purchase Order so he clicks on 'Print labels for all received products'.



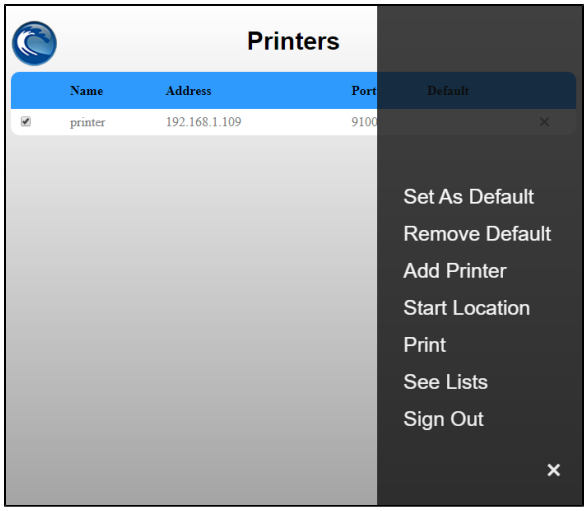
Next Alex clicks on the option 'Print labels corresponding to the quantity counted for each item in the list' so he is sure to have a matching number of labels per items received in the Purchase Order.



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



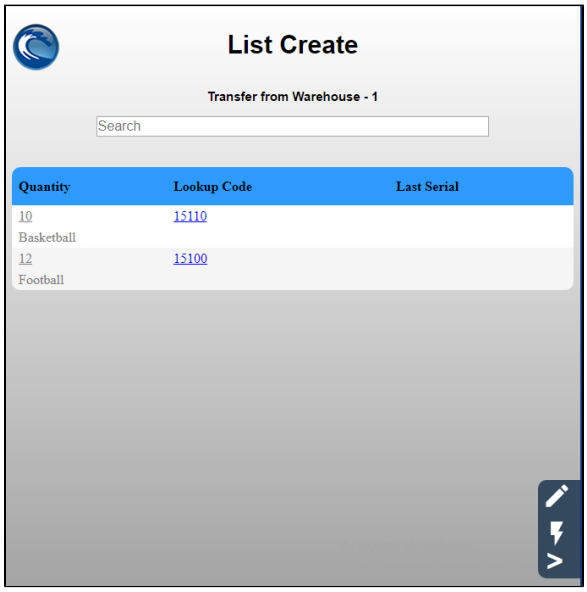
Now Alex is able to place a check mark next to the printer he would like to use. He clicks on the Menu button once more and selects Print to start the printing process.



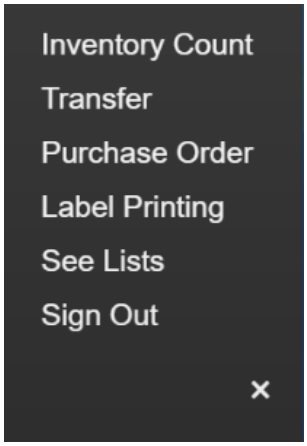
Transfer in from a Warehouse (non-store)

Transfer in from a Warehouse (non-store)

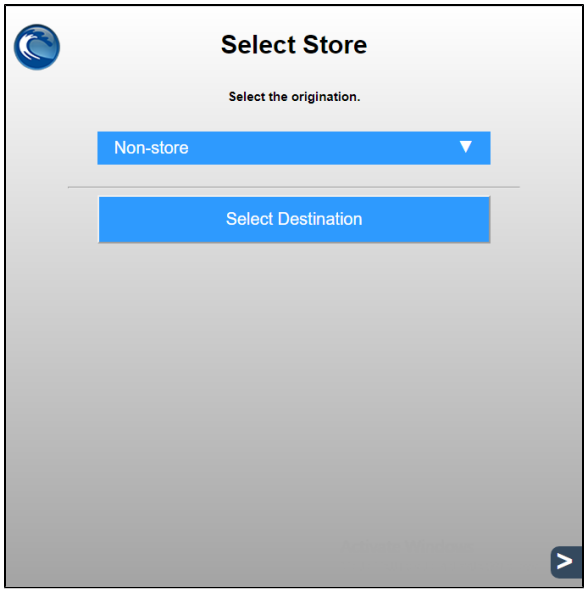
An employee creates a list based on the items the store just received from the warehouse. If the user does not have manager rights then a manager logs into MMS, selects the same list and then clicks on the Menu button at the bottom right of the window.



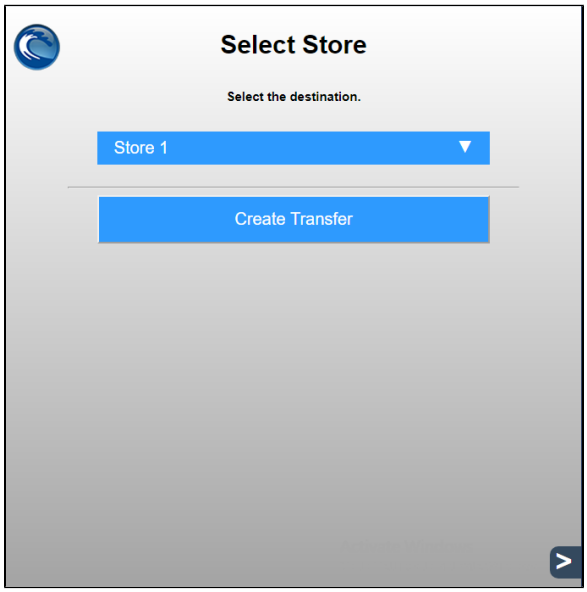
Next the manager clicks on the Transfer option from the Menu.



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.



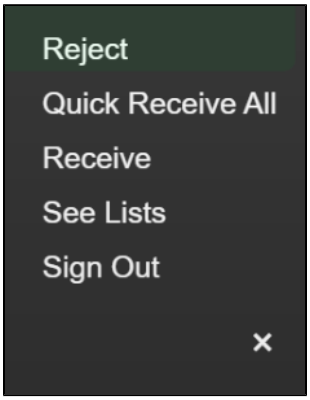
The manager selects the receiving store from the drop down menu and then clicks on Create Transfer.



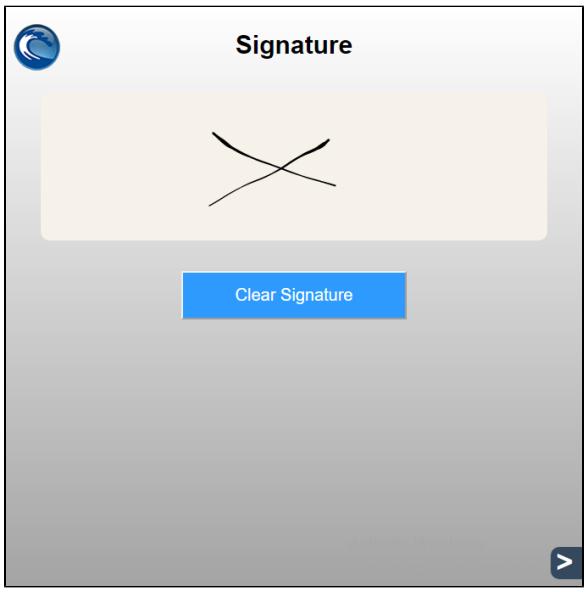
In the Receive window the manager enters in the quantity received fro each of the items. Next they click on the Menu button at the bottom right of the screen.



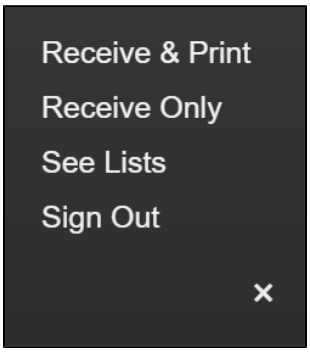
In the menu they click on Receive to continue.



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.



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