

Mobile Inventory App Guide

Rev 08/2021

A Global Payments Company



Table of Contents

Overview
Requirements1
CRE Configuration2
Central API Connection2
Authorize Employee as User1
Configure Over-the-Air Preferences2
Configure Bar Code Preferences2
Configure Automatic Inactivity Logout
Mobile Inventory App4
Download and Sign In 4
Components of Sign-In Screen
Automatic Inactivity Logout5
Inventory6
Scan Barcode7
Lookup Item9
Edit Item 10
Adjust Stock 11
Count Item 13
View Alt SKUs 14
Purchase Orders & Direct Store Deposits 15
Purchase Orders16
Direct Store Deposits
Pending Changes
Other App Components



Refresh Inventory	29
Settings	29
Data Retention During Internet Outages	30



Overview

CRE now offers a Mobile Inventory app for both iOS and Android that allows you to perform various inventory-related functions, including recording and adjusting inventory levels, creating and receiving purchase orders, and processing direct store deposits, all on a mobile device. This document will guide you through the use and features of the Mobile Inventory App.

As of version 5.2, the Mobile Inventory app sends automatic over-the-air inventory updates to CRE. These inventory data updates process within seconds, thus simplifying and speeding up the inventory management process for merchants.

As of version 6.4.0, the Mobile Inventory app supports functionality related to Choice items and Tag Customization. For more information on Tag Customization, please refer to our <u>Tag Customization</u> <u>Guide</u>.

We have worked to ensure backward-compatibility between versions of MIA and CRE so that merchants using older versions of CRE (minimum of 13.1026) can install and use the newest version of MIA.



Requirements

- The Mobile Inventory app requires CRE version 13.1016 or later.
- Over-the-Air updates require CRE version 13.1019 or later.
- Choice items and Tag Customization require CRE version 14.1005 or later
- CRE must be online and connected to Heartland's Central API.
- In order to use the Mobile Inventory app, you must subscribe.

Please note: At this time, the Mobile Inventory app can be run on both Android (phones and tablets - version 8 and later) and Apple devices (iPhones, iPods, and iPads - version 11.0 and later).



CRE Configuration

Central API Connection

• Click the Internet Features tab, and then select Page 3 to access Central API.

Setup Screen				×	
Account Control Company	Info Couponing Hardware	Internet Features	Inventory	Invoice Settings	
Payment Processing	Quick Invoicing & Alerts	Quick-Add	Receipt	Reports	
Restaurant Features	Station Specifics	System Access	Т	ouch Screen	
Page 1 Page 2 Page 3 Pag	je 4				
	Central API URL https://hpos.heartland.us Username PCAM4498 Password e Connect Connect				
<u>S</u> cale	<u>U</u> pdate	•		E <u>x</u> it	

- Enter <u>https://hpos.heartland.us/api</u> in the URL box, enter values for Username and Password, then click Connect.
- If connection is successful, the button will turn green and read **Connected**.



- Click **Update** to save changes and **Exit** to close.
- In order to begin synchronizing, once you have successfully connected to the Central API, you must close/restart CRE POS.

Please note: You need only do this configuration at the file server, and not at the workstations.



Authorize Employee as User

To enable a user for Mobile Inventory, you must take the following steps for each employee in **Employee Maintenance**:

- Go to the **Personal Info** tab and define a valid and unique email address for employee.
- In the General Information area at the top of the screen, select Enable Mobile Inventory and select Save Changes and then Exit.

Employee Main	tenance					
Options Gen	eral Information F	or: Rufus				Keyboard
Department	~	Card Swipe ID				
Employee ID	100101	Customer				
Password	*****	Hourly Wage	\$0.00			
Display Name	Rufus	Take CC Tips in	Cash at End of Shi	ift	Click t	o Select Picture
Disa <u>b</u> le this Er	nployee	Require Clock-Ir	n Before Login	Enable Mo	bile Inventory	
Permission	s Personal Info	Job Codes &	Wages Sto	re Associations	s Payroll Info	
First Name	Rufus		Street Addres	ss		
Middle Name]			
Last Name	Schmincke		City			
SSN / ID	00000000		State			
Phone #	000000000		Zip Code			
E-Mail	rufus@rufus.rufus]			
Birthday]			
Search by En	nplovee ID					
100101			dd	Sa <u>v</u> e	<u>J</u> ob Code	Time Clock
		Emp	loyee	Changes	Setup	Management
Previous	<u>N</u> ex	t 🕐 !	<u>H</u> elp	<u>D</u> uplicate	De <u>l</u> ete	E <u>x</u> it

Please note:

- Each user requires their own unique email address. That is, a single email cannot be used more than once at any given site.
- The Enable Mobile Inventory option is available only for employees with email addresses on file in CRE. If the email address is blank, the Mobile Inventory option will be grayed out. As well, deleting an email from a user with Mobile Inventory enabled will automatically disable Mobile Inventory.
- You cannot use the default '01' user for Mobile Inventory, nor can you use any employees that were created as duplicates of this user by using the **Duplicate** function. If any such user requires access to Mobile Inventory, you must create them anew using **Add Employee** and then configure with appropriate permissions.



Configure Over-the-Air Preferences

As of version 13.1019, CRE supports over-the-air inventory updates to/from the Mobile Inventory app. These automatic updates process within seconds, thus simplifying and speeding up the inventory management process for merchants.

To use this feature, do the following:

- Go to Setup | Setup Screen.
- Go to the Internet Features tab, and then select the Page 4 subtab.

Payment Pro	cessing	Quick Invoicing & Ale	rts C	uick-Add	Receipt	Reports
Restaurant	Features	Station Specifics		System Access	T	ouch Screen
Page 1 Page 2	Page 3 Page 4					
Mobile Po	cket Inventory Sy	mbologies				
	Drop first digit	t Drop last digit		activity Logout in	Mobile Invento	ry Application
UPC A			Logout if	no activity for	4 minutes	
UPC E0						
UPC E1						
EAN 8						
EAN 13						
Enable thi Inventory	ver the air update s option to bypass Track Express app e the changes dire atabase.	roval,				

• Check the Enable over the air update box and select Update.

Configure Bar Code Preferences

To configure bar code preferences, from **Page 4** of **Internet Features** in the **Setup Screen** (as above), select the appropriate options under **Mobile Pocket Inventory Symbologies**, and click **Update** to save changes.



Configure Automatic Inactivity Logout

As of CRE version 14.1005 and Mobile Inventory version 6.3.0, for added security, we have added an option to automatically log out users from the Mobile Inventory app after a specified number of minutes of activity. This setting must be enabled in **Internet Features** of CRE.

Setup Screen Account Control	Company Info	Couponing H	ardware Int	ernet Features	Inventory	\times Invoice Settings
Payment Proce	ssing	Quick Invoicing & Ale	erts Q	uick-Add	Receipt	Reports
Restaurant Fe	eatures	Station Specifics	s	System Access	Т	ouch Screen
Page 1 Page 2	Page 3 Page 4					
Mobile Pock UPC A UPC E0 UPC E1 EAN 8 EAN 13	ket Inventory Sy Drop first digit	-		activity Logout in no activity for	Mobile Inventor 4 minutes	
Enable this of Inventory Tra	er the air update option to bypass ack Express app the changes dire abase.	roval,				
<u>S</u> cale	e	U	pdate		E	E <u>x</u> it

Once set, it will be picked up and enforced by the app the next time a user refreshes data.

With this setting enabled, the app will behave as follows:

- If a user is inactive for the set duration, the app will automatically log them out and return them to the login screen.
- When the user is ready to log back in, they will be required to enter their credentials.
- If a user has pending changes at the time of automatic logout, the app will keep those changes intact as pending.

Heartland Cash Register Express

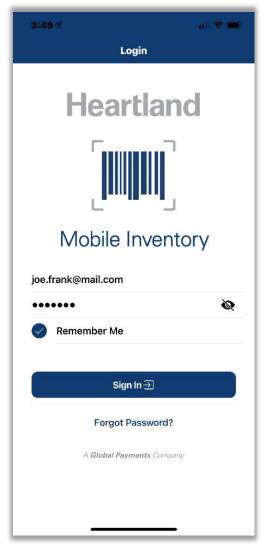
Mobile Inventory App

Download and Sign In

- 1 Download the Heartland Mobile Inventory app.
 - For Android devices, download from Google Play.
 - For iOS devices, download from the App Store.
- 2 Enter the **Email** and **Password** associated with your CRE store(s) from your **Welcome Email**.
- **3** Select **Sign In**. The first time you sign in, the app will prompt you to refresh the inventory associated with your store.
 - If you have only a single store associated with your credentials, the app will automatically connect and retrieve that store's data.
 - If you have multiple stores associated with your credentials, the app will prompt you to select a store and will then connect and retrieve the selected store's data.

Components of Sign-In Screen

- Email: Use the email associated with your CRE store(s) from your Welcome Email.
- Password: Use the password associated with your CRE store(s) from your Welcome Email. You can show/hide your password by tapping the eye icon.
- Remember Me: Check this box on devices used only by you.
- Sign-In button: This button will be enabled after valid data is entered in Email and Password fields.
- Forgot Password: Selecting this will open a browser window so you can reset your password.

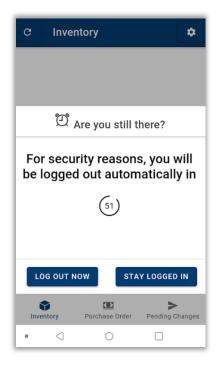




Automatic Inactivity Logout

As previously described, you can configure the Mobile Inventory app to automatically log out users after a designated number of minutes of inactivity. This setting must be defined in CRE. For more information, please refer back to <u>this section</u>.

Before logging out a user, the Mobile Inventory app will display a message informing them that they will soon be logged out unless they take action. The message displays when there is one minute remaining, based on the **Inactivity Logout** time set in CRE, and begins its countdown at 59 seconds. The countdown will continue unless the user selects one of the available options, or until the time reaches zero (0) seconds, at which point, the app will log the user out.



- If the user chooses to Log Out Now before the countdown expires, the app will treat the action as a manual log-out and will return them to the log-in screen where they will be required to enter their credentials manually when they wish to log back in.
- If the user chooses to Stay Logged In before the countdown expires, the app will return the user to the previous page and will reset the allotted time for Inactivity Logout.



Inventory

The **Inventory** screen is the default landing page of the **Heartland Mobile Inventory** app, and it displays immediately upon login. From this page, you can access and edit your inventory items by using either the **Scan Barcode** and **Lookup Item** function. The **Inventory** screen also displays the date and time of the last inventory update.

9:32		all 🗟 🗖
Ċ	Inventory	ø
	Scan Barcode	
	Lookup Item	
	Lookup nem	
Last Upd	ated at 6/28/2020, 9:	:31:48 AM
Inventory	Purchase Order	Pending Changes



Scan Barcode

Standard Items

If you select **Scan Barcode**, the app will open a barcode scanning viewer to perform the scan. Align the barcode in the green box so that the red line passes through it.

all 🗟 🔤	10:37
ther liquid needed in recipe.	Cack Item Details
	Item Number
y has been dedicated to and sustainably. Our organic thful, delicious rice while	073416001602
nd sustainably. Our organic	Item Name
thful, delicious rice while	Lundburg Brown Rice Syrup
IT TOT TUTUTE Gener Boons.	Department
al stewardship at Lundberg	NONE
A VIEW AND A COMPANY OF THE OWNER.	Cost
	4.29
	Price
	7.99
	Retail Price
72416 00160 2	7.99
73416 00100	In Stock
	12
	Show Other Details
No. of Concession, Name of	1
	Adjust Stock Count It
Cancel	

Once the app has captured the barcode, it will search for the matching item.

If a matching item for the barcode exists in the database, the app will display the **Item Details** page, as pictured in the example above. From here, you can edit the item details, as well as enter **Adjust Stock** and **Count Item**.

If the app does not find a matching item, it will display a message to that effect, with the option to add the item. Selecting **OK** will open the **Add Item** page.

	firm 416001602] not nd.
Do you want to	add this item?
Cancel	ок



Choice Items

If you scan a Choice item, the app will display all linked standard items, and will denote any linked standard items, both tagged and non-tagged. Tagged items will display in a hyphenated fashion, with their assigned tags preceding the item names (for example, 'TagName - ItemName').

Choice Item with Non-Tagged Items: In this example, we have scanned a Choice Item called 'Baskets' which has two non-tagged standard items attached to it ('Large Basket', and 'Small Basket).

÷	Choice	Item Selection	
Choice It	Kets - BAS tem hoose an item from		
LAF	arge Basket RGEB ce: \$5.00	In Stock: 10.00	>
SM	mall Basket	In Stock: 10.00	>

Choice Item with Tagged Items: In this example, we have scanned a Choice Item called 'Choice Master' which has two tagged standard items attached to it ('Choice 0, tagged 'Fresh', and 'Choice 1' tagged 'Stale).

← Choice I	tem Selection	
Choice Master	- 66666666	
Choice Item Please choose an item from th	he list below to view the correspon	ding item detail.
Fresh - Choice	0	>
Price: \$6.75	in Stock: 0.90	
Stale - Choice 1	I	
98761234		>

In either case, From this page, as above, you can select the item you would like to view or edit, and the app will open the **Item Details** page for that item. For tagged items, this page includes the **Tag** field and the selected tag. Please note that the Tag field is not editable, and displays only for tagged items.



Lookup Item

Standard Items

If you select **Lookup Item**, the app will open a **Lookup** page with a **Search** box. This page includes important information about inventory items, including price and in-stock values.

To search for an item, simply type in an item name or number, and the app will narrow results to matching items.

ack	Lookup			〈 Bac	ck		L	ooku	p			
्र search by	item name or number			Q	syrup							
test 06933876		>					wn R	Rice S	yrup			
Price: \$3.00	In Stock: 100			P	rice: \$7.9	99		In S	Stock: {	5		
Lundburg Br 073416001602 Price: \$7.99		>										
CandyBar 096619215690 Price: \$5.00	In Stock: 482	>										
	search by item name or number st assars6 assars6 assars6 ass 33.00 in Stock: 100 In Stock: 100 In Stock: 5 In Stock: 5 In Stock: 5 In Stock: 5 In Stock: 482 In Dollar each bolLARBOOKS bolLARSUPPLIES DOLLARSUPPLIES											
10DOLLARBOOI	KS	>			-	-	-	t J	/ L	۲ ا	i (D
10DOLLARBOOK Price: \$10.00 Ten Dollar Su 10DOLLARSUPF	kS In Stock: 88 upplies PLIES			q	w e	e r d	·] ·	g	h	j	k)
10DOLLARBOOI Price: \$10.00 Ten Dollar Su	kS In Stock: 88 upplies PLIES			q	w e	e r d	f c	g	h b	j	k	2

You can then select the desired item from the list to open its Item Details page.

Choice Items

As with scanning, if you look up a Choice item, the app will display all linked standard items, and will denote any linked standard items, both tagged and non-tagged. You can then select the standard item you would like to view or edit, and the app will open the **Item Details** page for that item.





Edit Item

To edit an item, from the **Item Details** page, select the edit icon in the upper right corner of the page.

ack Item Details	♦ Back Item Details
em Number	Item Number
96619215690	096619215690
em Name	Item Name
CandyBar	CandyBar
epartment	Department
IONE	NONE
ost	Cost
.00	3.00
rice	Price
.00	5.00
etail Price	Retail Price
.00	0.00
n Stock	In Stock
72	472
how Other Details	Show Other Details
Adjust Stock Count Item	

This will activate all editable fields so you can make desired changes. Once you have made your changes, select the save icon in the upper right corner.

Please note: You cannot edit Item Number or In Stock from this screen.



Adjust Stock

This function allows you to adjust stock for inventory items within the app.

Increase or Decrease

- 1 From the **Item Details** page, select **Adjust Stock**.
- Select an Action. By default, Increase is selected. To decrease stock level, as in our example, select Action and, in the window that opens, select Decrease and then OK.

	9:40)	_		_	_		ni 🗢 I	-
(в	Back		A	djus	t Sto	c k			
		m: Lui Stock		rg Bro	own R	ice S	yrup		
4	Actior	n					Inc	rease	Ŧ
E	Enter	Adjus	tmer	nt Val	le				
F	Reaso	on Co	le						~
			Sa		d Rep xit	eat			
1	2	3	4	5	6	7	8	9	0
-	1	:	;	()	\$	&	@	"
#+=	-	•	•		?	!	•		\bigotimes
	АВС			sp	ace			retu	rn
¢	۲							Ļ	<u>Q</u>

- 3 Enter the number by which you wish to adjust your stock.
- 4 Select a **Reason Code** from the list. For more information on **Reason Codes**, please refer to our <u>Vendors & Purchase Order</u> <u>Guide</u>.
- 5 Select **Save and Repeat** if you have more adjustments to make. Select **Save and Exit** if you are finished with stock level adjustments.



Change Tag

The Mobile Inventory app allows you to transfer, or migrate, a quantity of items from one tagged status to the other. For more information on this feature, please refer to our <u>Tag Customization</u> <u>Guide</u>.

1 Find and select the desired item from the Inventory page and select Adjust Stock.

2 Select Change Tag.

← Choice Item Selection	← Item Details 🖍	← Adjust Stock	← Adjust Stock
Choice Master - 66666666 Choice Item	Item Number CHOICE0	Item: Choice 0 In Stock: 10.00	Item: Choice 0 In Stock: 10.00
Please choose an item from below to continue.	Item Name Choice 0	Act Action	Action Change Tag *
FRESH - Choice 0	Department BAKERY - BAKERY	Ent O Increase	5 ×
Price: \$2.00 In Stock: 10.00	Cost 0.00	Re: Decrease	Reason Code 👻
STALE - Choice 1 CHOICE 1 Proce 52.00 In Strock: 10.00	Price 2.00	Change Tag	
	Retail Price 0.00	CANCEL OK	
	In Stock	SAVE AND REPEAT	SAVE AND REPEAT
	ADJUST STOCK COUNT ITEM		
		EXIT	SAVE AND EXIT
• < 0 □	• < 0 🗆	• < 0 □	• < 0 🗆

3 Select the desired tag from the dropdown list and enter the quantity you wish to migrate.

4 Tap Save and Exit.

Please note:

- If you enter a quantity greater than the quantity on hand, the app will display a message to that effect so you can correct the value.
- Tag migration is unidirectional. For example, you can change an item's tag from 'New' to 'Old', or 'Fresh' to 'Stale', but not vice versa.





Count Item

This function allows you to enter a new count for an item's stock level within the app.

1 From the Item Details page, select Count Item.

	1:02							ul 🗢 (<u> </u>
Ba	ck		(Coun	t Iter	n			
	iter In S	n: Ca tock	ndyBa : 472	ar					
4	72								8
			Sa	ve an	d Rep	eat			
				E	xit				
_									
	2	3	4	5	6	7	8	9	0
1)	\$	&	@	"
1 -	1	:	;	(<u>'</u>	\square	-	_	
-	1):	;	(-	!	•		\bigotimes
-	/ BC				-	!	•	retu	

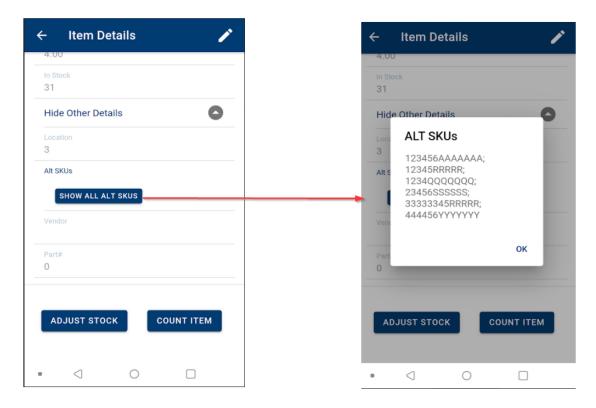
- 2 Enter the desired count value. Keep in mind that this value will replace the existing count an, therefore, should include **ALL** stock.
- 3 Select **Save and Repeat** if you have more adjustments to make. Select **Save and Exit** if you are finished with count adjustments.

Please note: Since some items, such as coupons and lottery pay-ins and pay-outs, are nonstandard, they are ineligible for actions such as editing, adding to purchase orders, etc., in MIA. With this in mind, to avoid confusion and inadvertent errors, when these items are looked up or scanned, they now display in read-only mode. This is true as of MIA version 6.1.0 and CRE version 14.1001.



View Alt SKUs

As of version 6.2.0, the Mobile Inventory app allows you to look up and view alternate SKUs for items. If the app finds multiple matches for the search criteria, it will display a **Show All Alt SKUs** button.



If you select this option, the app will display a list of all matching alternate SKUs.



Purchase Orders & Direct Store Deposits

The Purchase Order page of the Mobile Inventory app allows you to perform several functions related to purchase orders and direct store deposits. These include:

- Receive PO
- Create PO
- Credit DSD
- Create DSD

The following section explains how to perform each of these.

9:43		uli 🗟 🗖
Ċ	Purchase Orders	ø
Purchase Ord	ers	
	Receive PO	
	Create PO	
Direct Store D	Deposit	
	Credit DSD	
	Create DSD	
Last Updat	ed at 6/28/2020, 9:3	31:48 AM
Inventory	Purchase Order	Pending Changes



Purchase Orders

Receive PO

The **Receive PO** function allows you to receive existing purchase orders within the app. When you select this option, the app will display a list of all open purchase orders previously fetched from POS. To receive a purchase order, select **Receive PO** from the **Purchase Order** page and follow the steps below.

1 You can select a purchase order from the list, or use the search field to narrow the list of purchase orders by PO number, vendor, or reference number.

Back Receive PO			く Back	Receive P(
् search by PO#, vendor # or	reference#		Q 123	
Purchase Order#1 Vendor: test	Due: 06/18/20	>	Purchase Or Vendor: test	rder#1
Purchase Order#2 Vendor: test	Due: 06/18/20	>	Purchase Or Vendor: test	rder#2
Purchase Order#1199042178 Vendor: test	Due: 06/30/20	>		

After you enter search terms, the app will automatically filter existing purchase orders so that only those with matching values are displayed.

- 2 Once you have selected the desired purchase order from the list, the app will display the **Purchase Order** page, including **Vendor** and, if available, **Reference Number**.
- 3 To receive an item, you can either simply select an item from the list. Aternatively, to narrow results, you can enter search terms in the box provided, or you can select Search by Barcode to scan the item's barcode. If you select Search by Barcode, the app will open the mobile device's camera allowing you to scan the barcode.
 - If the scanned barcode doesn't exist in the purchase order, MIA will display a notification to that effect.
 - If the scanned barcode does exist, MIA will display a screen showing the quantity ordered with an editable field for the quantity received. The quantity received will default to one (1). To receive a quantity greater than one, you can either enter the desired value in the field, or scan the item's barcode again until the desired quantity is received.



4 Once you have selected an item, the app will display the Item Name page where you can enter quantities received. In the Received box, enter the total quantity received, including any damaged items. If any items are damaged, enter the quantity in the Damaged box. Likewise, if any items are out-of-date or expired, enter the quantity in the Out-of-Date/Expired box.

9:43	al + 🚥	2:35 🗸		at 🗢 💼	2:35 🕫	.ul 🗢 📼)
く Back	Receive PO	K Back	PO #6		く Back	Item Name
Q Search		Vendor: tes Reference	t Number: 0628200	948		Lundburg Brown Rice Syrup ber: 073416001602 • \$4 29
Purchase Ord Vendor: test	>	Status	Open	Complete	Ordered: 1 Received:	2
	Due: 6/18/2020 12:00:00 AM	Items Receiv	ved: 0		Receiving	
Purchase Ord Vendor: test	der#2	O searc	h by name or numb	er	12	
Vendor (est	Due: 6/18/2020 12:00:00 AM	a searc	They have of hume		Damaged	
Purchase Ord			Search By Barcode		o	
Vendor: test	> Due: 6/26/2020 12:00:00 AM	Lundburg Bi Ordered: 12 Received: 0 Receiving Now Damaged Now		>		Save
	•					
			Save Purchase Orde	r		

The app will automatically adjust your inventory count for the received item to exclude all **Damaged** and **Out-of-Date/Expired** quantities. For example, if you ordered 48 of an item including 8 damaged and 3 expired, you would enter 48 in the **Received** box, 8 in the **Damaged** box, and 3 in the **Out-of-Date/Expired** box, and the item count would increase by 37. Be advised that the sum of **Out-of-Date/Expired** and/or **Damaged** items cannot exceed the quantity received.

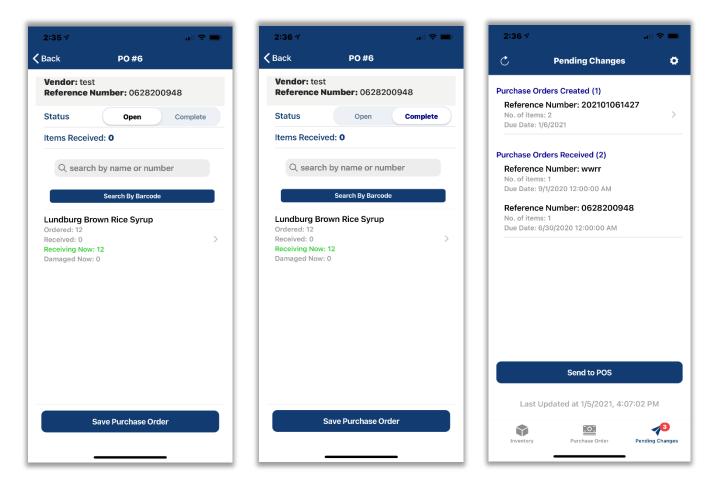
Please note: The **Out-of-Date/Expired** option is available in version 6.6.0 and later of the Mobile Inventory app.

5 Once you have entered all quantities, select **Save**. This will return you to the **Purchase Order** page with the received and damaged values reflected.

Please note: As of version 6.1.0, to allow for greater flexibility and to support a wider range of scenarios, the app allows merchants to receive partial quantities of items and to leave associated purchase orders in 'Open' status, or to mark as 'Complete', depending on needs.



6 To complete a purchase order, select the **Complete** option next to **Status**.



7 Select **Save Purchase Order** to send it to the **Pending Changes** page where you can send to the POS when desired.

Please note: As of version 6.1.0, so that merchants have more control over the purchase order process, both in MIA and in CRE, the app now supports sending open purchase orders to CRE. To send an open purchase order, after receiving desired quantities of items, you must save the purchase order as described above. Once saved, simply go to the **Pending Changes** page and select **Send to POS**.



Share PO

As of version 6.2.0, we have added a **Share Purchase Order** button to the Mobile Inventory app so that authorized users can easily share PDFs of purchase orders with appropriate parties as needed. After approving a purchase order in CRE and refreshing the data in the Mobile Inventory app, the user will then see the new **Share Purchase Order** option. This option will display for all such purchase orders in 'Receive' status.

← P0 #	#57	
Vendor: 2 Reference N	umber: 90	
SHA	RE PURCHASE	ORDER <
Status	Open	Complete
	ived: 0	

If a user selects the **Share Purchase Order** option, the app will display a screen indicating that the request is processing. . During this time, controls such as **Back**, **Share Purchase Order**, and **Save Purchase Order** will be disabled,

Once the request is complete, the user can share this file via their preferred medium as offered by their mobile device's built-in share options (for example, WhatsApp, email, Messenger, etc.). The purchase order will be shared as a PDF attachment, and will be formatted as in the example below.

PO				Purc	hase Order:	49474							
/endor: 2 Reference N SHA	lumber: 90 IRE PURCH/	ASE ORDER	<	1 Blu STE 1 PR N 1095	Y			Vendor: OTHER 10 Other V Others, NY Email: info Phone: 18	12345 @other.com				
status	Open		mplete	Term									3.7
hare with					: 222		Due Date	e: 3/12/2021	Ship Via: Air				
					Store ID	Part Number	Item #	Description	Qty Ordered	# per Case	Cases Ordered	Cost Per	Extended Cos
	D,		2	1	1001	12345	0801963233 67	Remedy	10	10		1.00	10.0
A Itches	MIA	My Drive	noreply	2	1001	12345	0801963233 67	Remedy	10	10		1.00	10.0
			@heartland	3	1001	159	0780000123 54	Root Beer	1	0		1.00	1.0
0	M		Δ	4	1001	161	0780000123 56	Cream Soda	1	0		1.00	1.0
atsApp	Gmail	Email	Save to Drive	5	1001		01256808	PEPSI CAN	1	0		0.00	0.0
itsApp	Gmail	Email	Save to Drive	6	1001		GIFT_C	Gift Card	1	0		0.00	0.0
		-		7	1001	12345	0801963233 67	Remedy	10	10		1.00	10.0
~.	*	9		8	1001	12345	0801963233 67	Remedy	10	10		1.00	10.0
rby Share	Bluetooth	Skype		9	1001	12345	0801963233 67	Remedy	10	10		1.00	10.0
<	C											Total Cost:	52.0



Please note:

- Completed/closed purchase orders are not visible within the Mobile Inventory app and, as a result, cannot be shared via the app.
- This feature is available as of CRE version 14.1004, and is accessible only by authorized employees as configured in CRE in the Handheld tab of the Permissions section of Employee Maintenance. The Mobile Inventory app receives these permissions from CRE and allows only authorized employees access to the Share Purchase Order option. If an unauthorized employee attempts to use the option, the app will inform them that they have insufficient permissions. For more information, please refer to the related <u>CRE Release Notes</u>.

Vendor: 2 Reference		: 90	
s	HARE PU	RCHASE OF	RDER <
Status	Ор	en	Complete
Items Re	eceived:	0	
٩		n by name	
	SEARC	H BY BARC	ODE
Extra Ordered: Received			
nsufficien	t Permissi	ions	
isumcien	, remissi		-

Scan Code to Look Up PO

As of version 6.2.0, we have added a **Scan Code to Look Up PO** option to the **Receive PO** section of the Mobile Inventory app so that users can look up and identify purchase orders by scanning a QR code. If you select this option, the app will open a scanner (as for item scanning in the **Inventory** section) with **Cancel** and flashlight buttons at the bottom. When the QR code is scanned, the app will detect the purchase order from the QR code and display it below the scan button.

Bill To(Ship To: Bar Code Express Company Name 10 Blue Hills Pearl River NY 10954 Instructions: Terms:		Vendor: My Vendor 1st Street NY, NY 10606 Email: MyVendor@MyVender.com Phone: 8887226374			
Ref #: 15	Due Date: 3/9/	2021 Ship Via: dqr			
# Store ID Part Number		Receive PO	Cases Ordered	Cost Per	Extended Co
1 1001 001	01900008 5 47	Receivero		1.00	2.0
	Purcl	59 SCAN CODE TO LOOKUP PO hase Order# 59		Total Cost	2.6

If there are no matching purchase orders detected, the app will display a toast notification to that effect ('Cannot find Purchase Order').



Create PO

The **Create PO** function allows you to create a new purchase order within the app. To create a purchase order, select **Create PO** from the **Purchase Order** page and follow the steps below.

1 Select **Create PO** to initiate the process. From the **Create PO** page that opens, select a **Vendor** from the list and enter a **Reference Number**.

9:46		
Back	Create PO	
Vendor (requi	red)	
Enter Referen	ce Number (rec	uired)
Due Date		Jun 28, 20
Enter Ship Via	9	
Add Items		
	Vendor	
	Vendor	
test		
Car	ncel	ок



 2 Select Add Items. You can add items in two ways: Scan Barcode or Item Lookup. These behave as described in the <u>Inventory</u> section above.
 Please note: If you scan or look up a Choice item, the app will display the linked standard items (tagged and non-tagged) as described in previous sections. From the list of linked items, you may select and add desired standard items to your purchase order.

3 Once you have selected an item to add to the purchase order and select an appropriate value for **Order By**. Enter desired quantity and select **Add Item**.

11:35	11:35 "⊢ † ■	11:36
ack Purchase Order	C Back Lundburg Brown Rice Syr	
Vendor: test Reference Number: 0628201136 Due Date: 6/30/2020 Ship Via: Total Items Ordered: 0	Item Name: Lundburg Brown Rice Syruj Item Number: 073416001602 Cost: 4.29 In Stock: 12 On Order: 12	Vendor: test Reference Number: 06282 Due Date: 6/30/2020 Ship Via: Total items Ordered: 12
Scan Barcode	Order By taches	Scan Barcode
Lookup Item	Quantity	Lookup Item
NO ITEMS ADDED	12	ITEMS ADDED (1)
	Add Item	Lundburg Brown Rice Syrup Ordered: 12 Order by: eaches
	Order By	
	Eaches 🗸	
Create PO	Cases	Create PO
	Cancel OK	

Please note: Order By refers to the unit by which an item is ordered and received. In this example, **Eaches** would imply single units and **Cases** would indicate a full case, and the quantity **(Eaches)** contained therein would be defined in CRE Inventory Setup.

- 4 Once you have added all desired items to the purchase order, select **Create PO** to finalize.
- 5 Click **OK** on the success box.



Please note: The app will not activate the Add Items function until the Vendor and Reference Numbers have been completed.

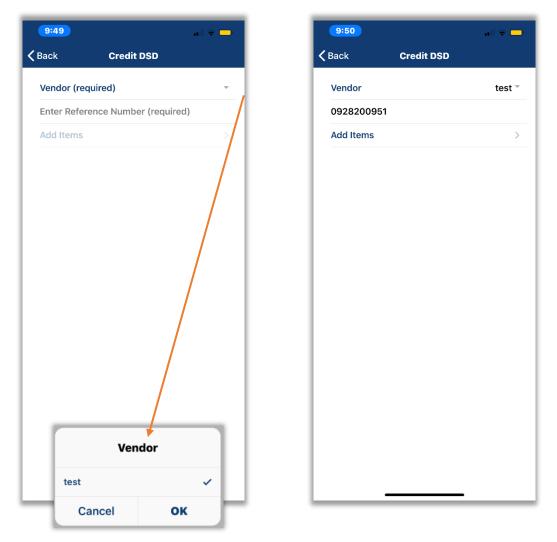


Direct Store Deposits

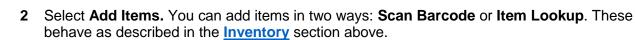
Credit DSD

The **Credit DSD** function allows you to perform a credit direct store deposit within the app. To create a credit DSD, select **Credit DSD** from the **Purchase Order** page follow the steps below.

1 Select **Credit DSD** to initiate the process. From the **Credit DSD** page that opens, select a **Vendor** from the list and enter a **Reference Number**.







Vendor: test Reference Number: 0928200951	Item Name: Disney Princess Story Book Item Number: 9781423105473 Cost: 0.00	Item Number: 978 Cost: 0.00	ey Princess Story Boo 81423105473
Scan Barcode	In Stock: -1	In Stock: -1	
Lookup Item	Order By Eaches	Order By Eaches	
ITEMS ADDED	Quantity	Quantity	
	Enter Quantity to Credit	9	(
	tidd Itom	Addu	tom
	Add Item	Add II	tem
	Add Item	Add H	Item
	Add Item	Add I	Item
	Add Item	Add I	tem
	Add Item	Add I	tem
	Add Item	Add I	tem
	Add Item		tem 6 7 8 9
	Add Item	12345	6789
	Add Item	12345	
	Add Item Order By	12345	6789)\$&@
	Order By	12345	6789)\$&@ !'
Create		1 2 3 4 5 - / : ; (#== , ?	6789)\$&@ !'

Please note: If you scan or look up a Choice item, the app will display the linked standard items (tagged and non-tagged) as described in previous sections. From the list of linked items, you may select and add desired standard items to your DSD.

- 3 Once you have selected an item to add to the credit DSD, select an appropriate value for Order By (this refers to the unit by which an item is ordered and received), enter a quantity and select Add Item.
- 4 Once you have added all desired items to the credit DSD, select **Create** to finalize.
- 5 Select **OK on** the success box.

Heartland

Register

Please note: The app will not activate the **Add Items** function until the **Vendor** and **Reference Numbers** have been completed.

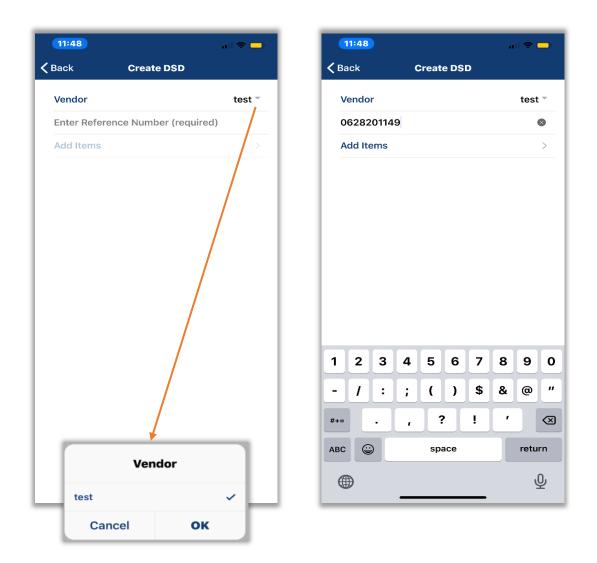
	Create
[Done DSD Credit Successful
	ок



Create DSD

The **Create DSD** function allows you to perform a direct store deposit within the app. To create a direct store deposit, select **Create DSD** from the **Purchase Order** page follow the steps below.

1 Select **Create DSD** to initiate the process. From the **Create DSD** page that opens, select a **Vendor** from the list and enter a **Reference Number**.





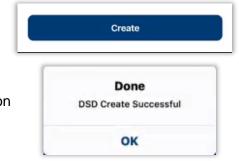
2 Select Add Items. You can add items in two ways: Scan Barcode or Item Lookup. These behave as described in the <u>Inventory</u> section above.

k Direct Store Deposit	K Back Jumbo School Jar	Back Direct Store Deposit
lendor: test eference Number: 0628201149	Item Name: Jumbo School Jar Item Number: JUMBOSCHOOLJAR Cost: 0.00	Vendor: test Reference Number: 0628201149
Scan Barcode	In Stock: -1	Scan Barcode
Lookup Item	Order By Eaches	Lookup Item
	Received 5 Damaged 0 Add Item	Jumbo School Jar JumboSchool Jar Received: 5 Damaged: 0
	Order By	
Create	Eaches 🗸	Create

Please note: If you scan or look up a Choice item, the app will display the linked standard items (tagged and non-tagged) as described in previous sections. From the list of linked items, you may select and add desired standard items to your DSD.

- 3 Once you have selected an item to add to the DSD, select an appropriate value for Order By (this refers to the unit by which an item is ordered and received), enter a quantity and select Add Item.
- 4 Once you have added all desired items to the DSD, select **Create** to finalize.
- 5 Select **OK** at the success box.

Please note: The app will not activate the Add Items function until the Vendor and Reference Numbers have been completed.

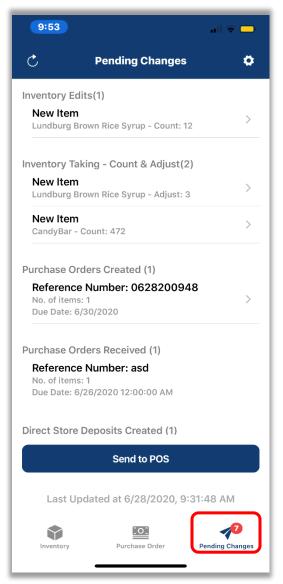




Pending Changes

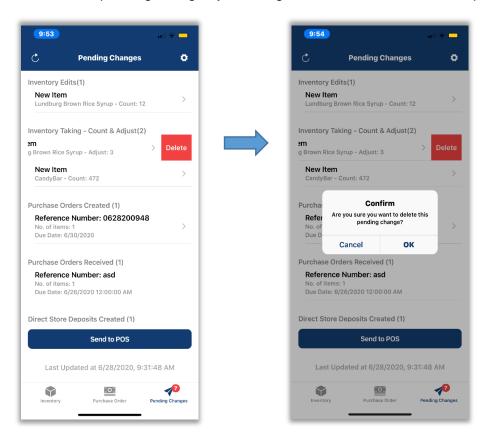
The **Pending Changes** page of the Mobile Inventory app displays all changes that have been entered in the app, but not yet sent to POS. This page will also display the last updated (date and time) with the POS.

- Pending changes are sorted by type.
- A badge notification indicating a count for all pending changes displays in the lower corner of the app, atop the **Pending Changes** icon.





• You can delete a pending change by touching the item from the list and swiping left.



To send pending changes to POS, tap the **Send to POS** button at the bottom of the screen and answer **OK** the confirmation prompt.

Wait for the success message and click OK.



Upon success, the date and time for the last update will reflect the sync.

Please note:

- CRE must be running and have Internet connectivity in order for data synchronization (sending to, and receiving from, POS) to take place.
- If you have over-the-air enabled, the app will automatically fetch refreshed site data immediately after sending data to CRE.



Other App Components

Refresh Inventory

To refresh the inventory data on your device, tap the **Refresh** icon in the upper left corner of the screen. This will refresh inventory data by pulling current data from CRE.

Please note: The refresh function **overwrites local data** so, if you have any pending changes on your device that you want to send to CRE, you must **submit pending changes BEFORE refreshing**.

inventory?	resh the	Inventory	
Cancel Ref	resh		

Settings

To access settings, tap the **Settings** icon in the upper right corner of screen. This page allows you to view and change the following settings:

- Beep on Scan This can be toggled off and on.
- Site Info See image below on left. Consists of User Name, Site Name, and SiteID.
- About See image below on right. Displays the following:
 - **EULA** opens end-user license agreement in browser window
 - **Privacy Statement** user-specific
- Change Password Opens the password recovery page where you can easily change your password.
- Log Out Logs out current user.



<	Back	Settings
	Beep	o on Scan
	\$	Site Info >
	(i)	About >
	6	Change Password
	\ominus	Log Out

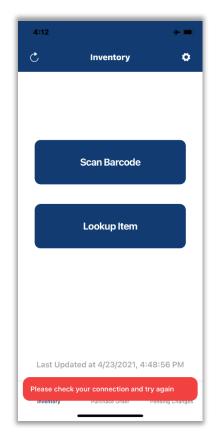




Data Retention During Internet Outages

As of version 6.3.0, so that users do not lose pending changes during periods of internet instability, we have implemented processes to ensure all such changes are stored until internet connectivity is restored.

- If there is no internet and a user with pending changes logs out of the app or closes it (either by killing it or restarting the device), when they try to reopen the app, it will display a message on the login screen reading, 'Please check your internet connection and try again.' For iOS devices, this message also suggests that you kill the app and try again.
- If there is no internet and a user with pending changes keeps the app open and does NOT log out, the app will keep the user logged in with their usual permissions, but the user will not be able Send to POS (this button will be disabled) or Refresh Data (if they attempt to do so, the app will display a toast message reading, 'Please check your internet connection and try again.' For iOS devices, this message also suggests that you kill the app and try again.).



In either case, when the internet is restored, the user with pending changes can start using the app as normal, and the pending changes will remain in the app (that is, they will not refresh automatically).