

Heartland

Mobile Inventory App Guide

Cash
Register
Express

Rev 08/2021

Table of Contents

Overview	1
Requirements	1
CRE Configuration	2
Central API Connection.....	2
Authorize Employee as User.....	1
Configure Over-the-Air Preferences.....	2
Configure Bar Code Preferences	2
Configure Automatic Inactivity Logout.....	3
Mobile Inventory App.....	4
Download and Sign In	4
Components of Sign-In Screen	4
Automatic Inactivity Logout	5
Inventory	6
Scan Barcode	7
Lookup Item	9
Edit Item.....	10
Adjust Stock.....	11
Count Item	13
View Alt SKUs	14
Purchase Orders & Direct Store Deposits.....	15
Purchase Orders.....	16
Direct Store Deposits	23
Pending Changes.....	27
Other App Components	29

Refresh Inventory..... 29

Settings..... 29

Data Retention During Internet Outages 30

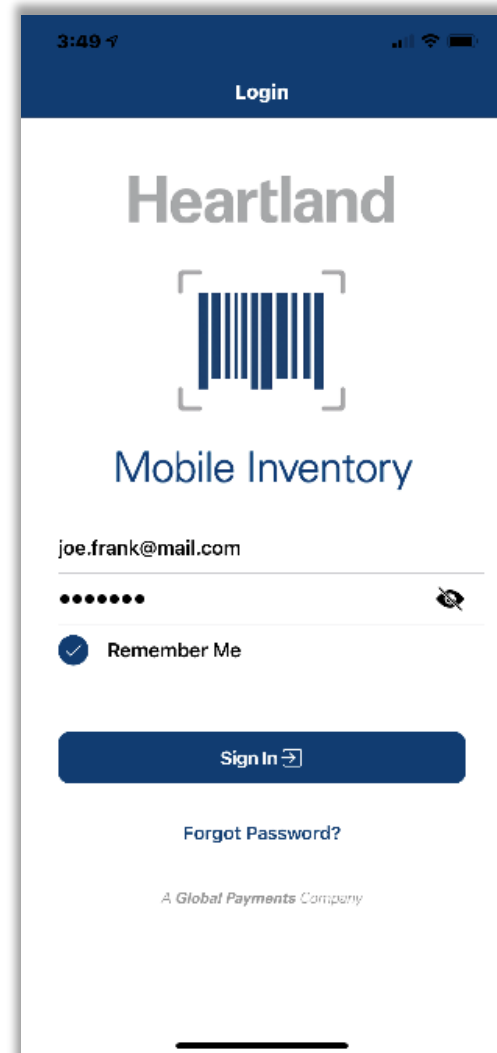
Overview

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 [Tag Customization Guide](#).

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

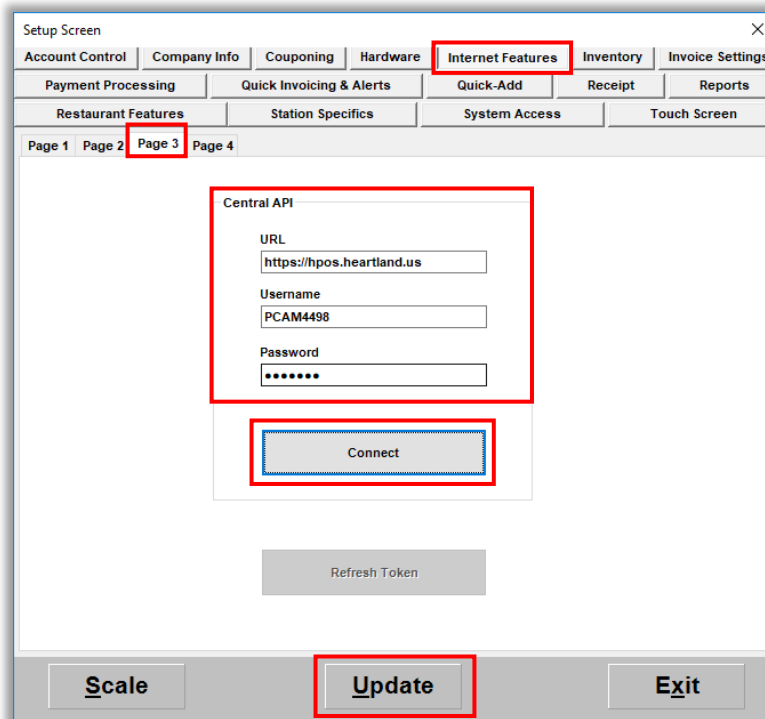
- ▶ The Mobile Inventory app requires CRE version 13.1016 or later.
- ▶ Over-the-Air updates require CRE version 13.1019 or later.
- ▶ Choice items and Tag Customization require CRE version 14.1005 or later
- ▶ CRE must be online and connected to Heartland's Central API.
- ▶ In order to use the Mobile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

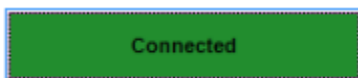
- ▶ Click the **Internet Features** tab, and then select **Page 3** to access **Central API**.



The screenshot shows the 'Setup Screen' with the 'Internet Features' tab selected. The 'Page 3' tab is also selected. The 'Central API' section contains the following fields and buttons:

- URL:
- Username:
- Password:
- Connect button
- Refresh Token button
- Scale button
- Update button
- Exit button

- ▶ Enter <https://hpos.heartland.us/api> 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 Maintenance

Options **General Information For: Rufus** Keyboard

Department Card Swipe ID

Employee ID Customer

Password Hourly Wage

Display Name Take CC Tips in Cash at End of Shift Click to Select Picture

Disable this Employee Require Clock-In Before Login **Enable Mobile Inventory**

Permissions **Personal Info** **Job Codes & Wages** **Store Associations** **Payroll Info**

First Name Street Address

Middle Name

Last Name City

SSN / ID State

Phone # Zip Code

E-Mail

Birthday

Search by Employee ID

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.

The screenshot shows the 'Setup Screen' window with the 'Internet Features' tab selected. Under 'Page 4', there are two main sections:

- Mobile Pocket Inventory Symbologies**: A table with columns for symbology types and checkboxes for 'Drop first digit' and 'Drop last digit'.
- Enable over the air update**: A checkbox that is currently unchecked. Below it is a note: 'Enable this option to bypass Inventory Track Express approval, and update the changes directly into the database.'

At the bottom of the screen, there are three buttons: 'Scale', 'Update', and 'Exit'. The 'Update' button is highlighted in grey.

	Drop first digit	Drop last digit
UPC A	<input type="checkbox"/>	<input type="checkbox"/>
UPC E0	<input type="checkbox"/>	<input type="checkbox"/>
UPC E1	<input type="checkbox"/>	<input type="checkbox"/>
EAN 8		<input type="checkbox"/>
EAN 13		<input type="checkbox"/>

- ▶ 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.

The screenshot shows the 'Setup Screen' with various tabs. The 'Internet Features' tab is selected. Underneath, there are several sub-tabs: 'Payment Processing', 'Quick Invoicing & Alerts', 'Quick-Add', 'Receipt', 'Reports', 'Restaurant Features', 'Station Specifics', 'System Access', and 'Touch Screen'. The 'System Access' sub-tab is active, showing 'Page 1', 'Page 2', 'Page 3', and 'Page 4'. The main content area is titled 'Mobile Pocket Inventory Symbologies' and contains a table with columns for 'Drop first digit' and 'Drop last digit'. Below this table is a checkbox for 'Enable over the air update'. To the right of the table, a red box highlights the 'Enable Inactivity Logout in Mobile Inventory Application' checkbox, which is checked, and a text field set to '4' minutes for 'Logout if no activity for'. At the bottom of the screen are three buttons: 'Scale', 'Update', and 'Exit'.

	Drop first digit	Drop last digit
UPC A	<input type="checkbox"/>	<input type="checkbox"/>
UPC E0	<input type="checkbox"/>	<input type="checkbox"/>
UPC E1	<input type="checkbox"/>	<input type="checkbox"/>
EAN 8		<input type="checkbox"/>
EAN 13		<input type="checkbox"/>

Enable Inactivity Logout in Mobile Inventory Application
Logout if no activity for minutes

Enable over the air update
Enable this option to bypass Inventory Track Express approval, and update the changes directly into the database.

Scale **Update** **Exit**

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.

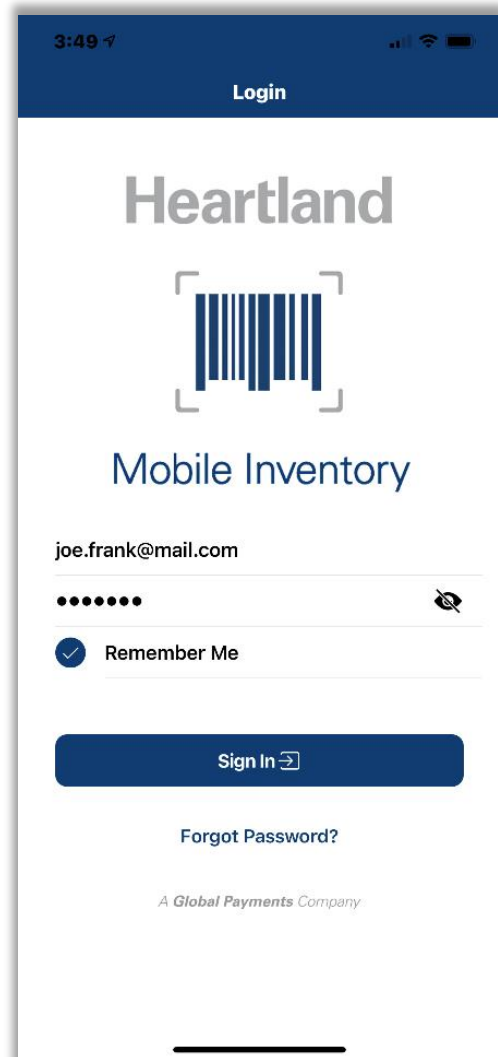
Mobile Inventory App

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

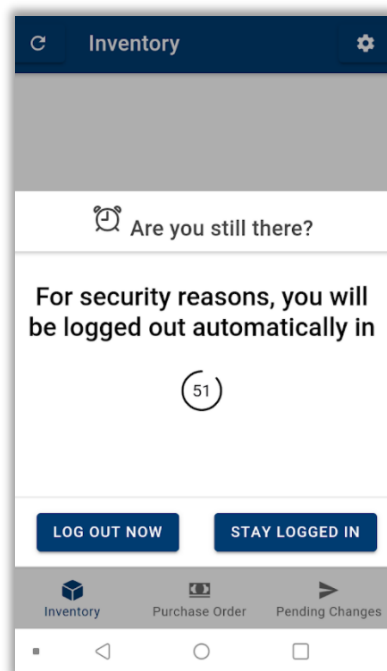
- ▶ **Email:** Use the email associated with your CRE store(s) from your **Welcome Email**.
- ▶ **Password:** Use the password associated with your CRE store(s) from your **Welcome Email**. You can show/hide your password by tapping the eye icon.
- ▶ **Remember Me:** Check this box on devices used only 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 [this section](#).

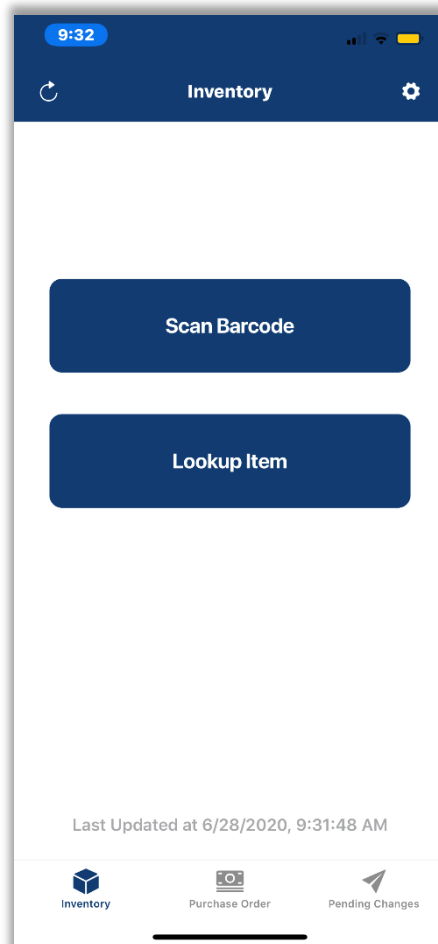
Before logging out a user, the Mobile Inventory app will display a message informing them that they will soon be logged out unless they take action. The message displays when there is one minute remaining, based on the **Inactivity Logout** time set in CRE, and begins its countdown at 59 seconds. The 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

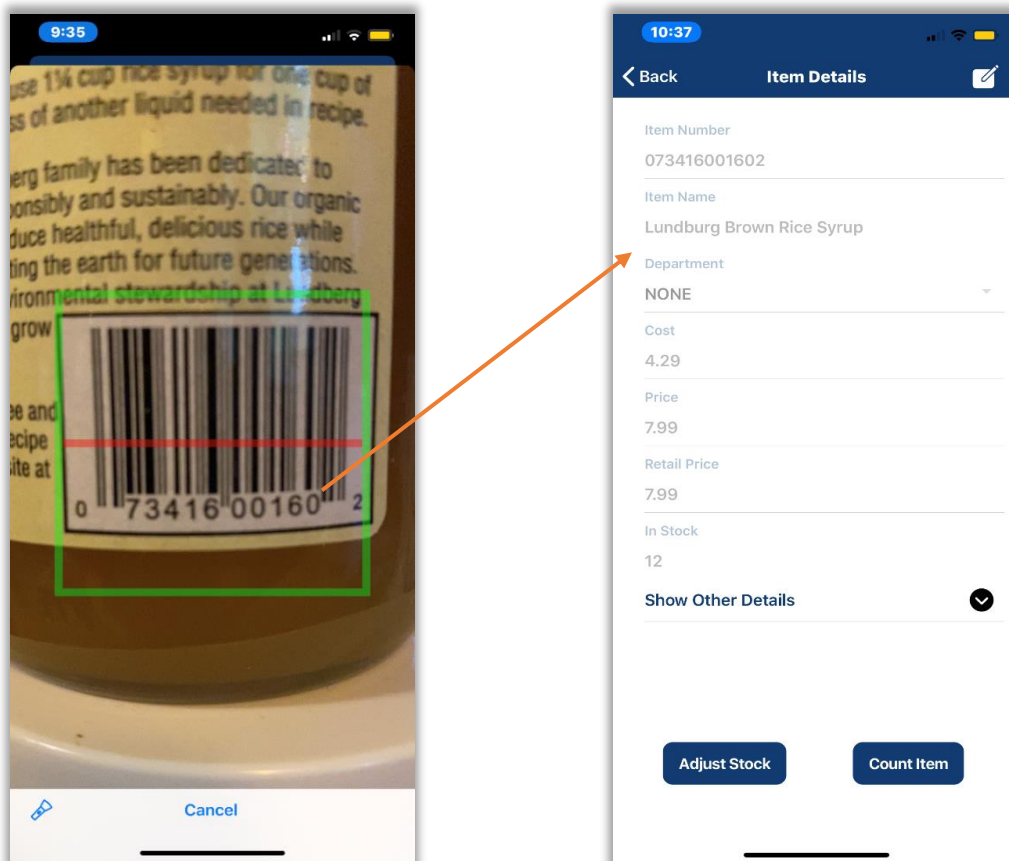
The **Inventory** screen is the default landing page of the **Heartland Mobile Inventory** app, and it displays immediately upon login. From this page, you can access and edit your inventory items by using either the **Scan Barcode** and **Lookup Item** function. The **Inventory** screen also displays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



Scan Barcode

Standard Items

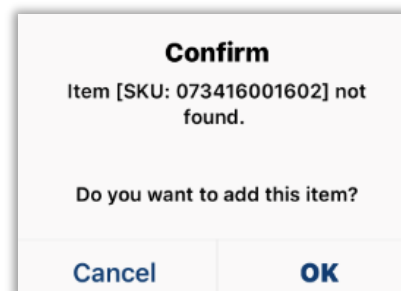
If you select **Scan Barcode**, the app will open a barcode scanning viewer to perform the scan. Align the barcode in the green box so that the red line passes through it.



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**.

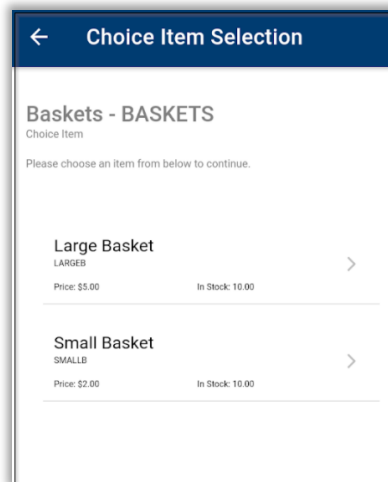
If the app does not find a matching item, it will display a message to that effect, with the option to add the item. Selecting **OK** will open the **Add Item** page.



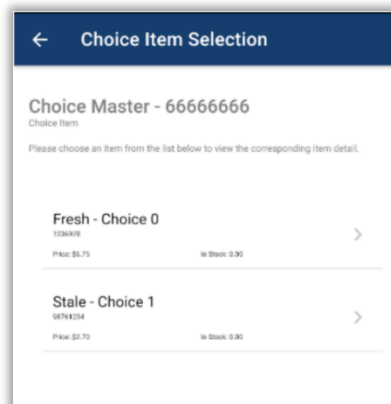
Choice Items

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 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').



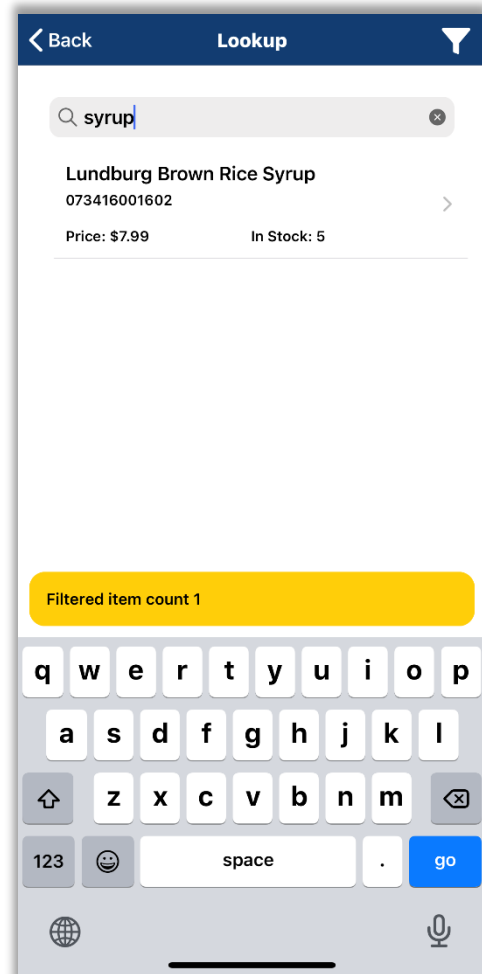
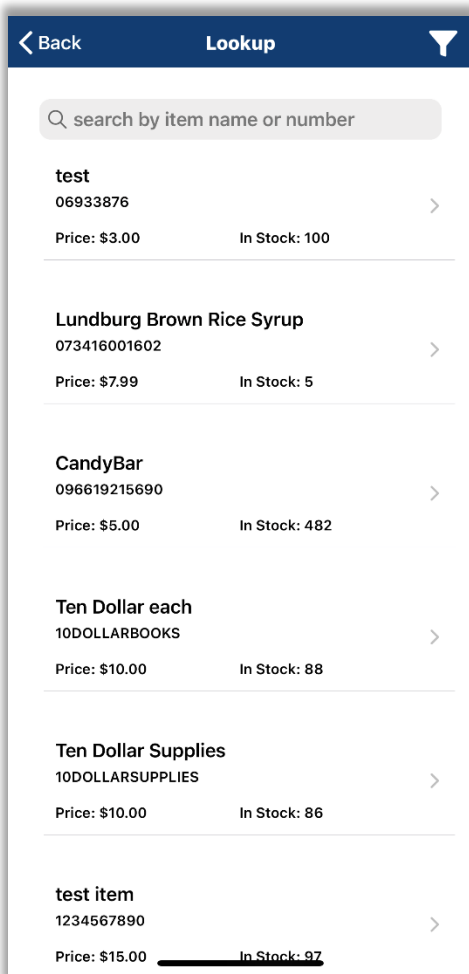
In either case, From this page, as above, you can select the item you would like to view or edit, and the app will open the **Item Details** page for that item. For tagged items, this page includes the **Tag** field and the selected tag. Please note that the Tag field is not editable, and displays only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



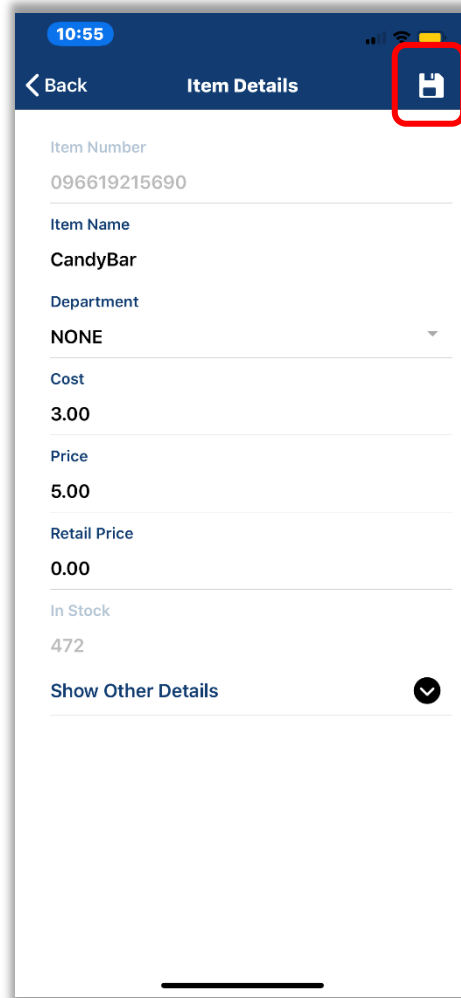
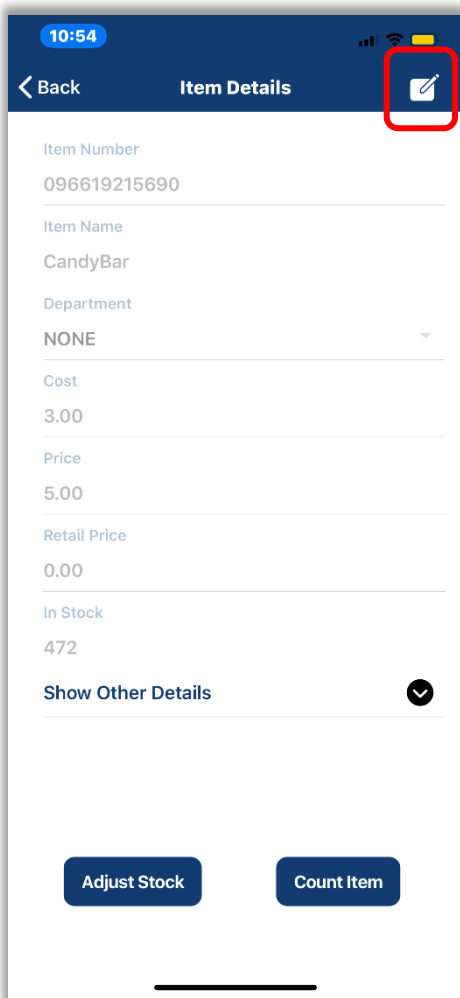
You can then select the desired item from the list to open its **Item Details** page.

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.



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.

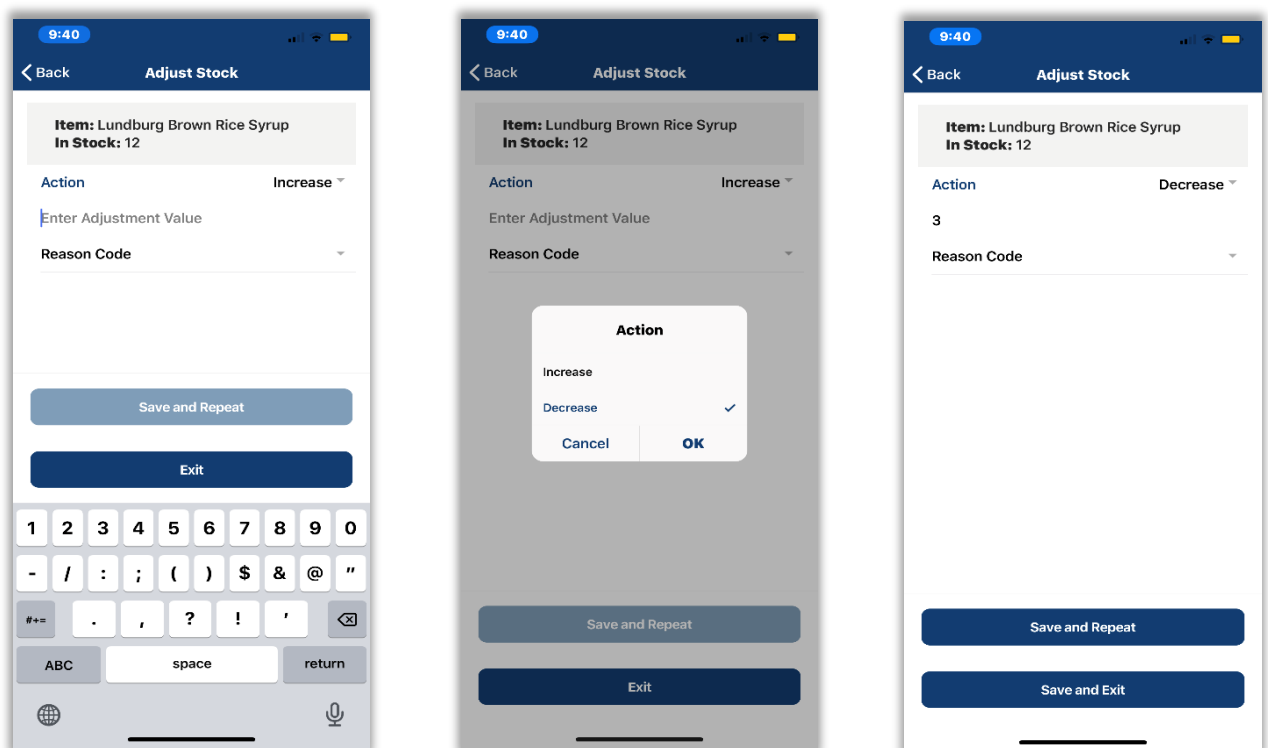
Please note: You cannot edit **Item Number** or **In Stock** from this screen.

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**.
- 2 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**.

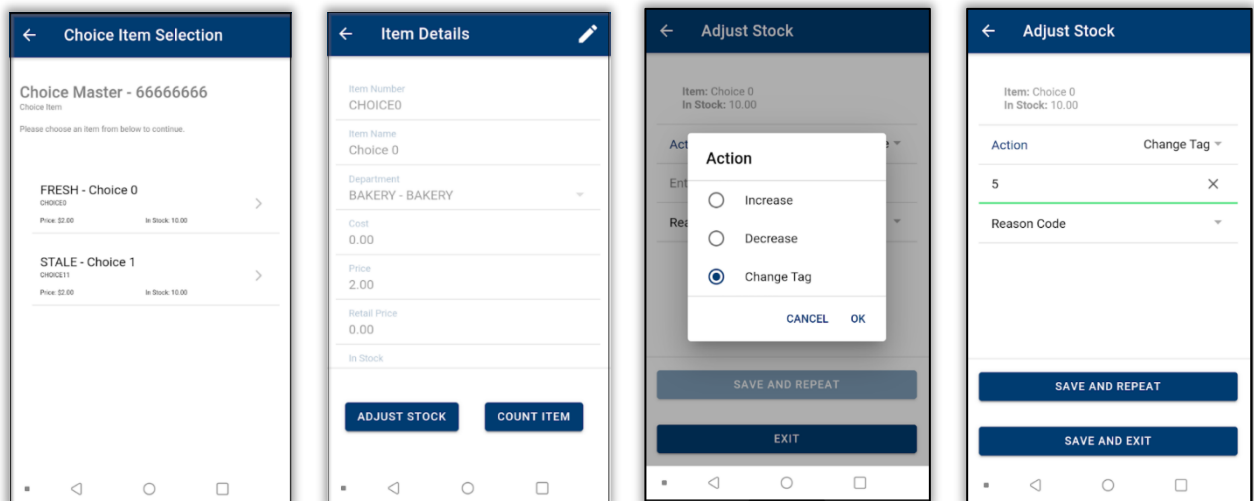


- 3 Enter the number by which you wish to adjust your stock.
- 4 Select a **Reason Code** from the list. For more information on **Reason Codes**, please refer to our [Vendors & Purchase Order Guide](#).
- 5 Select **Save and Repeat** if you have more adjustments to make. Select **Save and Exit** if 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 [Tag Customization Guide](#).

- 1 Find and select the desired item from the Inventory page and select **Adjust Stock**.
- 2 Select **Change Tag**.



- 3 Select the desired tag from the dropdown list and enter the quantity you wish to migrate.
- 4 Tap **Save and Exit**.

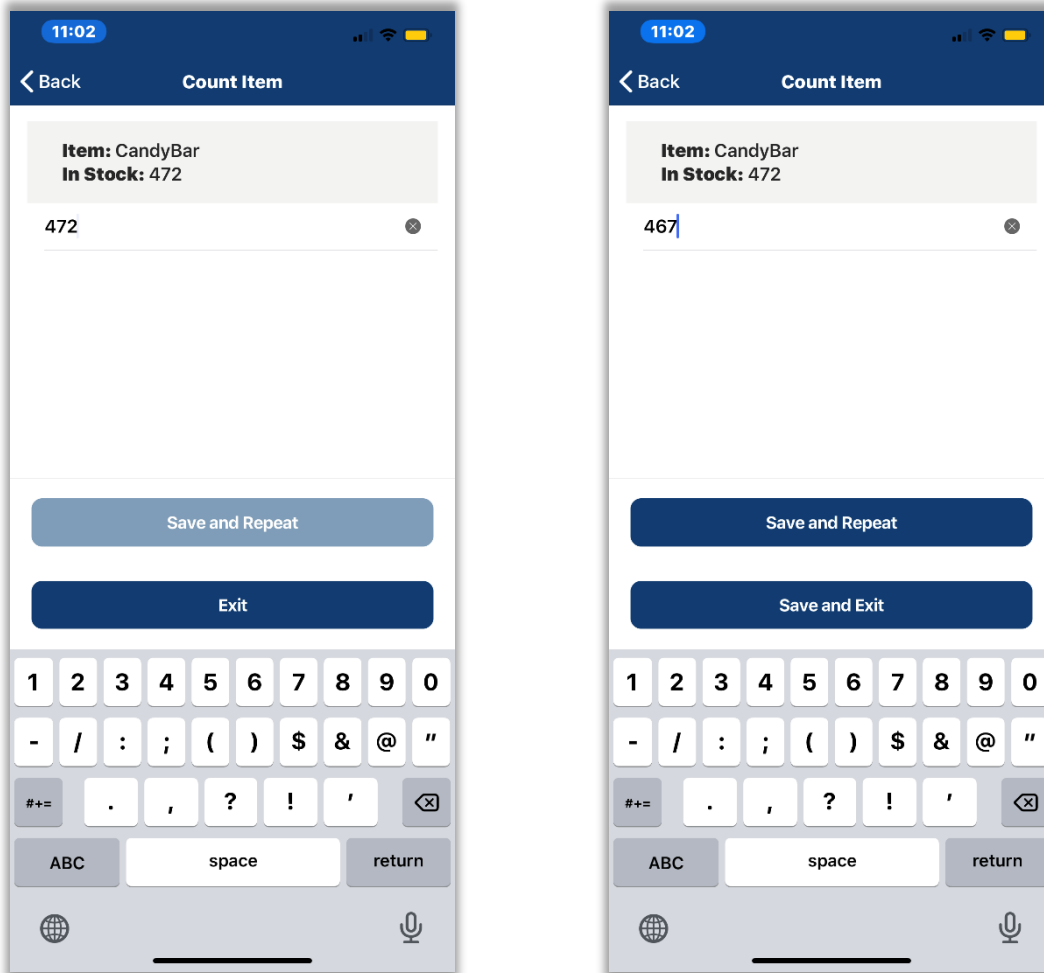
Please note:

- ▶ 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**.

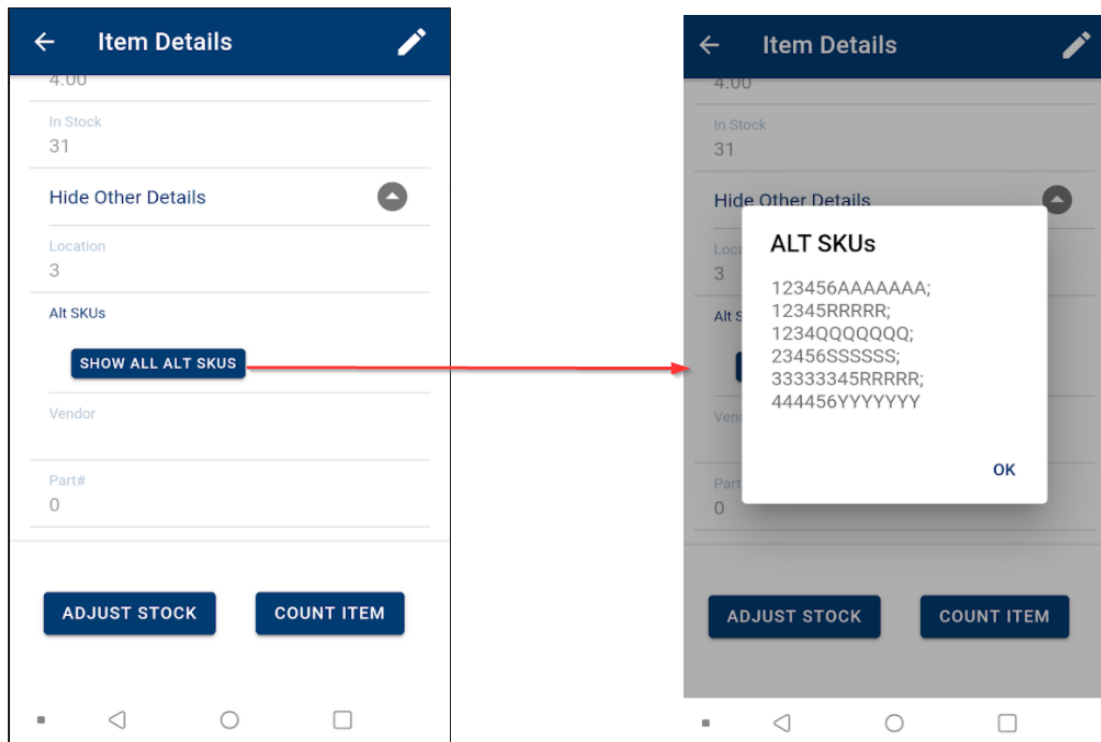


- 2 Enter the desired count value. Keep in mind that this value will replace the existing count and, therefore, should include **ALL** stock.
- 3 Select **Save and Repeat** if you have more adjustments to make. Select **Save and Exit** if you are finished with count adjustments.

Please note: Since some items, such as coupons and lottery pay-ins and pay-outs, are non-standard, 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.



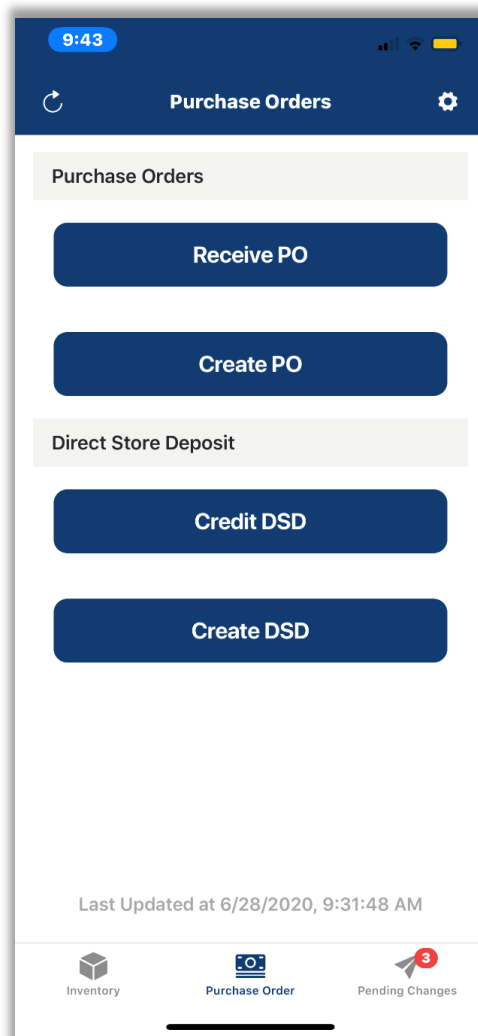
If you select this option, the app will display a list of all matching alternate SKUs.

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.

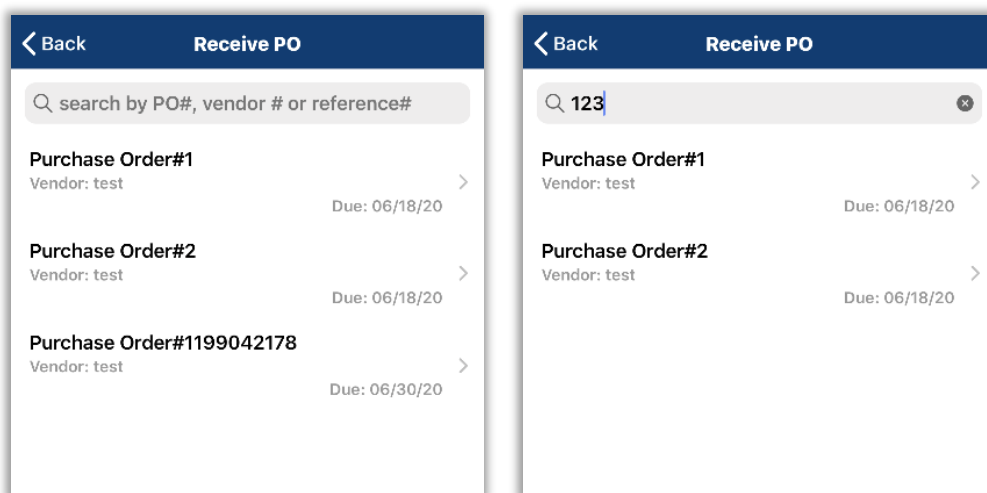


Purchase Orders

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.

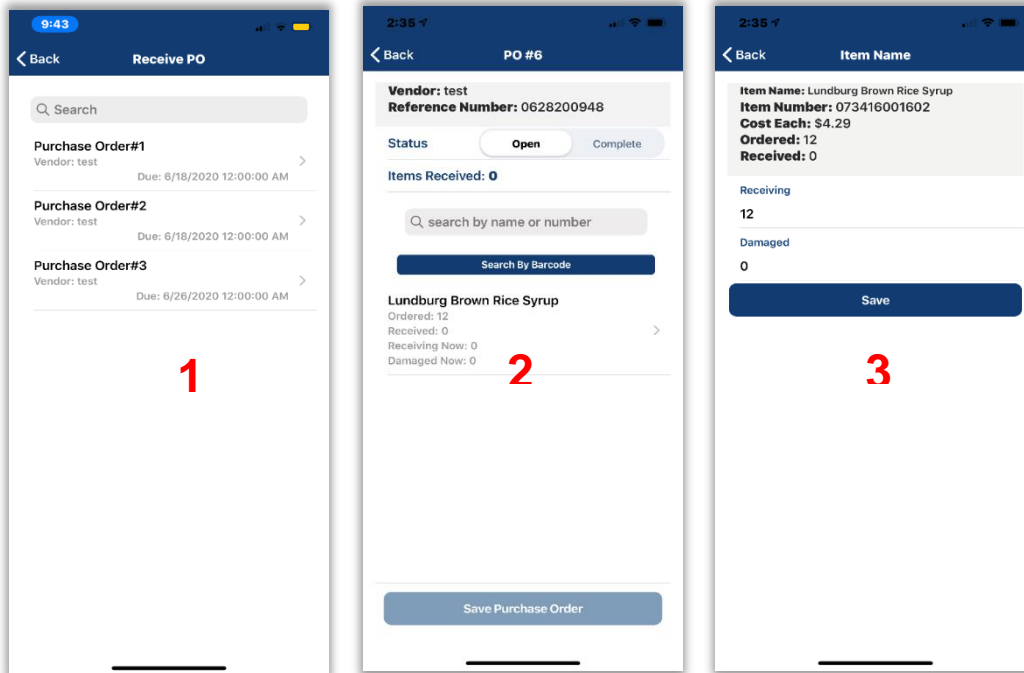
- 1 You can select a purchase order from the list, or use the search field to narrow the list of purchase orders by PO number, vendor, or reference number.



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. Alternatively, 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.

- 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.



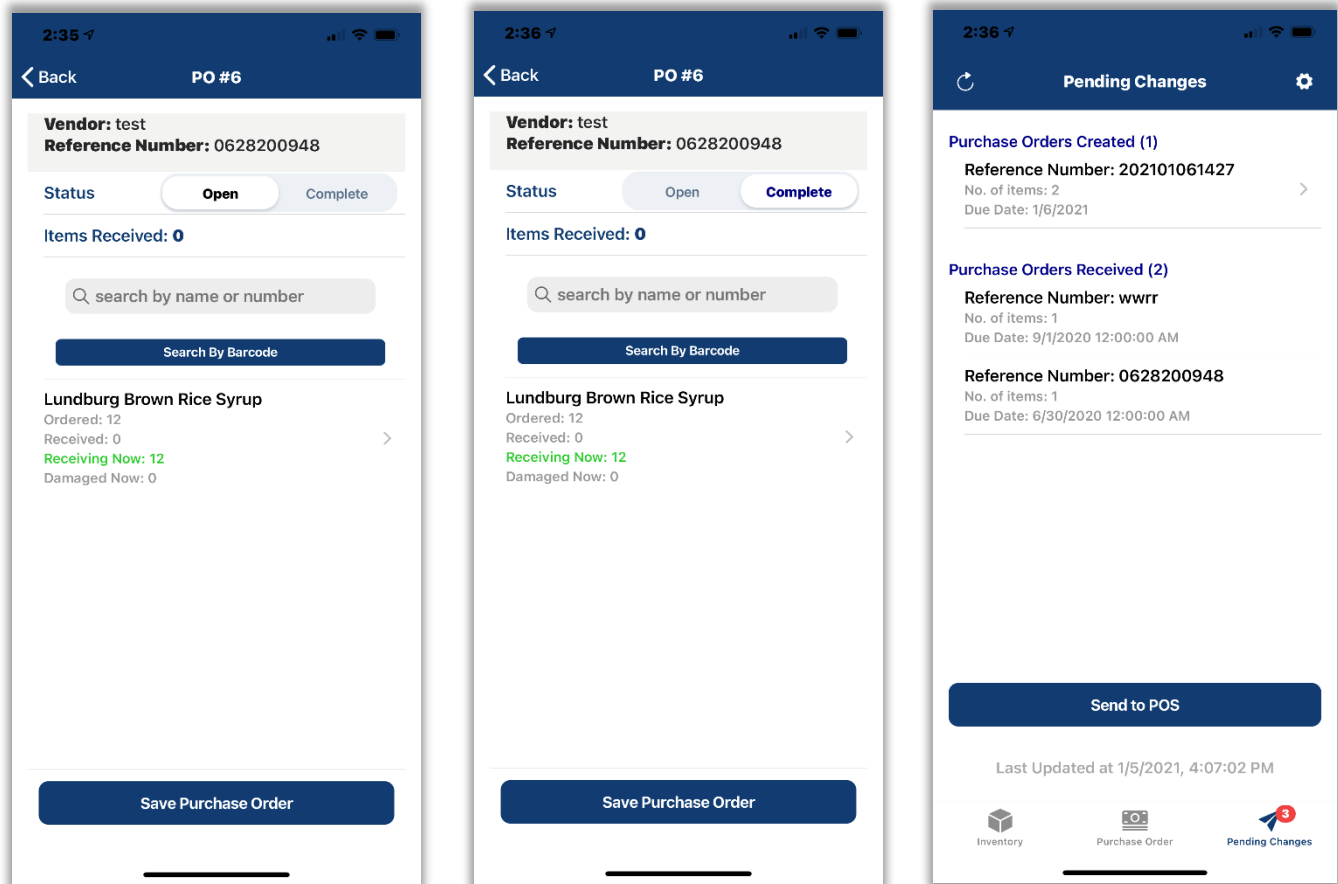
The app will automatically adjust your inventory count for the received item to exclude all **Damaged** and **Out-of-Date/Expired** quantities. For example, if you ordered 48 of an item including 8 damaged and 3 expired, you would enter 48 in the **Received** box, 8 in the **Damaged** box, and 3 in the **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.

- 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**.

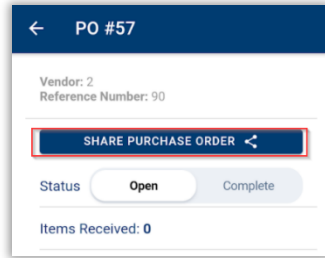


7 Select **Save Purchase Order** to send it to the **Pending Changes** page where you can send to the POS when desired.

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**.

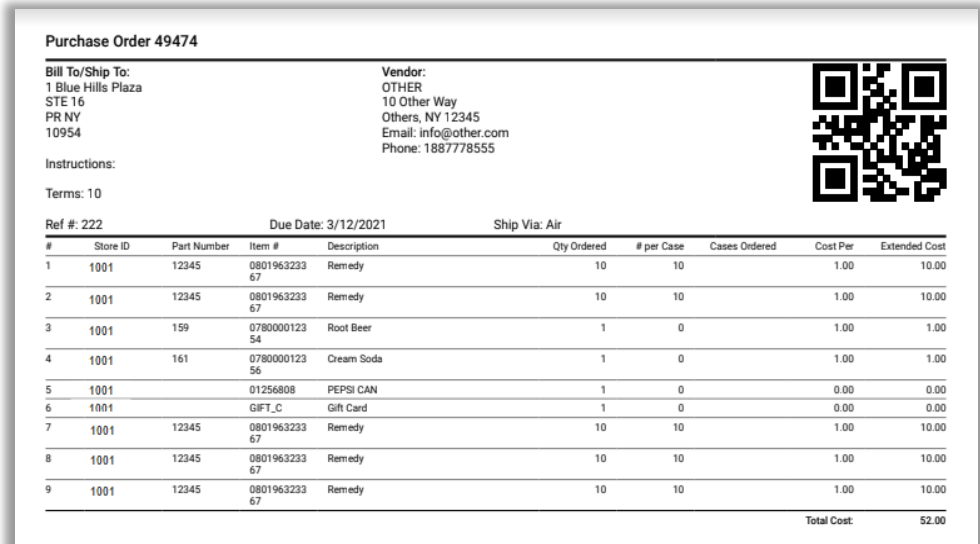
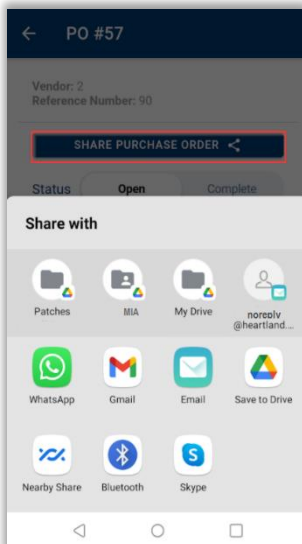
Share PO

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.



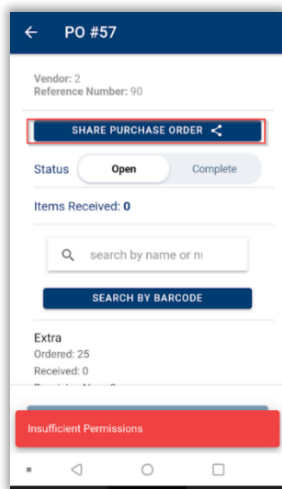
If a user selects the **Share Purchase Order** option, the app will display a screen indicating that the request is processing. . During this time, controls such as **Back**, **Share Purchase Order**, and **Save Purchase Order** will be disabled,

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.



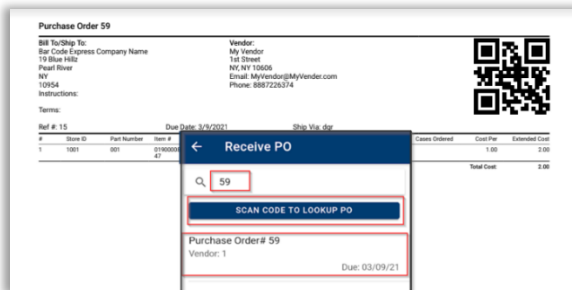
Please note:

- ▶ 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 [CRE Release Notes](#).



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.

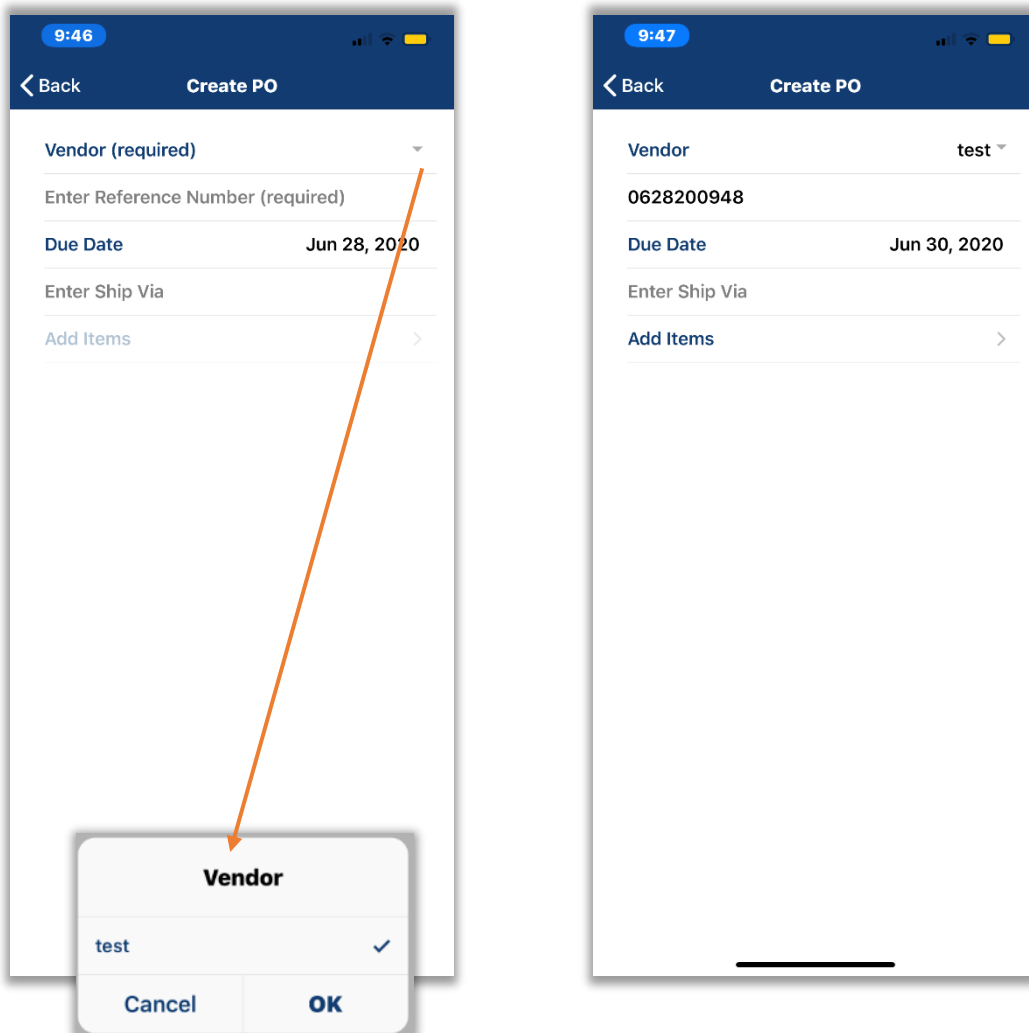


If there are no matching purchase orders detected, the app will display a toast notification to that effect ('Cannot find Purchase Order').

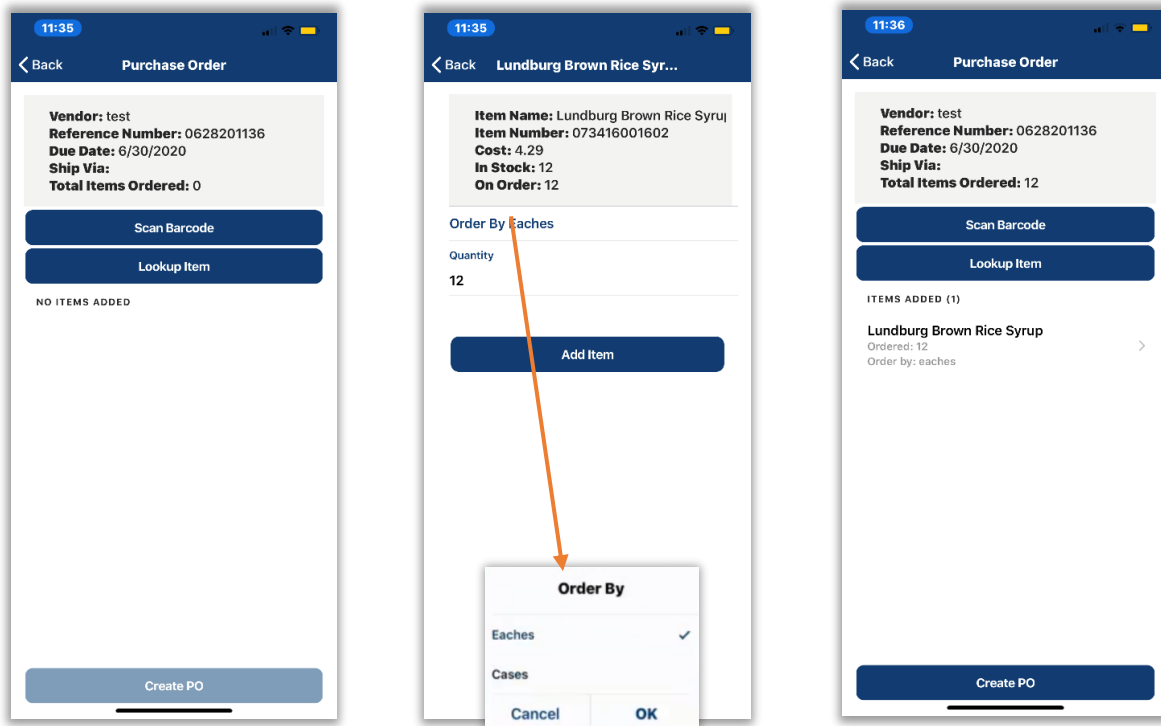
Create PO

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**.



- 2 Select **Add Items**. You can add items in two ways: **Scan Barcode** or **Item Lookup**. These behave as described in the [Inventory](#) 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**.



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.



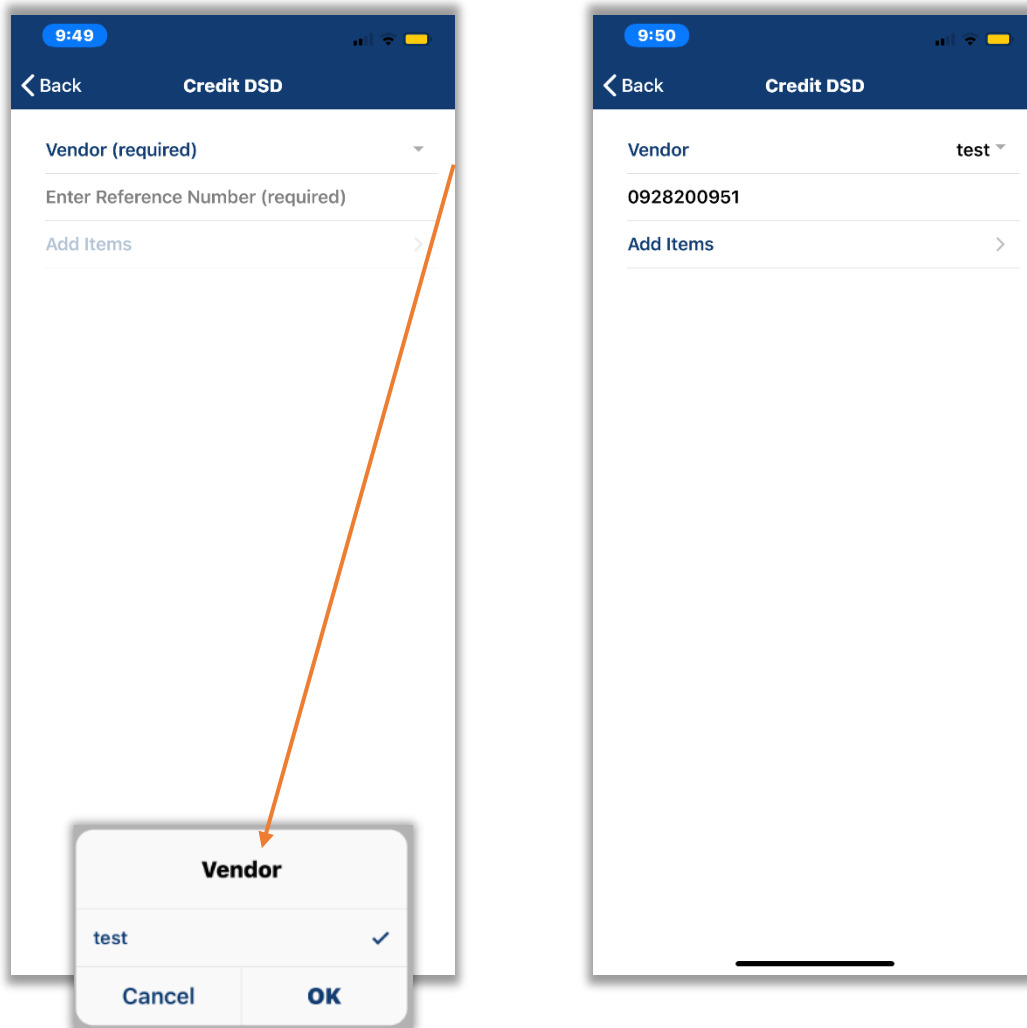
Please note: The app will not activate the **Add Items** function until the **Vendor** and **Reference Numbers** have been completed.

Direct Store Deposits

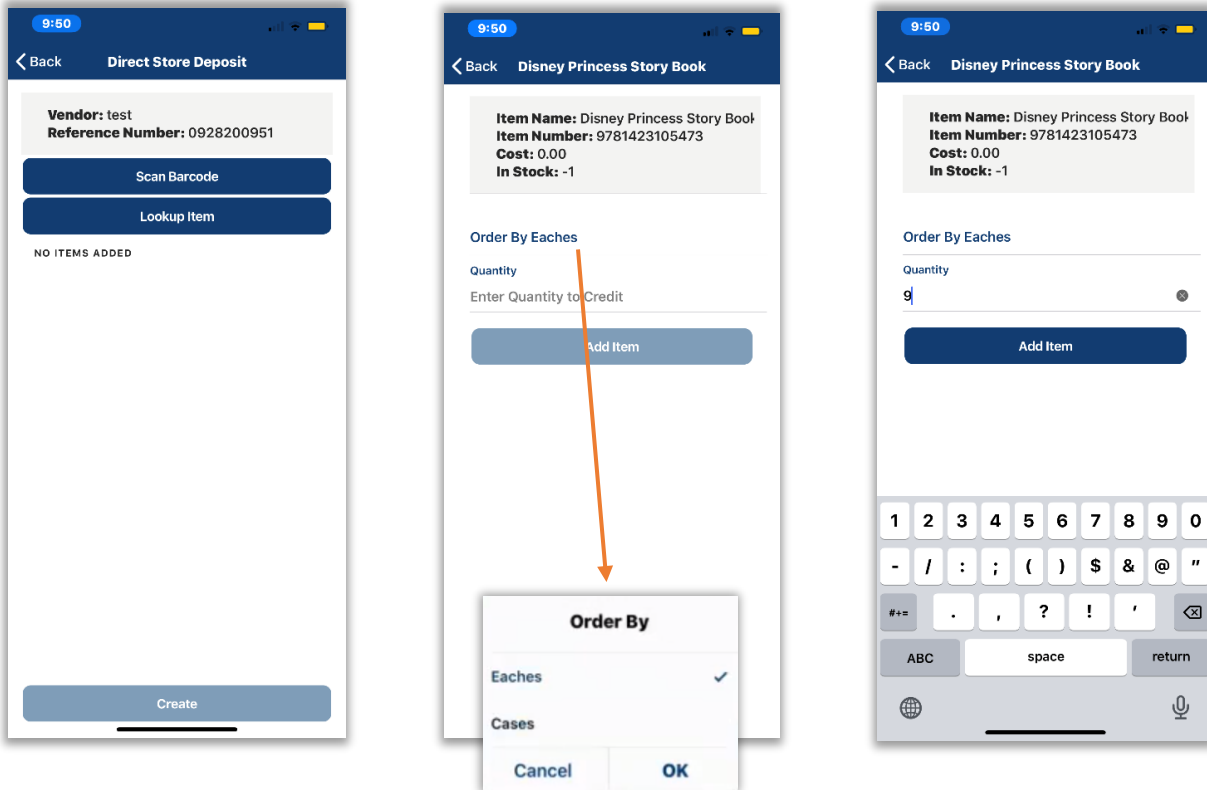
Credit DSD

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**.



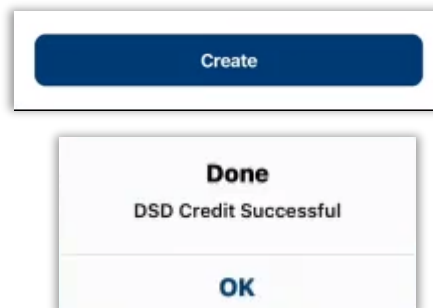
- 2 Select **Add Items**. You can add items in two ways: **Scan Barcode** or **Item Lookup**. These behave as described in the [Inventory](#) section above.



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 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.

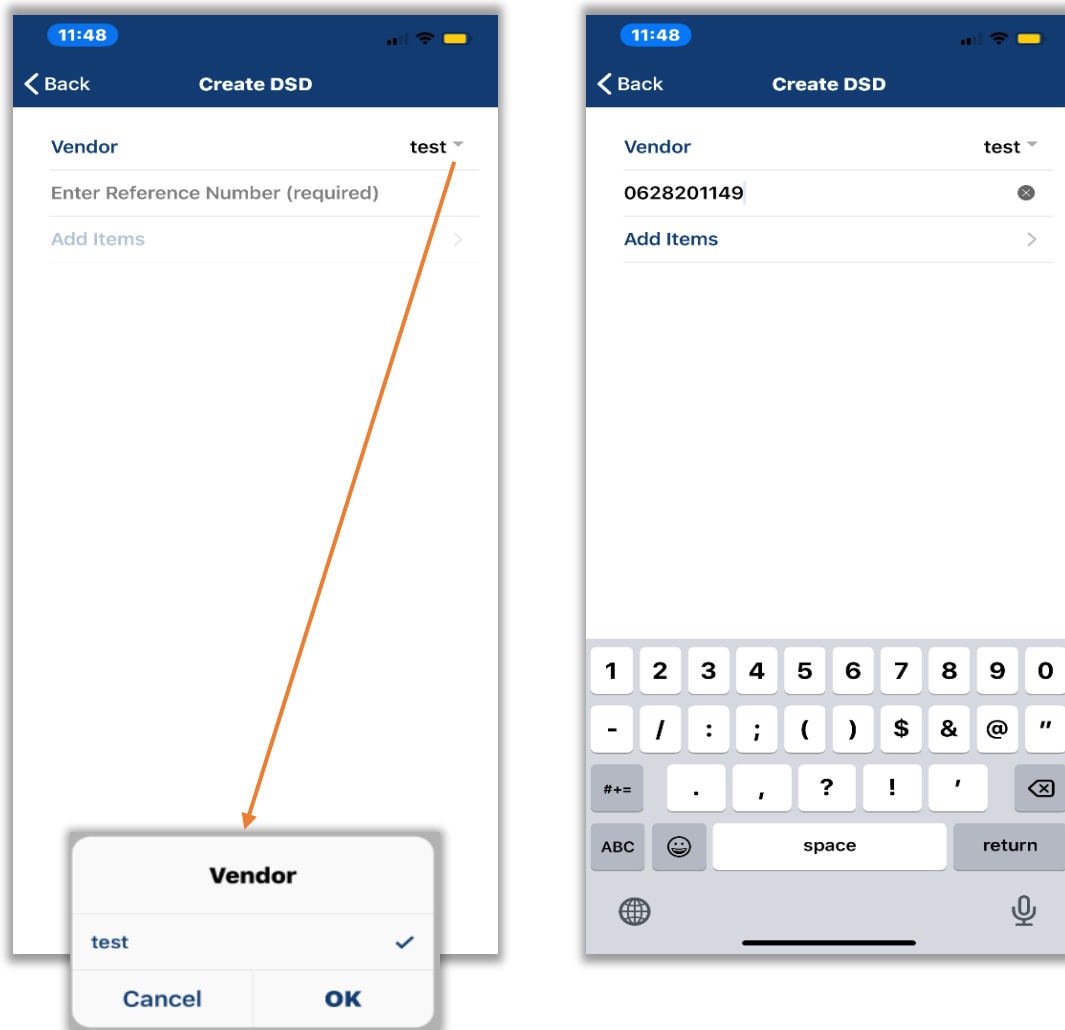
Please note: The app will not activate the **Add Items** function until the **Vendor** and **Reference Numbers** have been completed.



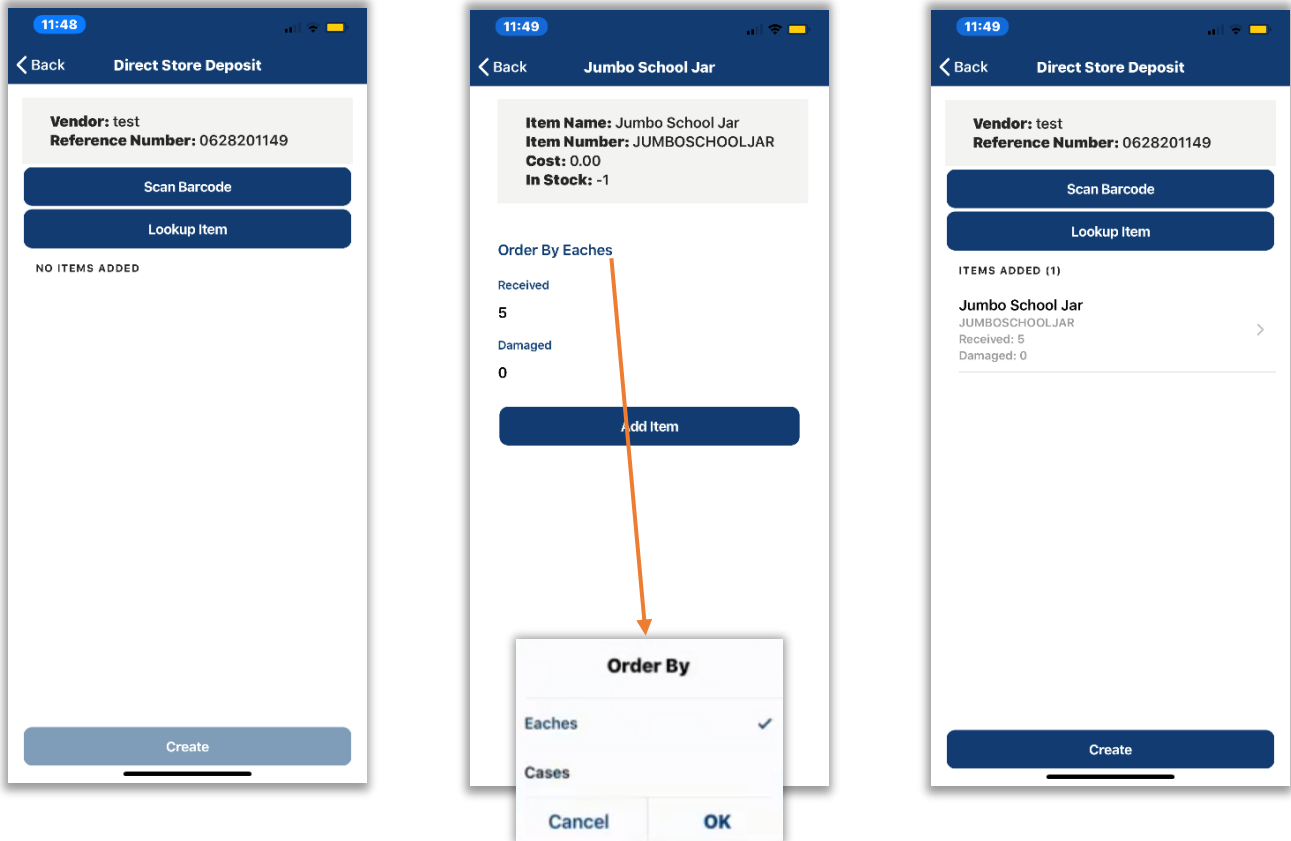
Create DSD

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**.



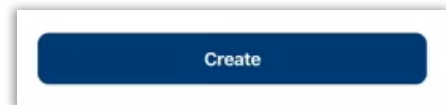
- 2 Select **Add Items**. You can add items in two ways: **Scan Barcode** or **Item Lookup**. These behave as described in the [Inventory](#) section above.



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 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.

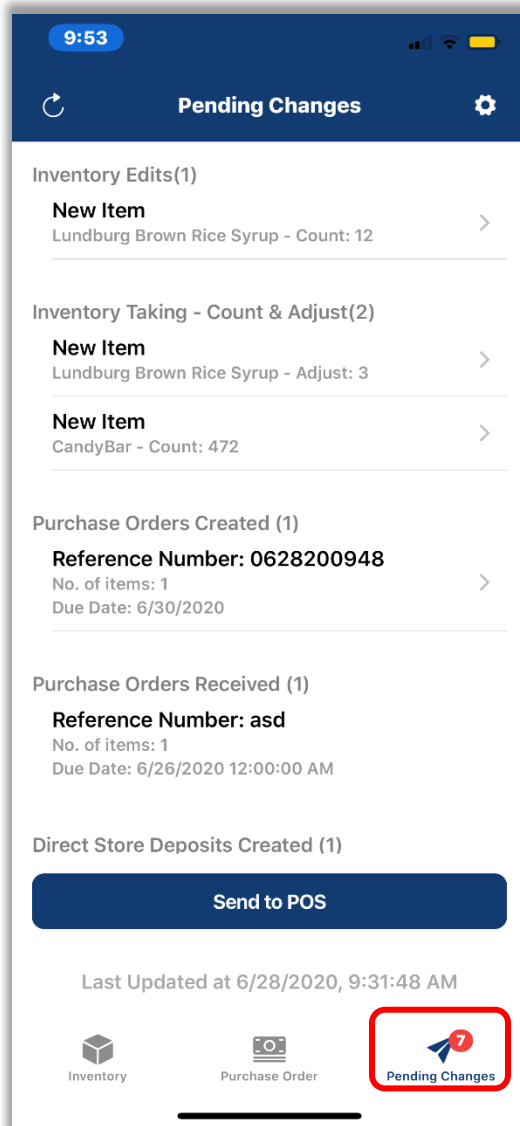
Please note: The app will not activate the **Add Items** function until the **Vendor** and **Reference Numbers** have been completed.



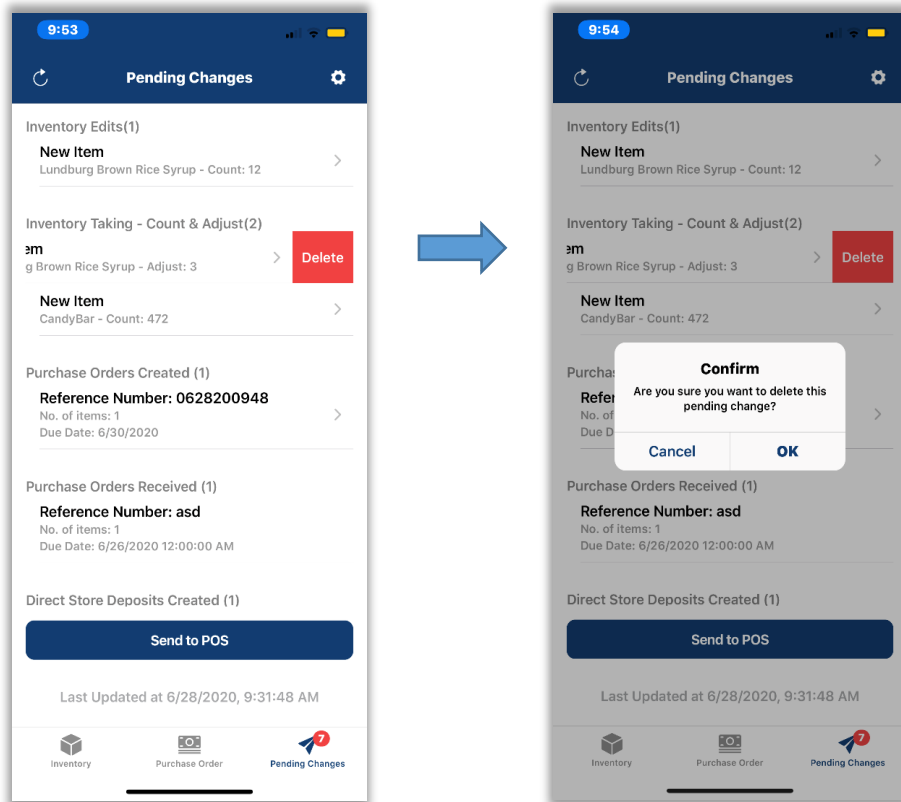
Pending Changes

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:

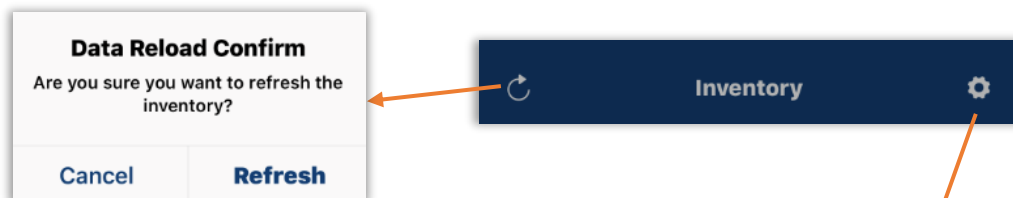
- ▶ CRE must be running and have Internet connectivity in order for data synchronization (sending to, and receiving from, POS) to take place.
- ▶ If you have over-the-air enabled, the app will automatically fetch refreshed site data immediately after sending data to CRE.

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.

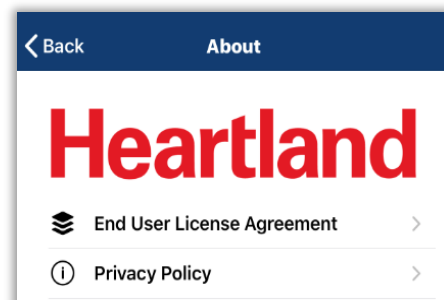
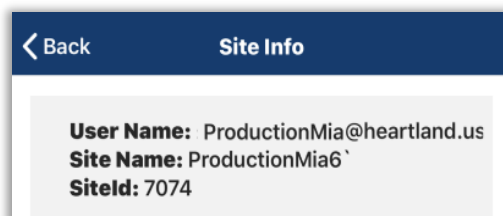
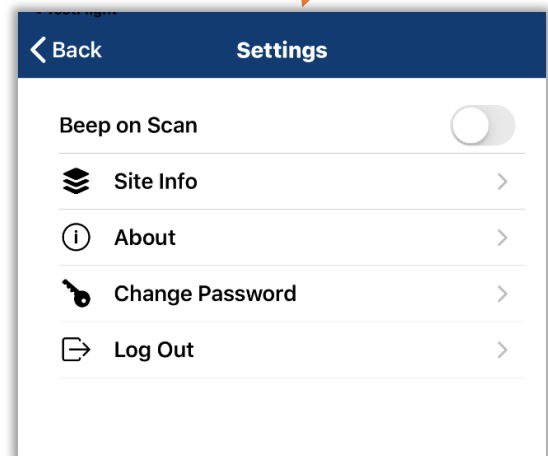
Please note: The refresh function **overwrites local data** so, if you have any pending changes on your device that you want to send to CRE, you must **submit pending changes BEFORE refreshing**.



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:

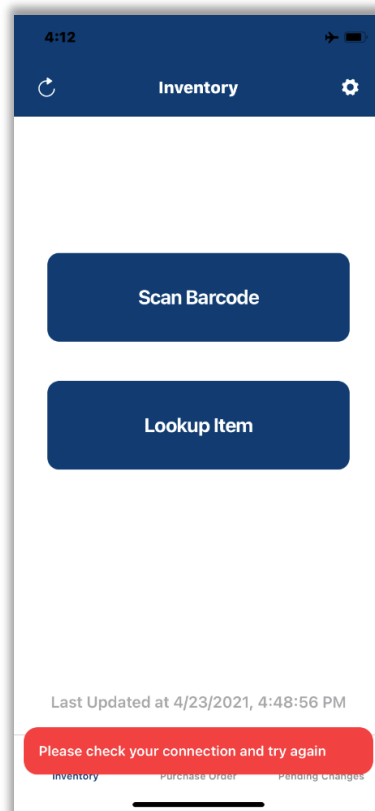
- ▶ **Beep on Scan** – This can be toggled off and on.
- ▶ **Site Info** – See image below on left. Consists of **User Name**, **Site Name**, and **SiteID**.
- ▶ **About** – See image below on right. Displays the following:
 - **EULA** – opens end-user license agreement in browser window
 - **Privacy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



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).