



# Bookstore Manager

Technical Information Document

## PDA – Setting Up & Using your PDA with BSMGR

### Document Information:

Category	Software	O/S	WinX	Last Modified	11/25/03
Author	JA – SA - SE				

### Document Summary

Instructions on setting up and using your PDA with BSMGR.

### Document Contents

**\*\*\*NOTE\*\*\* PLEASE VERIFY THAT YOU ARE ON THE LATEST VERSION OF BSMGR BEFORE PROCEEDING. If your Palm Desktop Software is installed and your hardware is already installed, you can start at Step #3.**

Step 1 – Connecting your PDA Cradle to the Computer .....	1
Step 2 – Installing the Palm Desktop Software on your Computer (1 <sup>st</sup> time only) .	2
Step 3 – Using BSMGR to Extract Categories/Depts to be counted .....	10
Step 4 – Transfer the Exported Files to the PDA (HotSync) .....	13
Step 5 – Counting Your Inventory using the PDA .....	14
Step 6 – Transferring the Scanned Inventory Files Back to the Computer (HotSync).....	20
Step 7 – Using BSMGR to update your On Hand Amounts, Add New Titles, and by option Print a Count Variance Report.....	20
Sample Change/Add reports.....	22

**Note: If installing on Windows NT 4.0, Windows 2000, Windows 2003 or Windows XP, you must log in as Administrator.**

### Step 1 – Connecting your PDA Cradle to the Computer

1. Shutdown your computer.
2. Plug the power cable into the PDA Cradle. Ensure that the PDA battery cover has the 2 windows on the back side and that the copper plates are visible in each window. (See figure below).

Without Battery Cover



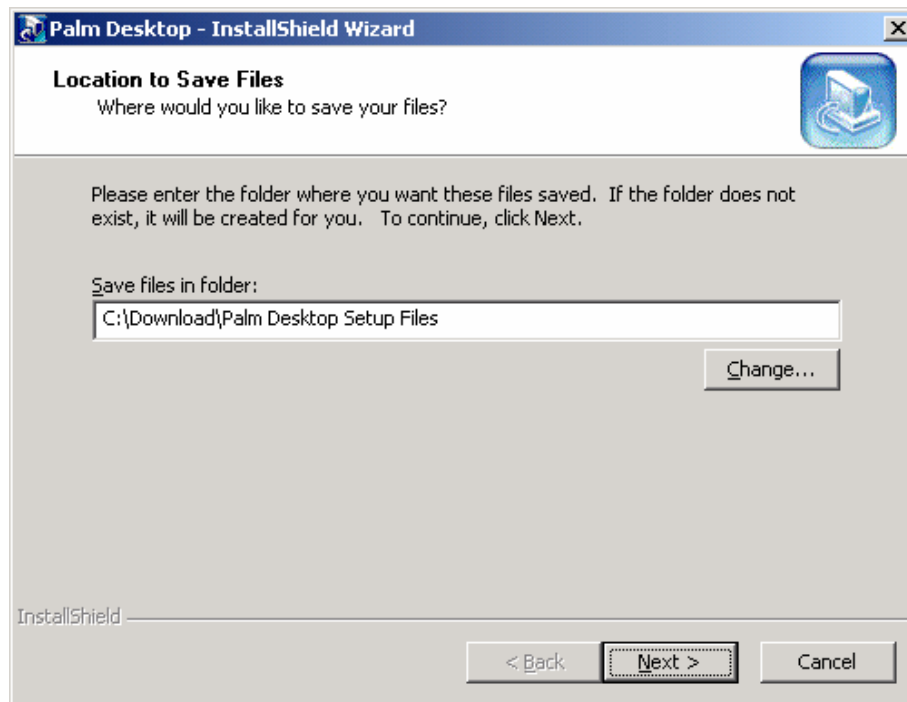
With Battery Cover



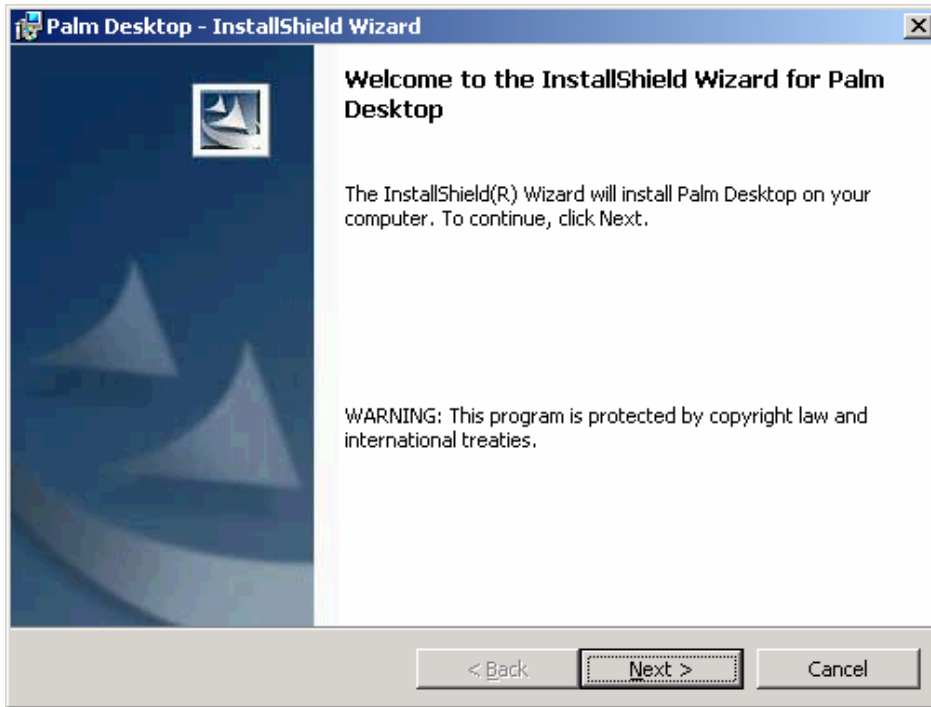
3. Place the PDA in the cradle, the Power Light on the cradle should turn red to indicate the battery is charging, or turn green to indicate that the battery is fully charged. If the power light does not come on, check your PDA power connection and the outlet.
4. The battery in the PDA must be fully charged before using it. It is recommended that you let the PDA battery charge 8 hours the first time you use it.
5. You will need to check to make sure that you have a COM port available. For reference purposes we will assume that COM1 is available. If COM1 is taken, you may use COM2 if available. Plug the PDA into COM1 using the provided serial cable.
6. Now that you have the PDA connected, you will need to turn your computer back on.

## **Step 2 – Installing the Palm Desktop Software on your Computer (1<sup>st</sup> time only)**

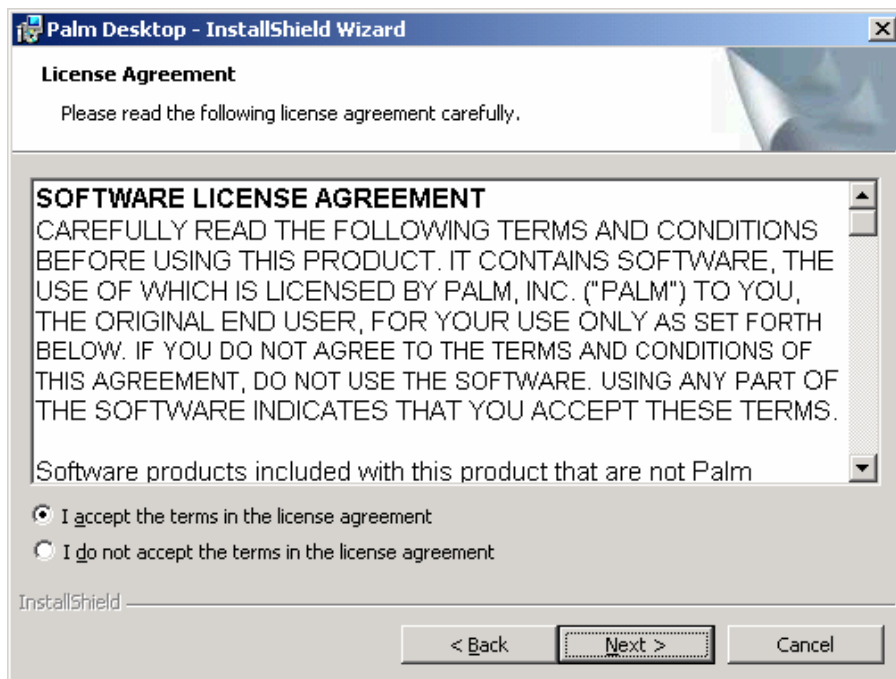
1. Insert the CD labeled “Palm Desktop Software 4.1 for Windows”



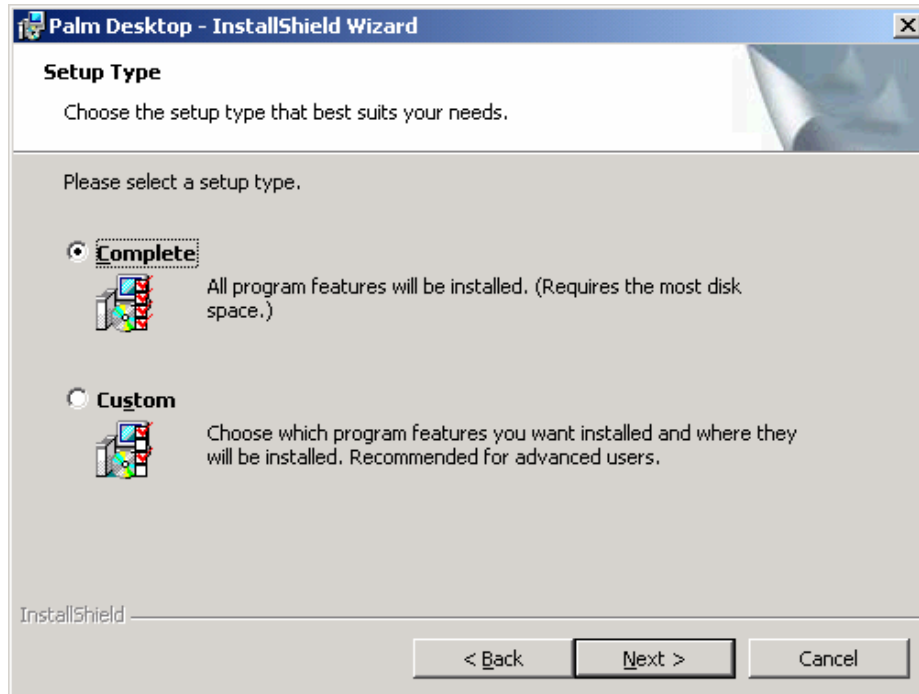
2. At the “Location to Save Files” window, make sure it says, “c:\Download\Palm Desktop Setup Files” and then click Next



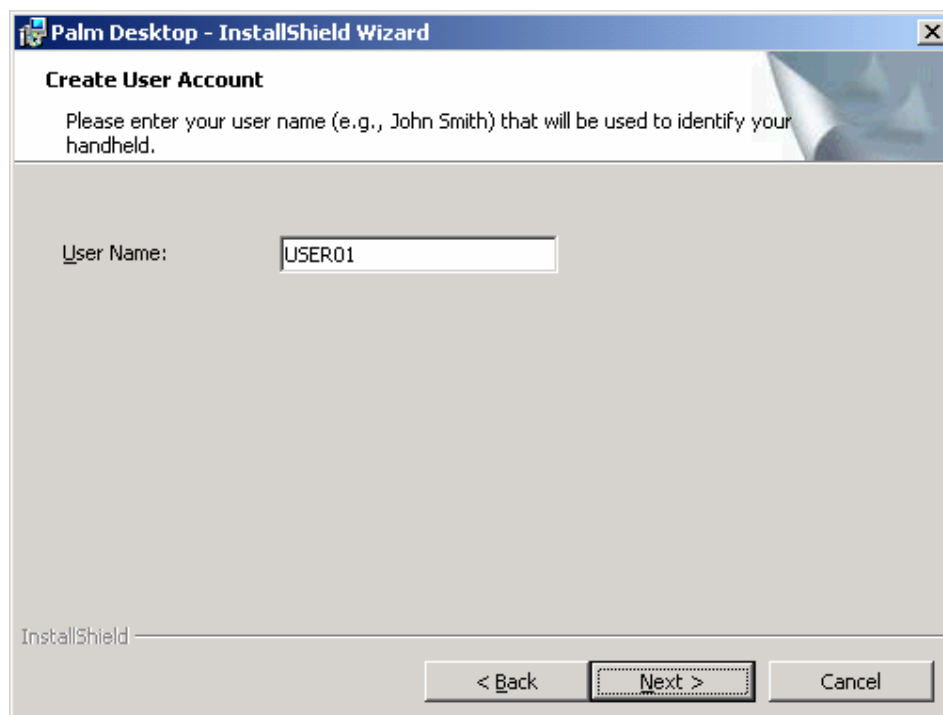
3. At the “Welcome to the InstallShield Wizard for Palm Desktop” window, click Next.



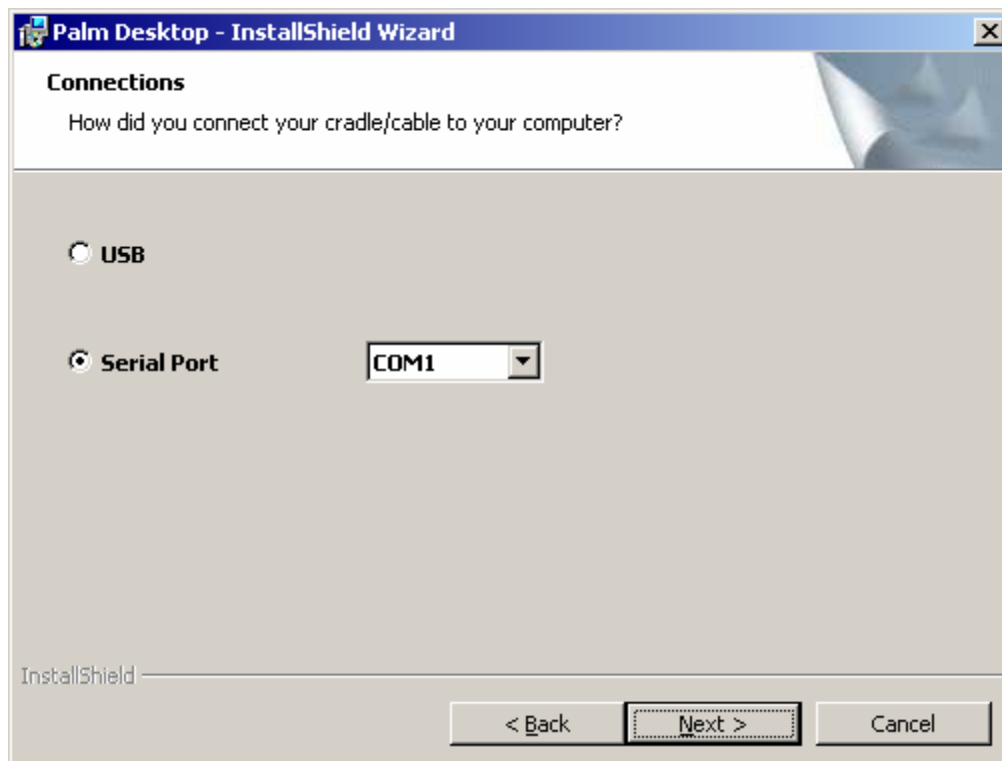
4. At the “License Agreement” window, click the radio button next to “I accept”. Now click Next.



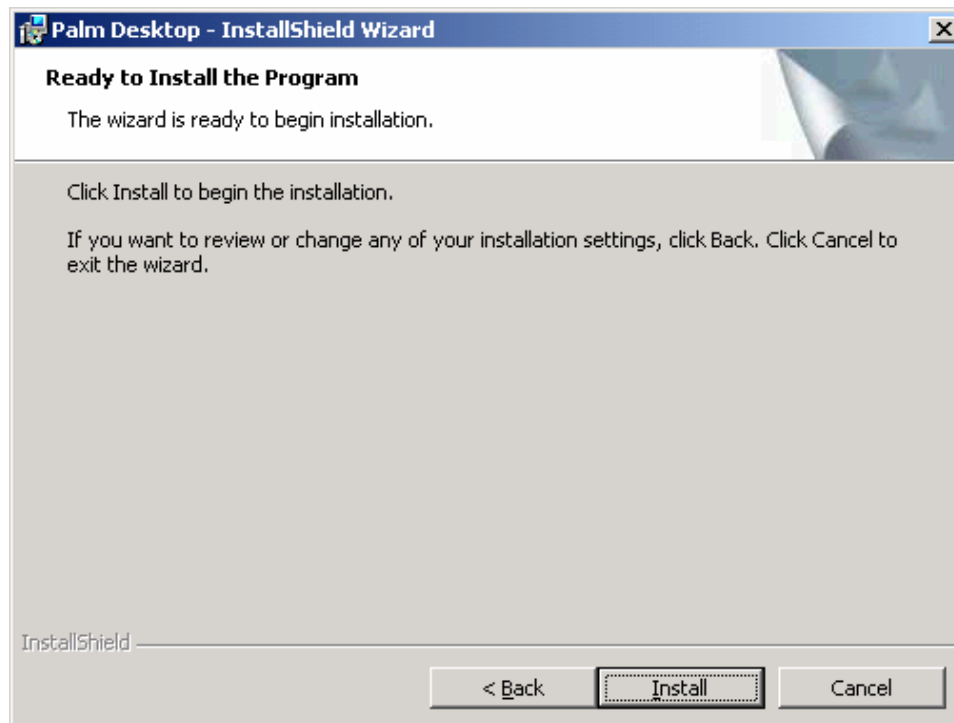
5. At the “Setup Type” window, click the radio button next to Complete and then click Next.



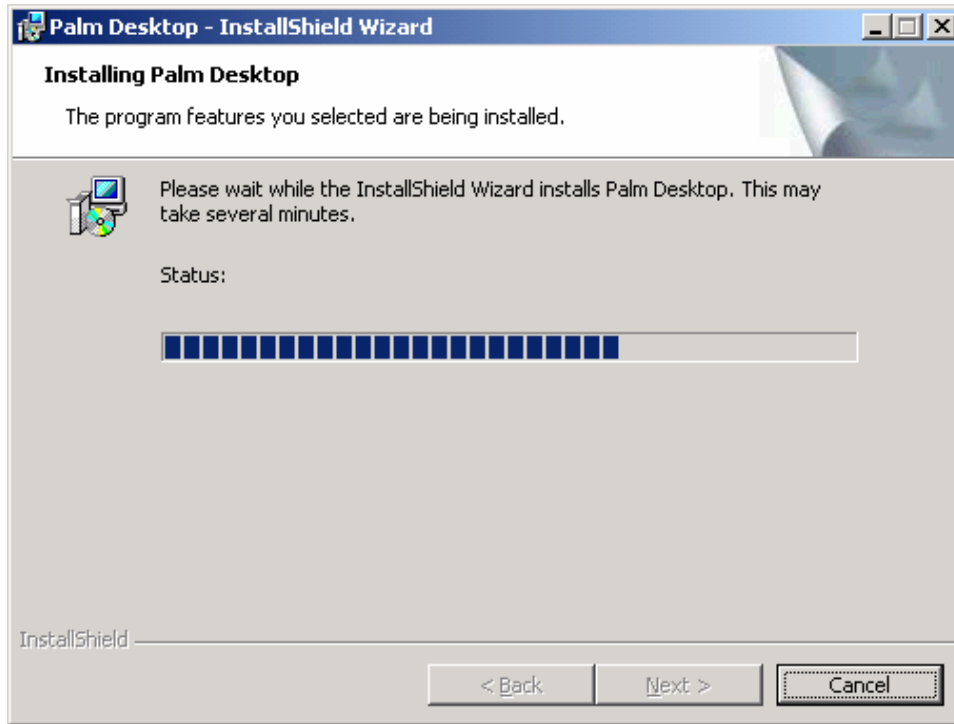
6. At the “Create User Account” window, enter a name. The name must be all one word and up to six characters (no spaces). Click Next.



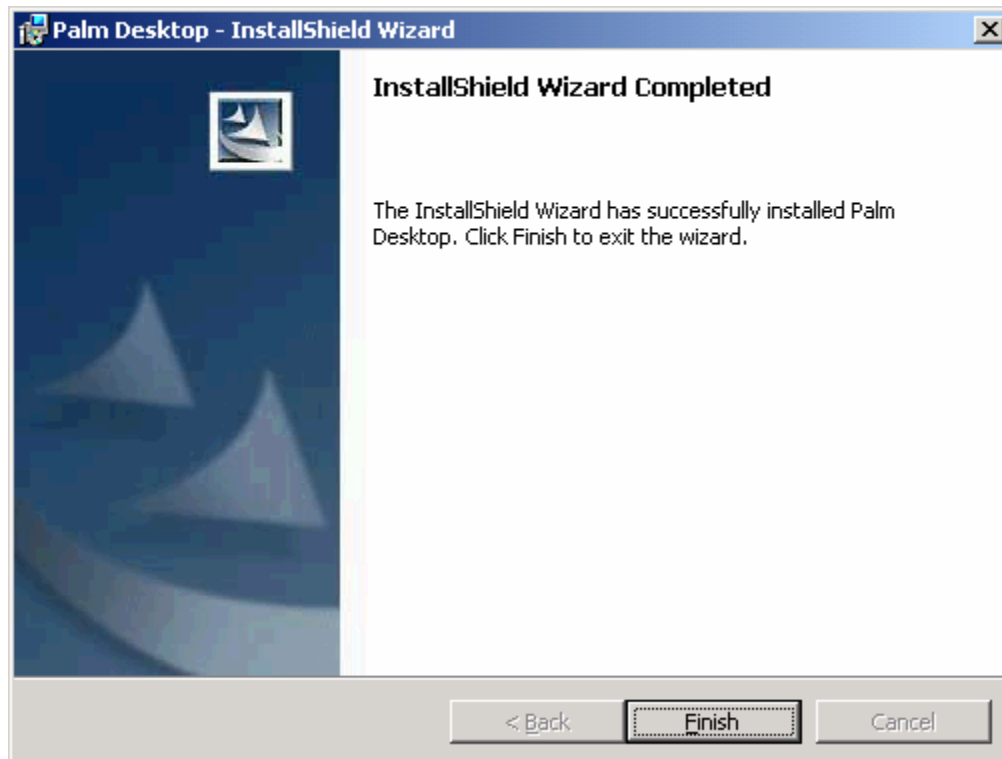
7. At the "Connections" window, click the radio button next to Serial Port, then in the drop down box, select COM1, then click Next.



8. At the "Ready to Install the Program" window, click Install.



9. You should now see the files being copied.

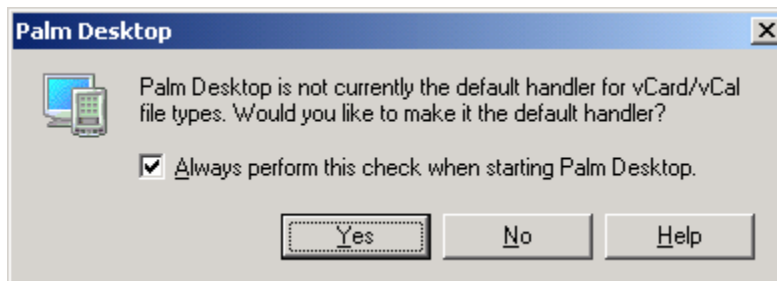


10. At the "InstallShield Wizard Completed" window, click Finish.

### Installing Giraffe

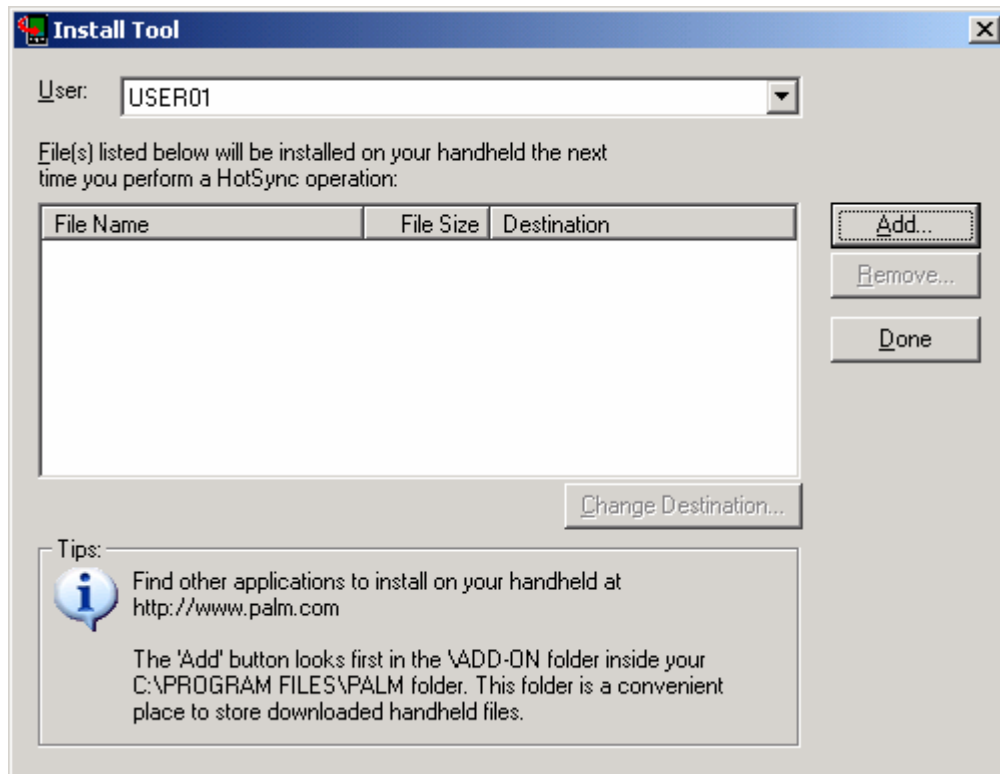


11. Once the software installation is complete we will need to open the "Palm Desktop" Icon from your desktop.
12. After opening Palm Desktop, you will get the following prompt:

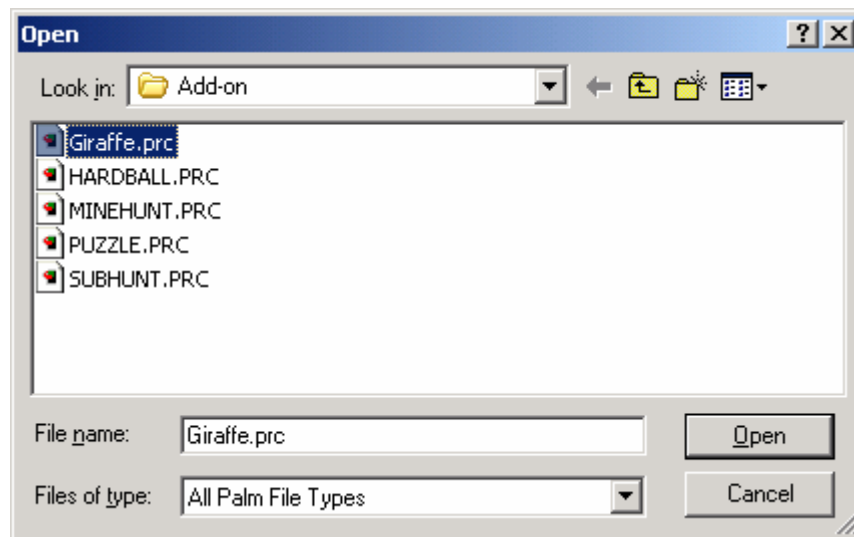


13. Click Yes to make Palm Desktop the default handler.
14. On the left side of the Palm Desktop software, click the Install button

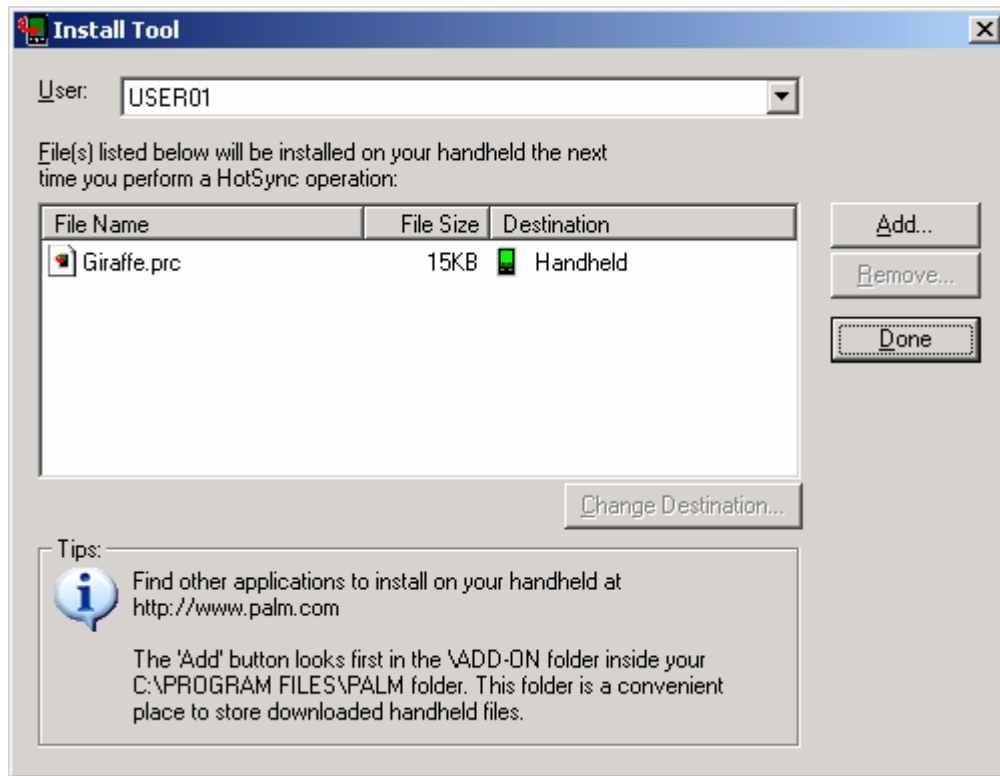




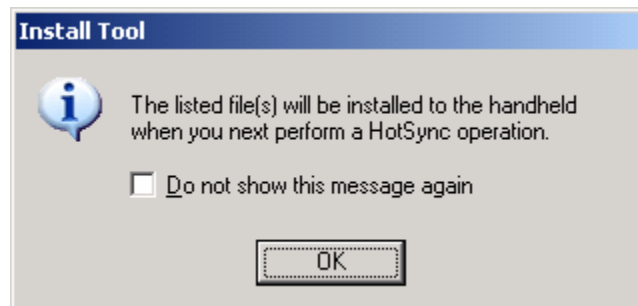
15. For User, keep USER01 or the name you specified earlier, then click Add...



16. Click Giraffe.prc file then click Open.

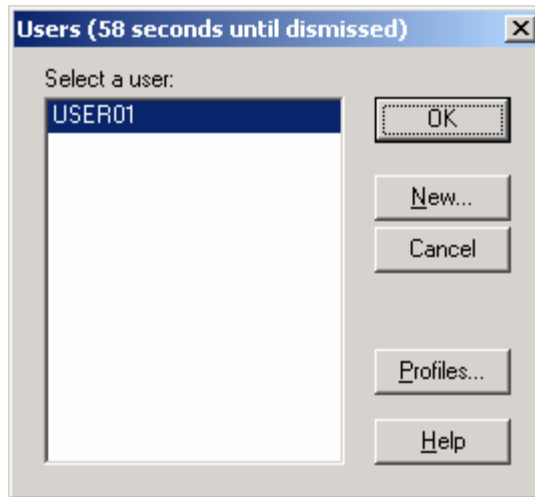


17. Now click Done

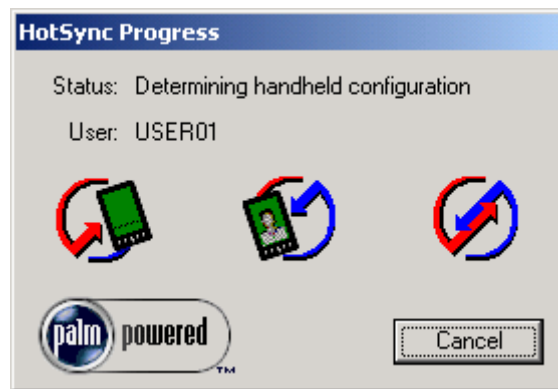


18. Click OK at the above prompt.
19. Close Palm Desktop Software
20. You should still have the PDA on the cradle. If so, press the HotSync button on the PDA Cradle. The HotSync button on the PDA Cradle. It looks like 2 arrows in a circle. (see figure to right)
21. You should here a tone and the following window will appear.





22. Select USER01 and then Click OK. You should see the following screen.

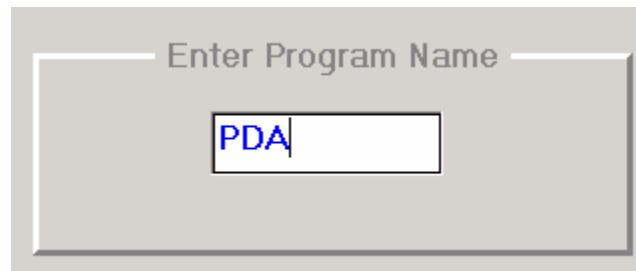


23. You should here a second tone and the screen should go back to the desktop.

24. If something was wrong it will give you an error message.

### **Step 3 – Using BSMGR to Extract Categories/Depts to be counted**

1. Open BSMGR.



2. Type PDA at Enter Program Name and hit enter.

## Creating the Count and Reference File

PDA - Export/Import IVM to Palm Database Format

Menu Utilities Output

Export File | Import File

**Count File Parameters**

- Categories   
Example (1-5, 9, 15)
- Department Range  to
- Vendor
- Model
- Promotion

Pull Returns  Category Names  Vendor Names

Start Title with Binding

**Reference File Parameters**

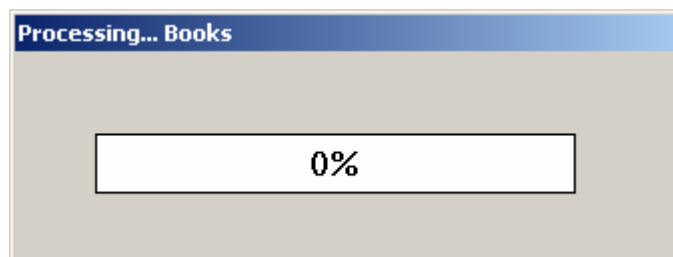
- No Reference
- Books
- International Books
- Bibles
- Music
- Gifts
- Software
- Consolidated
- Include 2nd Item Number

**Install Data**

PDA Install Path

Cancel=Esc Export=F4 V7 11/13/03

3. Select your Category Range and other options you would like.
  - Ex. Categories=1-3
    - We recommend doing a category range that will include about 500 items.
  - Check your reference file – Ex. Books is checked
4. Then click export or hit (F4) (BEFORE DOING THIS STEP, see [Exporting Details](#) below)
5. This screen will appear. This will set up your file so you can do your inventory. When this is finished you will then HotSync your PDA. It will prompt you when you need to HotSync.



## **Exporting Details**

The “count” file is made up of items in your inventory that you select for counting.  
The “reference” file is made up of items in the Christian Books & More database.  
The reference file is used when you scan an item that is not in your count file or to alert you when you scan an item outside of the parameters used to create your count file.

The first step in the process is to decide what type of count and reference file you need. For example, if you will be doing a quick count of category 1 and are confident you have all of the items you will be counting in your inventory master file, click the radio button by “Categories” and enter 1 in the category entry field count file parameters.  
Since you are confident that you have all of the items you will be counting in your inventory, a reference file is unnecessary.

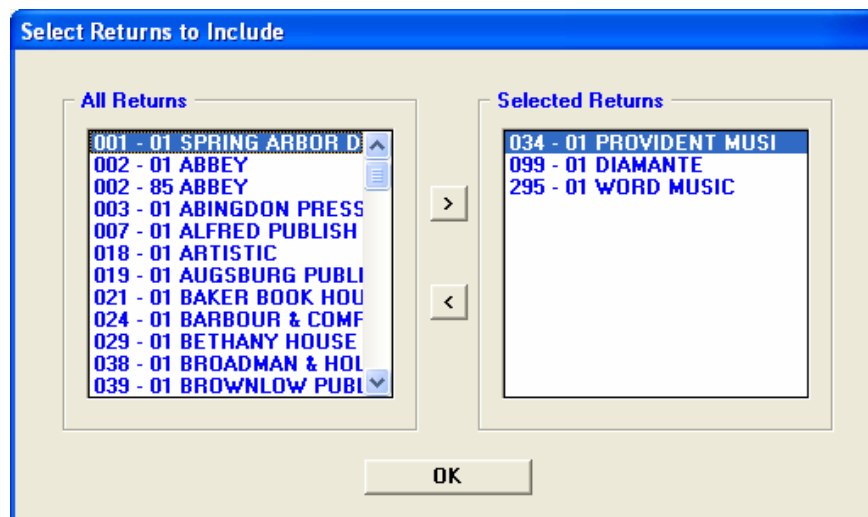
If you think you will be encountering items not in your inventory, try to choose databases for your reference file that match the items you will be counting.

While the reference file is very helpful for quickly adding new items to your inventory master file, it is typically quite large and will slow down the “Download HotSync” When you re-Sync to put the files back onto the computer, it is much faster.

To be able to see Category and/or Vendor names on the PDA instead of just numeric codes check the “Category Names” and/or “Vendor Names” boxes.

Note: If you would like the PDA to add inventory as you scan, then you will need to select the appropriate reference file. This will keep you from having to enter inventory manually.

To let QuickCount notify you when you scan an item on a return, check the “Pull Returns” box. This will display the following screen:

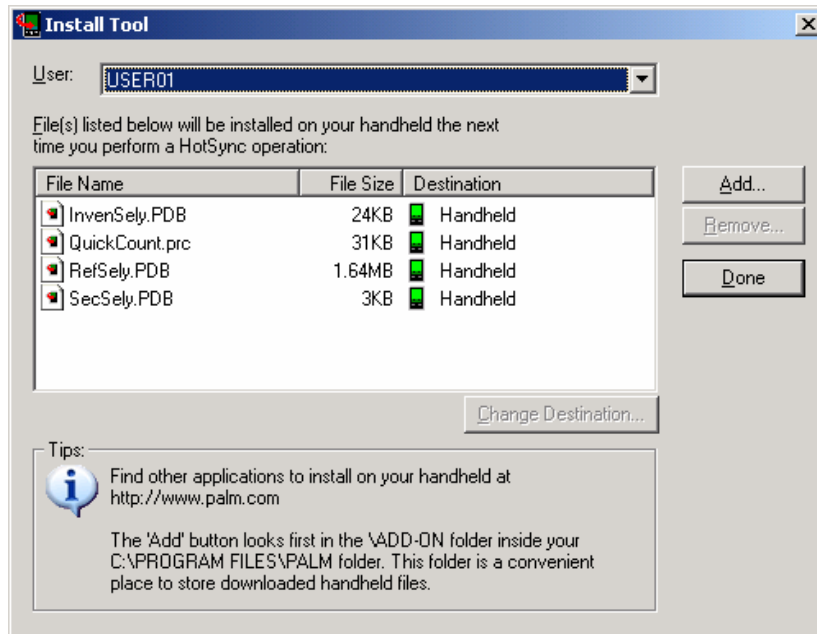


**Tip:** You can create and “HotSync download” the reference file and leave it on the PDA, then create, load and use count files without recreating the reference file each time.

For example, if you plan to count your books a category at a time over the next few days. Just create and load the reference file for books and then when you want to count a book category, choose “No Reference” and only create a count file for the category you want to count.

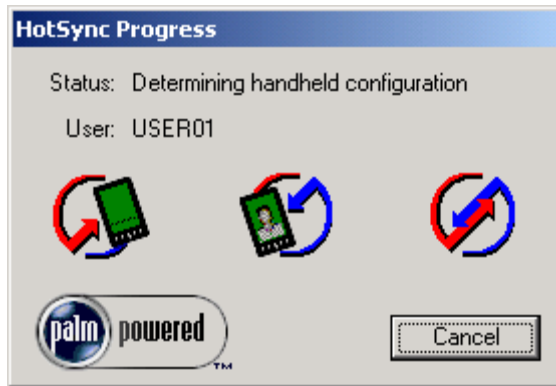
#### **Step 4 – Transfer the Exported Files to the PDA (HotSync)**

1. When the processing screen goes away, the “Install Tool” window that is shown below will pop up. Click done on this screen. Now you will need to HotSync your PDA by pressing the HotSync button on your cradle. (See figure to the right)



**\*\*\*NOTE\*\*\*** Hot Syncing will download the applications and files to the PDA. The time required for the HotSync will depend on the size of your files and the speed of your connection. A serial connection with a baud rate of 9600 will transfer about 72 Kb per minute. This will take anywhere from 20 minutes to over an hour.

Since only the count file is returned from the PDA to the PC, the upload HotSync is typically much faster than the download HotSync. When you do a HotSync, you will see the “HotSync Progress” window shown below.



### **Step 5 – Counting Your Inventory using the PDA**

1. Now turn your PDA on and look at the Menu screen to see if you see the QuickCount Program (See figure below)



2. Tap QuickCount and you should see the QuickCount Main Menu (See figure below). Now tap the Count button.



3. Tap the "Count" title to drop down the "Edit" menu. On the "Edit" menu, tap "Ask to Add." (See figure below).

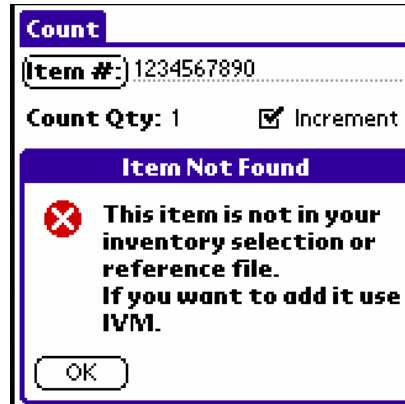
<b>Edit Options</b>	
<b>EditDetails</b>	
<b>Ask to Add</b>	
Count Qty: 0	<input checked="" type="checkbox"/> Increment
System Qty:	Loc:
Title:	
Lst Sid:	(Ven:)
Min/Max:	(Cat:)
Price: \$	
(Done)	Adjust qty -> ..... (+) (-)

- **What is Ask to Add and what happens if I scan something that isn't in my inventory?**
  - Ask to Add (See figure below on the left) will allow you to control what happens when you scan an item that is not in your inventory master file, but is in your reference file.
  - If you tap "Never Add," new items will be ignored. If you tap "Ask," the program will display the message (See figure below on the right) when a new item is scanned. ("Ask" is the default.)
  - If you tap "Auto Add," the item will be automatically added to your inventory when you import the count file back into Bookstore Manager.

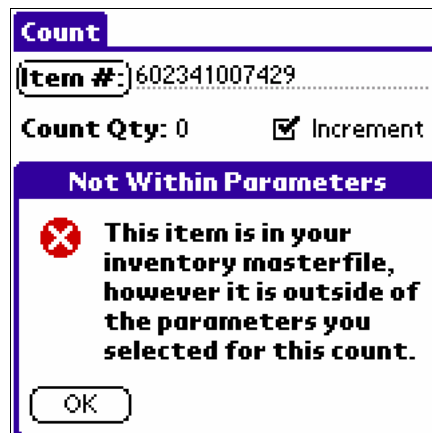
<b>Count</b>	
(Item #:)	.....
Count Qty: 0	<input checked="" type="checkbox"/> Increment
System Qty:	Loc:
<b>Add Prompts</b>	
?	What do you want me to do when you encounter items not in your count file?
(Never Add)	(Ask) (Auto Add)

<b>Count</b>	
(Item #:)	9780805461275
Count Qty: 0	<input checked="" type="checkbox"/> Increment
<b>Found In Reference</b>	
?	This item is not in your inventory master file. However, it is in the reference database. Do you want to add it?
(No)	(Yes)

- If you scan an item that is not in your count file and you are not using a reference file or the item cannot be found in your reference file, the program will display the warning shown below (See figure below).



- If you scan an item that is not in your count file, but is in your reference file and is flagged as being in your inventory master file, you will see the warning shown below (See figure below).



### **What does the Increment box do?**

- One key feature on the count screen is the “Increment” check box.
- As long as the “Increment” box is checked, when an item in the count file is scanned, the count quantity is incremented by 1. The data for the scanned item is displayed, but the item field is cleared and ready for the next scan.
  - This allows you to count as fast as you can scan.
- What information can I see when I count my inventory?
  - Item # – If the increment box is checked, the Item # field will always be empty, waiting for the next scan.
  - If an item doesn’t have a scannable barcode label, enter the item number and tap the “Item #” button/label.
  - Count Qty – This is the quantity you have scanned so far.
  - System Qty – This is the quantity Bookstore Manage thinks you have.

- Loc – This is the data from the “Location” field in IVM.
- Title – The first 25 characters of the title.
- Lst Sld – This is the last sold date in the following format YYMMDD.
- Ven – This is the vendor #1 in IVM.
- Cat – This is the category number.

\*\*\***Note**\*\*\*: If you chose to export the vendor/category names when exporting, you may tap the “Ven:” or “Cat:” labels to display the vendor or category name.

- Price – This is “Our Price #1” in IVM.

- If the Increment box is unchecked, the count quantity will not be incremented and the “Item” field will hold the number that was just scanned. (See figure below) The cursor will move to the “Adjust qty” field.
  - This is useful when counting an item where it would be easier to count by hand than scan each item. Once you have the count, simply enter it in the “Adjust qty” field and tap the “+” button.
  - This can also be useful if you mistakenly scan an item twice. Simply enter the quantity you want removed from the count and tap the “-” button.”

- Editing the details of an item is another situation when you would want to scan an item with the Increment box unchecked.

- To edit the details, simply scan the item with the increment box unchecked.
- Once the details are displayed, tap the “Count” title to drop down the “Edit” menu. (See figure above) Tap “Edit Details” on the menu to bring up the “Details” screen. (See figure below)
- Make the desired Changes and tap “Save” to continue.

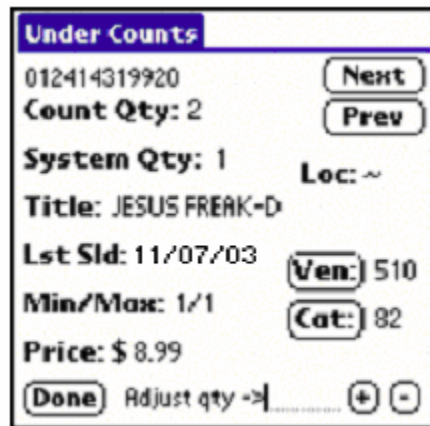
- If you chose the option to “Pull Returns” when exporting the count file, and you scan an item that is on a return, you will hear an alarm and see the following screen (See figure below).

\*\*\*Note\*\*\*: The “Pull Quantity” will be added to the Count Quantity automatically.

- Once you have completed your count, tap “Done” to return to the main menu (See figure below).



- From the main menu, tap “Review Under Counts.” (See figure below)

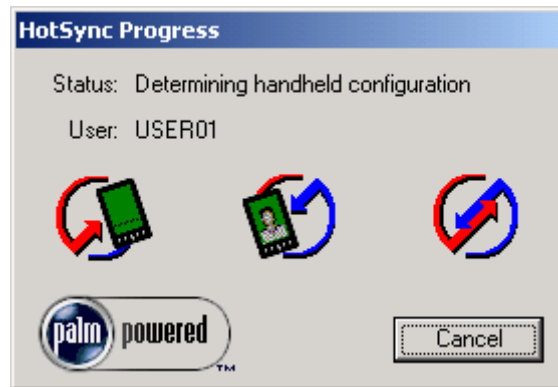


- The under count screen allows you to step through any items which have a system quantity that is not the same as your count quantity. This gives you an opportunity to search out any items you may have overlooked, or over-scanned.
- If you find the item, simply enter the quantity you found in the “Adjust qty” field and tap the “+” button.
- You may tap the “Under Count” title to edit the details of an item, as discussed earlier on the count screen.

## Step 6 – Transferring the Scanned Inventory Files Back to the Computer (HotSync)



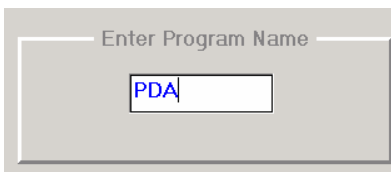
- Now you will need to HotSync your PDA by pressing the HotSync button on your cradle.



- With the PDA in its HotSync cradle, press the HotSync button. The count file will be uploaded to the PC.
- The time required for the HotSync will depend on the size of your count file and the speed of your connection. A serial connection with a baud rate of 9600 will transfer about 72 Kb per minute.
- Since the application and reference files are not returned from the PDA to the PC, the upload HotSync is typically much faster than the download HotSync.
- Once the HotSync is complete, bring up the PDA program in Bookstore Manager

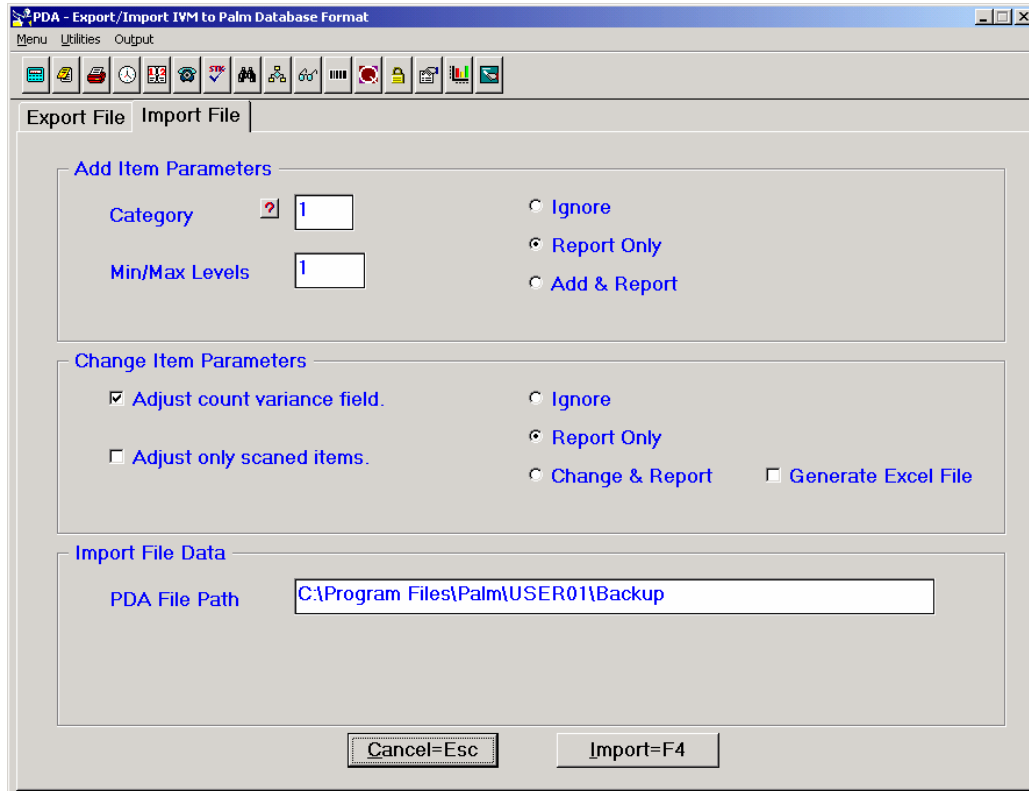
## Step 7 – Using BSMGR to update your On Hand Amounts, Add New Titles, and by option Print a Count Variance Report

1. Open up BSMGR and at Enter Program name, type PDA



2. Click on the "Import File" tab, and click which report you want.
3. If you are adding inventory, choose the default category for the new items and the default Min/Max level. Then select whether you want to actually add the items or just view a report showing the items to be added.
4. The following parameters are available for changes
  - **Add Item Parameters**
    - Ignore will ignore all new items
    - Report Only will only give you a report of the inventory you took without affecting On Hand levels in IVM.

- Add & Report will add all new scanned items to the category specified and also give you a printout of the items added / scanned.
- **Change Item Parameters**
  - Ignore will ignore any changes made to inventory.
  - Report Only will give you a report of items scanned.
  - Change & Report will change IVM to reflect the counts you just entered.
    - **\*\*\*NOTE\*\*\*** By default, all items that were not scanned or missed will be assumed “Out of Stock”.

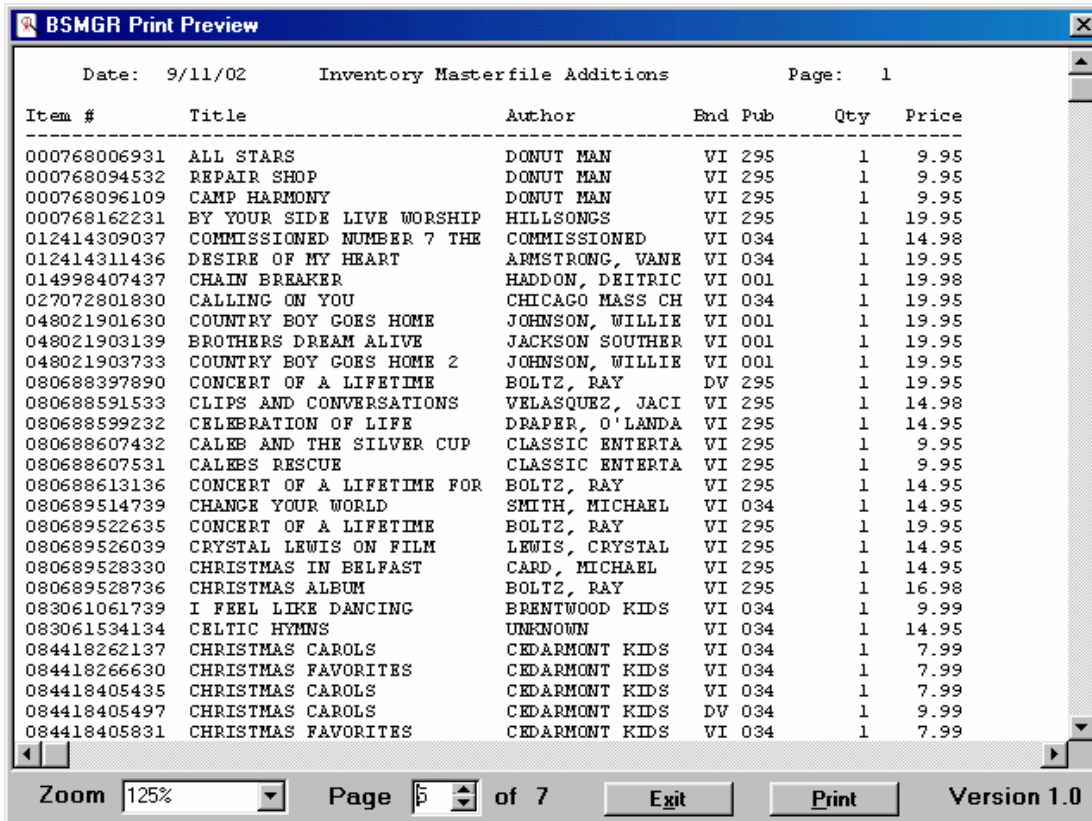


- To do a new category start back at Step 1 and repeat the process

**\*\*\*NOTE\*\*\*** Since PDA Import doesn't change the count file, you can run the import using the report only, or ignore options as many time as you like. However, when you HotSync next, the count file may be changed or removed.

## Sample Change/Add reports.

- Below is a sample report of items added.



The screenshot shows a window titled "BSMGR Print Preview" with a blue title bar. The window content displays a report titled "Inventory Masterfile Additions" dated "9/11/02" on page "1". The report is a table with columns: Item #, Title, Author, End Pub, Qty, and Price. The table lists 30 items, each with a unique ID, title, author, publication type, quantity, and price. The items include titles like "ALL STARS", "REPAIR SHOP", "CAMP HARMONY", "BY YOUR SIDE LIVE WORSHIP", "COMMISSIONED NUMBER 7 THE", "DESIRE OF MY HEART", "CHAIN BREAKER", "CALLING ON YOU", "COUNTRY BOY GOES HOME", "BROTHERS DREAM ALIVE", "COUNTRY BOY GOES HOME 2", "CONCERT OF A LIFETIME", "CLIPS AND CONVERSATIONS", "CELEBRATION OF LIFE", "CALEB AND THE SILVER CUP", "CALEB'S RESCUE", "CONCERT OF A LIFETIME FOR", "CHANGE YOUR WORLD", "CONCERT OF A LIFETIME", "CRYSTAL LEWIS ON FILM", "CHRISTMAS IN BELFAST", "CHRISTMAS ALBUM", "I FEEL LIKE DANCING", "CELTIC HYMNS", "CHRISTMAS CAROLS", "CHRISTMAS FAVORITES", "CHRISTMAS CAROLS", "CHRISTMAS CAROLS", and "CHRISTMAS FAVORITES". The prices range from 7.99 to 19.95. At the bottom of the window, there is a control bar with "Zoom 125%", "Page 5 of 7", "Exit", "Print", and "Version 1.0" buttons.

Item #	Title	Author	End Pub	Qty	Price
000768006931	ALL STARS	DONUT MAN	VI 295	1	9.95
000768094532	REPAIR SHOP	DONUT MAN	VI 295	1	9.95
000768096109	CAMP HARMONY	DONUT MAN	VI 295	1	9.95
000768162231	BY YOUR SIDE LIVE WORSHIP	HILLSONGS	VI 295	1	19.95
012414309037	COMMISSIONED NUMBER 7 THE	COMMISSIONED	VI 034	1	14.98
012414311436	DESIRE OF MY HEART	ARMSTRONG, VANE	VI 034	1	19.95
014998407437	CHAIN BREAKER	HADDON, DEITRIC	VI 001	1	19.98
027072801830	CALLING ON YOU	CHICAGO MASS CH	VI 034	1	19.95
048021901630	COUNTRY BOY GOES HOME	JOHNSON, WILLIE	VI 001	1	19.95
048021903139	BROTHERS DREAM ALIVE	JACKSON SOUTHER	VI 001	1	19.95
048021903733	COUNTRY BOY GOES HOME 2	JOHNSON, WILLIE	VI 001	1	19.95
080688397890	CONCERT OF A LIFETIME	BOLTZ, RAY	DV 295	1	19.95
080688591533	CLIPS AND CONVERSATIONS	VELASQUEZ, JACI	VI 295	1	14.98
080688599232	CELEBRATION OF LIFE	DRAPER, O'LANDA	VI 295	1	14.95
080688607432	CALEB AND THE SILVER CUP	CLASSIC ENTERTA	VI 295	1	9.95
080688607531	CALEB'S RESCUE	CLASSIC ENTERTA	VI 295	1	9.95
080688613136	CONCERT OF A LIFETIME FOR	BOLTZ, RAY	VI 295	1	14.95
080689514739	CHANGE YOUR WORLD	SMITH, MICHAEL	VI 034	1	14.95
080689522635	CONCERT OF A LIFETIME	BOLTZ, RAY	VI 295	1	19.95
080689526039	CRYSTAL LEWIS ON FILM	LEWIS, CRYSTAL	VI 295	1	14.95
080689528330	CHRISTMAS IN BELFAST	CARD, MICHAEL	VI 295	1	14.95
080689528736	CHRISTMAS ALBUM	BOLTZ, RAY	VI 295	1	16.98
083061061739	I FEEL LIKE DANCING	BRENTWOOD KIDS	VI 034	1	9.99
083061534134	CELTIC HYMNS	UNKNOWN	VI 034	1	14.95
084418262137	CHRISTMAS CAROLS	CEDARMONT KIDS	VI 034	1	7.99
084418266630	CHRISTMAS FAVORITES	CEDARMONT KIDS	VI 034	1	7.99
084418405435	CHRISTMAS CAROLS	CEDARMONT KIDS	VI 034	1	7.99
084418405497	CHRISTMAS CAROLS	CEDARMONT KIDS	DV 034	1	9.99
084418405831	CHRISTMAS FAVORITES	CEDARMONT KIDS	VI 034	1	7.99

- Below is a sample report of items changed.
- You will notice that the old/new columns are populated only when their respective data items were changed.

BSMGR Print Preview

Date: 9/11/02      Inventory Masterfile Changes      Page: 2

Item #	Title	Old Price	New Price	Old Qty	New Qty	Old Cat	New Cat	Old Pub	New Pub	Old Loc	New Loc
628740634424	HERE			0	1						
634387425028	LIGHT ETER			2	1						
637761742520	LINEUP			2	1						
637761744524	GIRLS AND			2	1						
637761744623	E PRAISE			1	0						
637761746627	NIGHT WE C			1	0						
637761746726	BALLPOINT			2	1						
639407000124	BROWNSVILL			0	1						
639407000223	BROWNSVILL			0	1						
639407000520	AWAKE AMER			0	1						
645177629922	DEEP STILL			1	0						
645177927226	DEEP STILL			1	0						
647867701628	ALL ABOUT			2	0						
653128000621	COME TO TH			1	0						
657022240121	ALL THE HY			2	1						
657022240923	ELECTRIC B			3	1						
657022519722	ECHOING GR			1	0						
657022521626	QUANTITY I			2	1						
657022521824	UPBEATS AN			2	1						
657022521923	OUR NEWEST			2	1						
657022524825	PROOF THAT	12.99	10.95	2	0						ia
661740091729	SINGING TR			1	0						
692417000720	TIME HAS C			1	0						
701122005422	IM FORGIVE			2	1						
701122007723	HEAVENS CH			4	1						
701122021323	MOVIN ON			2	1						
701122963524	HE SHALL R			4	1						
701122972625	SAVED BY G			3	1						

Zoom 125%      Page 3 of 7      Exit      Print      Version 1.0

Sample Excel Report (split into 2 images for better viewing)

Microsoft Excel - PDBchg3.XLS

File Edit View Insert Format Tools Data Window Help

A1      fx Item #

	A	B	C	D	E	F	G	H
1	Item #	Title	Old \$	New \$	Old Qty	New Qty	Old Cat	New Cat
2	2	TEST ITEM	\$9999.99	\$2.50	0	0	1	

Type a question for help

10      B      I      U      \$      %      ,

I	J	K	L	M	N	O
Old Pub	New Pub	Old Loc	New Loc	Cost	Qty Variance	Cost Variance
3				\$5999.99	0	\$0.00