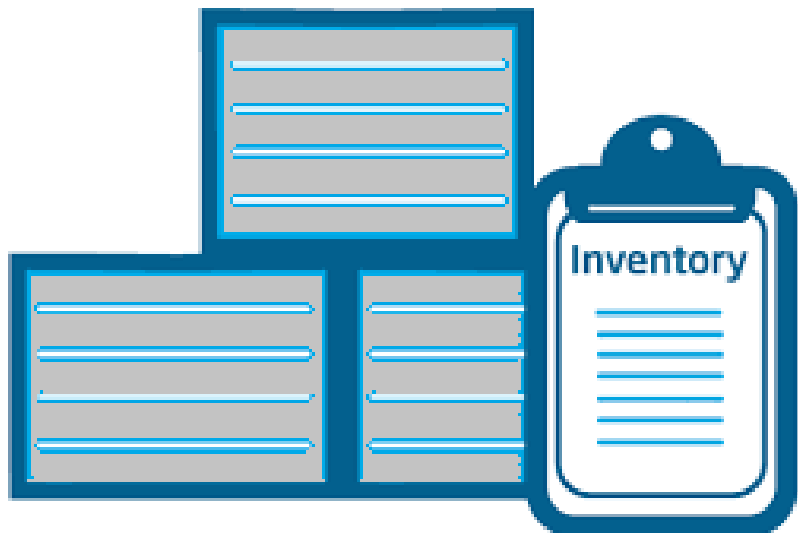


Inventrue

Inventory Count Module

Microsoft Retail Management System

Installation and User's Guide



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Inventrue - TRS Inventory Count Module

Microsoft Retail Management System

Installation Guide

Pre-requisites

- 1) The RMS Database server must be running SQL 2008 R2 or higher
- 2) The tablet or computer must have an internet connection to download software
- 3) The tablet or computer must have a full Windows O/S (Windows 7 or higher)
- 4) The tablet or computer needs .NET Framework 4.5.1

Before you begin....

To ensure a smooth installation setup, please read the four points below:

- 1) You will require your tablets or computers to be part of your store's network (wireless)
- 2) You will require your RMS Database connection information. This is the exact same information that you will find in Store Operations Administrator which you can open to obtain the settings (Open Store Operations Administrator → Click File → Click Configuration)
- 3) You will require a local and network folder to store your count files
- 4) Time Monday – Friday between 9am – 5pm Eastern time to call 1-877-877-4767 for your licenses once the software is installed on your device(s)

Download

Click the link below to download the TRS Inventory Count Software

<http://tricityretail.com/clickonce/inventrue-rms/>

Installation

Extract the installation from the zip file then right-click on the installation program and Run as Administrator.

Use all defaults for folders options and select the box to “Create a desktop icon” – this will provide an easy start to the program from the Window desktop.

Configuration

RMS Database Connection should match the settings in Store Operations (File → Configuration).

Test Database Connection will test to ensure that the database connection information is correct.

Check database for duplicate codes will test the database to ensure that there are no duplicate item codes or alias codes. If any duplicates are present in the database a will be displayed to inform of the codes that need to be corrected. Contact your RMS reseller to assist in repairing your database.

It is important that any duplicates be rectified to ensure the integrity of your data.

Unique File Identifier must be different on each device as a way of identifying the count files that are uploaded for import to RMS. Each device should have its own unique identifier. The file that will be available for import into RMS Physical Count will be displayed, using the unique identifier

Maximum quantity allowed is set to 99999 to allow a five digit quantity, 999 for a three digit quantity etc. This feature is designed to significantly reduce the chance that a user will scan a barcode in the quantity field.

Perform count online option will require a persistent network connection.

Include Inactive items will include all RMS items when creating a new blank count.

Backup / Store Count file directory when online (remote) will specify the location where the files should be uploaded for import into RMS. Normally, all devices would have the same directory on a shared folder on your network .

Backup / Store Count file directory when offline (local) will specify the location where the files should be stored on the local device.

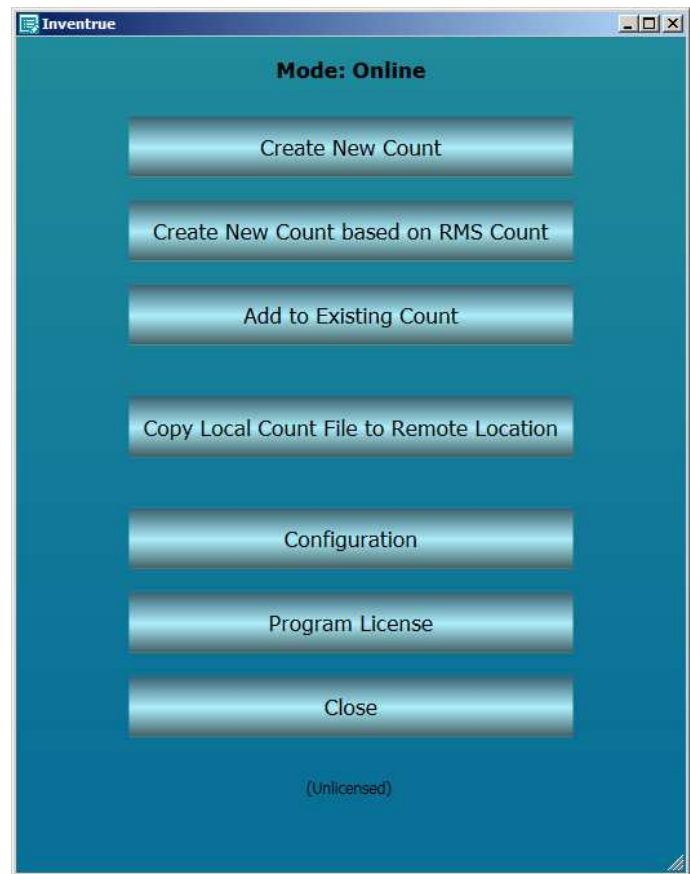
The screenshot shows the 'Database Setup' dialog box with the following fields and options:

- RMS Database Connection:**
 - Server Name: ServerName
 - Database Name: DatabaseName
 - Username: sa
 - Password: (masked with dots)
 - Time Out (in s): 30
 - Buttons: Test Database Connection, Check database for duplicate codes
- Unique file identifier: 01
- Filename is: RMSCount01.bdt
- Maximum quantity allowed: 999
- ☐ Perform count online
- ☐ Include inactive items
- Backup / Store Count File to the following directory when online (remote):
\\SERVER\TRS Inventory Count (with a Browse button)
- Backup / Store Count File to the following directory when offline (local):
C:\TRS Software\TRS Inventory Count (with a Browse button)
- Buttons: OK, Cancel

Usage

Inventrue will allow you to sync item catalogs and count files from your mobile device and networked PCs. Catalogs are built when the user begins the count and at this point, the device must be on the network. Once the catalog is built, the user is safe to disconnect from the network then perform their physical counts. The count file will be stored locally until the user connects the device to the network and clicks the “Copy Local Count File to Remote Location”.

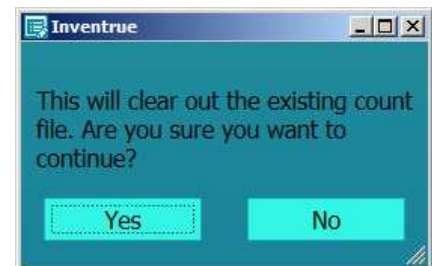
When you open the program you will see your mode (Online or Offline) posted at the top of the screen.



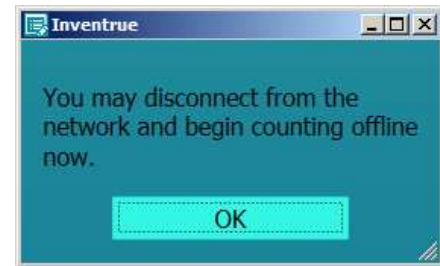
Create New Count

Click the Create New Blank Count button to enable a count on any or all items in your RMS database. When you click this button, the existing count file will be erased to make room for the new data.

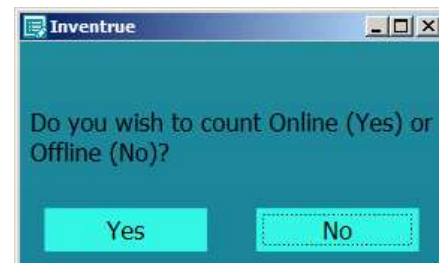
Click Yes, to start with a blank count file.



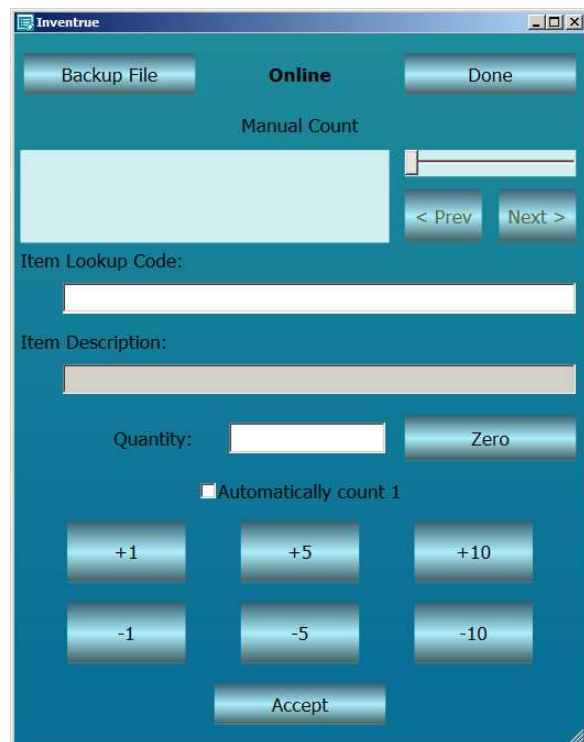
If counting offline, the display will now indicate that you can disconnect from the network to begin counting offline.



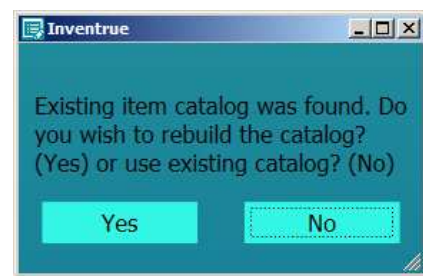
If the configuration option is set to count online, a prompt will request that you answer Yes to count online or No to count offline.



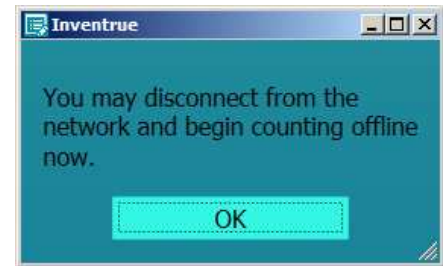
If answer is Yes, the count screen will be displayed and will indicate "Online" at the top of the display.



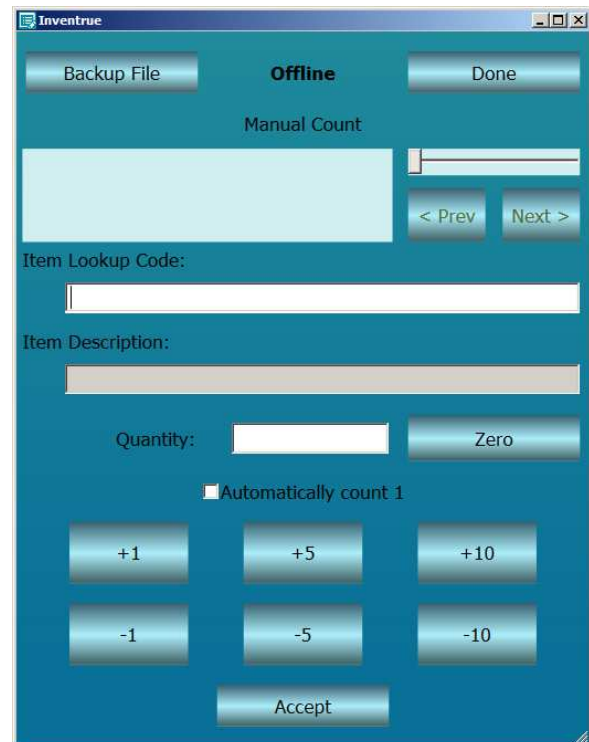
Next, you will be prompted to use the catalog. The default has been set to "No" so that you will not inadvertently over-write a file that you are already using. Choose "Yes" to build a new catalog. By default, Inactive items will not be included. If you would like to include inactive items, choose this option in configuration. In cases where you are performing a number of counts on the entire database, you may wish to keep the same catalog. If you're not sure, choose "No".



Once the catalog has been rebuilt or you have selected No to rebuild, a message will indicate that you can disconnect from the network to begin counting offline.



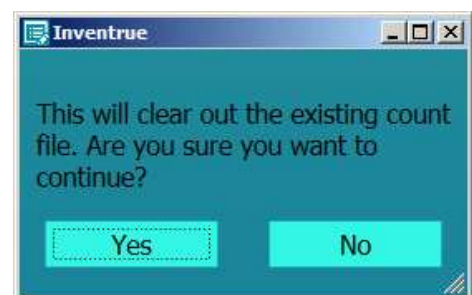
The count screen will be displayed and will indicate "Offline" at the top of the display.



Create New Count based on RMS Count

Click the Create New Count based on RMS Count button to create a count based on the items in an existing open, Physical Count in RMS. When you click this button, the existing count file will be erased to make room for the new data.

If you select "Create New Count base on RMS Count" you will be prompted clear the existing count file.



Click Yes, to start with a new count file and you will be prompted with a list of all open physical inventory counts.



Once you choose a count and click OK a catalog with the items in the count will be created and you will be able to disconnect from the network, if counting offline, to perform your count.

The count screen will be displayed.

Only items in the count will be permitted to be scanned.

Add to Existing Count

If you have a count in progress and you are taking a break or perhaps connected to the network to back up your file, simply click "Add to Existing Count" to continue counting.

If the option to count online is set, you will be prompted to answer Yes to count online or No to count offline.

Copy Local Count File to Remote Location

This button is used when you want to transfer your count file from your device to the remote (network) location to either submit the file for import into RMS or to periodically back up your file.

Every time you click this button, your file will copy to the remote location and rename the previous version of the file with a YYYYMMDDHHMM extension.

Counting Inventory

Backup File sends a copy of the local count file to the network remote location.

Done exits the count and returns to the menu.

The top window displays the last item counted. Use the **< Prev** and **Next >** buttons to scroll through previously counted items.

Item Lookup Code field is where the cursor must be to enter or scan items.

Item Description will be automatically filled in when an item is scanned and cannot be edited.

Quantity is where you will enter the counts for the item scanned / entered.

Zero will zero the count in the quantity field.

Automatically count 1 can be checked to automatically enter 1 in the count for each item scanned. If checked, upon scanning each item the program will save the item with a 1 count with having to enter the count and press **Accept**.

Pressing the **+1**, **+5**, **+10**, **-1**, **-5**, **-10** buttons will add or subtract these counts from the current item displayed. These buttons cannot be used if **Automatically count 1** is checked on.

Accept needs to be pressed after each item is scanned and the quantity has been entered if manually entering quantities with the **Automatically count 1** is unchecked.

The screenshot shows the 'Inventue' application window. At the top, there are three buttons: 'Backup File', 'Count Mode', and 'Done'. Below these is a section labeled 'Type of Count' with a large empty text box and two buttons, '< Prev' and 'Next >'. Underneath is the 'Item Lookup Code:' field with a text input box. Below that is the 'Item Description:' field with a text input box. The 'Quantity:' section includes a text input box and a 'Zero' button. A checkbox labeled 'Automatically count 1' is present. Below the checkbox is a grid of six buttons: '+1', '+5', '+10', '-1', '-5', and '-10'. At the bottom center is an 'Accept' button.

Licensing

To use Inventue in a live environment, the software must be licensed.

Without a license, Inventue may be used but as a demo only. Only 5 items scanned will be saved for import in Microsoft Retail Management System.

To Obtain a License

Press the **Program License** button on the main menu screen.

The lower left corner of the screen will inform you if the product is licensed or not.

A unique Auto-generated License ID will be displayed.

Provide this unique Auto-generated License ID to Tri-City Retail System to obtain a **License Code**.

Once you have obtained your license code from by Tri-City Retail System, enter the code in the

License Code field then press the **Verify** button. A message will be displayed indicating if the license is verified.

If your license is verified successfully, press the Close button.

Inventrue is licensed on this device only, not for any particular Store Operations database.

You will now be able to use Inventrue with any of your Store Operations systems.

A screenshot of a software window titled "Program License". The window has a blue header bar with the title and standard window controls (minimize, maximize, close). The main area is white. It contains two text input fields. The first field is labeled "Auto-generated License ID:" and contains the text "123456789012345678901234". The second field is labeled "License Code:" and is empty. Below the fields are three buttons: "Unlicensed" (disabled, grey), "Verify" (active, blue), and "Close" (active, blue).

Program License

Auto-generated License ID:

123456789012345678901234

License Code:

Unlicensed Verify Close

Contact Tri-City Retail Systems for all licensing request.

Tri-City Retail Systems Inc.
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