



RF Warehouse Automation For Sage 100 ERP 2013

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Installation Instructions and Cautions

PLEASE NOTE: SAGE 100 ERP must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.

Once SAGE 100 ERP installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

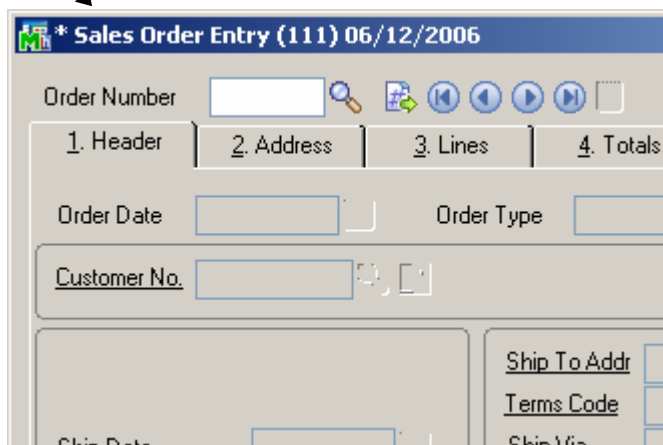
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any SAGE 100 ERP screens, you must run **Customizer Update** after you do an enhancement installation.

But wait! BEFORE you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100 ERP.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

| Enhancement | Level | Release Date | Serial Number | Unlocking Key | Status |
|-----------------|-------|--------------|--------------------|---------------|---------|
| IIG Enhancement | 5.00 | | AAAAAAAAAAAAAAAAAA | BBBBBB | Invalid |

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

Introduction

The **RF Warehouse Automation enhancement** for MAS 90 is the tool you need to serve your customers more effectively. Your team will be able to enter shipping data and receipts of goods while on the road with their Radio Frequency device with Windows CE — saving time and ensuring accuracy.

By connecting salespeople who are in remote locations to MAS 90 software, your company will be in a strategic position to serve your customers more quickly and more efficiently.

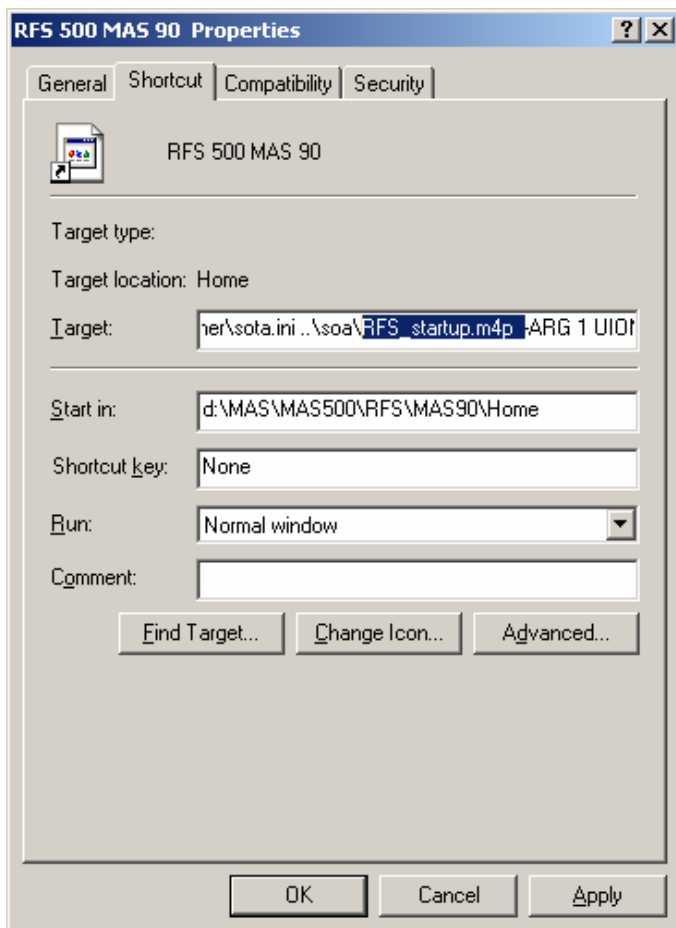
If you have salespeople who are traveling, Radio Frequency solutions can be a valuable addition to your company.

Before you run RFS

Before you start using **RF Warehouse Automation**, you must modify its desktop shortcut to be able to run it. Map the Network drive where your Sage 100 ERP Standard (MAS90) system is located.

Right-click your MAS90 icon on the desktop, and select the **Properties** in the pop-up menu. Go to the **Shortcut** tab.

In the **Target** field, type your path\MAS90\Home\pvxwin32.exe -hd ..\launcher\sota.ini ..\soa\RFS_Startup.m4p.
(where *your path* stays for the path to your Sage 100 ERP system, e.g. D:\MAS\Mas500\RFS).



Type the path to the Sage 100 ERP system using mapped drive. Click Ok or Apply to save this change.

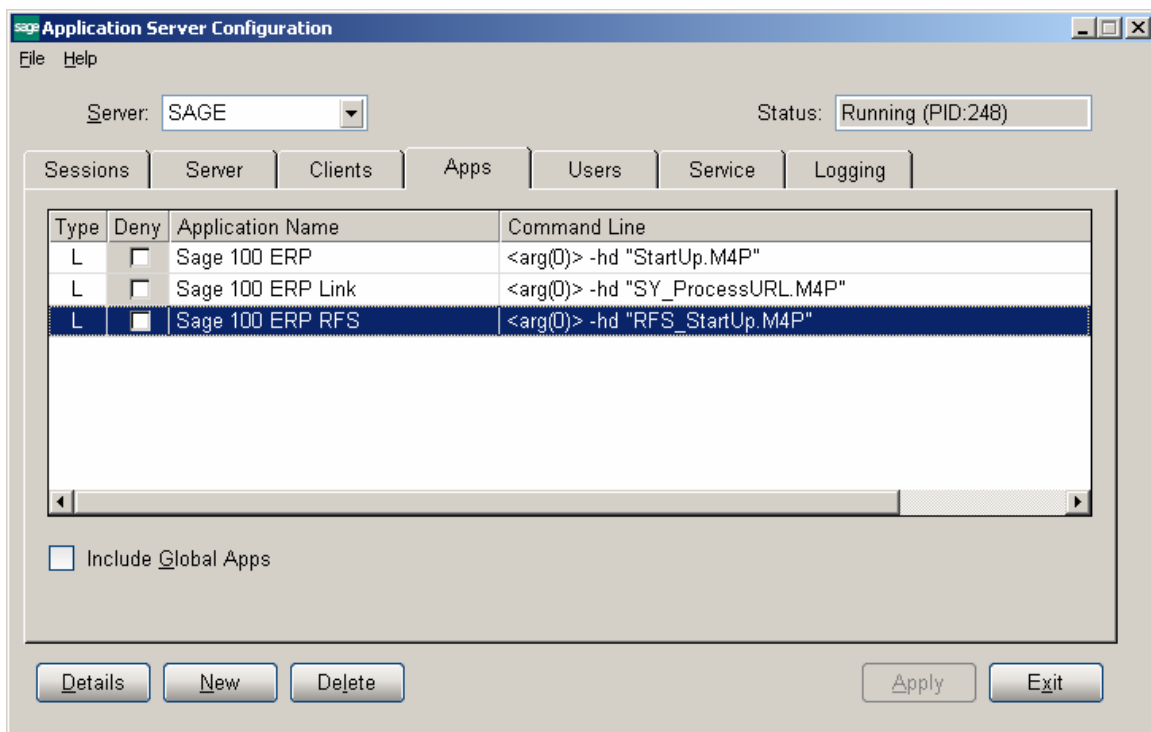
RF Client Configuration for Sage100 Advanced ERP

To be able to run RF in the client server mode it is necessary to copy the files from **RFS_Workstation** folder to your **Sage100ERPWorkstation-> MAS90** folder. After copying the files it is necessary to create **rfs_sota.ini** file in the: **Sage100ERPWorkstation\ MAS90 \Launcher**. It is a copy of original **sota.ini** except that **APPLICATION= Sage 100 ERP RFS** (this is a reference to an application in the application server).

New Application called **Sage 100 ERP RFS** should be added into the **Application Server Configuration**. It is a copy of **Sage 100 ERP** application with the following changes:

Application Name: Sage 100 ERP RFS

Lead Program: rfs_startup.m4p



Current - App Props for Server: "SAGE"

Application

App Name: Sage 100 ERP RFS

ProvideX EXE: <Default>

Server INI: <Default>

Lead Program: RFS_StartUp.M4P

Extra CMD Options:

Arguments:

Start-In Directory: <Default>

Init Window: Normal

Clients

Client Type: Any Client Type

WindX Ver: 00.0000/00 Max WindX Ver: 00.0000/00

JavX Ver: 00.0000/00 Max JavX Ver: 00.0000/00

Options

Disable Application

Allow Client Extra CMD Options

Allow Client Arguments

Allow Client to Set EID

Allow Client to Set Start-In Directory

OS Level

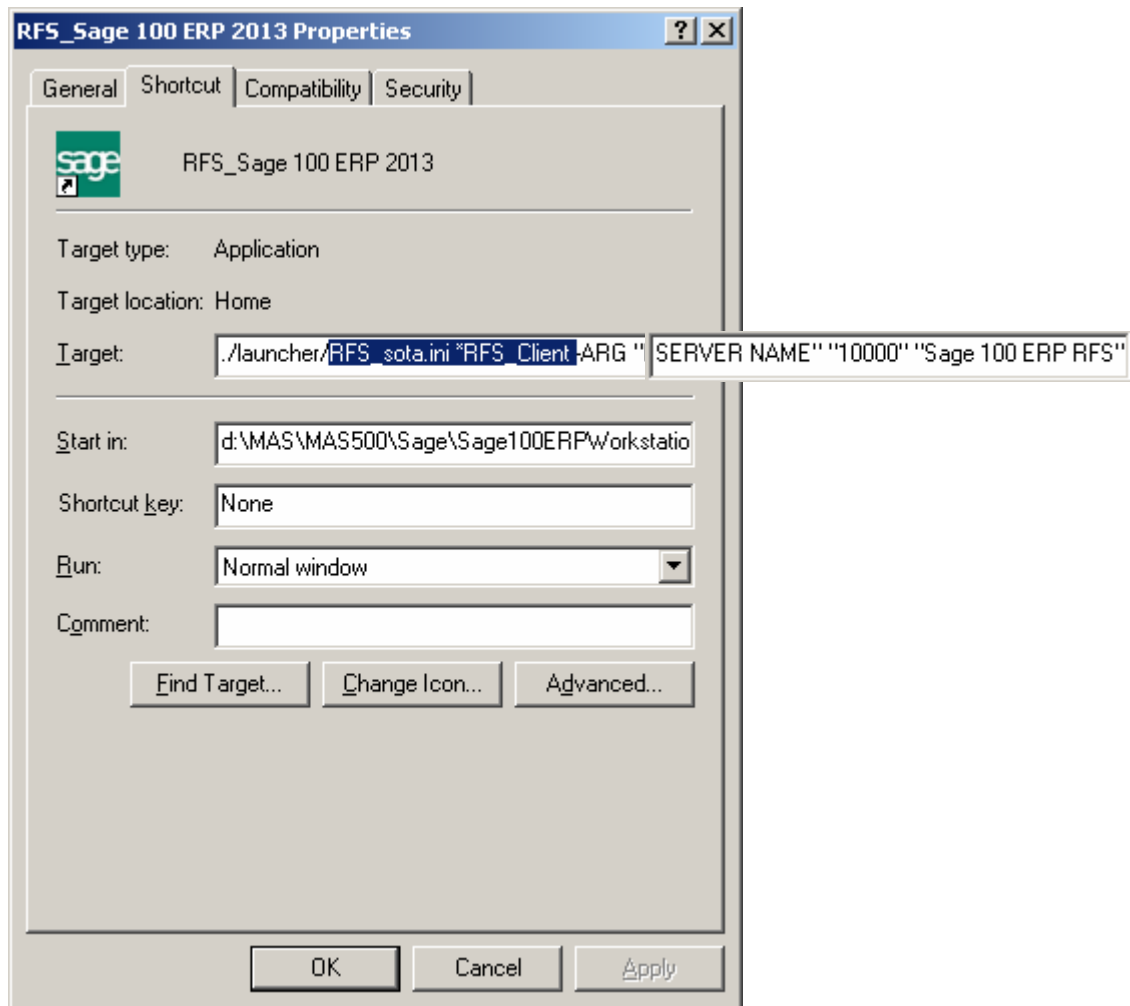
Default Umask: 0000

Detach Spawns via Nohup

Additional Environment Vars:

OK Cancel

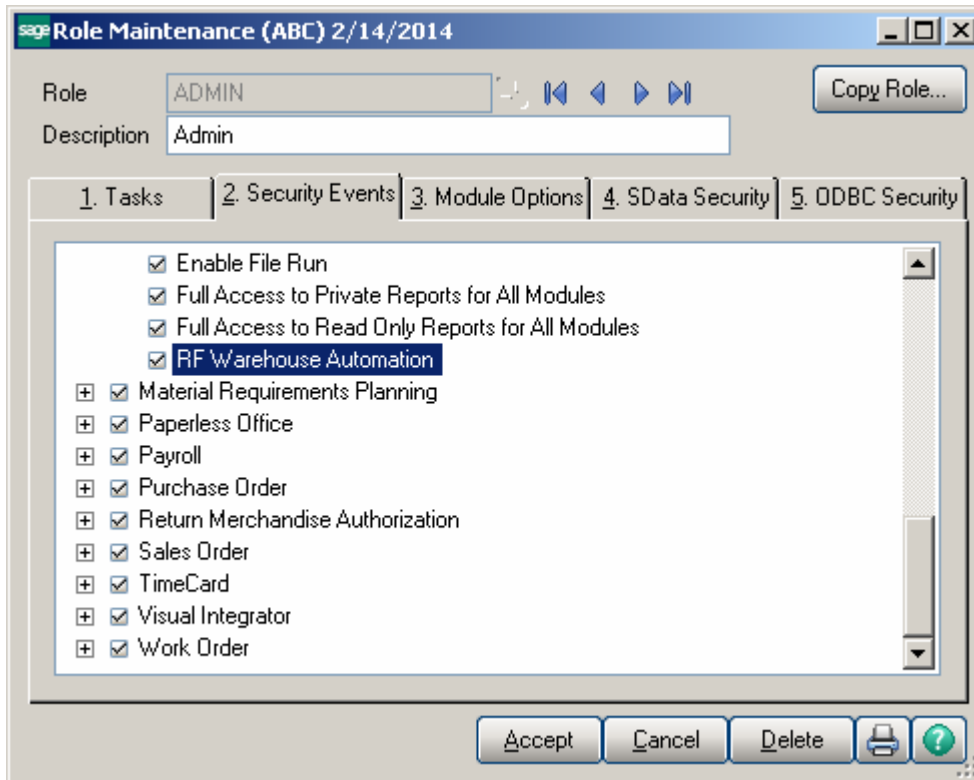
The following changes should be done in the **Sage 100 ERP 2013** shortcut to launch RF:



The path of your Workstation system is entered in the Start in field. The `rfs_sota.ini` and `*rfs_Client` are added in the Target field.

Sage 100 ERP for Windows CE Launcher

*Note: The **RF Warehouse Automation** security event must be enabled in the Role Maintenance for the role assigned to the user in order to allow running Sage 100 ERP for Windows CE.*



When running **Sage 100 ERP** for Windows CE, the first screen you see is the **User Logon** screen:

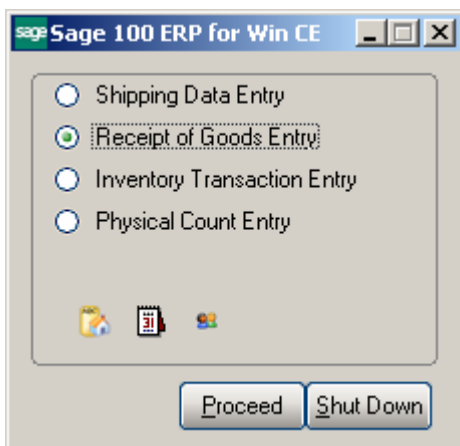


Enter your user logon and password.

Then select the Company:



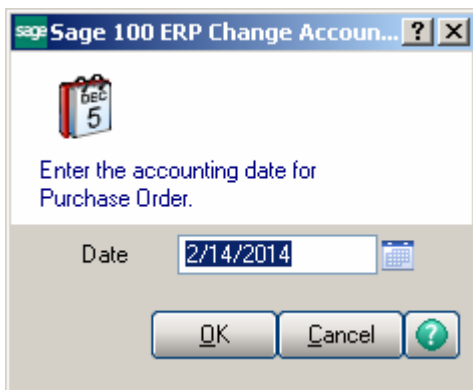
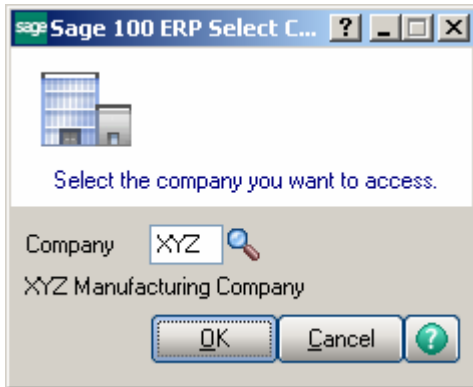
The launcher is opened:



The MAS 90 for Win CE launcher enables you to work with Shipping Data, Receipts of Goods, Inventory Transaction (Transfer and Adjustment) and Physical Count.

To launch any of these options, select it and click the Proceed button, or simply double-click the option you want.

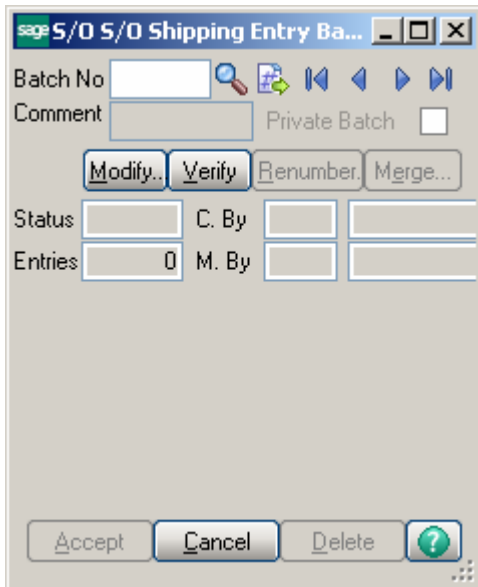
You can also change the active Company, Date, and User clicking the icons below.



The **Shut Down** button closes MAS 90 for Windows CE.

Shipping Data Entry

If **Batch Entry** is allowed in the **Sales Order Options**, the **S/O Shipping Batch** screen is displayed before opening the **Shipping Data Entry** screen.



The screenshot shows a software window titled "sage S/O S/O Shipping Entry Ba...". The interface includes a "Batch No" input field with a search icon and navigation buttons (back, forward, home, end). Below this is a "Comment" field and a "Private Batch" checkbox. A row of buttons contains "Modify..", "Verify", "Renumber", and "Merge...". The "Status" field is empty, and "C. By" and "M. By" fields are also empty. The "Entries" field displays "0". At the bottom of the window are "Accept", "Cancel", "Delete", and a help icon.

Click the **Next Batch Number** button to start a new batch, or enter an existing batch number.

In this case, the batch number is displayed on the **Shipping Data Entry**, and can be changed using the **Batch Number** button.

The screenshot shows the 'Shipping Data Entry' window. At the top, there are fields for 'ID' (value: 1), a date field (value: /14/2014), and a search icon. Below these are fields for 'Shp' (value: 00001) and a 'Batch Number, Alt-B' field. A 'Pkg' field is also visible. A table with columns 'Item Code', 'Ordered', 'Shipped', and 'Back' is present but empty. At the bottom, there are navigation buttons including 'Q', a printer icon, 'A/Inc.' (checked), 'S', 'A', and a back arrow.

The **Shipping Data Entry** screen enables you to enter shipping data.

This screenshot shows the 'Shipping Data Entry' window with more data entered. The 'ID' field is 1, the date is 2/14/201, and the 'Shp' field is 0100060. The 'Batch Number' is 00001. The 'Pkg' field is 0001. The table now contains two rows of data:

| Item Code | Ordered | Shipped | Back |
|-----------|---------|---------|------|
| D1400 | 1.00 | .00 | .00 |
| D2000-C | 1.00 | .00 | .00 |

An arrow points from a callout box to the top fields of the window.

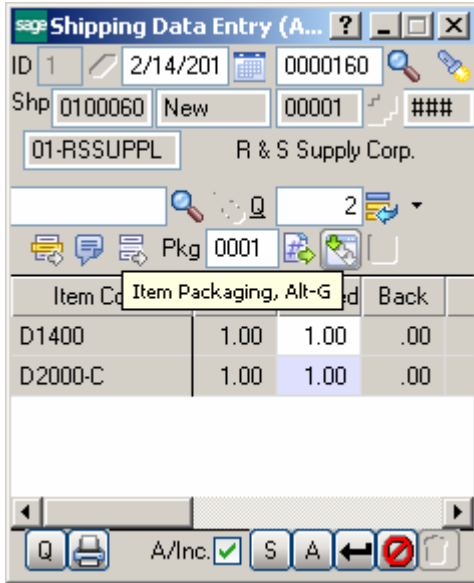
Shipper ID, Date, Order No, Lookups

S/ID is Shipper ID.

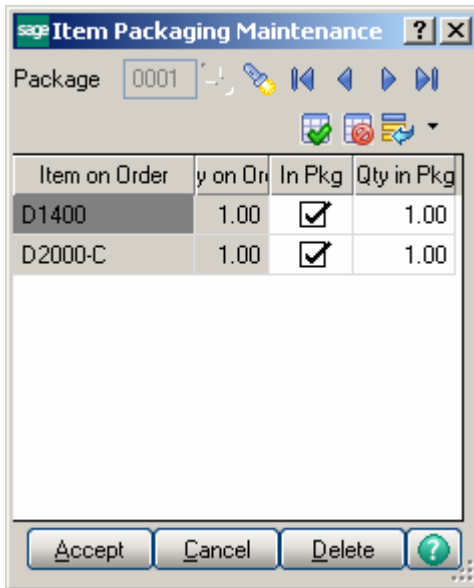
is Clear. Next to it is the Order No.

First **Lookup** displays the Sales Order List, to ship the selected Order. Second lists already entered Shipments.

Shp. is the Shipping Number and Status.



Click the **Item Packaging (Alt-G)** button to open the Item Packaging Maintenance.



Shipping Data Entry (A... ? - □ ×)

ID 1 2/14/201 0000160

Shp 0100060 New 00001 ###

01-RSSUPPL R & S Supply Corp.

2

Pkg 0001

| Item | Shipped | Back |
|---------|---------|------|
| D1400 | 1.00 | .00 |
| D2000-C | 1.00 | .00 |

Next Package No., Alt-X

Q A/Inc. ✓ S A ←

You can create the Next Package by the help of Next Package No. button.

Shipping Data Entry (A... ? - □ ×)

ID 1 2/14/201 0000143

Shp 0100062 New 00001 ###

02-ALLENAP Allen's Appliance Repair

5

Pkg 0001

| Item | Lot/Serial Distribution, Alt-Y | Back |
|----------------|--------------------------------|------|
| 1001-HON-H254 | 25.00 | .00 |
| 1001-HON-H254L | 3.00 | .00 |
| 2480-8-50 | 5.00 | .00 |
| 2481-5-50 | 4.00 | .00 |

Lot/Serial Distribution

Q A/Inc. ✓ S A ←

The **Lot/Serial Distribution** button is enabled for Lot/Serial lines.

The **Lot/Serial Distribution** screen is opened automatically upon entering the Shipped Qty.

sage Lot/Serial Number Distribution ? X

Item 2480-8-50 DESK FILE 8" CAP 50

U/M EACH

| Lot N | Show All Lots, Alt-L | Distribute |
|-------|----------------------|------------|
| 1 | | .00 .00 |

Distribution Balance 5.00

Auto Increment OK Cancel ?

A/Inc. is Auto Increment.
S displays the **Shipping** screen.

sage Shipping ? X

Terms Code 02 2% Ten Days, Net 30 Days

Confirm To Jeff Allen

E-mail Addr JAllen@avnet.com

Comment

Warehouse 002 WEST WAREHOUSE

FOB

Ship Via MAIL

Ship Zone

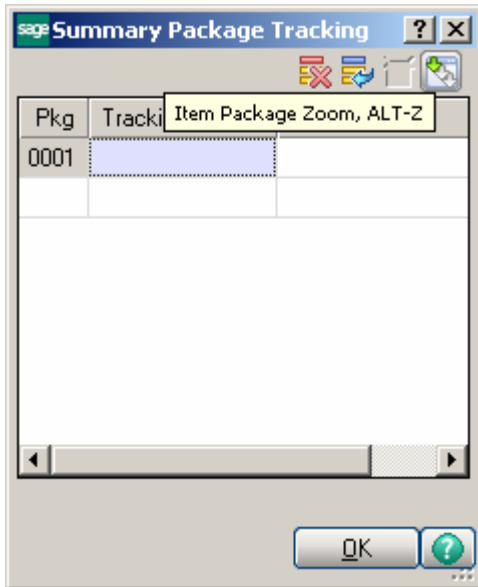
Ship Weight 00448 Pkgs 1

Frght Amnt .00

Tracking...

Tracking

The **Tracking...** button opens the **Summary Package Tracking Maintenance** screen.



The **A** button on the Shipping Data Entry screen opens the **Ship To Address** screen.

Ship To: 2 Residential Add

Name: Allen's Appliance Repair

Address: 18026 E. 10th
Rear Building

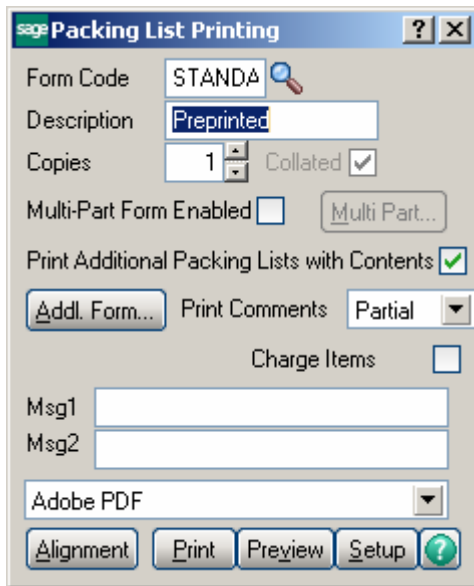
ZIP Code: 92875 State: CA

City: Fountain Valley

Country:

Packing List Printing

If the **Automatically Print Shipping Documents** box is checked on the **Main** tab of the **Shipping Setup Options** program under the **Sales Order Setup** menu, and the **Shipping Document to Print** is set to **Packing List** or **Both**, the **Packing List Printing** screen is opened when **Accepting Shipping Entry**.



The screenshot shows the 'Packing List Printing' dialog box with the following fields and controls:

- Form Code: STANDA
- Description: Preprinted
- Copies: 1, Collated
- Multi-Part Form Enabled Multi Part...
- Print Additional Packing Lists with Contents
- Print Comments: Partial
- Charge Items
- Msg1: [Empty text box]
- Msg2: [Empty text box]
- Printer: Adobe PDF
- Buttons: Alignment, Print, Preview, Setup, Help

Graphical Crystal printing is available.

If the **Addit. Packing Lists** box is checked; the **Additional Packing Lists** screen is displayed after printing (or previewing), allowing the user to print the additional lists.

Additional Packing List Printing

Form Code: STANDARD

Description: Preprinted

Copies: 1 Collated

Multi-Part Form Enabled Multi Part...

Adobe PDF

Alignment Print Preview Setup ?

If the **Automatically Print Shipping Documents** box is checked on the **Main** tab of the **Shipping Setup Options** program under the **Sales Order Setup** menu, and the **Shipping Document to Print** is set to **Invoice** or **Both**, the **S/O Invoice Printing** screen is opened when **Accepting Shipping Entry**, or after printing **Packing List**, correspondingly.

S/O Invoice Printing

Form: STANDA Preprinted Laser

Copies: 1 Collated Designer...

Multi-Part Form Enabled Multi Part...

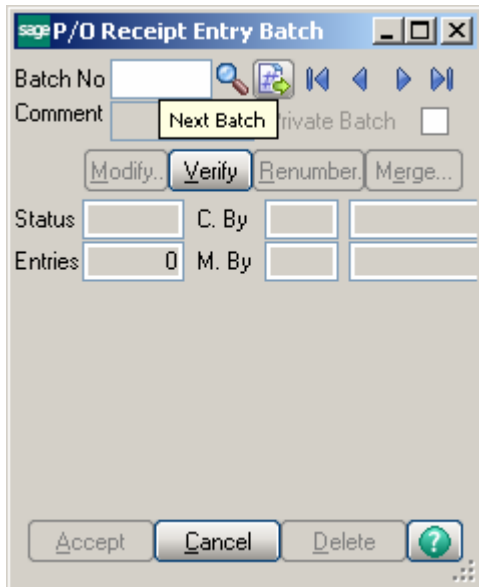
Comments?: Partial

Adobe PDF

Alignment Print Preview Setup ?

Receipt of Goods Entry

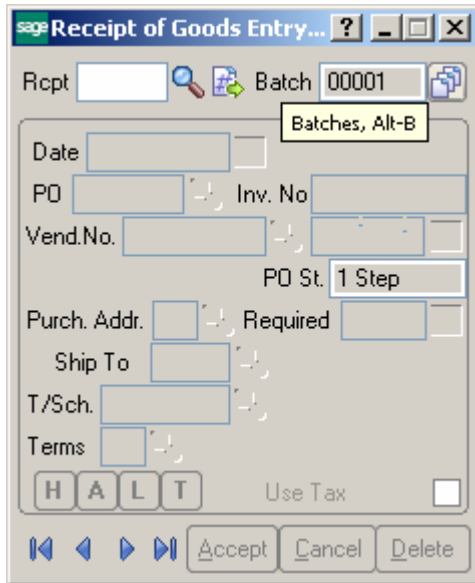
If **Batch Entry** is allowed in the **Purchase Order Options**, the **P/O Batch Number** screen is displayed before opening the **Receipt of Goods Entry** screen.



The screenshot shows a software dialog box titled "sage P/O Receipt Entry Batch". It features a "Batch No" input field with a search icon and navigation arrows. Below it is a "Comment" field with a "Next Batch" button and a "Private Batch" checkbox. A row of buttons includes "Modify..", "Verify", "Renumber", and "Merge...". The "Status" field is empty, and "C. By" is also empty. The "Entries" field shows "0", and "M. By" is empty. At the bottom are "Accept", "Cancel", "Delete", and a help icon.

Click the **Next Batch Number** button to start a new batch, or enter an existing batch number.

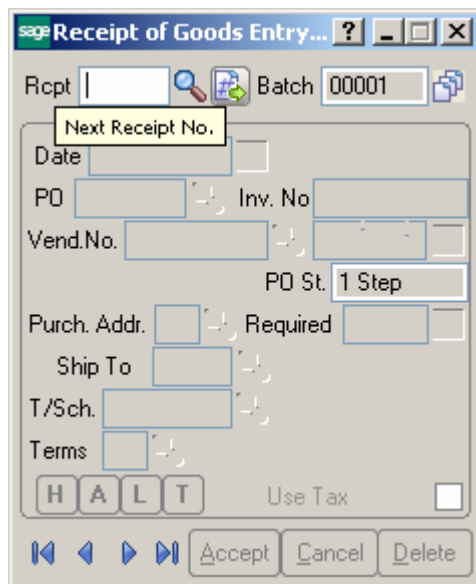
In this case, the batch number is displayed on the **Receipt of Goods Entry**, and can be changed using the **Batch Number** button.



The screenshot shows the 'Receipt of Goods Entry' window. At the top, there is a title bar with the Sage logo and window controls. Below the title bar, there are fields for 'Rcpt' (with a search icon) and 'Batch' (containing '00001'). A tooltip 'Batches, Alt-B' is positioned over a button with a document icon. The main area contains several input fields: 'Date', 'PO', 'Inv. No.', 'Vend.No.', 'PO St.' (set to '1 Step'), 'Purch. Addr.', 'Required', 'Ship To', 'T/Sch.', and 'Terms'. At the bottom left are 'H A L T' buttons, and at the bottom right is a 'Use Tax' checkbox. Navigation arrows and 'Accept', 'Cancel', and 'Delete' buttons are at the very bottom.

The **Receipt of Goods Entry** screen enables you to enter and review receipts of goods.

Enter Receipt Number in the **Rcpt No.** field or click the # (Next Number) button to create new receipt.



This screenshot is identical to the one above, but the tooltip 'Next Receipt No.' is positioned over the '#' button located to the right of the 'Rcpt' field.

sage Receipt of Goods Entry... ? _ □ ×

Rcpt 001020 Batch 00001

Date 2/14/2014

PO 0010013 Inv. No

Vend.No. 01-IBM

Ibm Corporation PO St. New

Purch. Addr. Required 6/30/2

Ship To 0000 ABC DISTRIBUTIN

T/Sch. DEFAULT Default Tax Sched.

Terms 03 NET END OF MONTH

H A L T Use Tax

Accept Cancel Delete

You can navigate through the orders using standard navigation arrow buttons at the bottom of the screen.

The **H**, **A**, **L**, **T** buttons open Header, Address, Lines, Totals screens respectively. These screens correspond to corresponding tabs of the Receipt of Goods Entry screen in the standard MAS 90.

Here is the **Header** screen opened with the **H** button:

sage Header ? ×

1099 Form None

1099 Box

Whse 000

Ship Via COMMON CARRIER

FOB

Comment

Confirm JOHN STEVENSON

E-mail

Tel [415] 555-9981

Ext

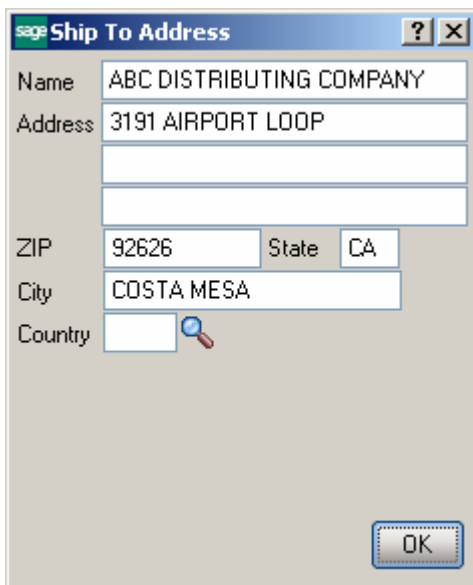
OK

Click the **A** button to display the **Purchase Address** screen:



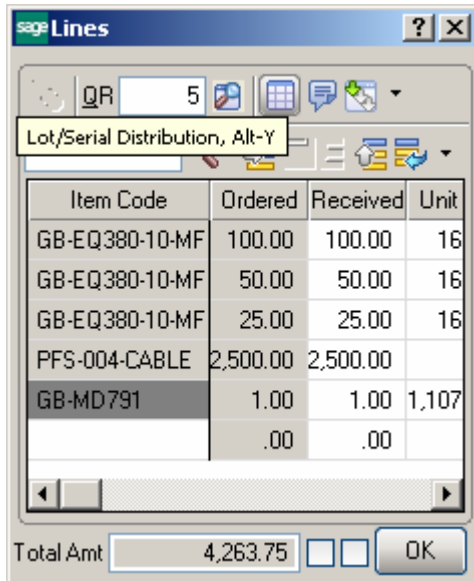
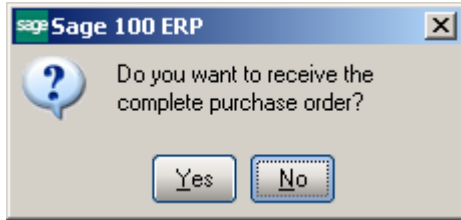
The screenshot shows a window titled "Purchase Address" with the Sage logo. It contains several input fields: Name (IBM CORPORATION), Address (33214 E. 45TH TERRACE), ZIP (92775), State (CA), City (SAN FRANCISCO), Country (with a search icon), Phone ((415) 555-9981), and Fax. At the bottom right, there are two buttons: "Ship To" and "OK".

The **Ship To** button in this screen opens the **Ship To Address** screen:

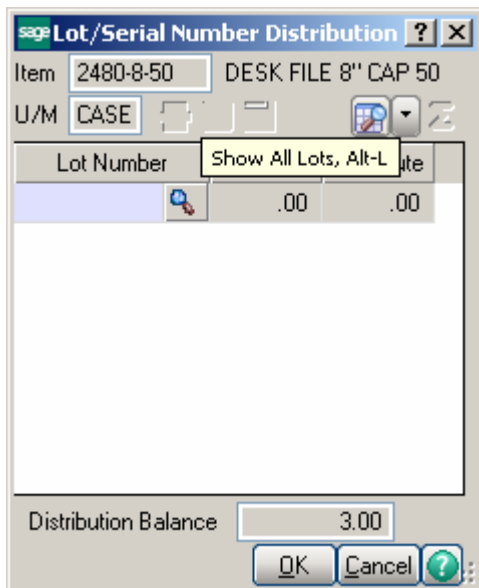


The screenshot shows a window titled "Ship To Address" with the Sage logo. It contains several input fields: Name (ABC DISTRIBUTING COMPANY), Address (3191 AIRPORT LOOP), ZIP (92626), State (CA), City (COSTA MESA), and Country (with a search icon). At the bottom right, there is one button: "OK".

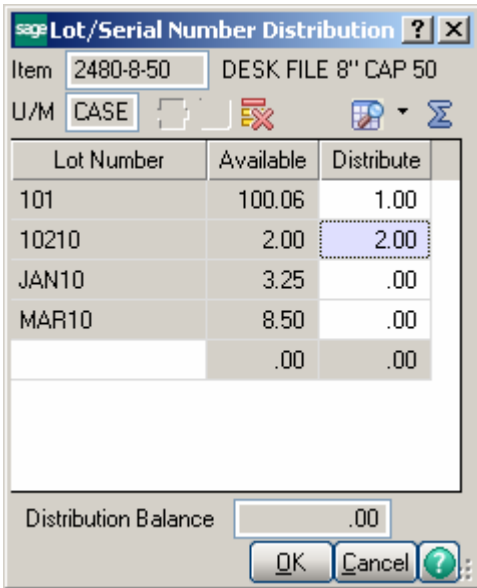
The **L** button on the **Receipt of Goods Entry** screen displays the **Lines** screen:



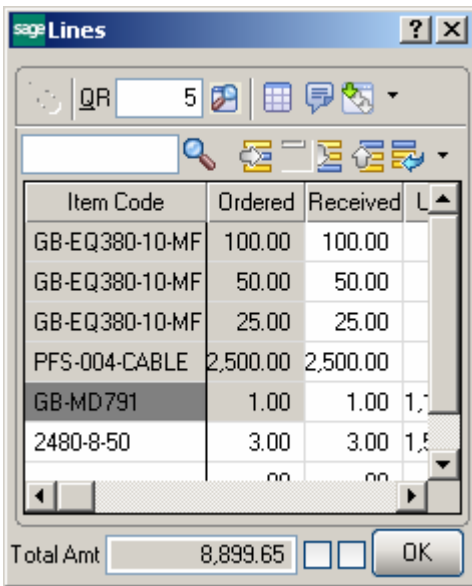
If an item is **Lot/Serial**, the **Lot/Serial Distribution** button allows opening the **Lot/Serial No. Distribution** screen:



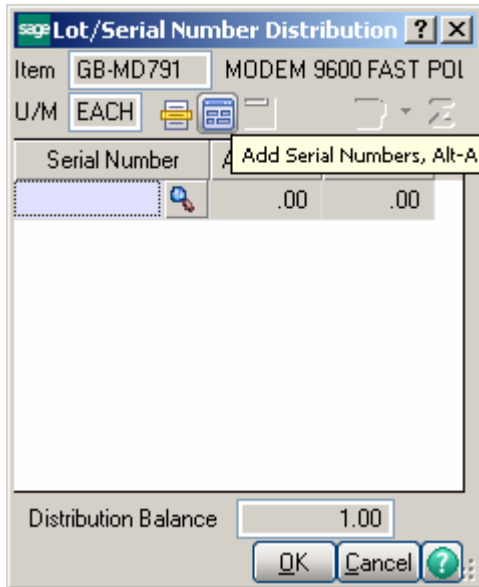
Enter the lot or serial number for the distribution, or click the Lookup button to list all available lot numbers to be distributed.



At the Distribute field, enter the total lot or serial number amount to be distributed.

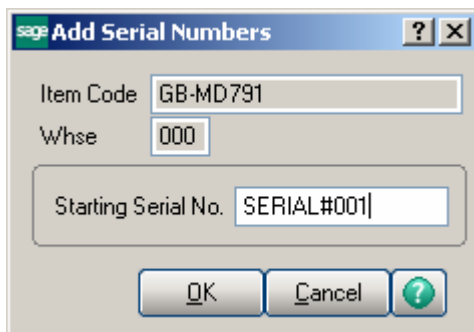


For Serial Items the Select Serial Items button is available:



You can click the Select Serial Numbers button to select the available serial numbers for the item or warehouse to be distributed.

You can also click the **Add Serial Numbers** button to create new serial numbers for items that are being added back to stock. The **Add Serial Numbers** task is available only for serial items.



It is necessary to enter only the **Starting Serial No.** and sequential Serial numbers are automatically created based on the Serial Item total quantity received.

Item: GB-MD791 MODEM 9600 FAST POI
 U/M: EACH

| Serial Number | Available | Distribute |
|---------------|-----------|------------|
| SERIAL#001 | .00 | 1.00 |
| | .00 | .00 |

Distribution Balance: .00

Buttons: OK, Cancel, ?

You can also add items on the fly.

Enter an item number that doesn't exist in the **Inventory Management**.

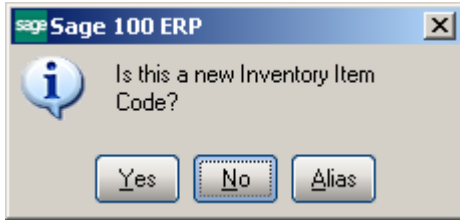
QR: 5

| Item Code | Ordered | Received | Unit Cost |
|--------------|---------|----------|-----------|
| 1001-HON-H25 | 5.00 | 5.00 | 34.250 |
| 2480-8-50 | 3.00 | 3.00 | 545.300 |
| 2568-3-25 | 2.00 | 2.00 | 575.800 |
| GB-MD750 | 2.00 | 2.00 | 275.850 |
| NEW_ITEM | .00 | .00 | .000 |

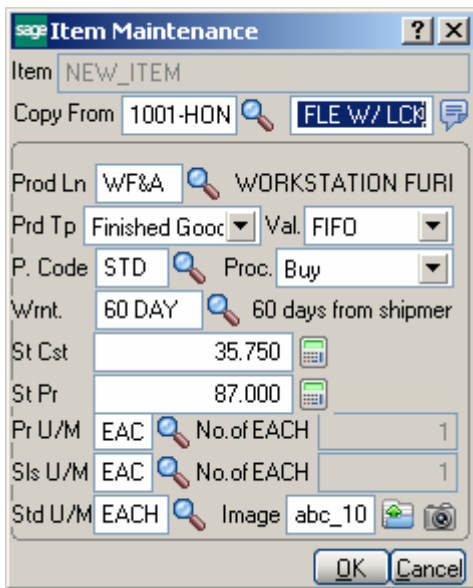
Total Amt: 8,510.45

Buttons: OK

When pressing *Enter*, the following message box will appear asking whether or not to accept the new or Alias Item.



Upon clicking **Yes**, the **Item Maintenance** screen will appear for new item entry (**Item** number is the one entered on the **Lines** tab of the **Receipt of Goods Entry**).



You can use **Copy from** lookup button to copy the fields of already existing items for the new one.

After filling in item related information in this screen and clicking **Accept**, you will be returned to the **Lines** tab of the **Receipt of Goods Entry**.

The screenshot shows the Sage Lines application window. At the top, there is a search bar with 'QR' and a value of '7'. Below this is a table with the following data:

| Item Code | Ordered | Received | |
|----------------|----------|----------|------|
| GB-EQ380-10-MF | 50.00 | 50.00 | |
| GB-EQ380-10-MF | 25.00 | 25.00 | |
| PFS-004-CABLE | 2,500.00 | 2,500.00 | |
| GB-MD791 | 1.00 | 1.00 | 1.00 |
| 2480-8-50 | 3.00 | 3.00 | 1.50 |
| NEW_ITEM | 2.00 | 2.00 | |
| | 00 | 00 | |

At the bottom of the window, the 'Total Amt' is displayed as 8,971.15, and there are 'OK' and 'Cancel' buttons.

For Alias Items (when you click **Alias** button on the message box asking whether or not the entered item is a new item), the newly added **Alias Item Number Maintenance** screen will be displayed.

The screenshot shows the Sage Alias Item Maintenance dialog box. The fields are as follows:

- Alias Item No.: NEW1
- Type: Vendor (dropdown menu)
- Vendor: 01-IBM
- Item No.: 1001-HON-H252LK
- Item Description: HON 2 DRAWER LETTER FLE W/ LCK
- Alias Item Description: Alias of 1001-HON

At the bottom, there are 'OK' and 'Cancel' buttons.

Upon clicking **OK** you will be returned to the **Lines** tab with the selected Item No automatically loaded into the Item Code field in the data entry.

The screenshot shows the Sage Lines window with a table of items. The table has columns for Item Code, Ordered, and Received. The total amount is 8,899.65.

| Item Code | Ordered | Received |
|----------------|----------|----------|
| GB-EQ380-10-MF | 25.00 | 25.00 |
| PFS-004-CABLE | 2,500.00 | 2,500.00 |
| GB-MD791 | 1.00 | 1.00 |
| 2480-8-50 | 3.00 | 3.00 |
| 1001-HON-H252L | .00 | .00 |
| | .00 | .00 |

Total Amt: 8,899.65

If the Job Cost (or Work Order) module is integrated with Purchase Order, the fields related to Work Order become available in the lines grid:

The screenshot shows the Sage Lines window with a table of items. The table has columns for Item Code, Work Order, Step, and Trans Ty. The total amount is 2,859.30.

| Item Code | Work Order | Step | Trans Ty |
|-----------|------------|------|---------------|
| *TESTIN | 0095015 | 0072 | Outside Proc |
| BOARD-0 | 0095016 | 0010 | Miscellaneous |

Total Amt: 2,859.30

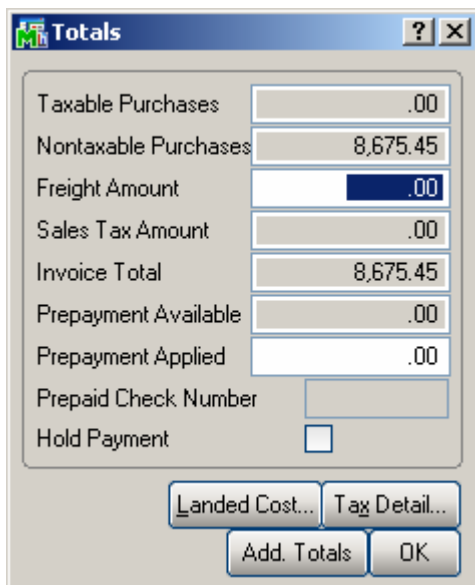
Enter the **Work Order** number representing the work order to which you want to distribute the cost associated with the line item. Click the Lookup button to list all work order numbers.

Enter the **Step** number for the selected work order against which you want to distribute the cost associated with the

line item. Click the Lookup button to list all step numbers for the current work order.

Select a **Transaction Type** to be used to record the cost of the line item. This field is available only if a work order number or step number was entered

Click the **T** button on the **Receipt of Goods Entry** screen to display the **Totals** screen:



| | |
|----------------------|--------------------------|
| Taxable Purchases | .00 |
| Nontaxable Purchases | 8,675.45 |
| Freight Amount | .00 |
| Sales Tax Amount | .00 |
| Invoice Total | 8,675.45 |
| Prepayment Available | .00 |
| Prepayment Applied | .00 |
| Prepaid Check Number | |
| Hold Payment | <input type="checkbox"/> |

Landed Cost... Tax Detail...
Add. Totals OK

N/Tax. stands for Non-Taxable,
S/Tax for Sales Tax,
P/Pmnt Prepayment,
and **P/Paid** for Prepaid.
Hld Pmnt stands for Hold Payment.

The **Landed Cost** button opens the **Landed Cost Entry** screen:

| | Cost Type | Description | Method | Amount |
|---|-----------|-------------|--------|--------|
| 1 | FRGHT | Frei | Cos | 25.00 |
| 2 | | | | .00 |

Total Landed Cost: 25.00

Buttons: OK, Cancel

The **Add. Totals...** button in the Totals screen opens the **Totals Additional** screen:

Fields:

- Taxable Purchases: .00
- Nontaxable Purchases: 8,899.65
- Freight Amount: .00
- Sales Tax Amount: .00
- Invoice Total: 8,899.65
- Prepayment Available: .00
- Prepayment Applied: .00
- Prepaid Check Number: []
- Hold Payment:

Buttons: Landed Cost..., Tax Detail..., Add. Totals, OK

| Item Code | Ordered | Received | L |
|----------------|----------|----------|--------------------------|
| GB-EQ380-10-MF | 25.00 | 25.00 | <input type="checkbox"/> |
| PFS-004-CABLE | 2,500.00 | 2,500.00 | <input type="checkbox"/> |
| GB-MD791 | 1.00 | 1.00 | <input type="checkbox"/> |
| 2480-8-50 | 3.00 | 3.00 | <input type="checkbox"/> |
| 1001-HON-H | .00 | .00 | <input type="checkbox"/> |
| | .00 | .00 | <input type="checkbox"/> |

Total Amt: 8,899.65 OK

++NEW++ and ++AUTO++

RFS Receipt of Goods works with bar code scanners.

If the **New** box is checked, the program will add items in new lines irrespective of their presence in the existing lines.

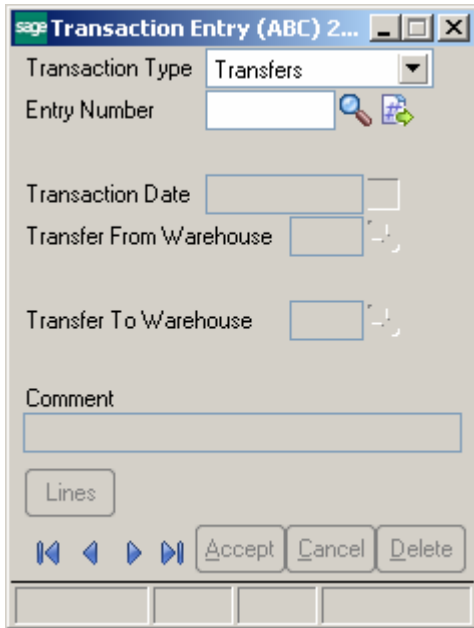
If the **Auto Increment** box is cleared, the program will find line with this item and select that line. You can increase the quantity in the line manually.

If the **Auto Increment** box is checked, the program will automatically increase the quantity of the item in the line where the received quantity does not exceed the ordered. A new line will be added only if there is no such line.

You can either check these boxes with the mouse or type in ++NEW++ or ++AUTO++ respectively in the Item Number field.

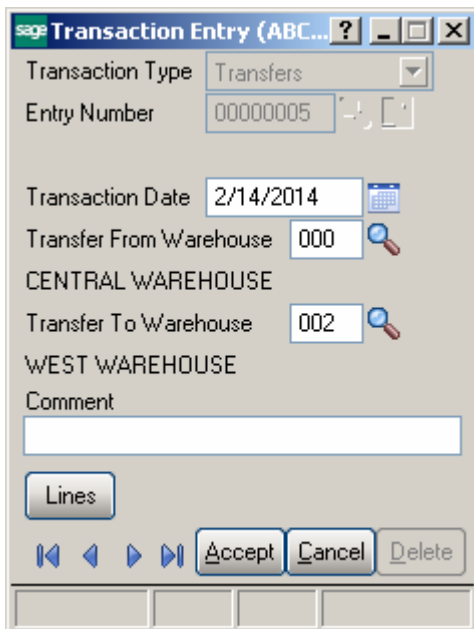
Inventory Transaction Entry

The **Inventory Transaction Entry** screen allows entering Transactions of the **Transfer** and **Adjustment** types.



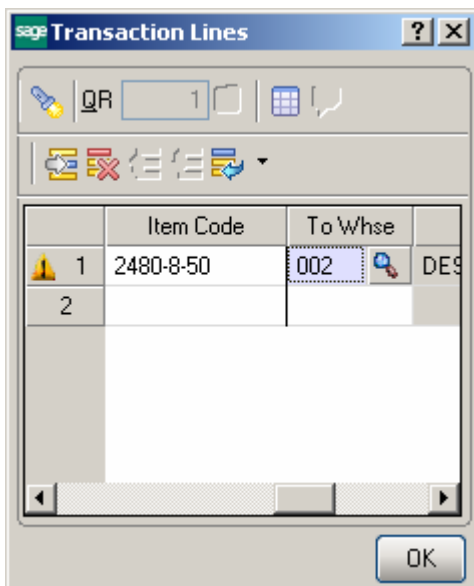
The screenshot shows the Sage Transaction Entry (ABC) 2... window. The Transaction Type is set to Transfers. The Entry Number field is empty. The Transaction Date, Transfer From Warehouse, and Transfer To Warehouse fields are also empty. A Comment field is present below. At the bottom, there are navigation buttons (back, forward, etc.) and action buttons (Accept, Cancel, Delete).

Select **Transfers** in the **Transaction Type** drop-down list and click the **Next Entry Number** button. Enter the **Transfer Date**, **Transfer From** and **To Warehouses**, and **Comment**.



The screenshot shows the Sage Transaction Entry (ABC) window after data entry. The Transaction Type is Transfers. The Entry Number is 00000005. The Transaction Date is 2/14/2014. The Transfer From Warehouse is 000 (CENTRAL WAREHOUSE). The Transfer To Warehouse is 002 (WEST WAREHOUSE). The Comment field is empty. The Accept button is highlighted.

You can navigate through the Transactions using standard navigation arrow buttons at the bottom of the screen. Click the **Lines** button to open the **Transaction Lines** screen.




Select an Item or its General Alias. The **To Warehouse** is defaulted from the header and may be changed for particular line. Enter the **Quantity** to be transferred, and click **OK**.

If the item is Lot/Serial, the **Lot/Serial Distribution** screen is popup.

| | Available | Distribute |
|---|-----------|------------|
| 1 | 10,003.00 | 3.00 |
| 2 | 200.00 | .00 |
| 3 | 325.00 | .00 |
| 4 | 850.00 | .00 |
| 5 | .00 | .00 |

Distribution Balance: .00

Enter **Lot(Serial) Number**, and quantity to **Distribute**.
 The **List** button opens the list of all the Lot(Serial) numbers. Use the  button to distribute all the quantity to a selected Lot Number.

Select **Adjustments** in the **Transaction Type** drop-down list and click the **Next Entry Number** button.
 Enter the **Transaction Date**, **Default Warehouse**, and **Comment**.

Transaction Type: Adjustments

Entry Number: 00000010

Transaction Date: 2/14/2014

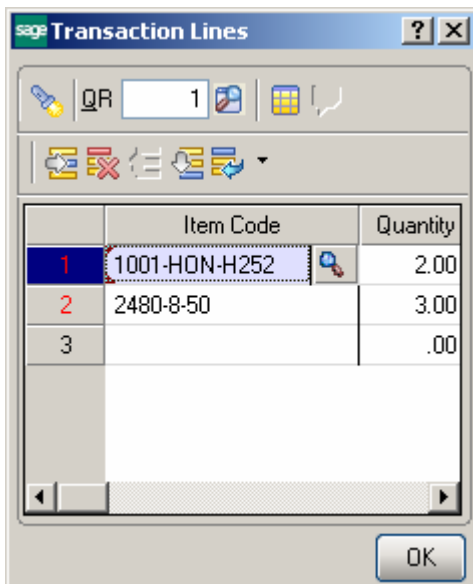
Default Warehouse: 000
CENTRAL WAREHOUSE

Comment:

Lines

Navigation: Back, Forward, Accept, Cancel, Delete

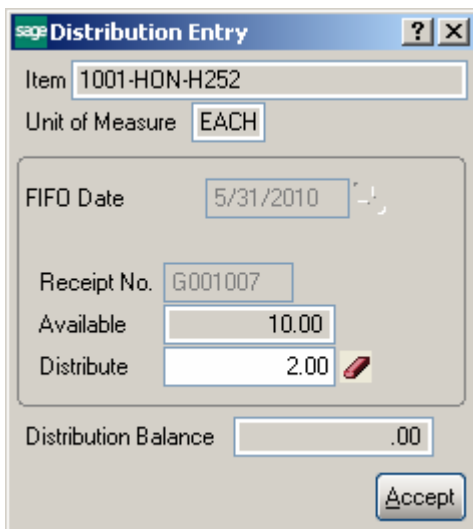
Click the **Lines** button to open the **Transaction Lines** screen.



The screenshot shows the 'Transaction Lines' window with a table containing the following data:

| | Item Code | Quantity |
|---|---------------|----------|
| 1 | 1001-HON-H252 | 2.00 |
| 2 | 2480-8-50 | 3.00 |
| 3 | | .00 |

For items with LIFO/FIFO Valuation, the distribution screen is displayed on entering the quantity.



The screenshot shows the 'Distribution Entry' window for item 1001-HON-H252. The fields are as follows:

- Item: 1001-HON-H252
- Unit of Measure: EACH
- FIFO Date: 5/31/2010
- Receipt No.: G001007
- Available: 10.00
- Distribute: 2.00
- Distribution Balance: .00

For items with Lot/Serial Valuation, the distribution screen is displayed on entering the quantity.

sage Distribution Entry

Item 2480-8-50

Unit of Measure EACH

Lot Number

JAN10

Available 325.00

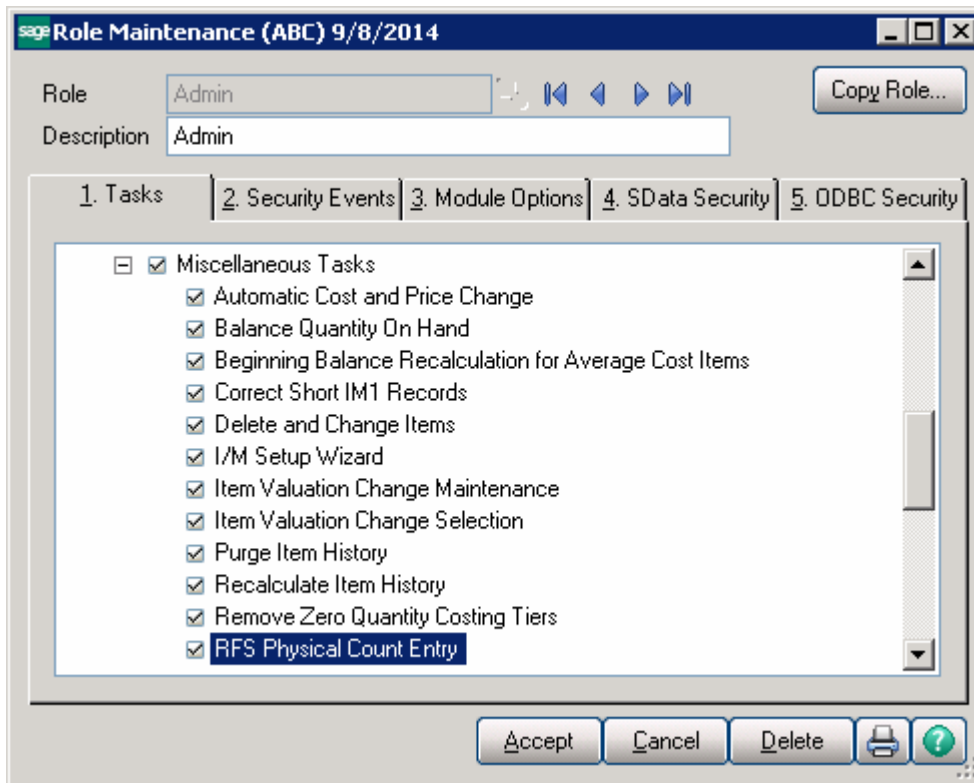
Distribute 3.00

Distribution Balance .00

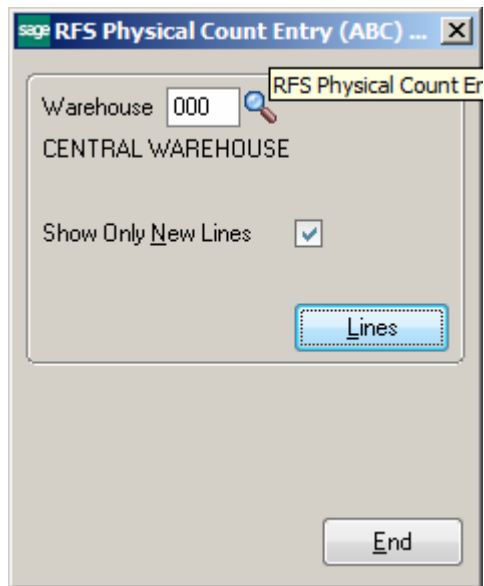
Accept

Physical Count Entry

In the **Role Maintenance** select the **RFS Physical Count Entry** task added to the Inventory Management Miscellaneous Tasks menu to enable access to **RFS Physical Count Entry** for the current role.



On the **Physical Count Entry** screen, enter the **Warehouse Code**, and select if you wish to see all lines frozen or just the lines you will enter.



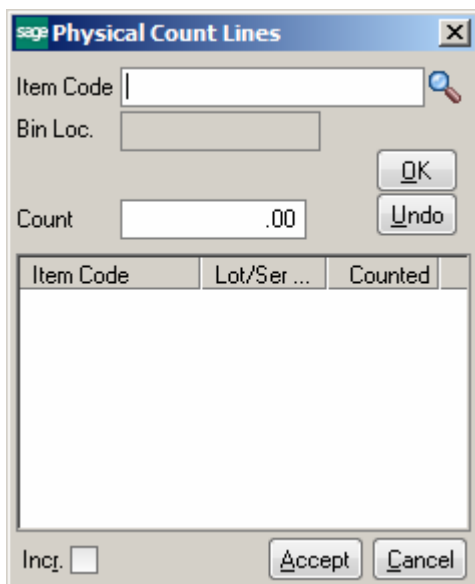
You can navigate through the Warehouses using standard navigation arrow buttons at the bottom of the screen.

Physical Count Entry requires that products be frozen using the Physical Count Worksheet program similar to how the standard Physical Count Entry program works. However you normally only see what you counted to speed counting and reduce errors in counting.

Click the **L**ines button to open the **Physical Count Lines** screen.

There are two versions of the line screens. The first screen is the standard screen if the MBN module is not installed or activated for the selected warehouse. This is **Item Code Only** screen. Counts are by Item only.

The second version of the screen is when IIG's **MBN** module is installed and is active for the selected warehouse. This is the **Bin/Item** screen. Counts are by Bin Location and Item..

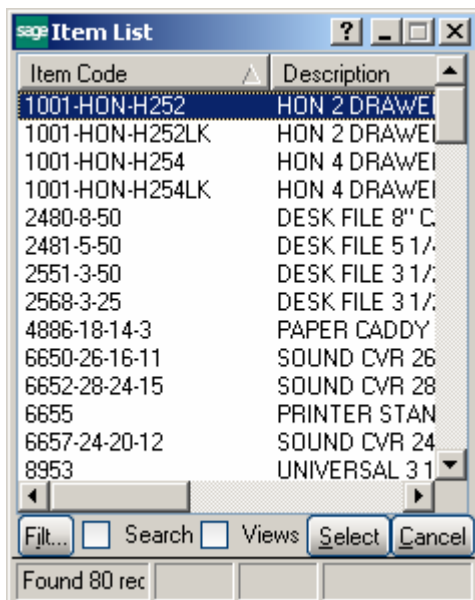


The **Physical Count Lines** dialog box contains the following fields and controls:

- Item Code**: A text input field with a magnifying glass icon (Lookup button).
- Bin Loc.**: A text input field.
- Count**: A text input field containing ".00".
- Buttons**: **OK**, **Undo**, **Accept**, and **Cancel**.
- Table**: A table with columns **Item Code**, **Lot/Ser ...**, and **Counted**.
- Other**: An **Incr.** checkbox.

Item Code Only screen.

The **Lookup** button opens the **Item List** screen.



The **Item List** dialog box displays a list of items with the following columns:

| Item Code | Description |
|-----------------|------------------|
| 1001-HON-H252 | HON 2 DRAWER |
| 1001-HON-H252LK | HON 2 DRAWER |
| 1001-HON-H254 | HON 4 DRAWER |
| 1001-HON-H254LK | HON 4 DRAWER |
| 2480-8-50 | DESK FILE 8" C. |
| 2481-5-50 | DESK FILE 5 1/2" |
| 2551-3-50 | DESK FILE 3 1/2" |
| 2568-3-25 | DESK FILE 3 1/2" |
| 4886-18-14-3 | PAPER CADDY |
| 6650-26-16-11 | SOUND CVR 26" |
| 6652-28-24-15 | SOUND CVR 28" |
| 6655 | PRINTER STAN |
| 6657-24-20-12 | SOUND CVR 24" |
| 8953 | UNIVERSAL 3 1/2" |

At the bottom of the dialog box, there are controls for **Filt...**, **Search**, **Views**, **Select**, and **Cancel**. A status bar at the bottom indicates "Found 80 rec".

Item Bin Location will be displayed for the selected item.

| Item Code | Lot/Ser ... | Counted |
|---------------|-------------|---------|
| 1001-HON-H252 | | 5.00 |

If the **Incr.** box is cleared, the program will find the item and select that line. You can increase the count manually. If the **Auto Increment** box is checked, the program will automatically count up the item just after entering/scanning the Item Number.

You can enter/select the Item number or it's General Alias.

If the **IIG UPC** module is installed scanning the item's UPC code or the ITF-14 case code will select the item. If the ITF-14 case code is scanned the program will increment by the standard UOM conversion factor. So if the ITF-14 is for example a case of 12 and the standard UOM is EACH, the program will count 12 instead of 1. This is best used with the **Incr.** field checked.

If the selected Item is Lot/Serial, all the Lots (Serials) of the item are listed.

Select a lot item from the Item List.

Physical Count Lines

Item Code: 2480-8-50

Bin Loc.: C-100-10

Lot/Ser: JAN10

Count: 1.00

| Item Code | Lot/Ser ... | Counted |
|---------------|-------------|---------|
| 1001-HON-H252 | | 5.00 |
| 2480-8-50 | JAN10 | 1.00 |

Incr. Accept Cancel

Enter lot number in the **Lot Number** field and click **Enter**. If the entered Lot Number exists in the list it will be selected, otherwise new Lot Number will be added in the list. The lookup will show you the lots for the selected warehouse.

Physical Count Lines

Item Code: 2480-8-50

Bin Loc.: C-100-10

Lot/Ser: JAN10

Count: 1.00

| Item Code | Lot/Ser ... | Counted |
|---------------|-------------|---------|
| 1001-HON-H252 | | 5.00 |
| 2480-8-50 | JAN10 | 1.00 |

Incr. Accept Cancel

If the **Incr.** box is cleared, the Lot number with a 0 count will not be added. You must enter the count manually.

If the **Auto Increment** box is checked, the program will automatically increase the count of the lot.

Enter ++**Auto**++ in the **Item Code** field and press Enter to check/uncheck the Auto Incr. box automatically.

Physical Count with MBN

| Bin Loc | Item Code | Counted | L |
|---------|-----------|---------|---|
|---------|-----------|---------|---|

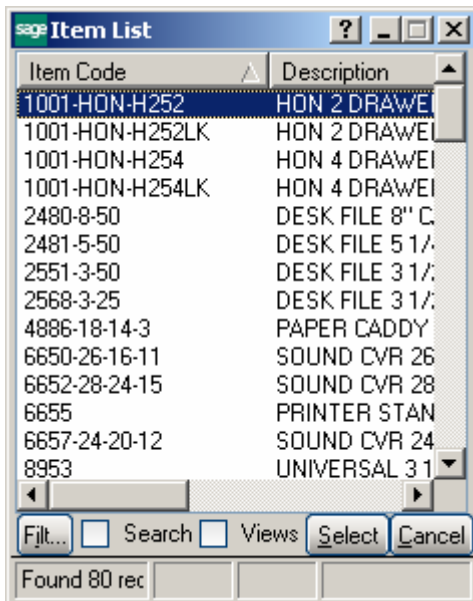
When **MBN** is installed and the warehouse is enabled for bin locations, the **Physical Count Lines** screen changes to the **Bin Location/Lines** format.

You must select the bin you are counting. An additional check box (**Keep Bin**) will retain the **Bin Location** selected and flow the scanning back to the **Item Code** to speed scanning and counting of the products in the bin. When you finish counting the bin, click on the **Clear** button to reset the bin. You can select by lookup or by scanning the bin if the bin is bar coded.

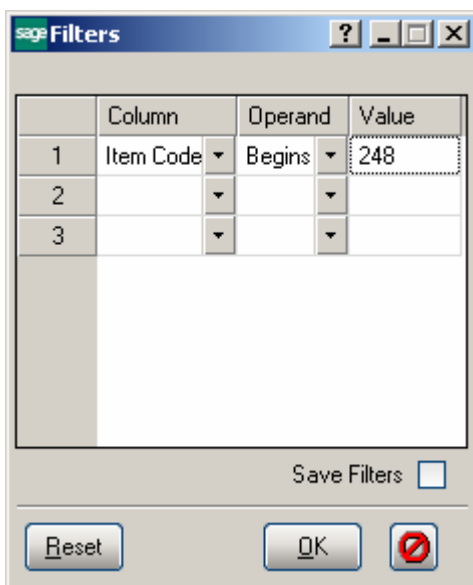
***Note:** We suggest that you click Accept at the end of each aisle to update the counts entered. Remember that nothing is posted to the MAS count files until Accept is clicked.*

Lookups in RFS

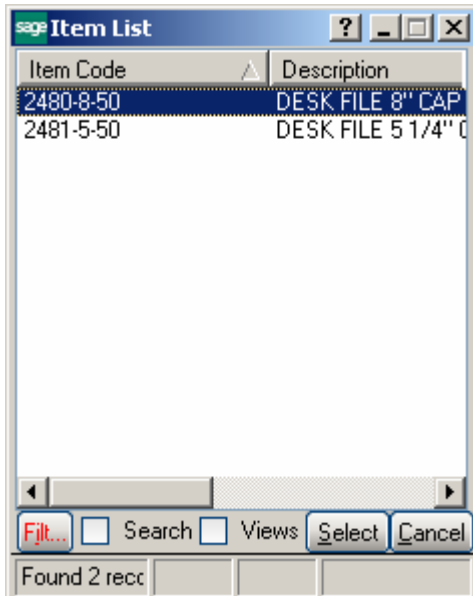
Lookups in the RFS enhancement enable all the functionality the standard MAS 90 lookups have (except for the Zoom button). The starting symbols can be entered before clicking the Lookup button to narrow the displayed items list.



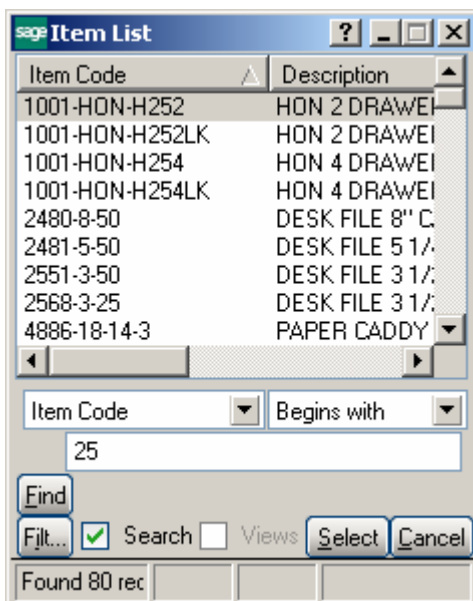
The **Filt...** button enables setting **Filters**.



After applying the filters, the **Filt...** button appears red.

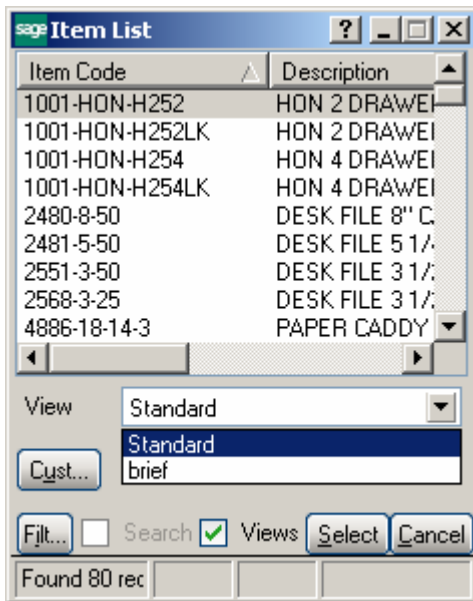


Check the **Search** box to specify search criteria in the displayed fields. Click **Find** to search with the entered criteria.

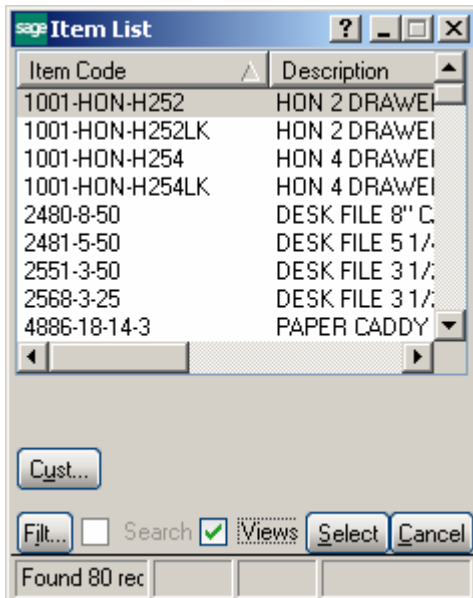


Check the **Views** box to work with lookup views.

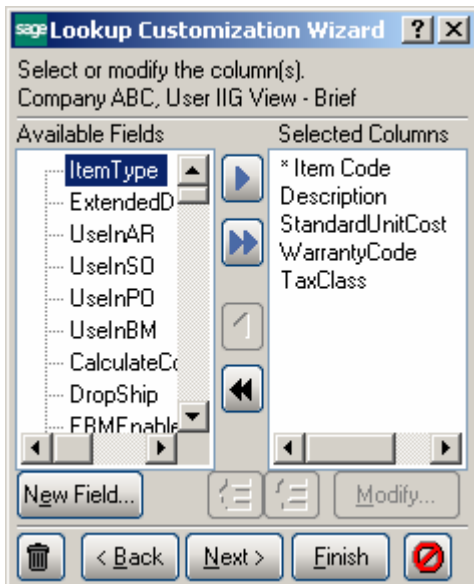
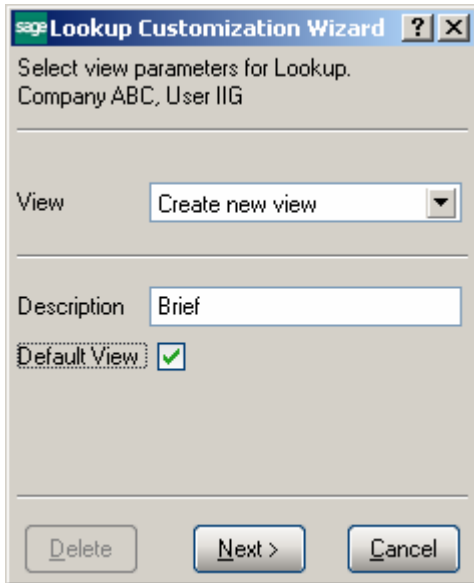
Select a view from the **View** drop-down box to switch to that view.

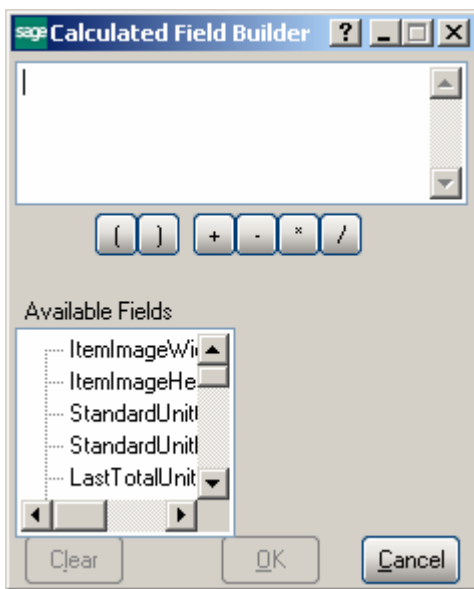
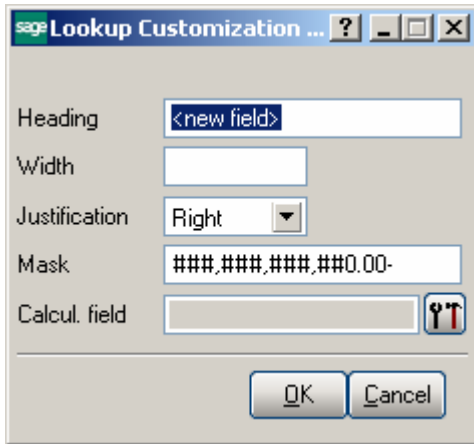


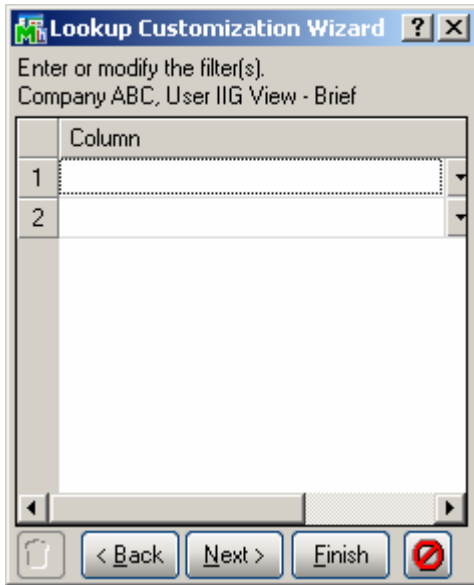
If there is no custom view, the **View** drop-down box is not visible.



Click **Cust...** button to create a new or change an existing view.







Appendix

An example of RFS Installation on handheld devices

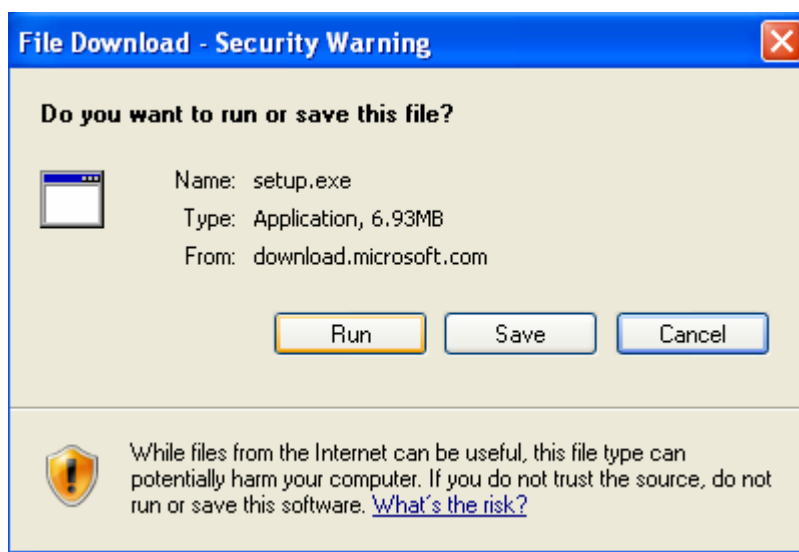
1-Microsoft Active Sync should be installed on the computer:

1-Download:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=7269173A-28BF-4CAC-A682-58D3233EFB4C&displaylang=en>

(If this link didn't work easily open www.google.com and search for "Download Microsoft Active Sync")

2-Click on Run



3-On Welcome Page Click Next

4-Accept License Agreement and click next

5-Enter Customer Information and click next

6-Choose Destination folder and click next

7-Install...

8-Finish

2-After Installation of Microsoft Active Sync connect your PDA to the computer using USB Cable and select Guest Partnership (No) and click next.



3- In order to make connection between handheld device and Citrix server, Citrix ICA client for windows CE has to be installed on PDA:

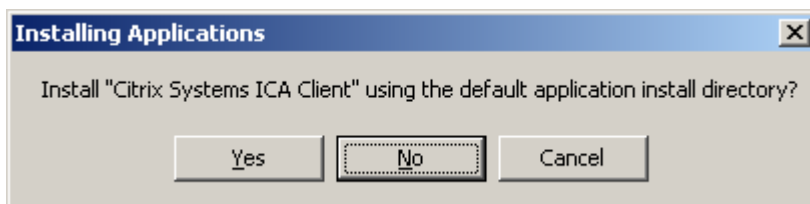
1-Download Citrix ICA client for Windows CE on your computer:

<http://www.citrix.com/site/SS/downloads/details.asp?dID=2755&downloadID=3602>
(If this link didn't work easily open www.google.com and search for "Citrix ICA client for windows CE")

2-Installation:

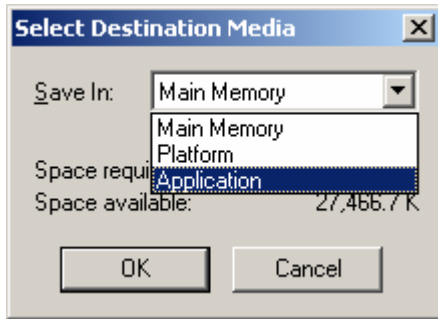
1-Run cesetup.exe

2-It will ask for installation path:



3-Click on "No" button

4-following screen will pop up:



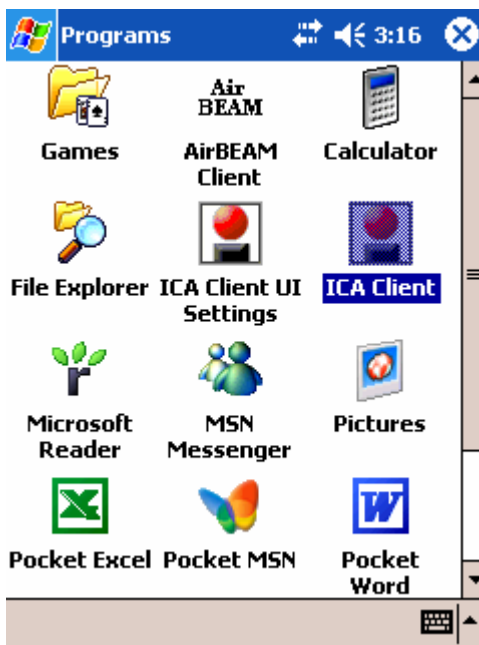
Choose “Application” option from drop down list and click “OK” and follow the installation on PDA screen to complete the installation. It will add two icons on PDA’s Programs screen:

5-finish

4- Configuration of RFS on Handheld Device:

1-On handheld Device Click on Start then Programs

2-Choose ICA Client



3-Create New Connection



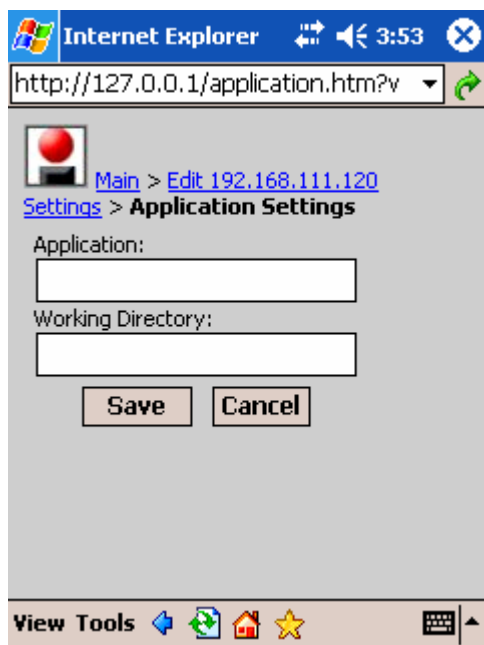
4-Enter the Citrix Server IP address



5-Save

6-Edit

7-Edit Application Settings



8-In this step you need to know the MAS 90/200 running address on Citrix Server. So, Login to the CITRIX Server and Right-click on the MAS 90/200 program Shortcut and select properties then write down the Address in Start-in path.

According to Shortcut address on Citrix Server fill the Application and working Directory fields:

Application: your path\MAS90\Home\pvxwin32.exe -hd ..\launcher\sota.ini
..\soa\RFS_Startup.m4p

Working Directory: your path\MAS90\Home

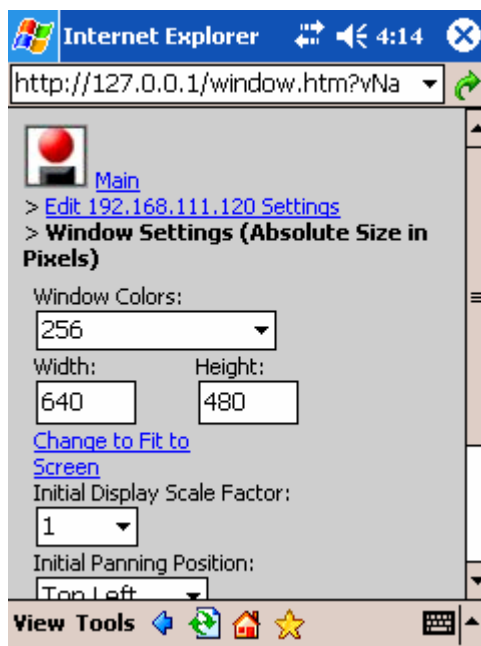
(Where *your path* stays for the path to your MAS 90/200 Start-in path, e.g. D:\MAS\Mas450\Rfs).

10-Save

11-Click on Edit link and click on Edit Logon Information.



- 12-Enter your Citrix server logon Username, Password and Domain and save it.
- 13-Click on “Edit <citrix server IP address> Settings” link and click on “Edit Windows Settings”



- 14- Click on “Change to Fit to Screen” link and save it.
- 15- Finish

Sample

For the setup of Symbol MC9090 handhelds

AD Prep and Documentation

Allocate the handheld's IP address, HH username, and hostname. Place adhesive labels on the handheld using the format "HH<##> <hostname> <IP address>".

Update info on the Handheld IP's Excel Spreadsheet.

Initial Handheld Setup

1. Immediately place the unit in the charger to ensure the backup battery becomes fully charged. Once the handheld is charged, proceed to the next step, removing the handheld from the charging unit. (Charging will be more rapid if the handheld unit remains powered off.)
2. Click on the Start button and set the system time.
3. Enter the hostname of the handheld and its description.
 - Go to Start > Settings > System tab > About > Device ID tab > Device name:
 - (In the Description field, input the HH user who will be using the handheld.)
 - Click OK to exit.
4. From the main screen, disable 802.11d wireless access by using the Wireless Options tool.
 - Select the wireless icon on the lower right of the screen, and then select Options from the pop-up menu.
 - From the drop-down menu, select "Regulatory", then clear the "Enable 802.11d" checkbox.
 - Click Save to save changes, then Exit.
5. **For P3 handhelds only** – Enable both 2.4 GHz and 5.0 GHz bands for wireless connectivity.
 - Select the wireless icon on the lower right of the screen, and then select Options from the pop-up menu.
 - From the drop-down menu, select "Band Selection" and ensure that both "2.4 GHZ Band" and "5 GHz Band" are selected.
 - Click Save to save changes, then Exit.
6. Connect the handheld to your company wireless network
 - Select the wireless icon on the lower right of the screen, and then select "Find WLANs" from the pop-up menu.
 - Once the scan for WLANs has finished, select and hold your stylus over the "yournetworkname" WLAN, then select Connect to initiate the connection wizard. Enter the following settings:
 - Profile ID – accept both defaults, which should be "yournetworkname". Click Next to continue.
 - Operating Mode – accept both defaults, which should be "Infrastructure" and "Allow Any Country". Click Next.

- Authentication – accept default “none”. Click Next.
 - Encryption – use the drop-down menu to select “40-Bit WEP”. Accept the default Key Index of 1 and leave the “Use Passkey” checkbox unchecked. Click Next.
 - 40-Bit WEP – replace the password fields with 10 lowercase a’s: aaaaa aaaaa. Click Next.
 - IP Address Entry – Use the drop-down menu to change the option to “Static”. Click Next. Enter the IP Address and Subnet Mask, then check the Advanced check box. Click Next. Leave the G/W field blank, enter DNS server info, and leave the WINS field blank. Click Next.
 - On all remaining screens, accept all defaults. You will then be back at the Manage Profiles screen. Click OK to exit.
 - If you are prompted with a pop up box that says “Establishing Connection”, choose the “Work” connection.
 - On the lower right corner of your screen, you should see your wireless status indicator either in red, yellow, or green, indicating the strength of your wireless signal.
7. Test connectivity to your LAN.
- Click on the wireless status icon in the lower right corner of your screen and select “Wireless Diagnostics” from the popup menu.
 - Select ICMP Ping.
 - In the IP field, enter 172.16.1.1, and click on Start Test.
 - Monitor the Total Tx and Total Rx indicators to ensure you are able to ping the company gateway.

Installing The Datawedge Application

1. Place the handheld in a charger and connect the charger via a USB cable to a computer that has Microsoft ActiveSync installed.
2. Upon your computer’s registering the connected mobile device, navigate through the Active Sync wizard, indicating that there is nothing you want to synchronize. If your system does not connect to the handheld, try adjust the “USB to PC” setting on the handheld. By default the “Enable advanced network functionality” checkbox is checked. You should uncheck it if you experience any connectivity issues.
 - Go to Start > Settings > Connections tab > USB to PC
3. Go to your computer, and select the “Explore PocketPC” option from the Tools menu of Active Sync. This will open an Explorer window into your handheld.
4. Copy the appropriate Datawedge components, as excerpted below from Symbol’s documentation:
 - Unzip the DataWedge download package (if necessary) into a temporary folder on the PC.
 - Copy “\Bin\PPC\DataWedge.exe” from the PC to the \Application folder on the device.
 - Copy “\Application\DataWedge.cpy” from your PC to the \Application folder on the device.

5. Browse to the \Application\Bin\PPC\DataWedge.exe file, hold the stylus on the file until the popup menu appears, and select Copy.
6. Paste the shortcut into the Windows\Startup folder on the handheld. (If you cannot see the Windows folder, you may need to enable the option to unhide hidden and system files on your computer.) Then manually launch Datawedge by selecting it while you are still in the \Windows\Startup folder.
7. Click on the DataWedge icon in the lower right corner of your screen, and from the popup menus, go to Barcode > Prefix/Suffix.
8. Check the checkbox that says "Send ENTER key after suffix"
9. Click OK to exit.
10. Test the scanner by opening Word Mobile and performing a test scan.
 - Go to Start > Programs > Word Mobile
 - Click on New to create a new document if no other test document is available.
 - Scan a barcode and observe the data in Word Mobile. Each successive scan should be on its own line.
 - Exit until you get the handheld's main screen.

Installing the Citrix ICA Client

1. From your computer make sure that the handheld has been able to reconnect to your computer, and run the Citrix CE client program, cesetup.exe. Click OK when prompted.
2. Your computer will now display a message stating that you should check the handheld for any further messages to finish this installation. Click OK and proceed to your handheld...
3. Your handheld should now be asking you a location to which you want to install the Citrix client. Accept the default, which should be "Device", then click "Install" on the lower left corner of your screen.
4. Click on "I Accept" to accept the license agreement.
5. After the program installs, you will receive a confirmation message that installation was successful. Click OK to exit.
6. Warm boot the handheld to verify that DataWedge loads on startup.
7. Disconnect the handheld from the cradle and terminate your Active Sync session, as wireless access may be disabled while connected to Active Sync.

Connection Settings For Wireless Citrix Environment

1. Open the Citrix ICA client configuration utility.
 - Go to Start > Programs > ICA Client
2. From the main menu, select PN Agent Properties.
3. Select "Enable PN Agent".
4. In the Server URL field, enter the IP address 172.16.1.195, then click on the Save button.
5. If the connection is made, you will be presented with a Login Details screen. Enter the below details:
 - Username: the HH<##> ID of the handheld.
 - Password: the default password.
 - Domain: "your domain name"

6. Check the "Save Password" checkbox, and then click OK.
7. When the screen refreshes, scroll down and click on the Save button one more time.
8. At the top of that screen, click on the "Main" hyperlink.
9. Click on Edit Global Settings.
10. Click on Edit Preferences.
11. Scroll down to the "Enable Full Screen (No Local Taskbar)" checkbox, and check it.
12. Scroll to the bottom of the screen, and click Save.
13. Click the X to exit.
14. You should now be at the Programs Screen. Click the X to exit to the Main screen of the handheld.

Setting up a Connection to MAS

1. Configure the appropriate menu settings.
 - Go to Start > Settings > Personal tab > Menus
2. Scroll down the Menus page until you see the "T200" icon, and select it. Click OK to exit.
3. The T200 icon should now appear on the Start Menu.
4. Click on the T200 icon to initiate a connection to MAS.
5. Enter the appropriate User ID and corresponding password.
6. If this is the first time you have connected to MAS using this handheld, MAS will prompt you for the company code you wish to access. Enter the Company Code and select OK.
7. You should now be at the MAS 90 for Win CE main menu. Select Shut Down to exit MAS. You will be returned to the handheld's main screen.

Notes

1. In the event that the handheld is cold booted, most (if not all) of the setup steps will need to be repeated. A warm boot will cause no loss of settings.

When resetting after a cold boot, make sure to rename the handheld to the appropriate hostname BEFORE configuring the Citrix environment. This will aid in not causing duplicate terminal server licenses from being issues to the same handheld. Also make sure the handheld is not connected to Active Sync.