PBS Mobility™

Orders and Inventory

Passport Business Solutions ™

Passport Business Solutions
PBS Mobility™ User Guide - Orders and Inventory
02/07/2017

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Passport Software, Inc.
181 Waukegan Rd.
Suite 200
Northfield, IL 60093
847-729-7900
Main: www.pass-port.com
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Overview

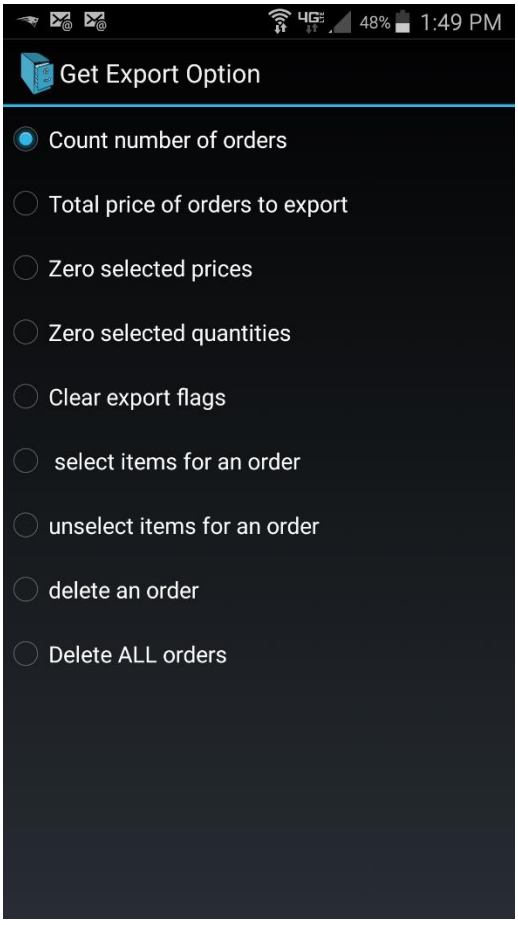
PBS Mobility is a series of mobile applications that integrate with the PBS software. This will be an expanding library of applications to help you work on your Android mobile devices and integrate with the PBS SQL database.

General

Below are a few general topics you will want to understand before you start using PBS Mobility.

Back button. Each mobile device has its own button structure for navigation. Some use real buttons, some use buttons presented on the display or even on the side of the device. The back button will be important as you navigate through PBS Mobility. As you'll learn, it may be used to exit a function but it may also be used to invoke something to occur.

As an example, when using the Utilities under Orders, you will see there are many options (we'll cover the utilities in more detail later in this document). You can select any one of those options with a touch of your finger. To run the utility you selected, you simply press your Back button and the program will run.



Hybrid App

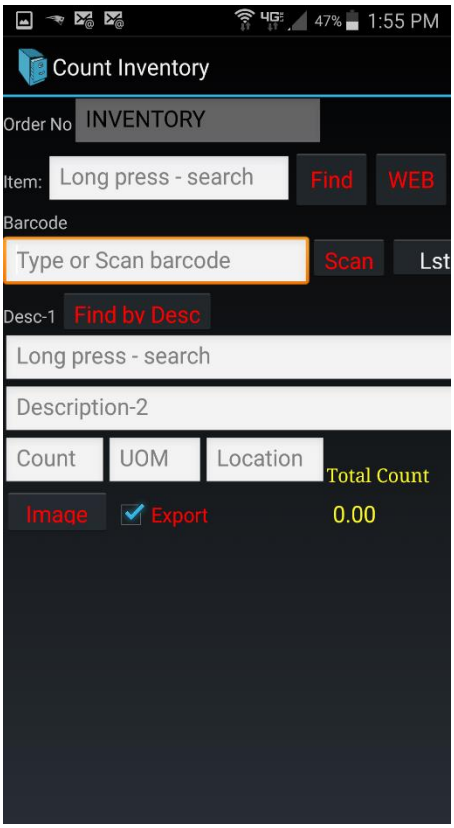
PBS Mobility is what we call a hybrid app which has many advantages over a complete cloud hosted solution. What's the difference? A cloud hosted solution is only available to you when you have a good WIFI or data connection on your phone. That means if you aren't in a place that provides one or the other, you can't use the app.

A hybrid solution, like PBS Mobility, runs most key functions directly on your device. We store a copy of key files like the customer and item records so you can perform key transactions on your device whether or not you have access to the internet. That means you can enter orders, pick orders and enter inventory counts on your phone wherever you are. Once you have an internet connection available you can then you can interface your data.

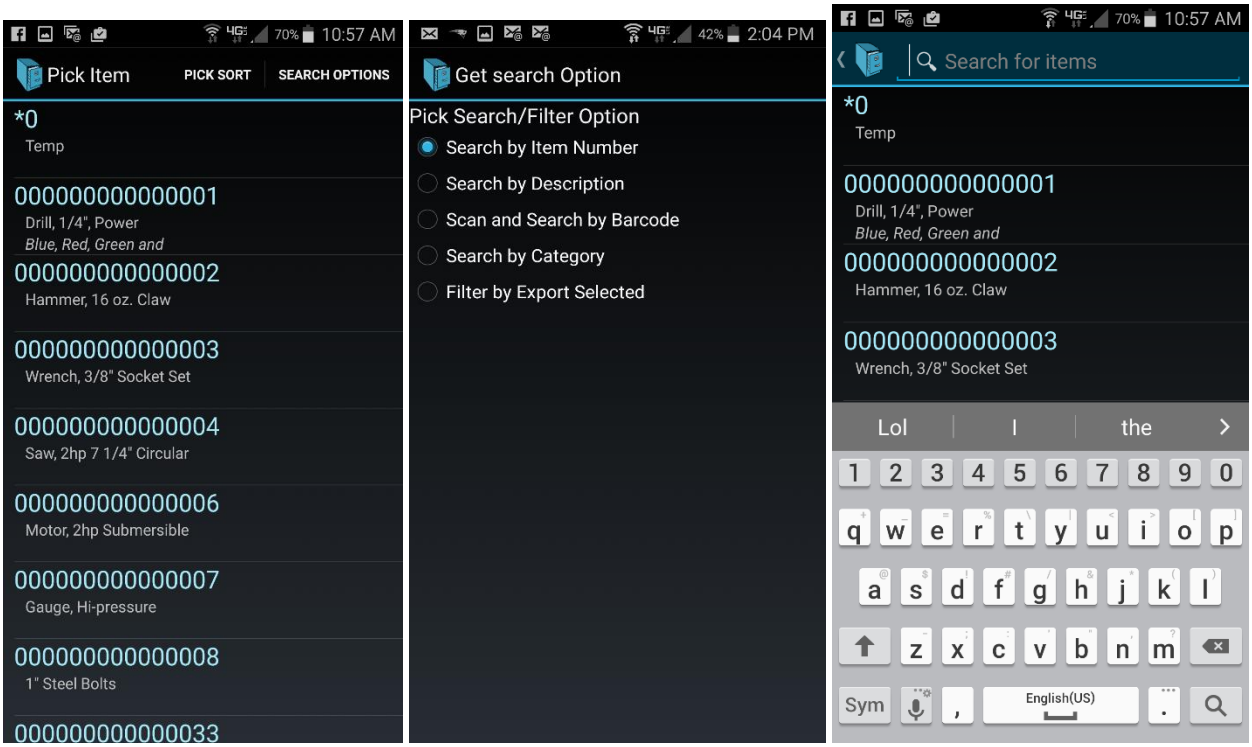
We believe this is the best approach for businesses who may be in the field and have little or no access to a data connection while they are there. In many cases, large warehouses may not have access to internal WIFI due to distance from the router, electrical interference or no WIFI being present. Data is often stifled when the signal is weak to begin with and you're attempting to use your phone from inside a metal building. The hybrid application will allow you to continue to work in these conditions.

Search Options

Depending on where you are in the app, there may be multiple ways to search for and find an item or perhaps a customer in your database. In the example taken from the Inventory app, you can see an excellent example of this:



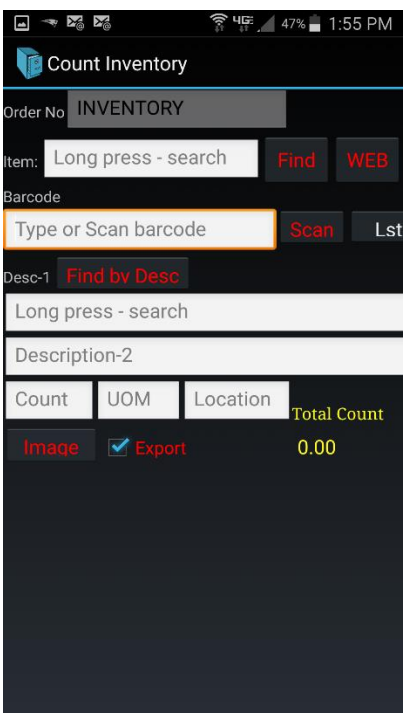
Notice the Find button next to the Item field. Pressing this button will invoke a list of items in your database that you can simply scroll through until you find your item and a simple tap of the finger will select the item for you and return you to the above screen. This is fine if you're working with a very small list of items but what happens when you have more than 7000 items in your database? Simply press the Search Options (below) in the upper right hand corner and you will see you have a handful of options to choose from:

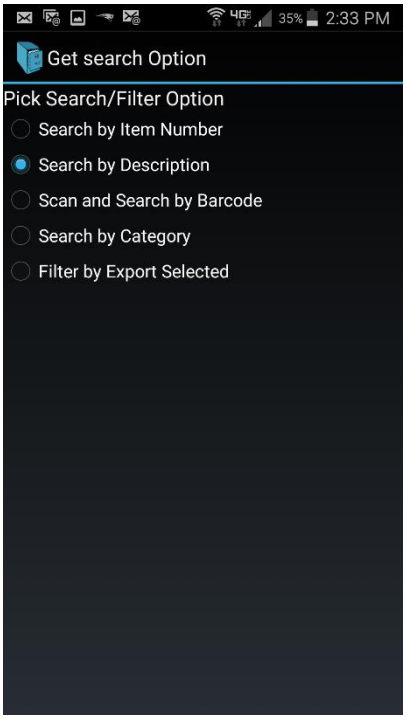


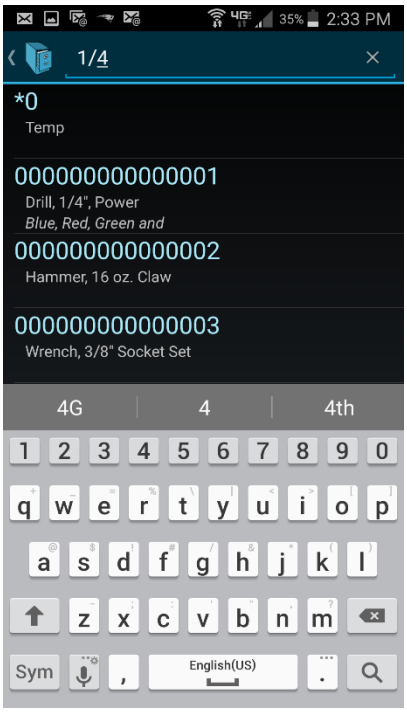
Once you select your preferred search option (above right), press your Back button and you will now see a search box (above left) and your keyboard should be active. Start typing and you will be brought to the first matching record based in the search criteria.

NOTE: The Find button searches records sequentially. In other words, if you are searching the description field and type "drill" it will search for any record whose description begins with the word drill.

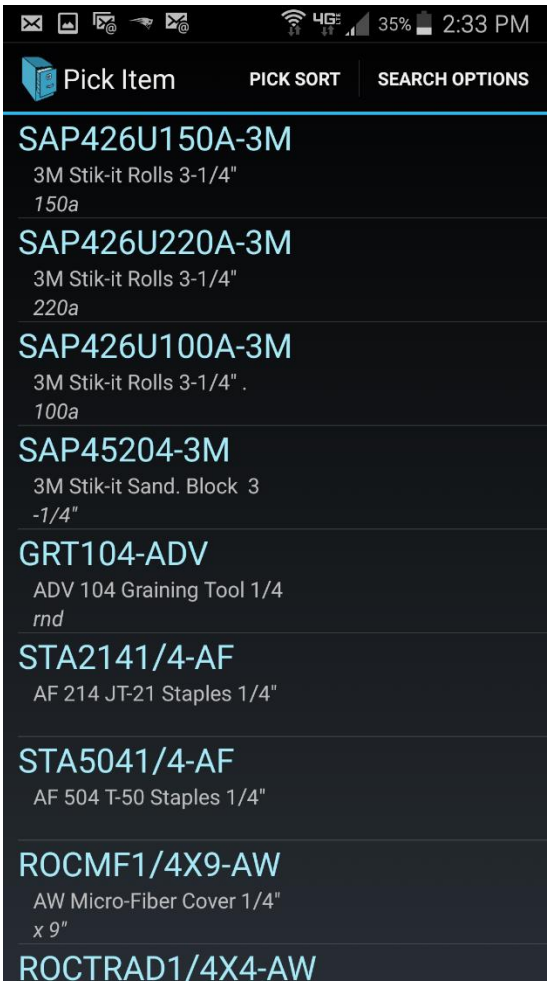
Going back to the original screen, you will also note that some fields have the words "Long press-search" in them (below). This is an alternative method for searching for an item. If you press and hold your finger on one of these fields, you will once again see your list of items, but there's a catch. When you press Search Options, and then choose the field you'd like to search, you are no longer just searching for an exact match starting at the beginning of the field, you are performing what's called a Context Search. In other words, you will be searching the entire field for a match of your text. For instance, in the example screens below, we invoke this search, choose the description as our search option, and then we search for "¼" looking for any record that has "¼" in it regardless of where in the description it appears. You can see the results below:


47% 1:55 PM
Count Inventory
Order No
INVENTORY
Item:
Long press - search
Find
WEB
Barcode
Type or Scan barcode
Scan
Lst
Desc-1
Find by Desc
Long press - search
Description-2
Count
UOM
Location
Total Count
Image
Export
0.00


35% 2:33 PM
Get search Option
Pick Search/Filter Option
Search by Item Number
Search by Description
Scan and Search by Barcode
Search by Category
Filter by Export Selected


35% 2:33 PM
1/4
*0
Temp
000000000000001
Drill, 1/4", Power
Blue, Red, Green and
000000000000002
Hammer, 16 oz. Claw
000000000000003
Wrench, 3/8" Socket Set
4G
4
4th
1 2 3 4 5 6 7 8 9 0
q w e r t y u i o p
a s d f g h j k l
z x c v b n m
Sym
English(US)

Results:



Notice all of the records shown have "¼" in them but in different places. Selecting any one of these will return the item back to the Inventory program.

This highlights the flexibility at your fingertips when it comes to searching for, and finding records in the PBS Mobility database.

Web

There are going to be places where you may see a button labeled Web. The Web buttons are only available when you have an internet connection on your device. So if you're not getting a good WIFI or data connection through your service, this feature won't be available at that time.

Assuming you do have a good web connection, pressing the Web button can provide you with more information about a customer or item, and even provide you with a real time look at things like current inventory status. It can be quite useful when you're sitting with a client and discussing their needs.

Customers and Ship-to Addresses

If you are a traditional PBS SQL user, you're accustomed to having a single customer that may potentially have multiple ship-to addresses. When you import your customers to PBS Mobility, to keep the database simple and streamlined, you will find that the import process will create a unique customer

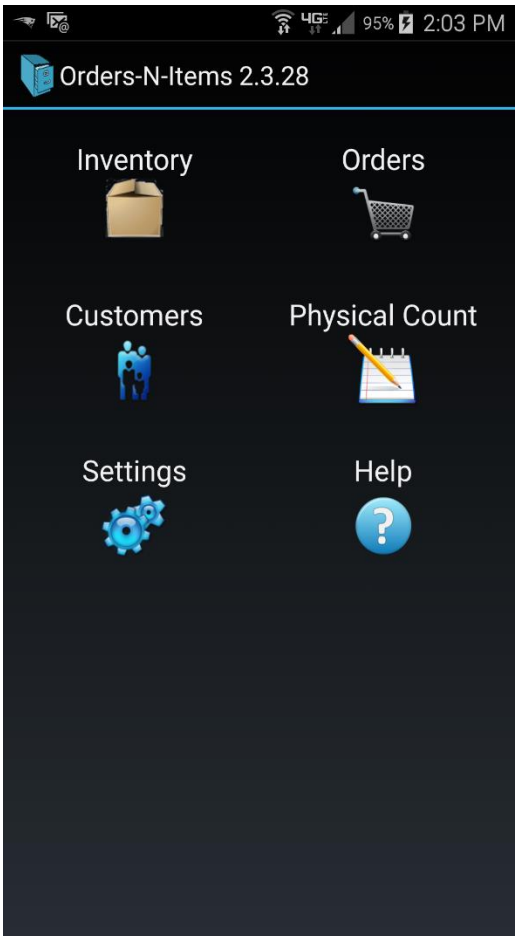
record for each ship-to address. When you select the proper customer record, the correct ship-to address will be shown in the order and will be passed back to PBS for you automatically.

PBS Orders and Inventory

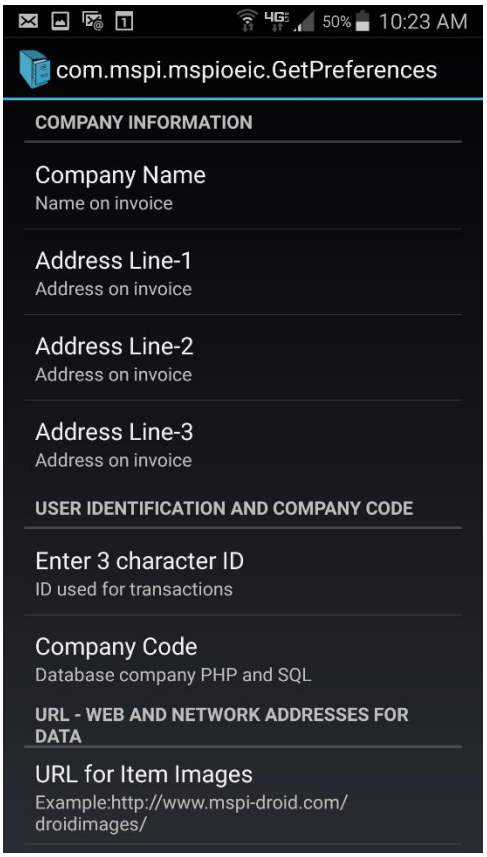
This set of mobile apps will allow you to quickly and easily enter sales orders and physical inventory counts that can be interfaced back to PBS SQL with the push of a button.

Setup - Preferences

Before you begin using PBS Orders and Inventory you must first set up the application. When you first launch PBS Orders and Inventory, you can press the Settings button to access each of the pieces of the setup process:



Once you press the settings button you will be presented with several setting options you will have to enter prior to using the application. These include:



The first setting is your company name. Simply tap this setting with your finger and a field will open up and allow you to enter your company name. Repeat this process with Address Line-1, 2 and 3. Reserve Address Line-3 for your City, State and Zip Code.

Once you're done with defining the basic information about your company you can proceed to the USER IDENTIFICATION AND COMPANY CODE section of the settings. It's here where you will start to set up your interface to PBS.

Start with the 3 character ID to be used for performing transactions. This is the ID that will be identified in the Inventory History reports once your inventory transactions are moved to PBS Inventory Control. The ID is 3 alphanumeric characters and can be entered by tapping Enter 3 Character ID with your finger.

Next is your company code and this should match the company in PBS you are integrating with. In other words, if you only use a single company in PBS, your Company ID is likely 00. If you use multiple companies, enter in the company ID you would log into using PBS on your desktop. This can be 2 alphanumeric characters.

NOTE: If this doesn't match your Company ID in PBS you will be unable to import items and customers and will not be able to interface orders or physical counts back to your PBS database.

Now you should proceed to the URL – WEB AND NETWORK ADDRESS FOR DATA

This is the area where you will define where PBS Mobility will find your PBS SQL database wherever your server happens to be located.

The first setting in this section is the URL for Item Images. This allows you to point to a web address/folder where you can find images related to items in your PBS Mobility database. This is a feature exclusive to the PBS Mobility application at this time. If you have one, you may enter it here. It may look something like:

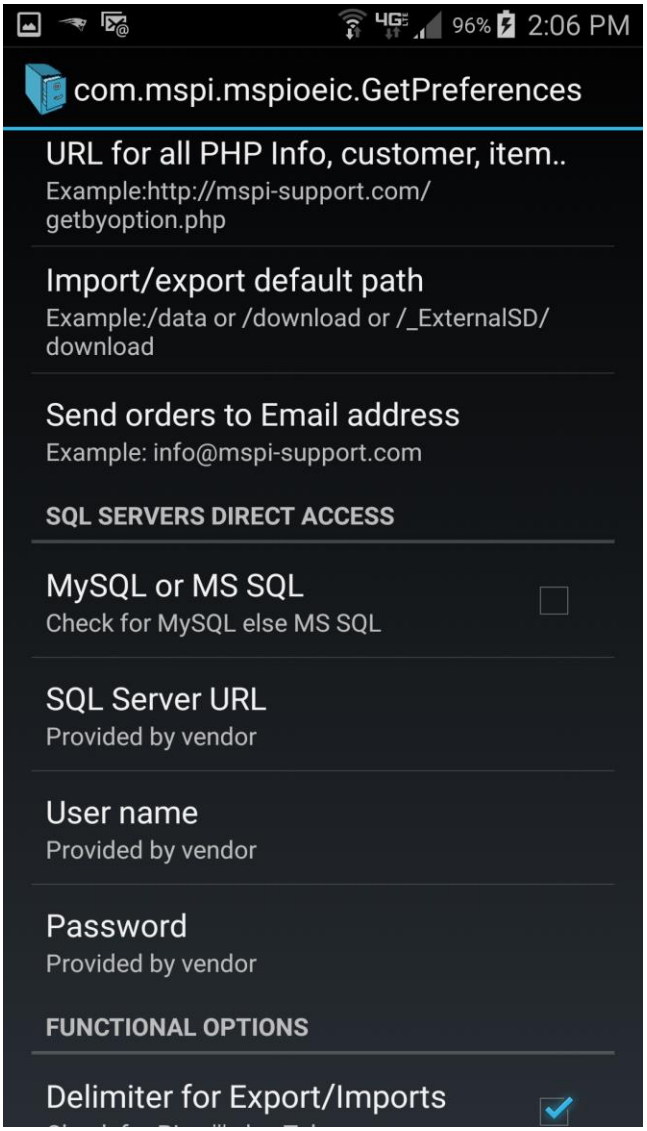
http://168.93.99.58/droidimages/

or

http://www.pass-port.com/images/

In either case, if you upload images to this folder on your web server, your PBS Mobility app can allow you to view those images on your Android device.

If you place your finger on the screen and drag it up, you will see there are additional fields to be completed:



The next setting is the URL for all PHP Info, Customer, Item… It's here you will point back to your web server which your PBS Mobility support assistant can help you with. This is a very important piece of the remote communication puzzle. Several of the remote, live functions rely on PHP for communicating with your PBS SQL database.

Import/Export Default Path

Now you should set your Import/Export Default Path. These are the folders on your Android Device where you will store data related to the PBS Mobility application. You may opt to store these in your device's memory or you may opt to create and point to folders on your external SD card if you wish. NOTE: Locating data on an SD card could result in slower performance.

Send Orders to Email Address

You will find there are multiple options for sending orders out of PBS Mobility. Most will opt to use the direct PBS SQL interface, which results in the order being pushed directly into the PBS SQL database. Others may wish to collect orders offline and email them back to a contact at their office. In either case, it's best to set up your Send Orders to Email Address email address. Be sure to check this carefully so that you ensure the orders will be received and processed.

SQL Servers Direct Access

It's in this section that you will tell PBS Mobility where it will find your PBS SQL database and assign it the credentials to log into the database for processing data.

MySQL or MS SQL

The first field is a simple check box asking if you will be integrating to a MySQL or Microsoft SQL database. For the purposes of integrating to the PBS SQL database, you will leave this box unchecked.

SQL Server URL

Tap this setting to define the path to your SQL Server. Your support assistant will help you determine the correct path to enter here.

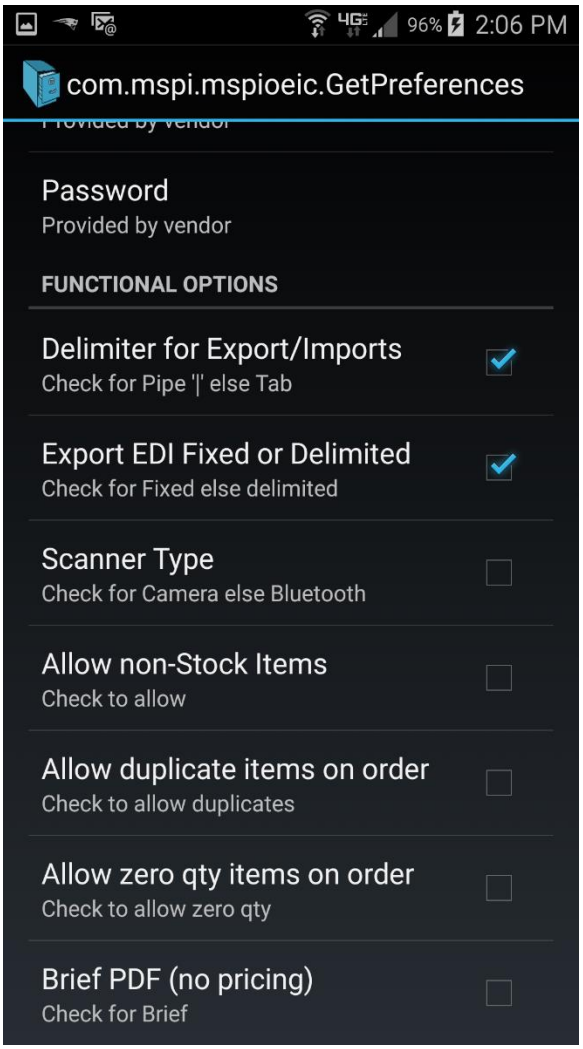
User Name

User name will be provided to you by your IT Manager or support assistant. This is the login needed to log into your PBS SQL database.

Password

Password will also be provided to you by your IT Manager or support assistant. This is the password needed to log into your PBS SQL database.

Now place your finger on the screen once more and drag it up to move to the last several fields in the setup function. The screen should include the following fields (note, we've already set Password):



Functional Options

It's here where you will determine how you wish to use some of the functions within PBS Mobility.

Delimiter for Export/Imports

When you are importing or exporting information from PBS Mobility, you have the choice of two different delimiter options, Pipe (|) or Tab. You can choose either. In the example above, we've chosen Pipe as our delimiter.

Export EDI Fixed or Delimited

If you choose to export or email your orders rather than interfacing them directly to PBS SQL, you can choose to use whether you would prefer to include a delimiter (defined in the prior field) or if you would prefer to use a fixed file format. In our example above, we've opted to use the fixed file format.

Scanner Type

You basically have two options here; use a Bluetooth scanner connected to your Android device, or if you've installed the scanner application paired with PBS Mobility, you can use your phone's camera

instead. We have found that an external scanner tends to be more accurate and easier to use than the camera but both will work for this application. If you plan to use your camera, check this box, otherwise leave it unchecked and be sure to pair your scanner with your phone before you start entering orders or inventory.

Allow non-Stock Items

Allow duplicate items on order

Allow zero qty items on order

Brief PDF (no pricing)

When you enter orders, you have the option of creating a PDF document when you're done. This document could then be emailed or otherwise stored and reviewed. If you prefer not to include pricing on this doc, check this box. If you'd prefer to include pricing, uncheck this box.

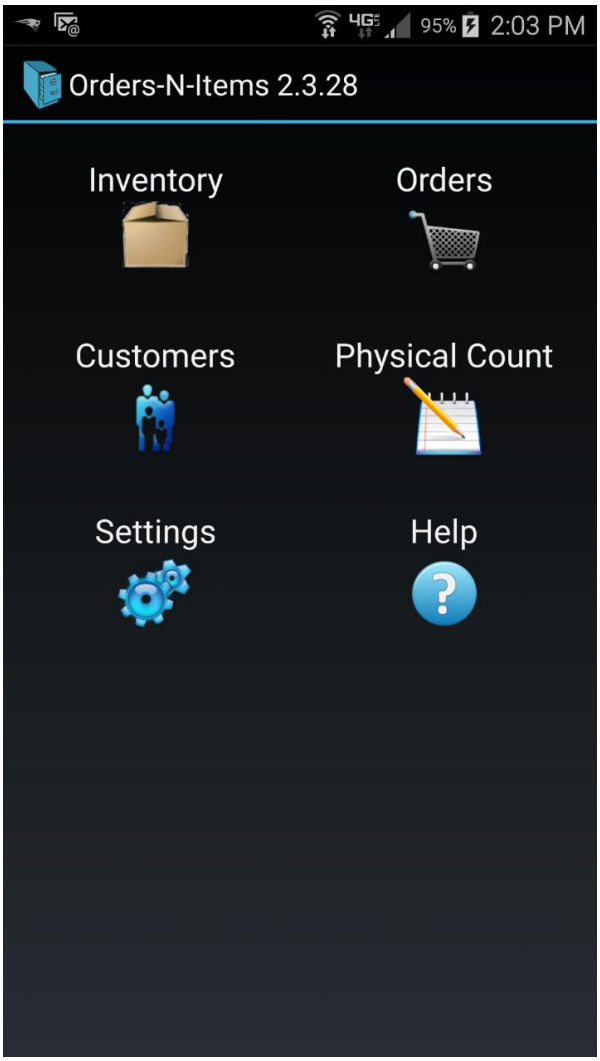
Importing Data

Now that you've set up PBS Mobility Orders and Inventory, it's time to perform your first big tasks. You should begin by importing data from your PBS SQL database so you will have it in PBS Mobility for processing.

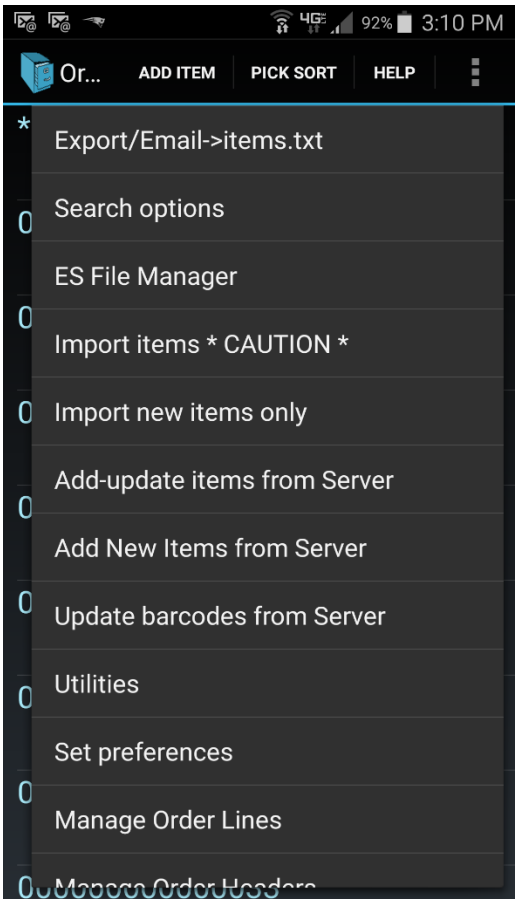
Inventory

Before we begin, it's important to note that this is the very same set of steps you will use to refresh your item database. This will allow you to add any new items added to PBS SQL since your last import, and it will also update important information like on-hand quantities and prices.

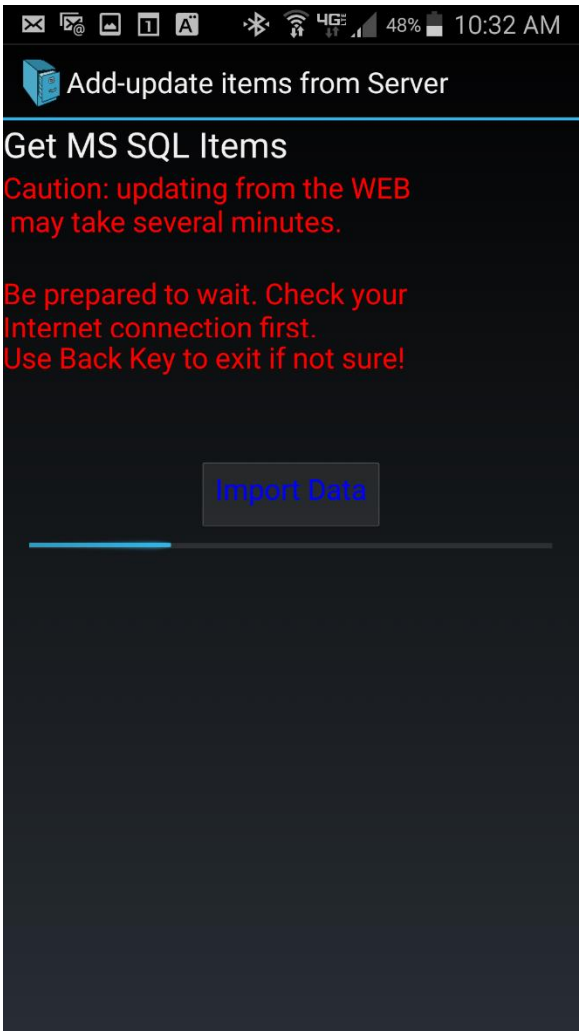
Start by tapping the Inventory button on your main PBS Mobility screen:



When you first go into this program, you should only see a few items across the top; Add Item, Pick Sort, and Help. There's also 3 dots one over the other. It's here you will find your utilities for your Inventory app. Press on those three dots and you will be presented with the following menu:

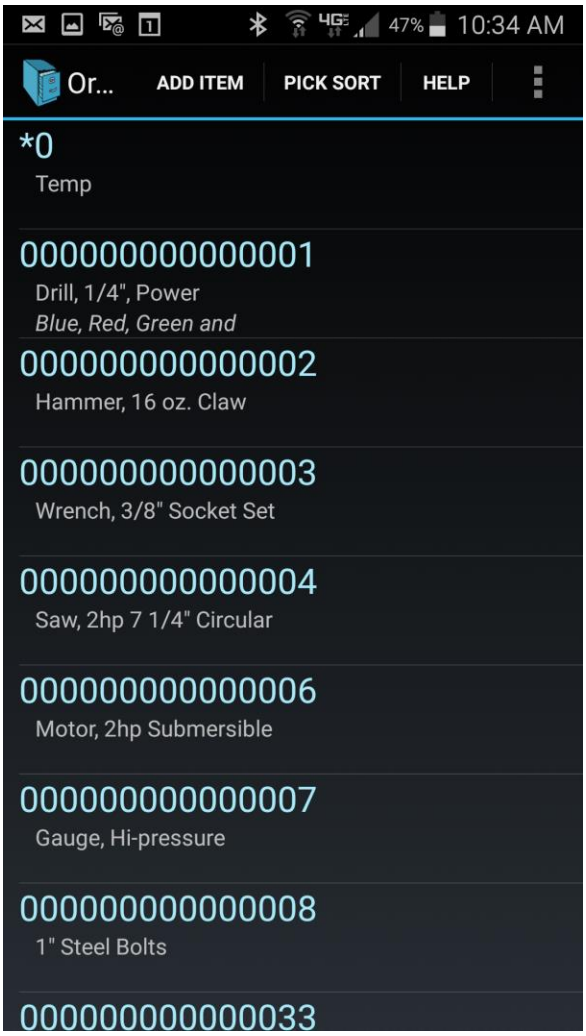


As a first time import, you should choose the Add-update Items from Server option. For a first time user, this will import all items from your PBS SQL database into the PBS Mobility Inventory application. This is a paired down version of the item master that includes the basic information you will typically need when working on a mobile device, and all of the information you will need to process orders and physical inventory transactions. Select this option by tapping it with your finger and you will see a new screen:



Press the Import Data button and the application will begin importing all of your items for the first time. If there is an error in your setup, you will be notified at this time and you should contact your PBS Mobility support assistant. Otherwise, as you can see in the image above, the progress bar should show the applications progress as it's importing your items. When it's done, you will be returned to the prior screen and should then see a list of all of the items in your PBS SQL Database right here in PBS Mobility.

NOTE: The speed of these imports will be dependent on the speed of your phone's processor as well as the speed of your internet connection. It's highly recommended you have a WIFI connection while doing these types of major functions. Data fees from your phone provider will apply otherwise.

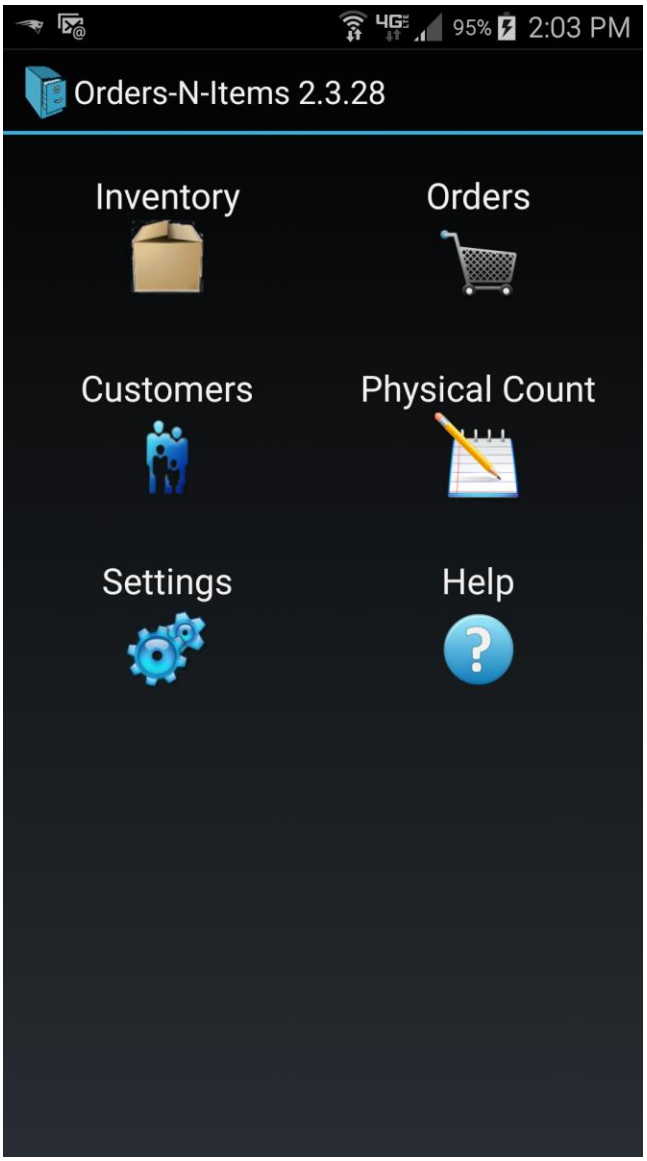


In the above example, we imported a little more than 7,000 items on a Samsung S5 with a solid WIFI connection in roughly one minute's time. Again, speed will vary based on several conditions. This is only presented as an example.

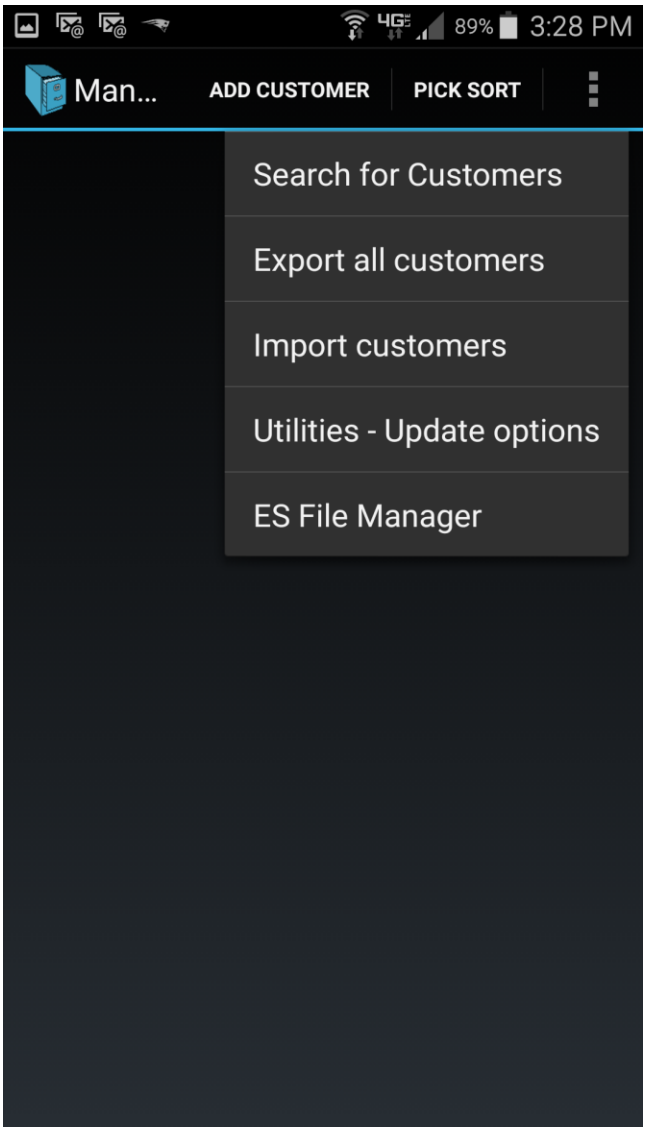
Importing Customers

Much like the Inventory Import option, you can also import customers from your PBS SQL database quickly and easily. You may wish to repeat this process periodically to ensure you have your latest customer database available to you.

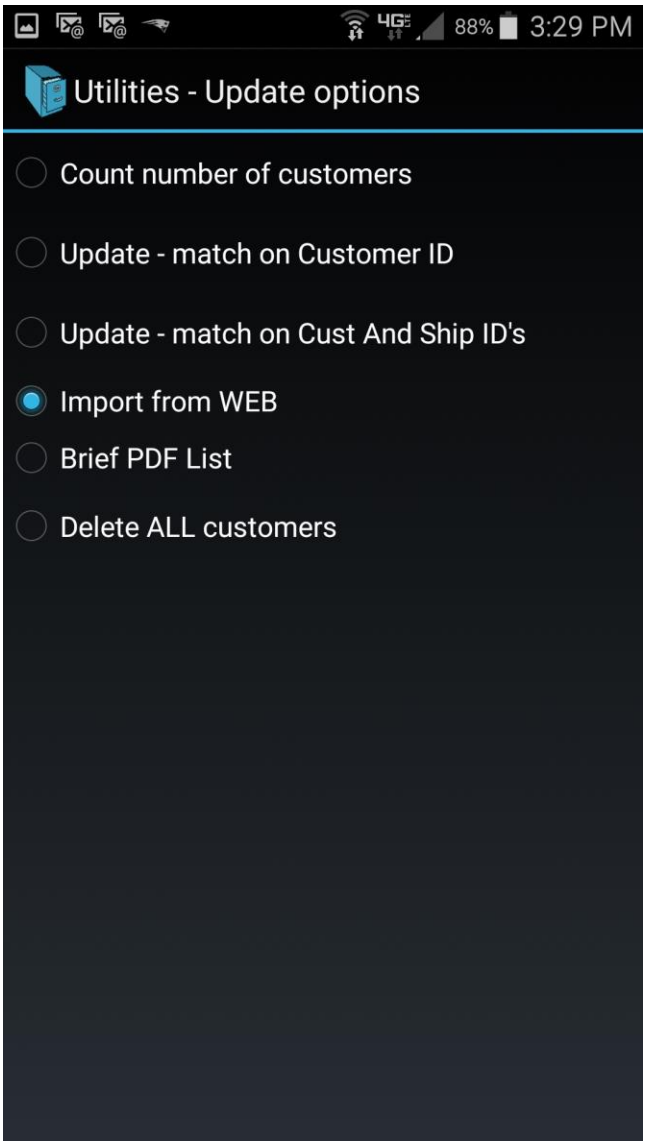
From your main PBS Mobility menu, select Customers:



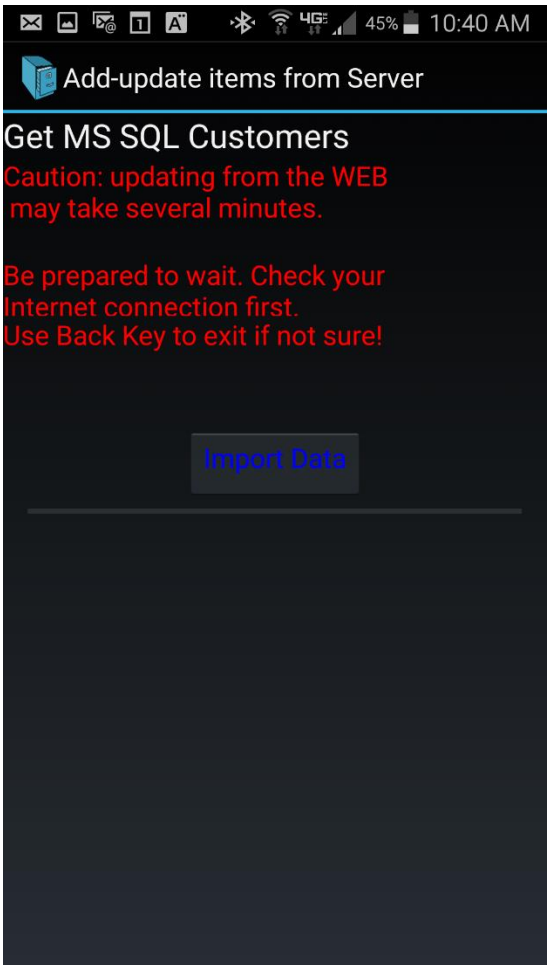
Once there, you will once again press the 3 dots in the upper right hand side of the screen to drop down the menu selections:

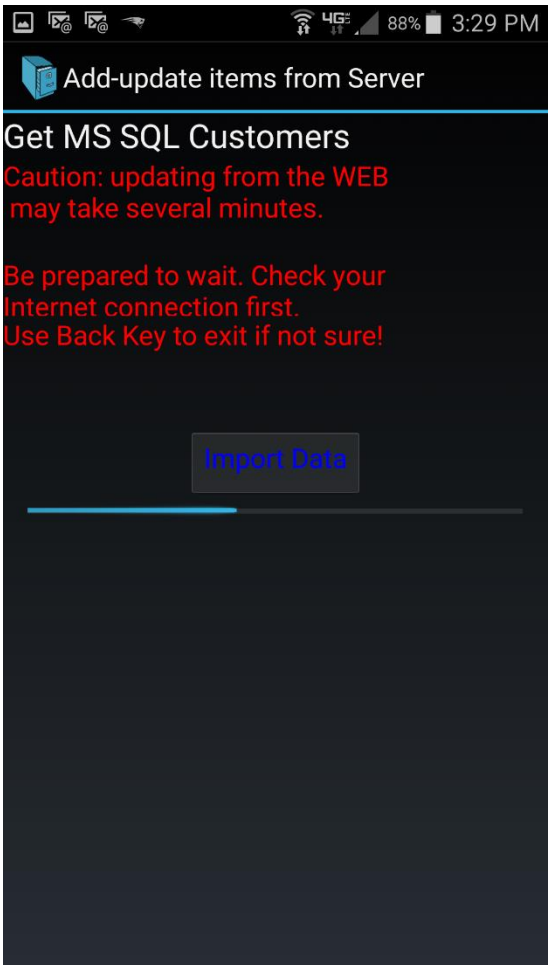


Now simply press *Utilities* – *Update Options*, and you will be presented with the following options:



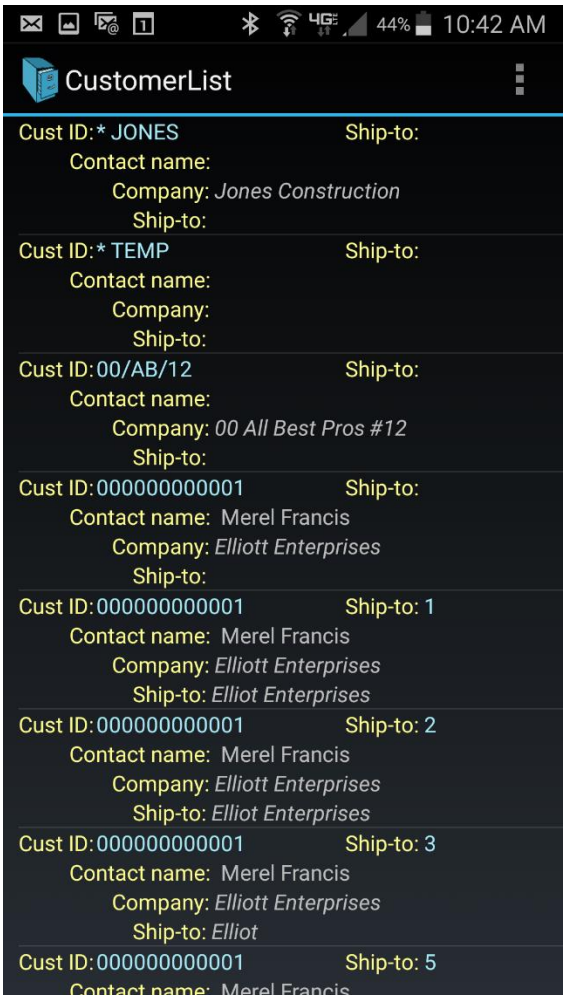
Press *Import from WEB* and then press the back button on your Android device and the program will present you with the following screen. When you press Import Data button, you will notice your progress bar will start to track the import progress.





Once it's done, you will hear an audible beep and be returned to your main menu. Select Customers again and you will now see all of your PBS SQL Customers listed here in PBS Mobility.

If you import the same customers twice the program adds them a second time. The result is you will have a doubling of the customers with ship-to's. If this happens you may delete the customers by selecting by selecting *Utilities – Update options* and select *Delete ALL customers*. Then you may import the customers again.

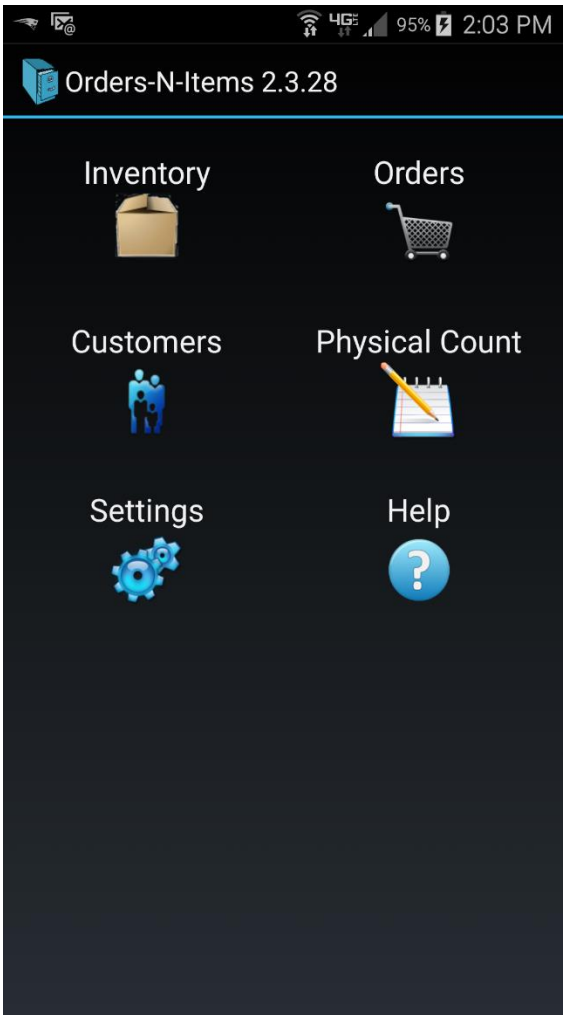


Now that you've imported customer and inventory records, you are ready to use PBS Mobility Orders and Inventory to start processing information.

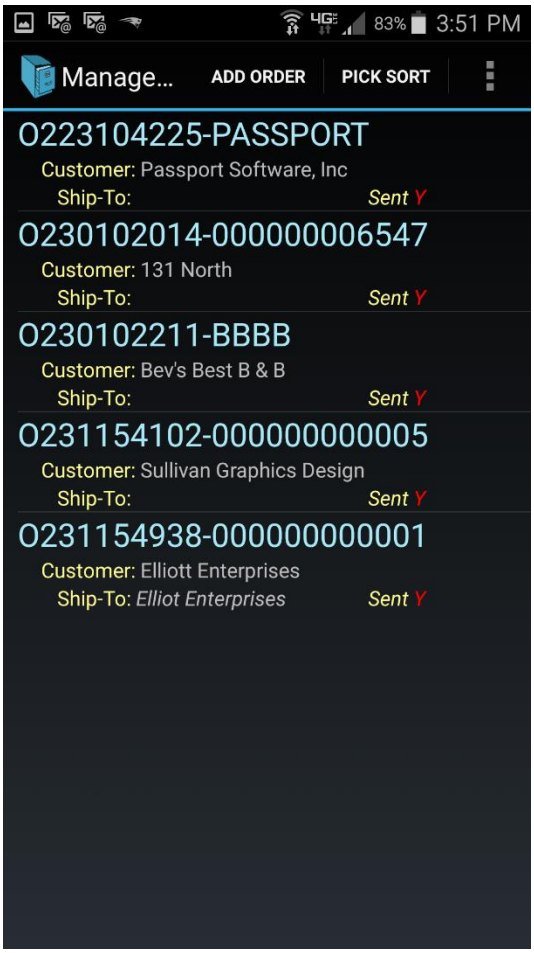
Orders

One of the most powerful functions in PBS Mobility Orders and Inventory is the ability to quickly and easily enter orders and then send them to your PBS SQL Database. In addition, you can also use this as a "Picking" application whereby you select items you're pulling to ship on the order and "fill" them in PBS, making your final packing list more accurate and easy to generate.

Begin by selecting the Orders button on the main screen:



You will now be presented with a list of orders previously entered (if there are any entered on this device) and will be provided with a few options at the top of the screen:



In the example above, you will see that we already have five orders entered into our PBS Mobility Orders app. Across the top you will note that once again, we have multiple options:

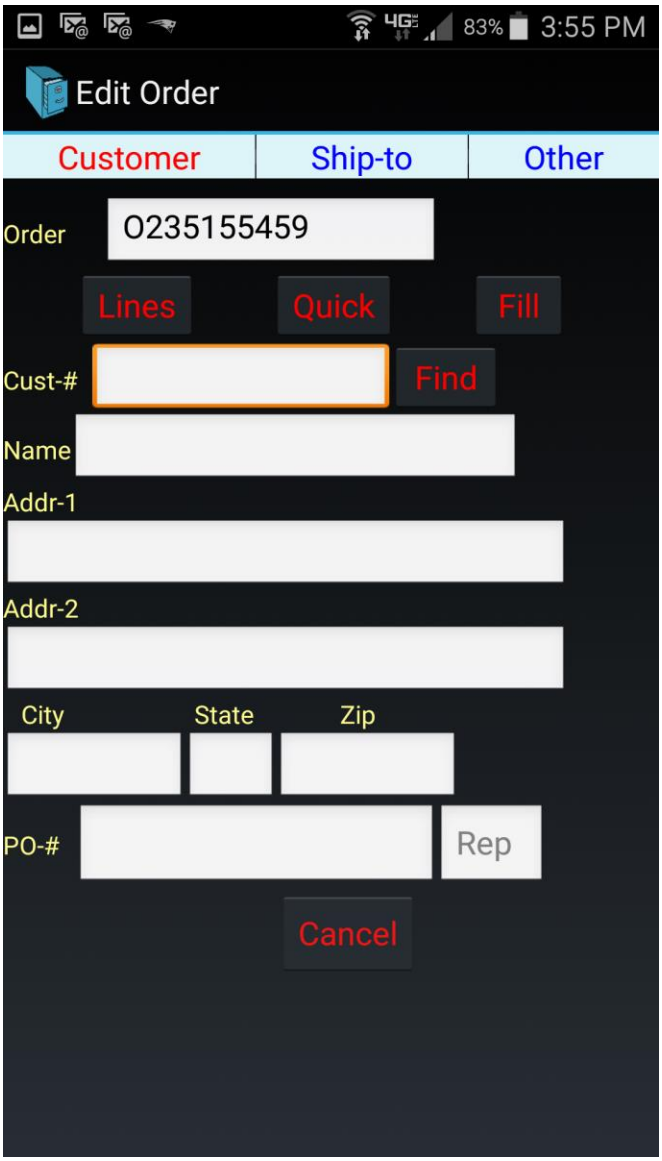
- Add Order
- Pick Sort
- Menu (Three dots over one another)

Pick Sort

We're going to start with this as it pertains to the screen you see above. You have the ability to choose your sorting option for your existing orders. If you tap Pick Sort you will see there are many options to choose from. Choose the option that best suits your needs and then press your device's back button.

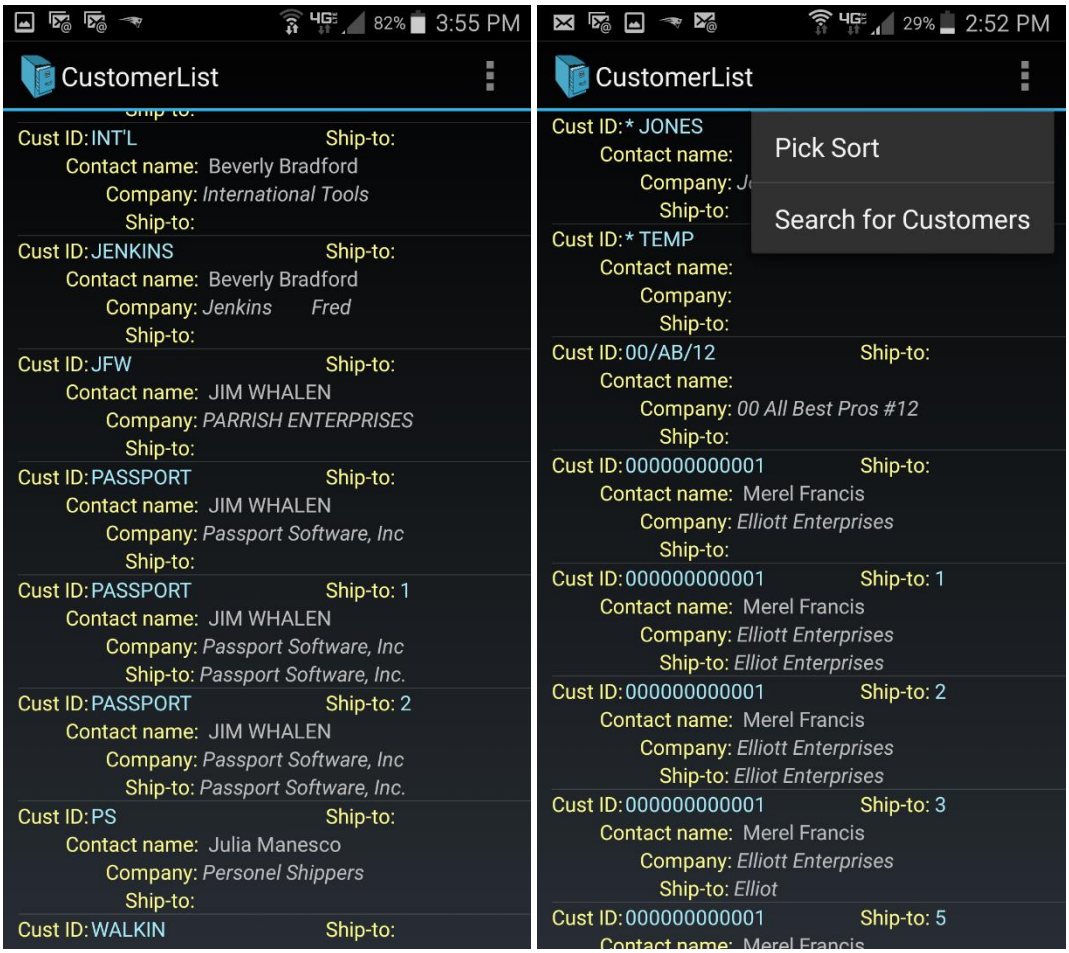
Add Order

This is the option we'll use to enter a new order into our PBS Mobility Orders app. Tap this with your finger and you will be presented with the following screen:

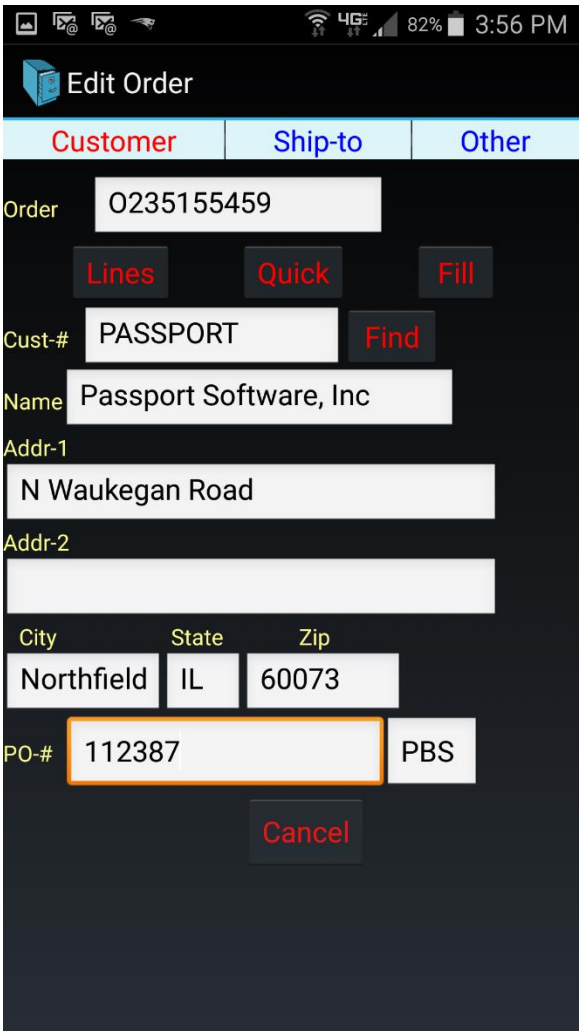


First, note that an order number has already been assigned here. This won't match the order number once it's posted to PBS SQL. That will be assigned just like any other order you would enter directly into OE Orders. This order number will be referenced in the final O/E order however.

If you know your customer's #, you can enter it now. If not, simply press the Find button to the right of the Cust-# field and you will be presented with a list of customers already imported or entered into the PBS Mobility Customers file.



If you have a small list of customers, you can scroll through your list by dragging your finger up and down until you find the right one and select it by tapping on the customer record. If you need to search your database, simply click on the menu button (the three dots to the upper left) and select Search for Customers (top left picture). Choose your search option, press your Back button, and enter in the information you are searching for. Regardless of how you get to your record, select a customer from your list and you will be returned to your initial order entry screen mostly filled in:

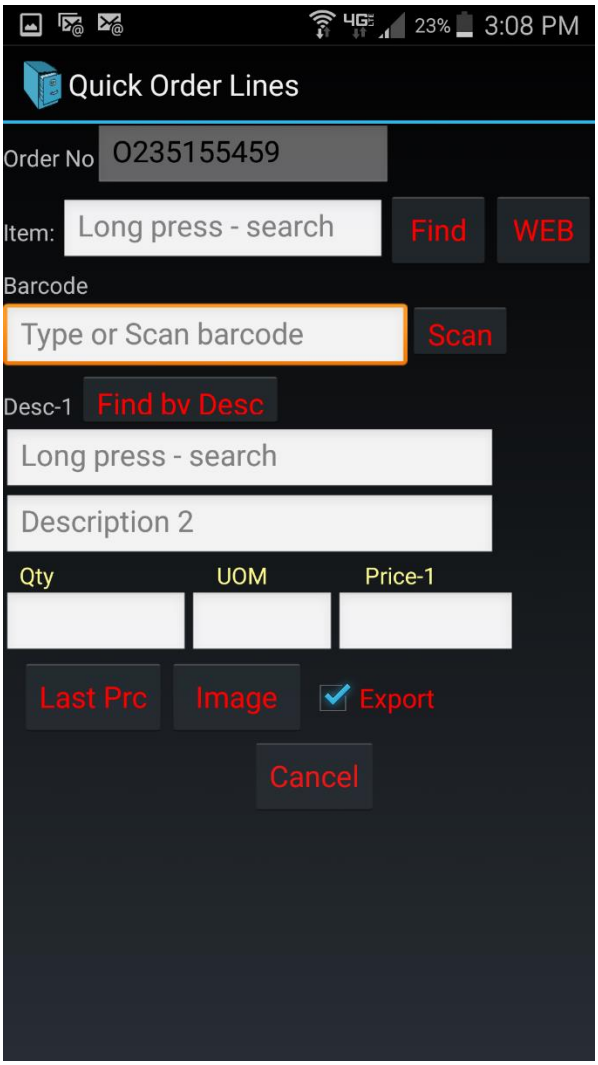


Now you have multiple options in how you may choose to proceed. Let's start with line entry. There are three options here:

- Lines
- Quick
- Fill

Quick

We're going to cover the Quick option first since like its name suggests, it's the fastest way to enter new lines in an order. Press the Quick button and you'll see the following screen presented:



This screen allows you to quickly and easily enter lines for your sales orders. Lets start by identifying what it is we're selling.

No Scanner

If you don't have a barcode scanner connected to your mobile device, and aren't using the camera to scan a barcode, or simply don't have a barcode available to scan, you can do the following:

1. Enter your item number into the Item field and press the Next button on your keyboard.
2. Enter the barcode number into the Barcode field and press Scan to find your item.
3. Use any one of the search options (see the chapter on searching for more details) including the long press search or the Find button and then select your item.

Bluetooth Scanner Connected to Device

If you've connected a bar code scanner to your Android mobile device, you can simply scan the barcode of the item you're looking to sell to your customer and then press the Scan button and it will find the item in your item database. If you have the Item barcoded, tap on that field instead and scan your

barcode. Enter in your quantity using your keyboard and then press Next and you're off to your next line.

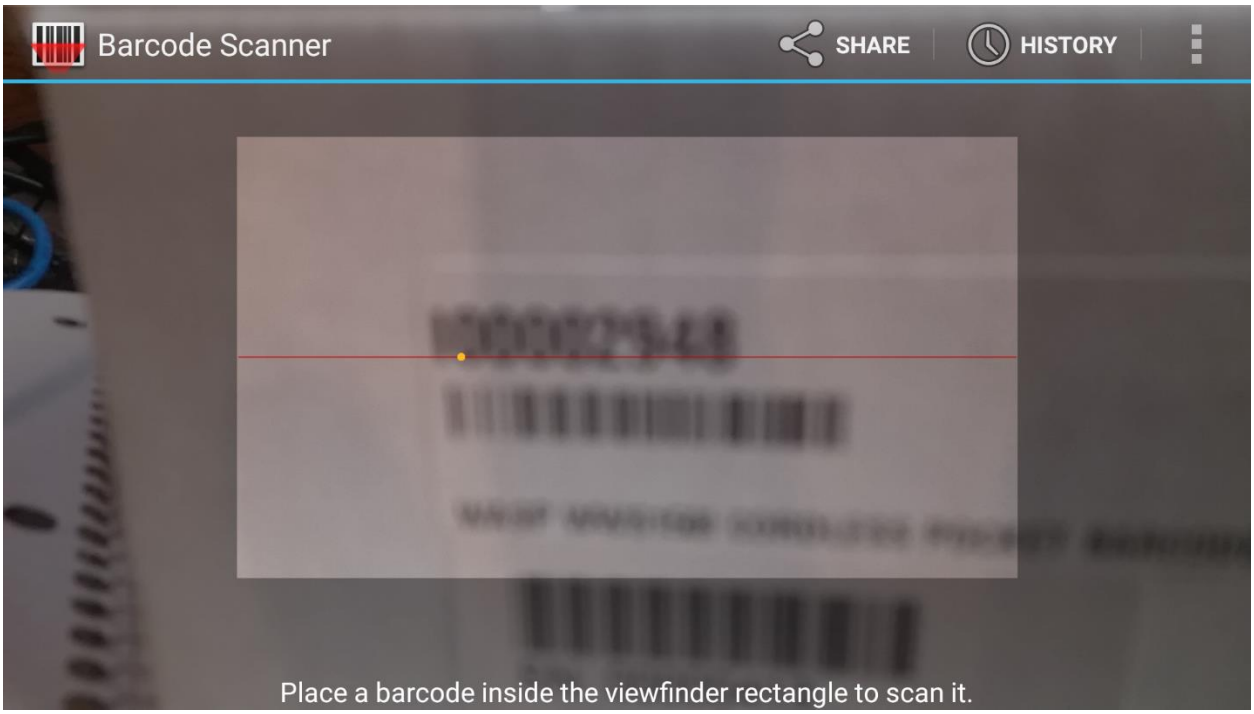
One area this can be extremely useful is distributors supplying their retail customers. The rep can scan the items on the shelf needing replenishment, scan the shelf label if the item is completely gone, or use the flexible search options to find the item in the database. The orders can be submitted as soon as they are done and your office staff can review the orders and start fulfilling them faster.

Phone Camera as a Scanner

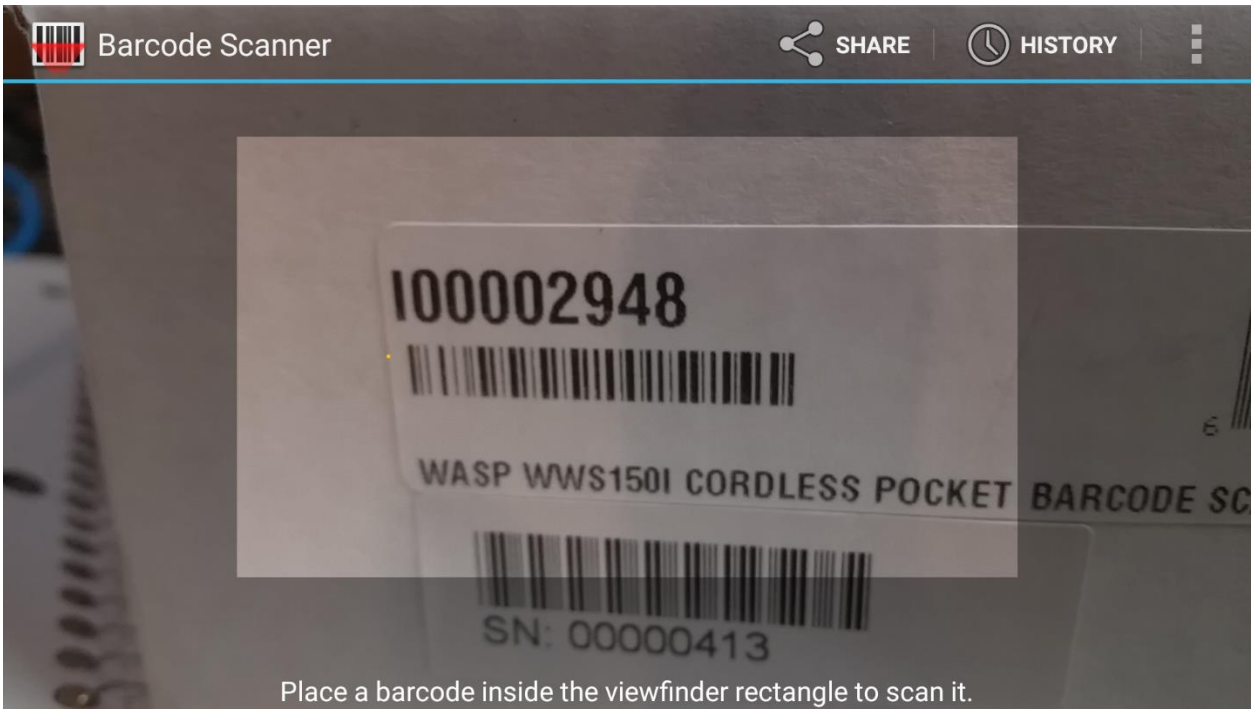
If you don't have a Bluetooth scanner on your device, you can always opt to use your phone camera as a scanner. We highly recommend using a scanner if you're going to do this regularly as they tend to scan more accurately, work better in low light situations, and are less clumsy to scan.

To use this option, you should have indicated that you will be using your phone as a scanner in the Settings file when you set up the application. This can be turned on and off if, for instance, you misplaced your scanning device or perhaps the battery in your scanner has died.

To use your phone as a scanner, while in the barcode field, press the Scan button. You will see your screen change and you'll see the scanner line appear in the visual window. Align this with your barcode field and it will be scanned and returned to the prior screen for you.

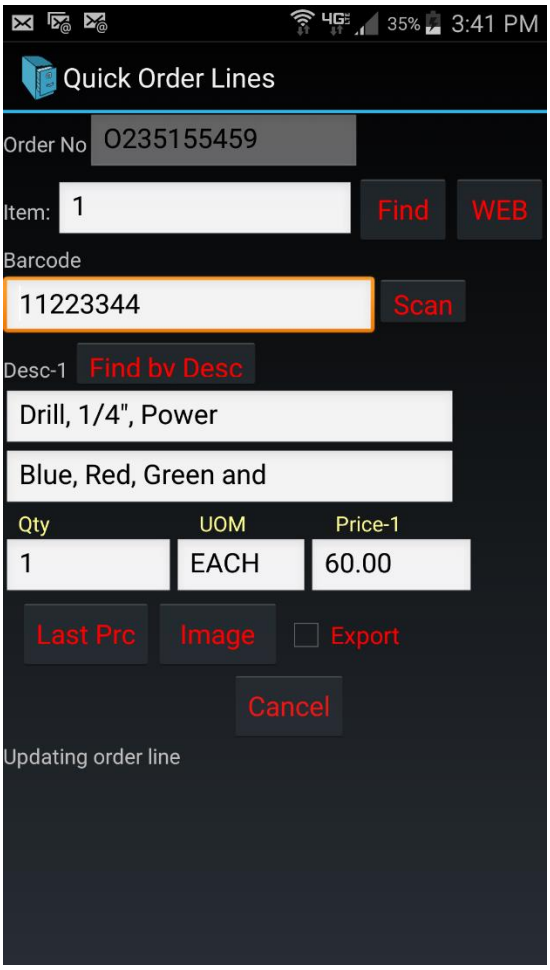


When the phone camera is invoked as a scanner it may be a little blurry as seen above. Adjust the scanner in or out and make sure it is flat to the barcode.



Once the red line is on the item it will perform the scan and return you to the entry screen with the item selected. NOTE: notice this is the box for one of the barcode scanners we've tested with PBS Mobility, WASP WWS150I.

Regardless of how your item is captured, entered, scanned or searched for and selected, the program will place you in the quantity field allowing you to quickly enter a quantity by tapping that field and using your keyboard on the screen:

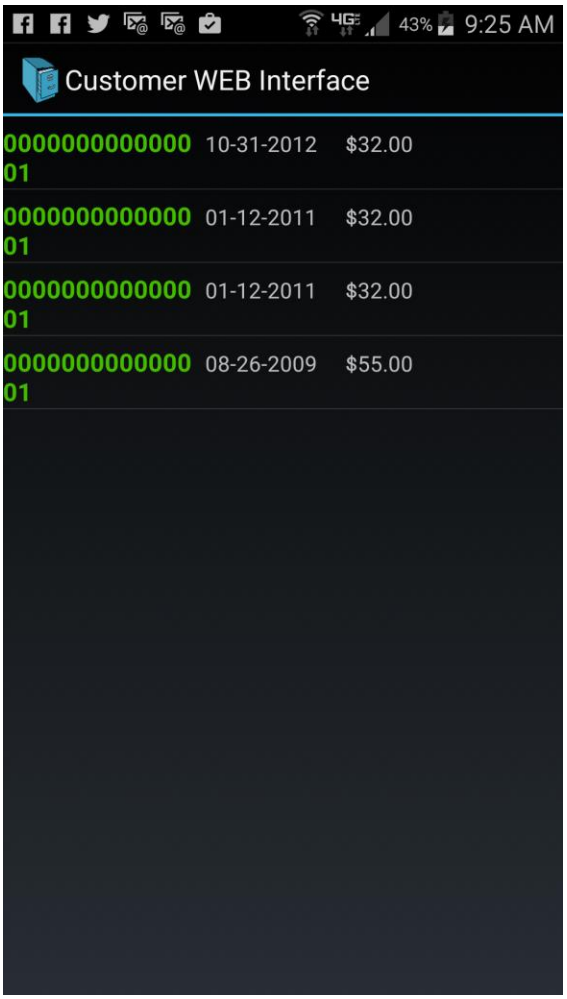


Once you enter your quantity, press Next on your keyboard and you should be asked for the next item on this order.

Here are a few other notes on some of the options you see on the above screen.

The Export check box only has importance if you plan to use the Export functions in PBS Mobility. If you plan to do a direct SQL interface, this can be left alone. If you plan to export records, and wish to include this record in the export, check this box. If you plan to not include it in the export, simply uncheck the box.

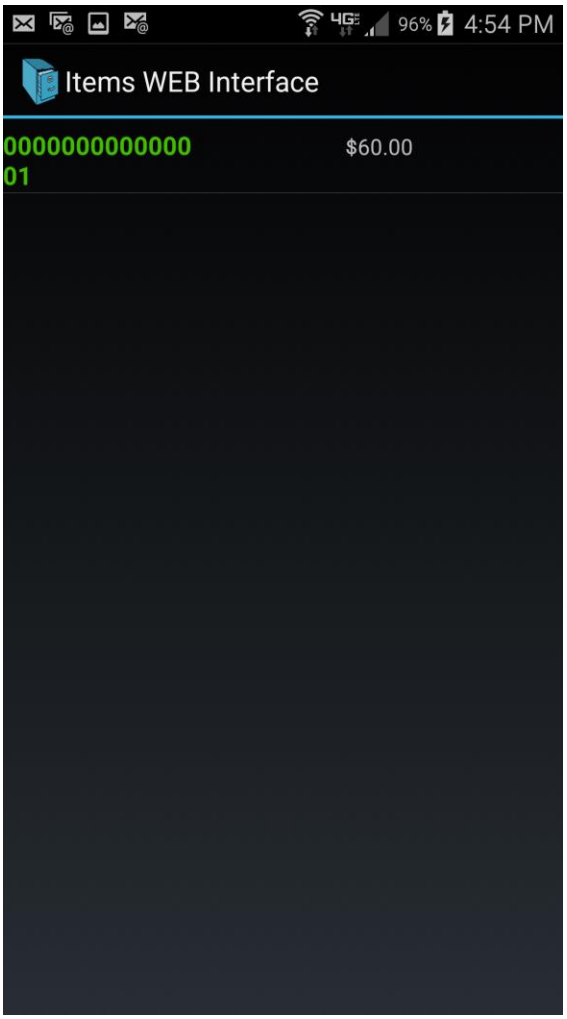
First, the Last Prc button will allow you to see the last few times you sold this item to this customer and at what price.



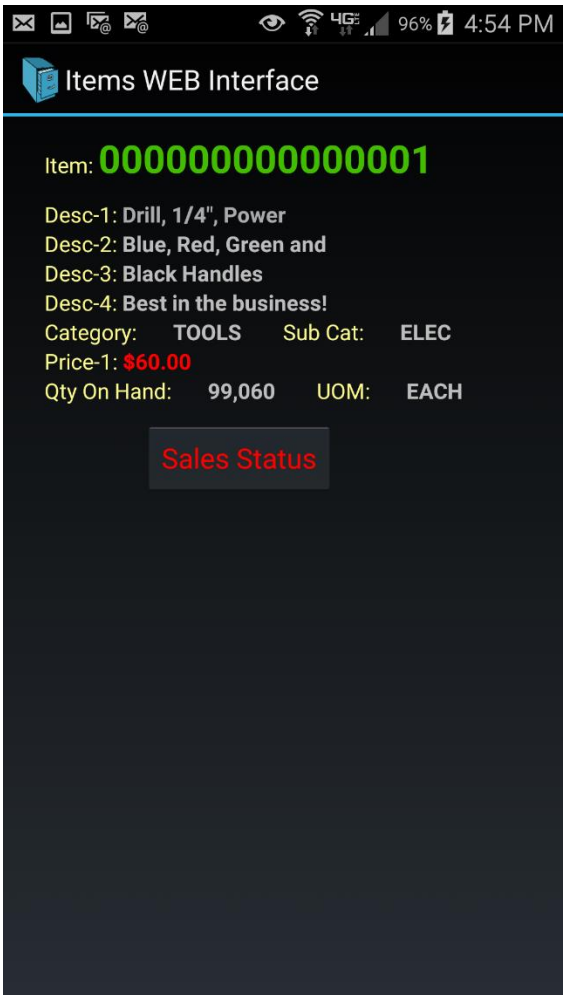
The Image button will allow you to view an image related to the item on your screen. If you tap the Image button, and you have a good internet connection, the device will reach out to the images folder on your web server and will display an image of the item for you.

Next to the Find button is a WEB button. As mentioned in the General section of this document, this can provide you with access to more information on the item than you will have available in the Inventory on your phone. Literally, this button will call out to your PBS SQL database, and retrieve real time data for you.

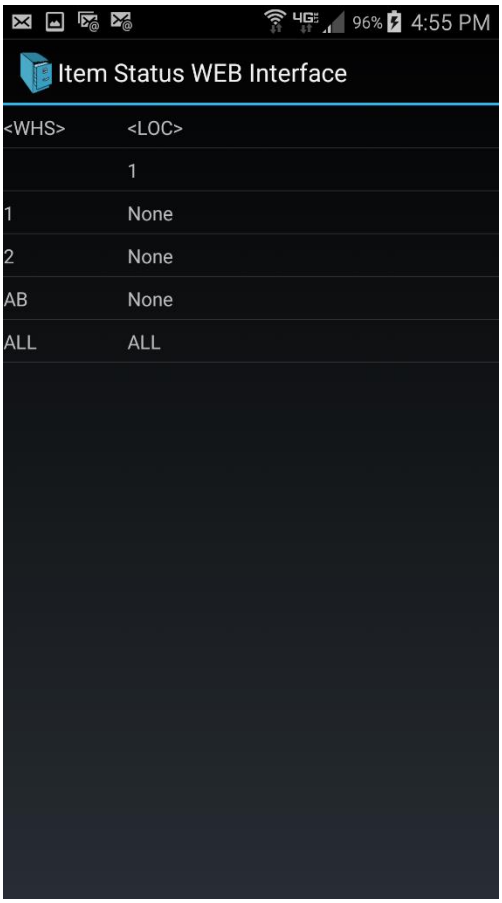
First, it will show you the item with the price 1 from the item master. You can tap that to see more:



If you tap this item it will then pull additional information from the item database in PBS SQL:



Here you will see all four lines of the item's description, it's category, price one, quantity on hand as of the moment you selected this web item and it gives you an opportunity to drill down and get even more information by tapping the Sales Status button:



Now you are presented with the Status records for the item you are viewing. Choose a warehouse to view the status records details:

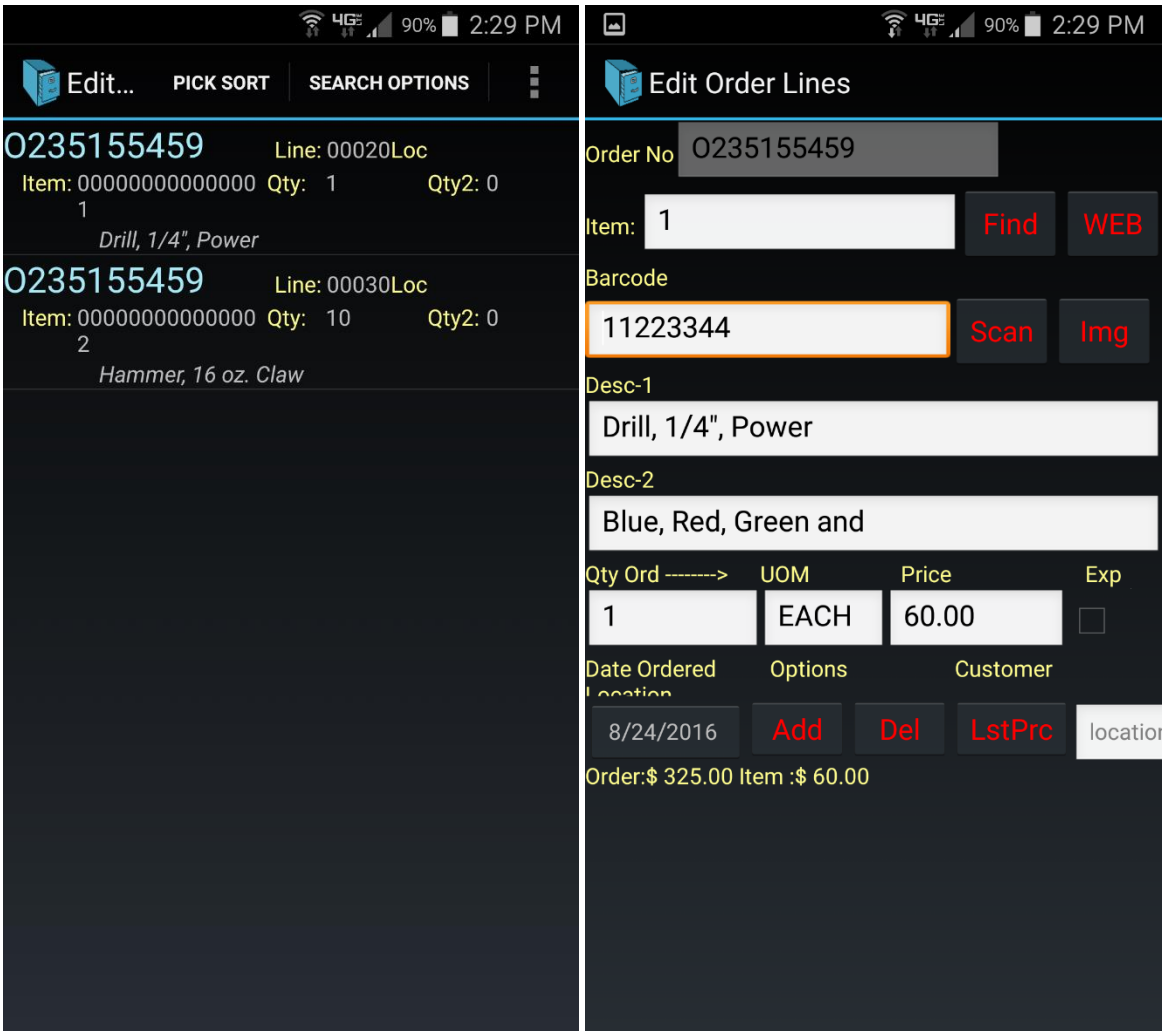
Once you're done viewing this information, press your Back button on your device until you return to the line item you were working with.

This wonderful feature allows you to see the latest inventory for this item, as well as information in which warehouses this may currently be available. This helps you make the best decisions at the time of entering the line.

NOTE: As previously mentioned in this document, the Web feature is only available when you have a good internet connection on your device.

Lines

This button will generally be used to review or edit lines entered using the Quick option. The biggest difference between the two is that when you select the Lines button, you will be presented with a list of lines that have been entered on the order. This will allow you to review them, and even edit them before you export, email or send them to the server for processing:



When you first tap the Lines button, you will be presented with a list of line items already on the order (left above). You can select either one by tapping it with your finger. At that point you will be presented with the actual line information (right above). It's here that you can edit the existing line, view an image related to it (press Img button like the Quick Line Entry), and even add a new one (Add button), delete this line (Del button) or view the most recent prices (LstPrc button) just like the Quick Line Entry.

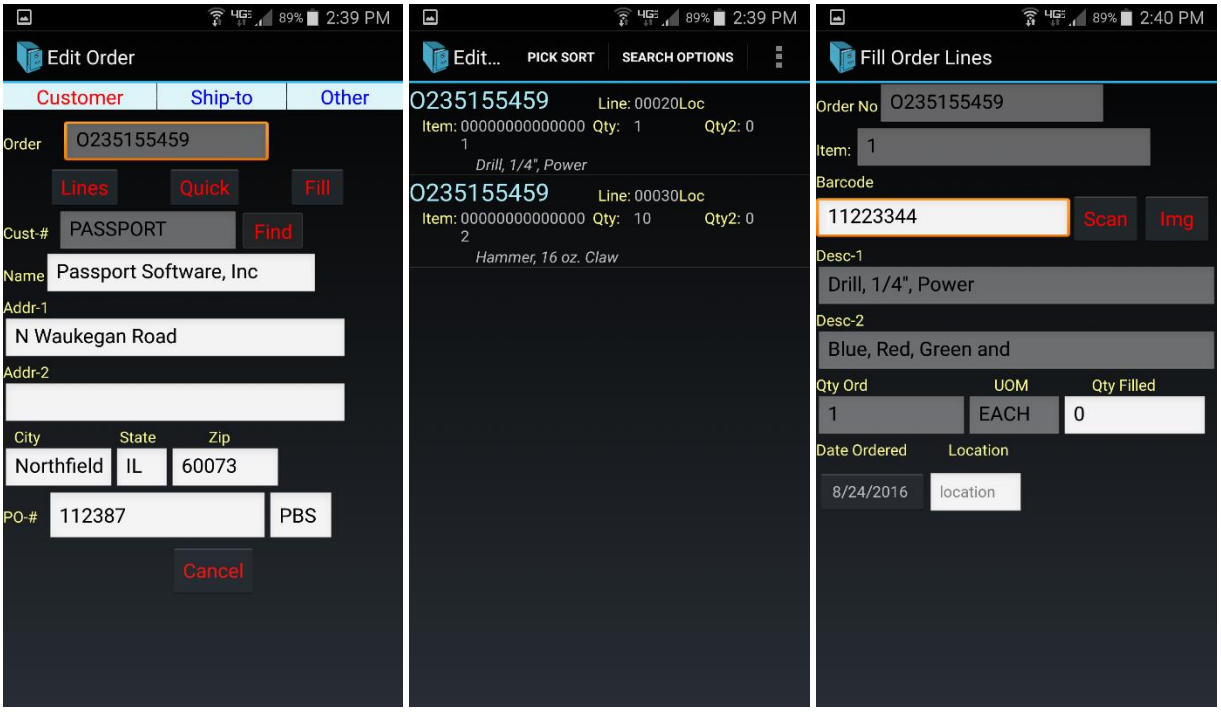
The Quick Line Entry is far faster for entering new lines but if you overlooked adding one, while reviewing your lines you can add another one now.

Again, you will primarily use this portion of the app to review and possibly edit lines already entered into the application.

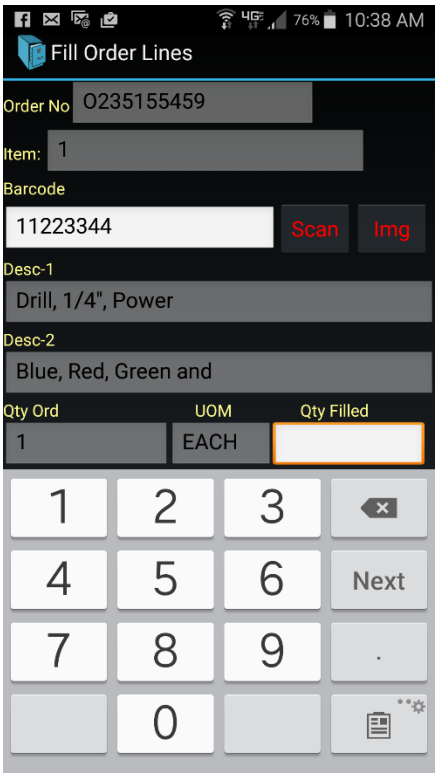
Fill

The Fill button on the main order screen allows you to use this application as a picking app for fulfilling your existing orders. If you've imported your PBS Orders from your PBS SQL database, you will have the opportunity to determine how many items were picked to ship. When you next update your orders, it will update the PBS SQL Line Item's Quantity to Ship to reflect the picked quantity. This will make it easy to reflect the correct quantities on your packing lists.

Once you select your order from the order list, you can then click the Fill button:

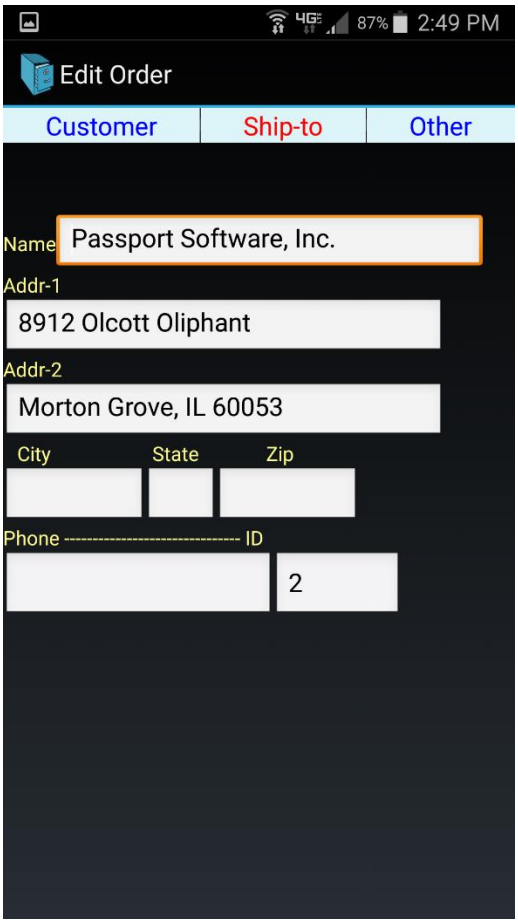


Then select the line you are picking (middle above), and you will be presented with the line information (above right). Now tap the Qty Filled field, and you can enter in the quantity you just picked (below). Once you're done, press your back key and select the next line and repeat until you are done picking the items for this order. If you are picking less than the balance on the order, the remaining balance will be backordered when you interface this order back to PBS SQL.

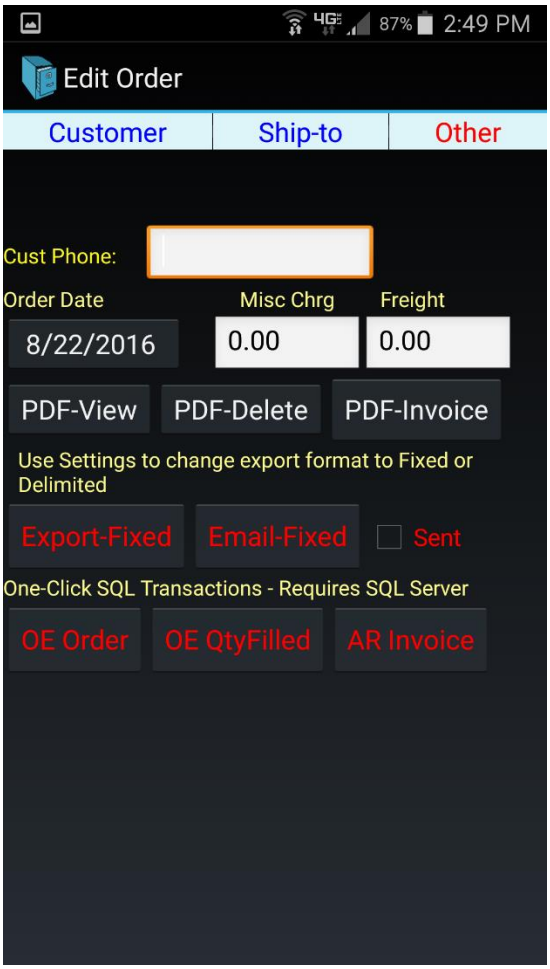


Interfacing Orders to PBS SQL

On your main order screen, you'll see there are three tabs across the top; Customer, Ship-to, and Other. The Customer section is where we've entered the order's header. The Ship-to will show you the ship-to address that was set when we selected the customer from the customer file. If you need to change the ship-to for a one-time delivery, you can do so here:



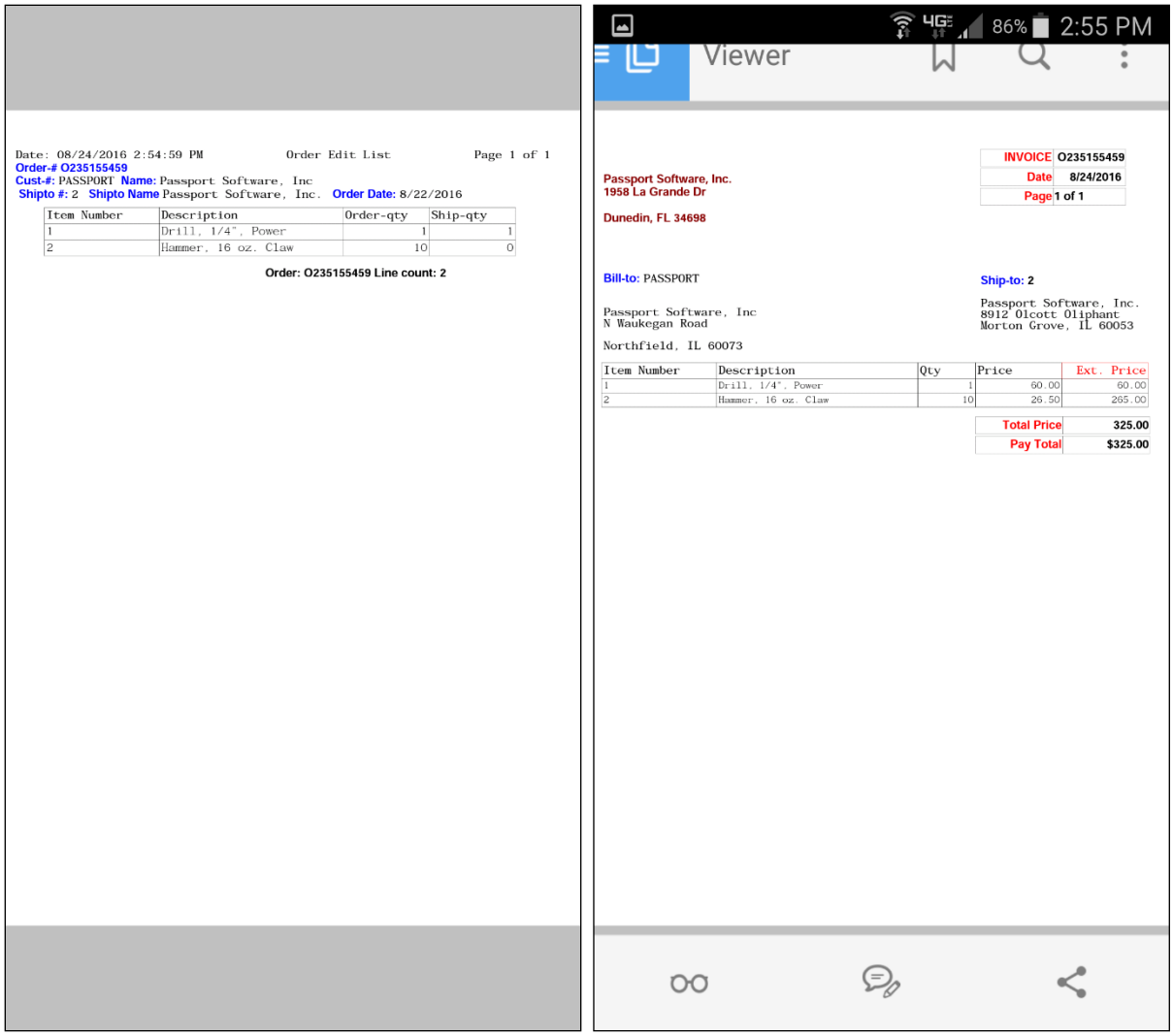
It's the Other option that will allow you to finish up the order and more importantly, send this order to PBS SQL.



First, if there is no customer phone number present, and you'd like to add one, you can do so now. Next, you can add a Misc. Charge or Freight if it's known at this point.

Below these entry fields you will see three buttons related to PDF's. Here's what these allow you to do:

- PDF-View – Here you can view a PDF of the order. This is basically an order acknowledgement. As you may recall, if you set the PDF to be "brief" in the setup, this won't include prices. If you didn't, then prices will be displayed as well.
- PDF-Delete – When you generate a PDF, this is saved to your device. If you would like to remove it, use this button.
- PDF-Invoice – You can tap this button to generate an invoice that can be emailed to your client. Keep in mind, if we are relying on O/E for invoicing, this likely isn't an option you will be working with as some order review/maintenance may be required in O/E once the order is imported.



Date: 08/24/2016 2:54:59 PM Order Edit List Page 1 of 1
Order-# O235155459
Cust-#: PASSPORT Name: Passport Software, Inc
Shipto #: 2 Shipto Name Passport Software, Inc. Order Date: 8/22/2016

Item Number	Description	Order-qty	Ship-qty
1	Drill, 1/4", Power	1	1
2	Hammer, 16 oz. Claw	10	0

Order: O235155459 Line count: 2

Passport Software, Inc.
1958 La Grande Dr

Dunedin, FL 34698

INVOICE O235155459
Date 8/24/2016
Page 1 of 1

Bill-to: PASSPORT

Passport Software, Inc
N Waukegan Road

Northfield, IL 60073

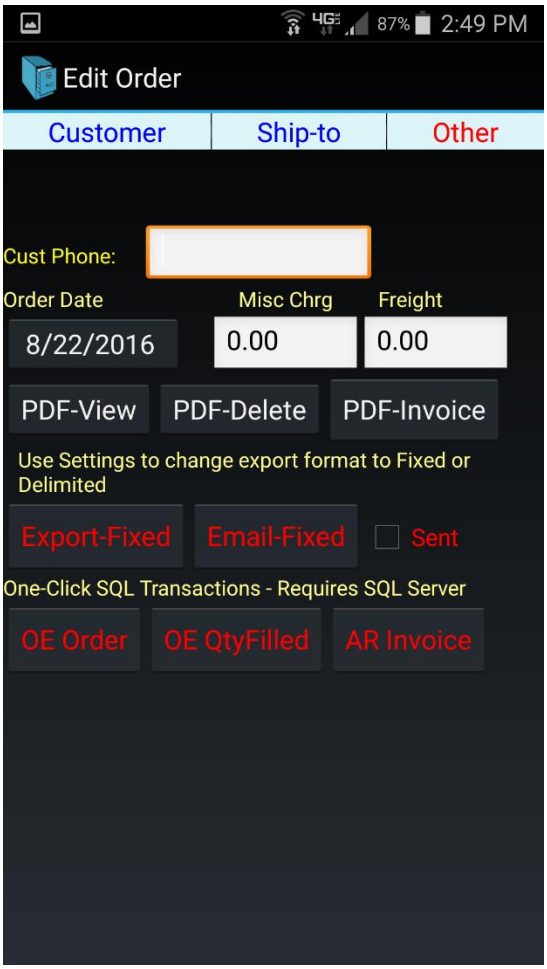
Ship-to: 2

Passport Software, Inc.
8912 Olcott Oliphant
Morton Grove, IL 60053

Item Number	Description	Qty	Price	Ext. Price
1	Drill, 1/4", Power	1	60.00	60.00
2	Hammer, 16 oz. Claw	10	26.50	265.00

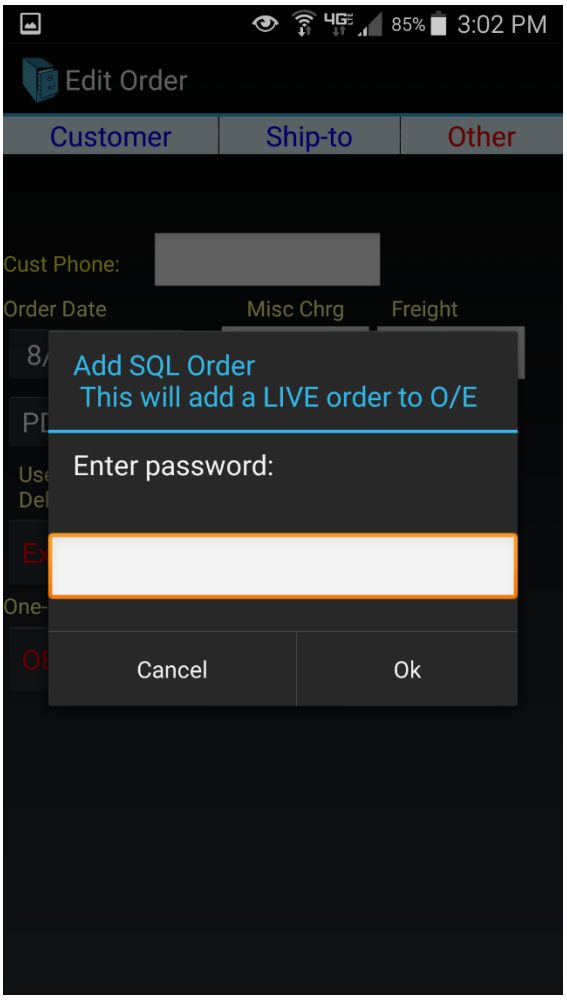
Total Price 325.00
Pay Total $325.00

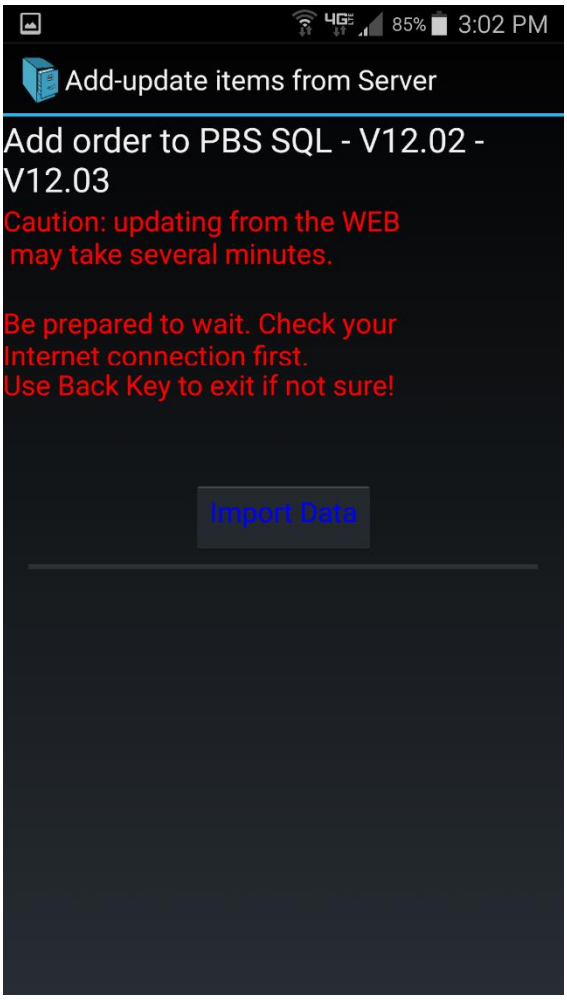
Let's take a look at how orders are submitted for processing. There are multiple options, though our first focus will be on how to send these orders directly to the PBS SQL database.



Order Entry Orders

If you are using PBS SQL Order Entry (O/E), when you are done with your order all you need to do is tap the OE Order button above. You will be asked for your password for submission (your PBS Mobility support assistant will have provided this to you) and then you simply press Import.





Once the process completes, you will hear an audible beep and then be returned to the Other screen of the order. At that point, your order has been successfully submitted to the PBS SQL database and is available immediately for review by your inside sales team. If there were any problems with the submission, you would have been notified by the application and returned to the prior screen.

NOTE: As you can see on the screen above, an internet connection is necessary at this time. This function will communicate securely with your PBS SQL database across the internet connection.

OE QtyFilled

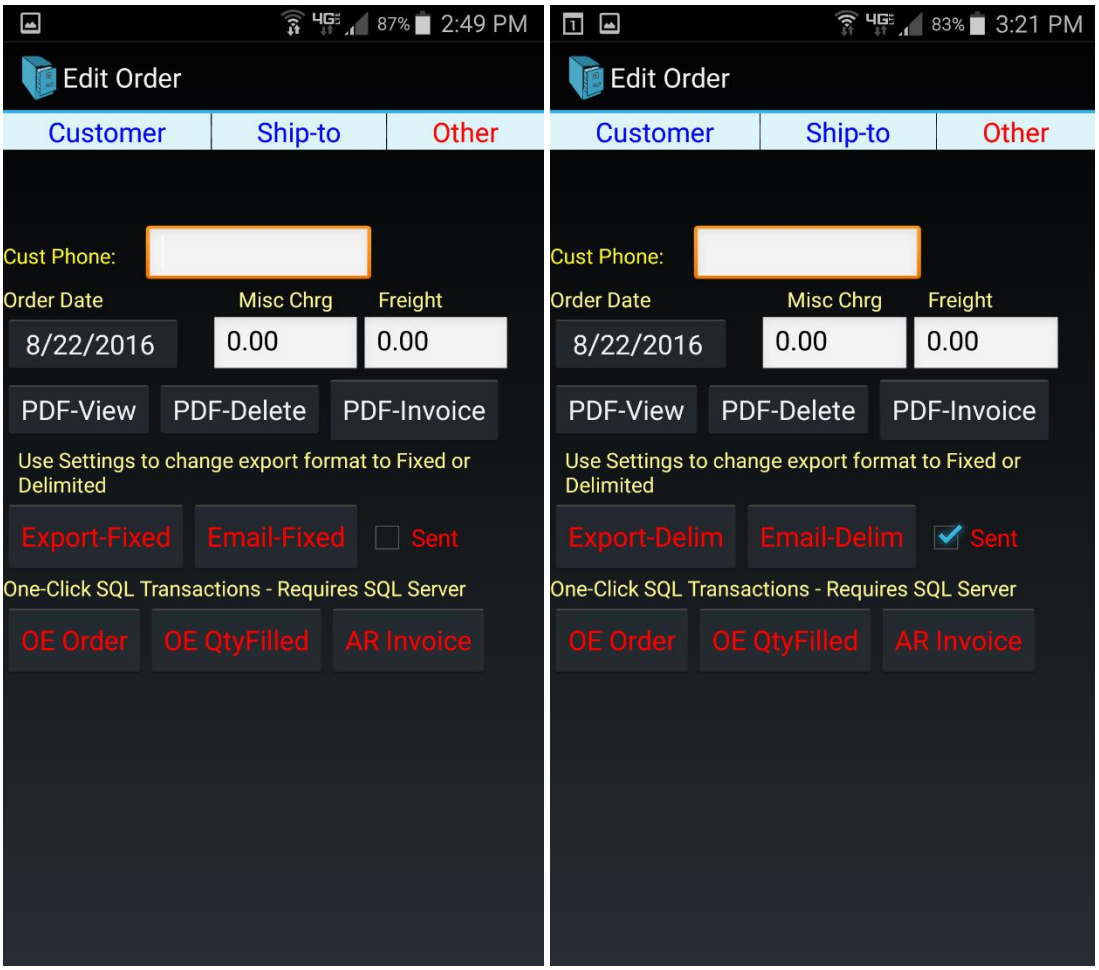
This process is very similar to the OE Order function though it's updating different information in the database. This relates to the Fill button we covered earlier in this document. Specifically, when you press this button, provide your login, and then click Import Data (same process as described above), instead of creating orders, this function will update your Quantity to Ship in the line items on the order based on the picked quantity you reported as you picked the orders.

This is a great way to allow your staff to pull orders and report back exactly what they picked to the system. The picked quantities will then be reflected on the packing list when Shipping prints it.

AR Invoice

This function is for PBS SQL users who don't use the O/E function, but instead use the AR Invoice function. The AR Invoice button will follow the same flow as the OE Order or OE QtyFilled but instead, will create an invoice for you in the A/R invoicing. It will also take into account the Goods and Services files as appropriate.

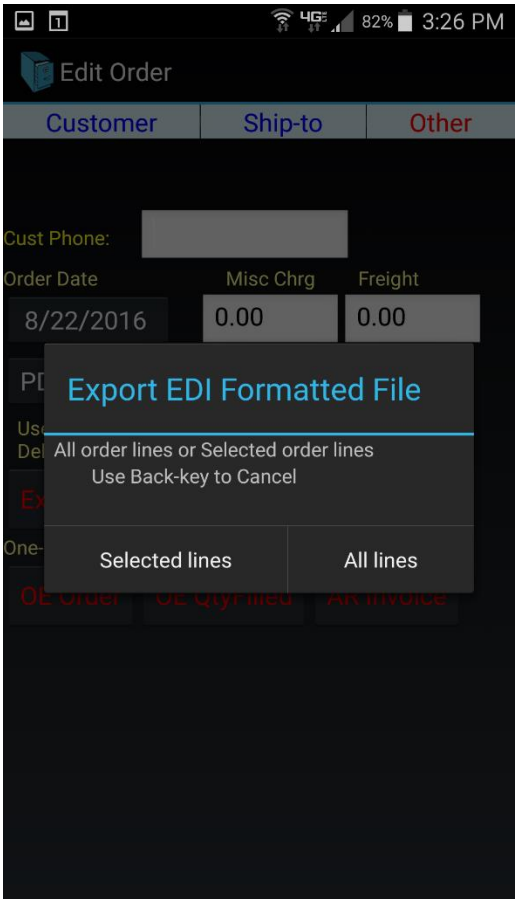
This covers the typical usage of the direct interface between PBS Mobility and PBS SQL. As you can see, the interface is quite easy to use and is very direct and also quite fast. There are some additional options we should cover below.



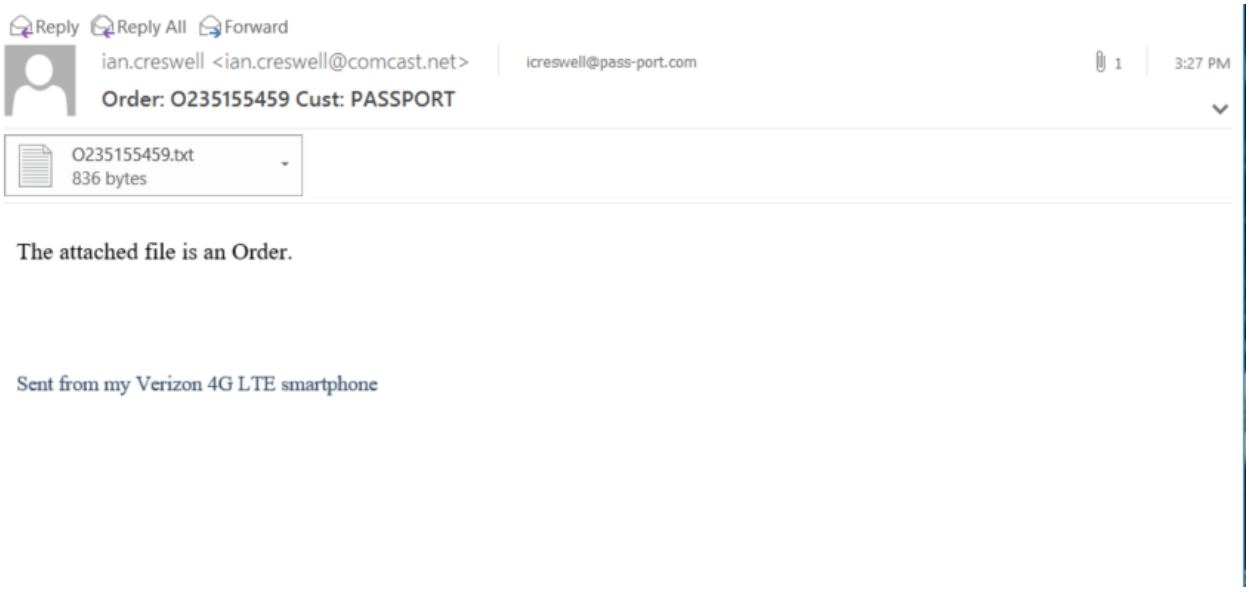
If you would prefer to not directly import your orders into PBS, but would rather have your outside sales reps submit those orders via email so that your inside sales reps can review them, then enter the orders into PBS SQL manually. You can use the Email-Fixed or Email-Delim (this button is determined by your PBS Mobility settings) or simply click on PDF-View and email the PDF document. You will have already set up an email address for submitting your orders in this setting.

When you press the Email button, you will be asked if you wish to send selected lines or all lines. If you choose selected lines, only the lines that had the Export box checked will be sent. If you choose all lines,

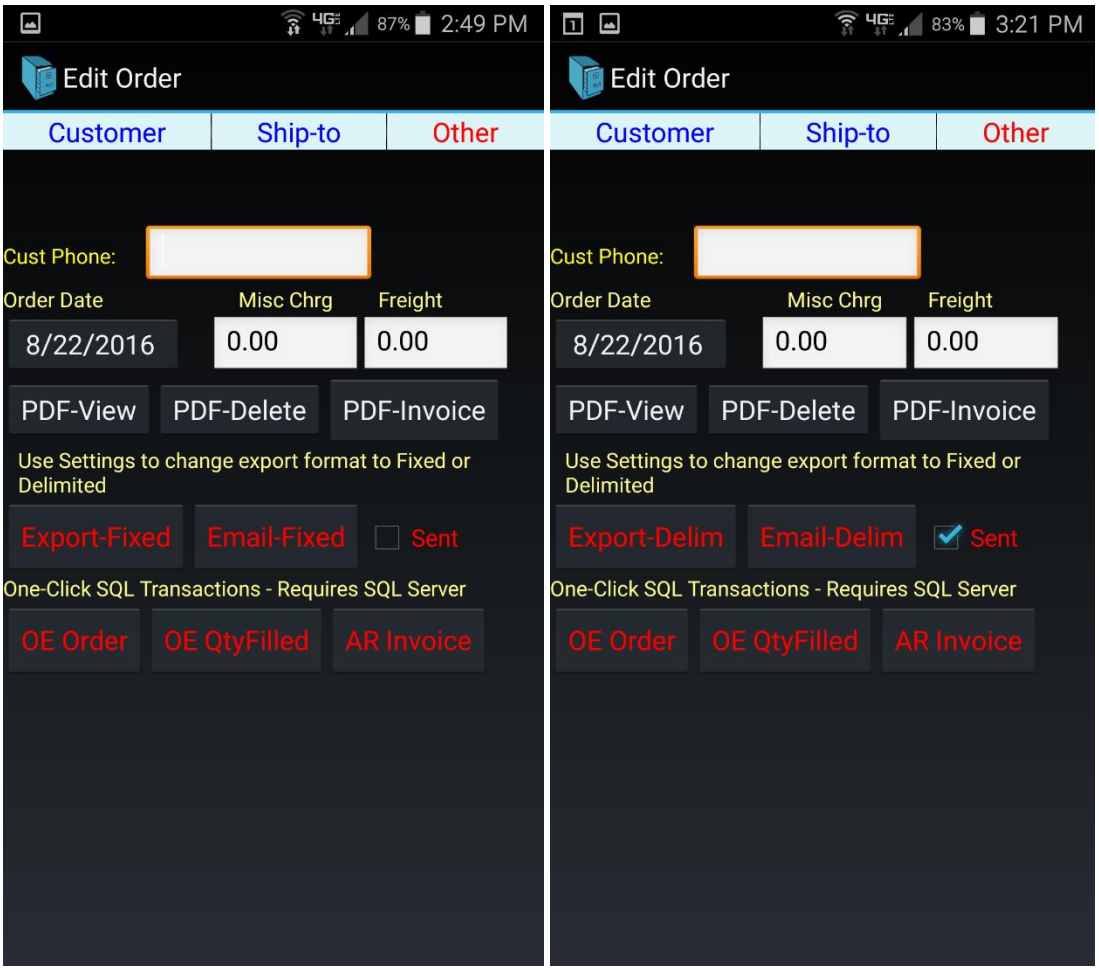
then the entire order will be sent to the email address. Once you choose, you will be asked which email app you wish to send this with, and then it will open up an email all formatted and ready to send. You can certainly add your own notes if you prefer.



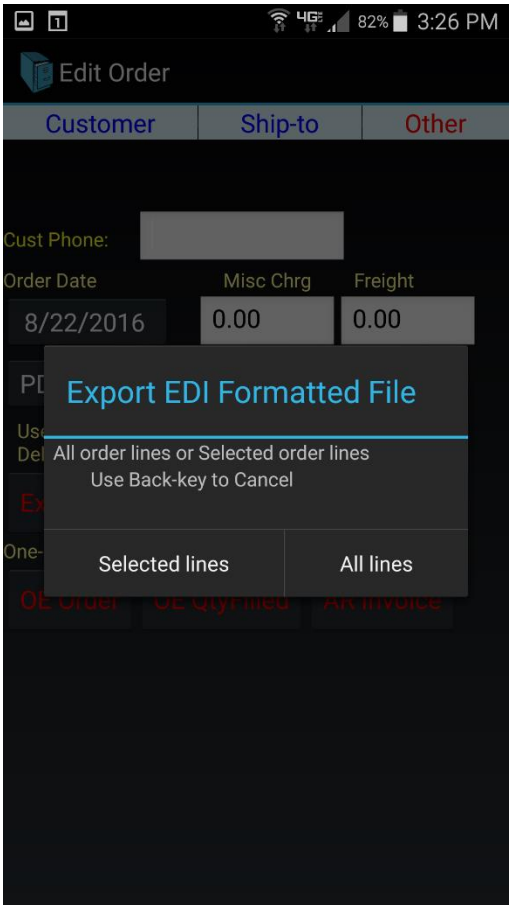
The email sent will look similar to this (note the attachment):



The last option is to simply export the file using the Export button (Fixed or Delim) and then send the results back to your staff or directly to the server via your ES File Manager tool.



You will once again be asked which lines you wish to export though you will only see a brief message appear on the display once you select your option indicating the export is complete:

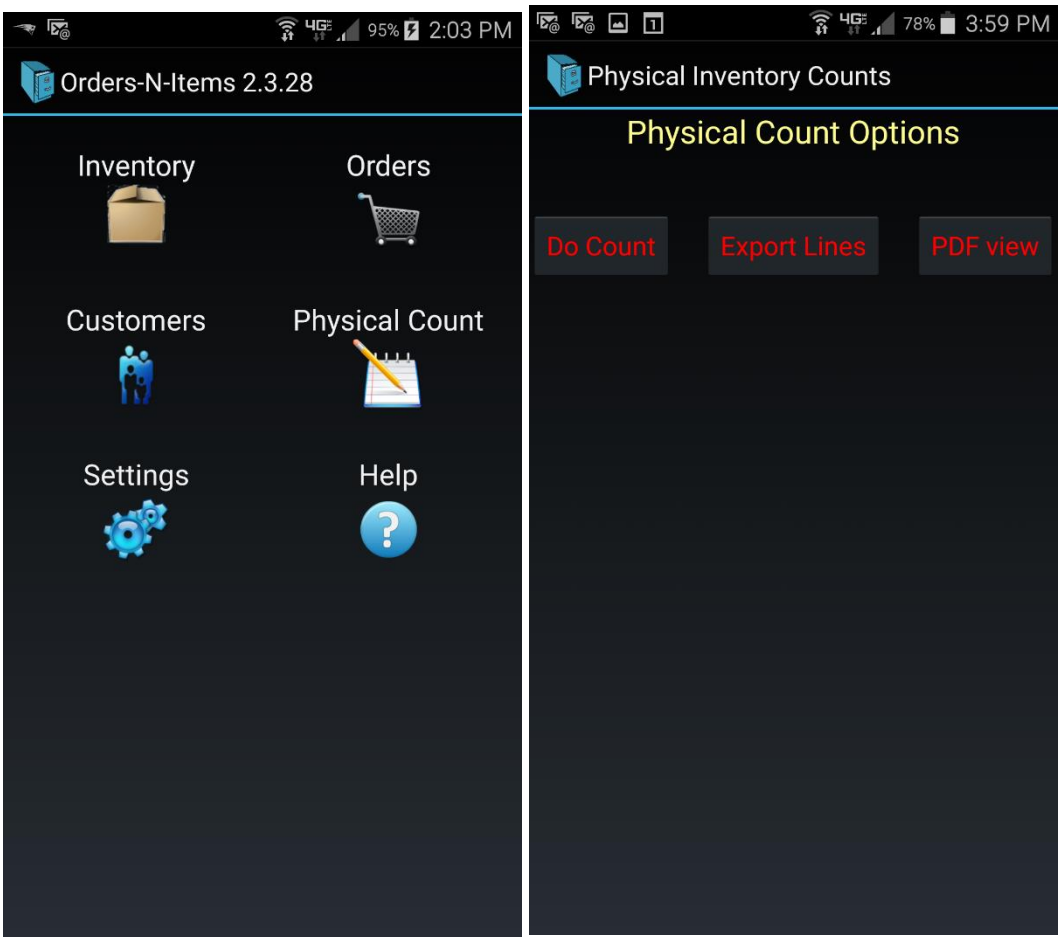


Physical Count

The Physical Count function is just what it indicates, it's an app that allows you to enter physical counts on your phone that can later be exported and sent to your PBS database and imported through a special import function.

This section will cover how you enter counts and export the results.

First, tap on the Physical Count button on the main PBS Mobility screen:

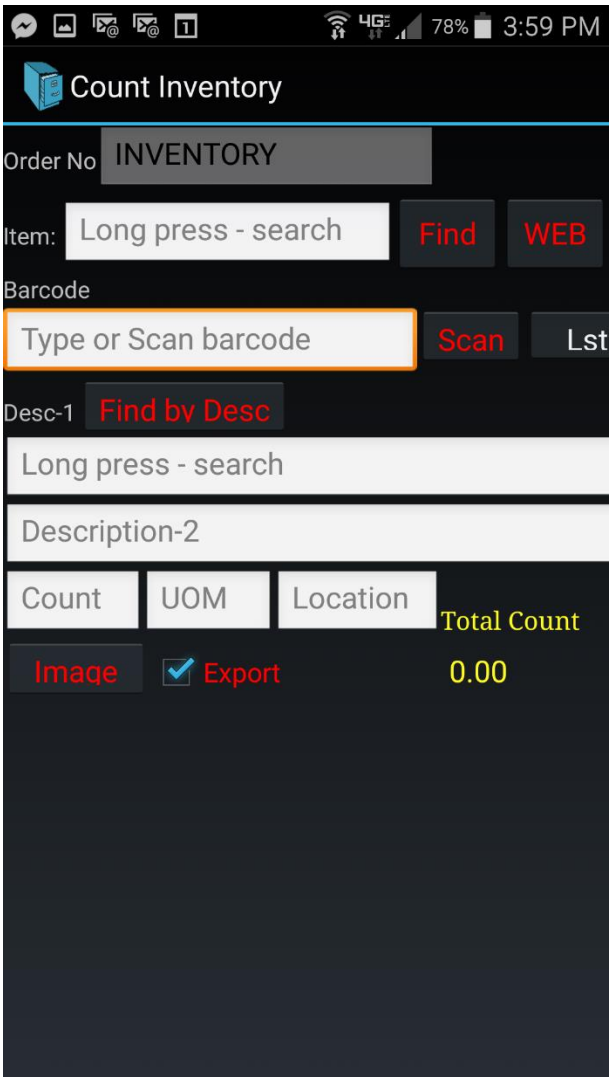


You will be presented with three options when you do (right above):

- Do Count – This is where you will actually enter the physical count records.
- Export Lines – This is the tool you will use to export your counts when you are done.
- PDF View – This is where you can review a report of your counts prior to exporting them.

Do Count

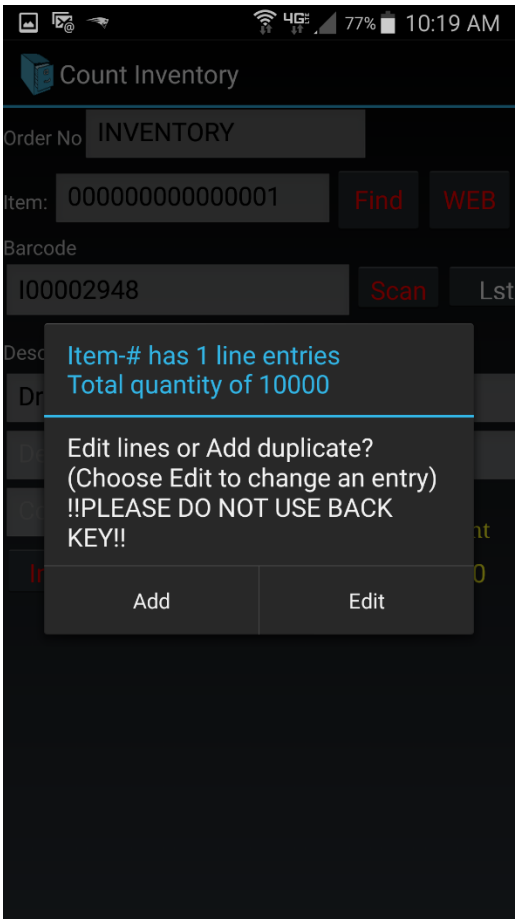
Before you can use the other two options, you must first enter counts into your system. Tap the Do Count button and you'll see the following screen:



This is quite simple to use. You can scan, enter or search for the item you are counting just like the other areas of the system (see the Search Options section of this document under General).

Once you've identified your item, enter your count and location if applicable, and press the Next button on your phone's keyboard and you will be ready to enter your next record. If you're counting the same item in different locations near one another, you can press the Lst button to bring up the last item you counted and then you can enter in the quantity and new location. This can be a nice time saver when you have the same item in different locations in the same general area of the warehouse.

NOTE: If you try to count the same item twice on the same device, you will receive a message asking if you wish to add to the existing count or add a new record. This can help reduce the risk of duplicate entries and errors.



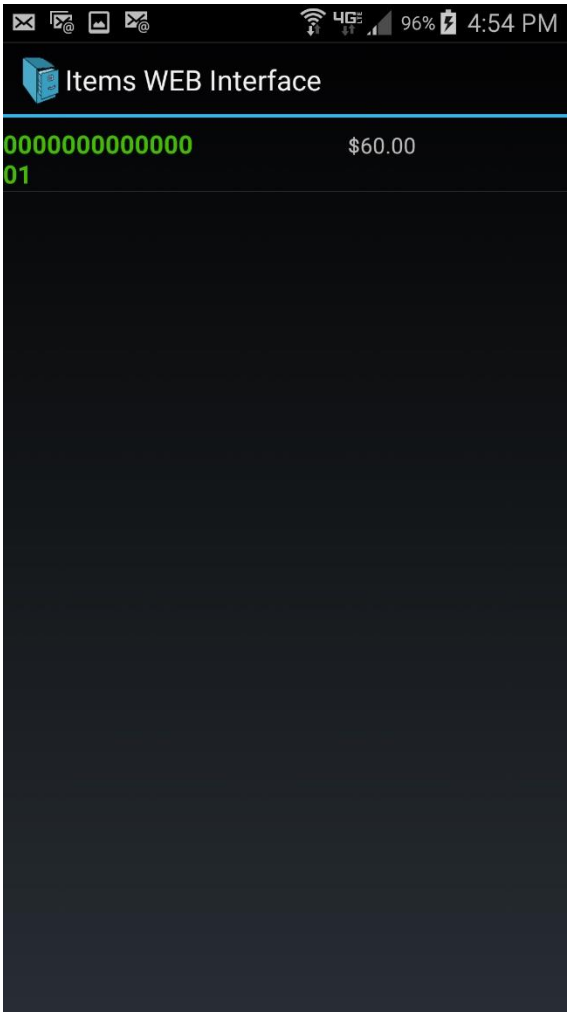
The other options include the ability to view an image related to the item. The image will be stored on your server in the Image folder you specified in the setup of PBS Mobility. If an image exists, it will be displayed for you. If not, you will be notified that there is no image available for you.

The Export box will be checked automatically. It's important that this box remain checked if you plan to export these records and import them to the PBS SQL physical counts file.

You may also view the Web information on this item which provides you with more details on the item and real time information (current information from the PBS SQL Database).

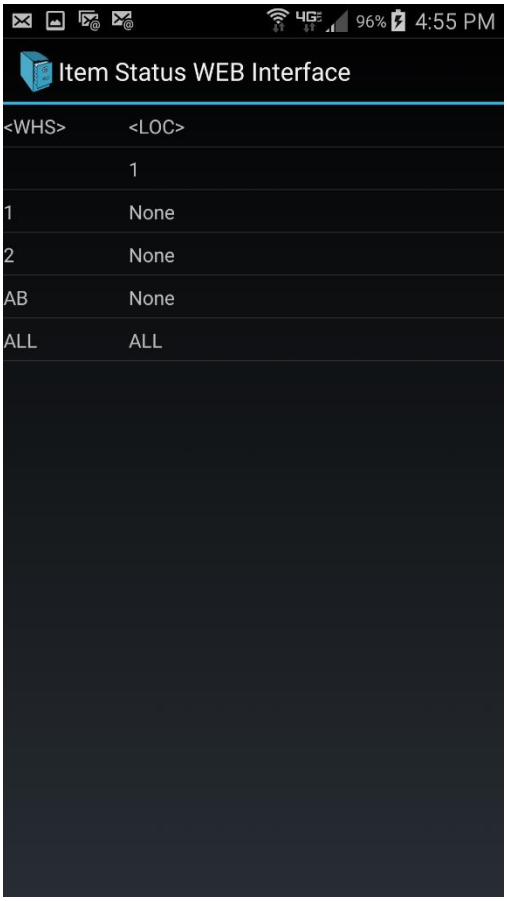
Next to the Find button is a WEB button. As mentioned in the General section of this document, this can provide you with access to more information on the item than you will have available in the Inventory on your phone. This button will call out to your PBS SQL database, and retrieve real time data for you.

First, it will show you the item with the price 1 from the item master. You can tap that to see more:



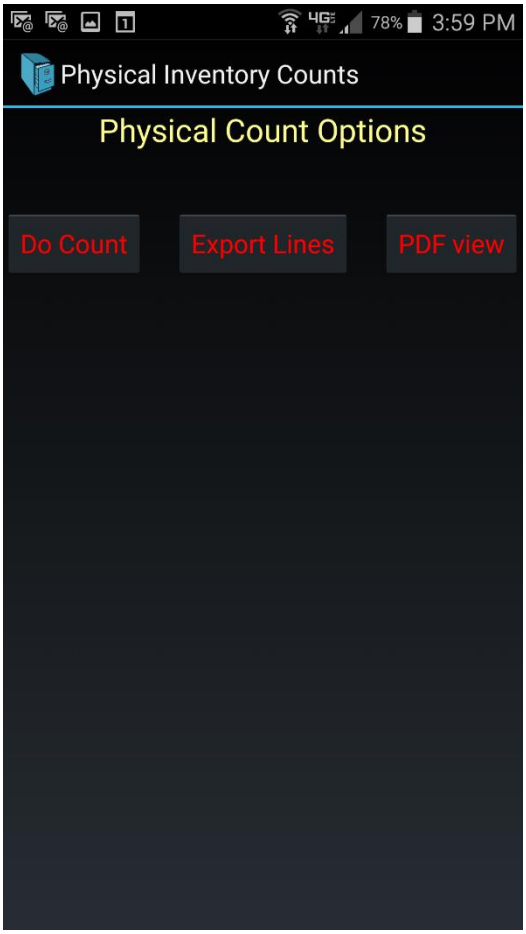
If you tap this item it will then pull additional information from the item database in PBS SQL:

Here you will see all four lines of the item's description, it's category, price one, quantity on hand as of the moment you selected this web item and it gives you an opportunity to drill down and get even more information by tapping the Sales Status button:



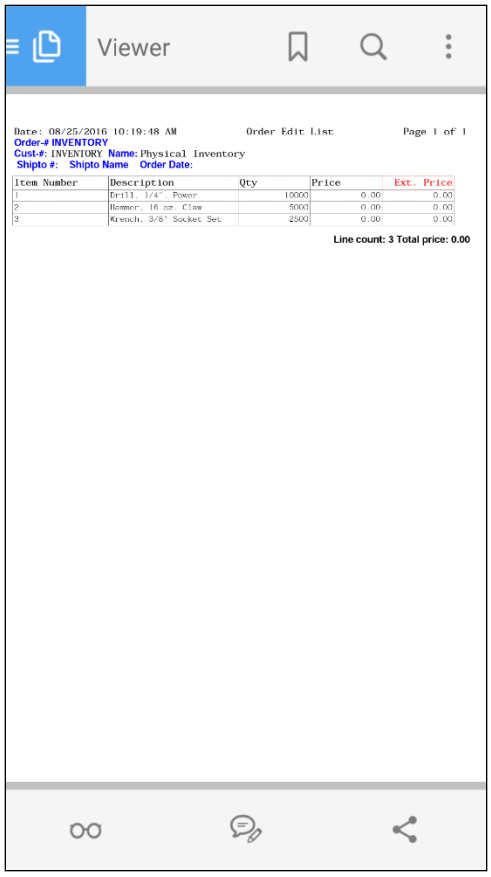
You are now presented with the Status records for the item you are viewing. Choose a warehouse to view the status records details:

Once you're done viewing this information, press your Back button on your device until you return to the line item you were working with.



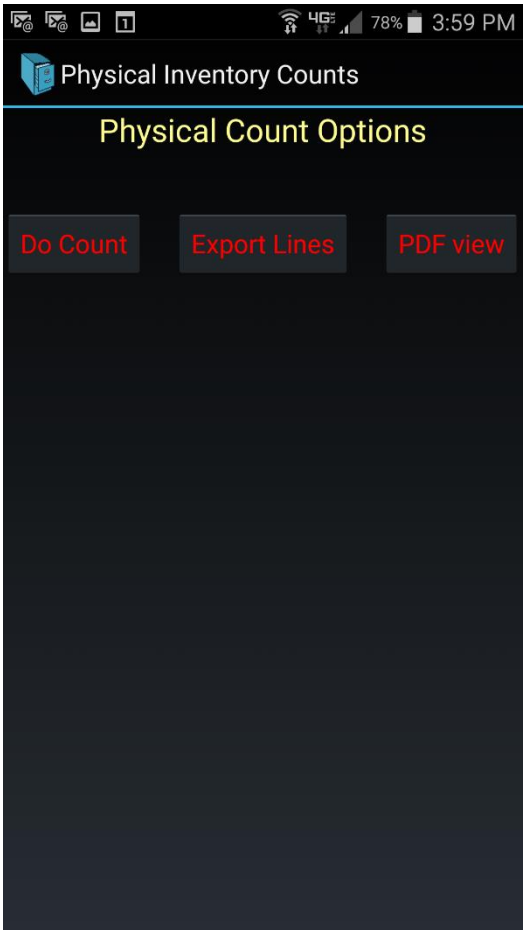
PDF View

Once you've entered your physical counts, you may wish to review them before you export them and send them to the server for processing. To do so, back on the main Physical Counts screen, press the PDF View button and your counts will be presented to you in a PDF document. Below are examples of this displayed both with the phone upright and reoriented for a landscape view to make it more readable:


Viewer
Date: 08/25/2016 10:19:48 AM
Order Edit List
Page 1 of 1
Order-# INVENTORY
Cust-#: INVENTORY Name: Physical Inventory
Shipto #: Shipto Name Order Date:
Item Number
Description
Qty
Price
Ext. Price
1
Drill, 1/4", Power
10000
0.00
0.00
2
Hammer, 16 oz. Claw
5000
0.00
0.00
3
Wrench, 3/8" Socket Set
2500
0.00
0.00
Line count: 3 Total price: 0.00

Viewer
Order-# INVENTORY
Cust-#: INVENTORY Name: Physical Inventory
Shipto #: Shipto Name Order Date:
Item Number
Description
Qty
Price
Ext. Price
1
Drill, 1/4", Power
10000
0.00
0.00
2
Hammer, 16 oz. Claw
5000
0.00
0.00
3
Wrench, 3/8" Socket Set
2500
0.00
0.00
Line count: 3 Total price: 0.00

Export Lines



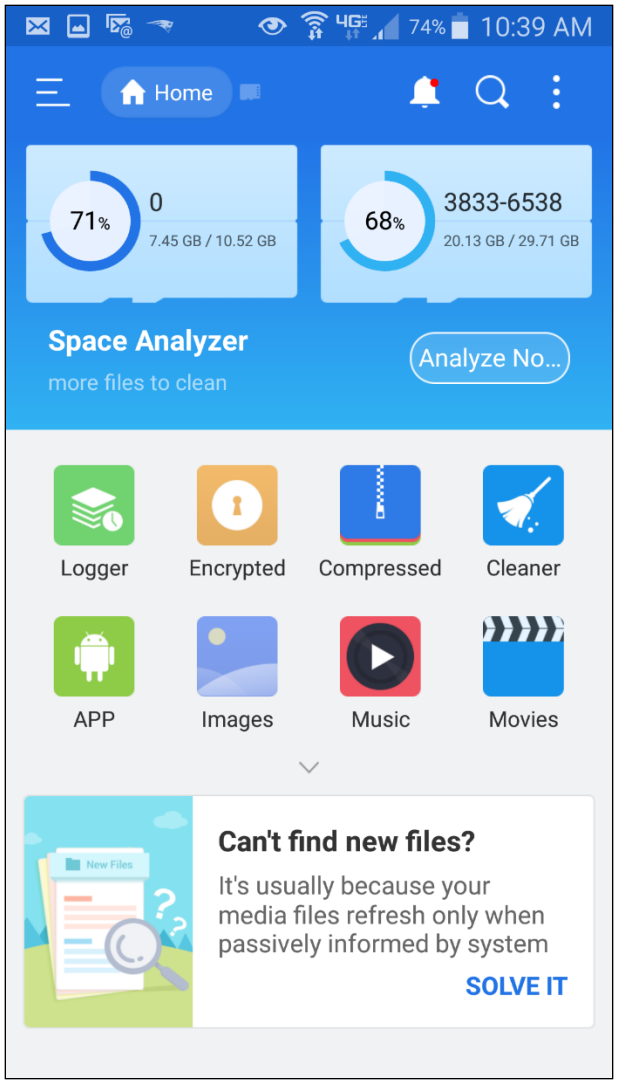
Once your counts are complete, and you've reviewed them and determine that they are ready to post to your server, you can now export your counts and pass them to your server. Tap the Export Lines button on the main Physical Count screen. You will briefly see a message that indicates "Export Completed" towards the bottom of your screen.

At this point, depending on how you choose to use ES File Manager, you can now send the file to your server or it can be retrieved and imported to your PBS SQL database and processed.

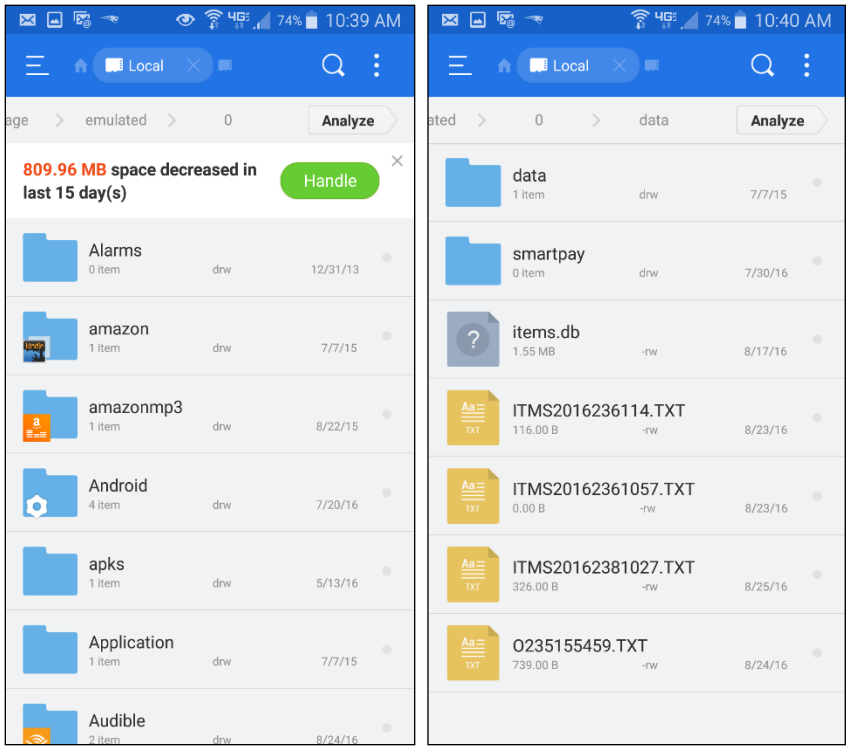
ES File Manager

We've referred to moving files around with the ES File Manager. This is a tool that made for easy management of files on your Android device. This isn't intended to provide complete documentation on the tool but to provide you with a few basics and some topics to research and discuss with your PBS Mobility support specialist.

As you've seen throughout this document, the ES File manager is accessible from a few areas of PBS Mobility but it will also be accessible from your list of installed apps on your Android device. In either case, when you first launch it, you will be presented with a screen that looks something like this (may vary depending on the version installed):



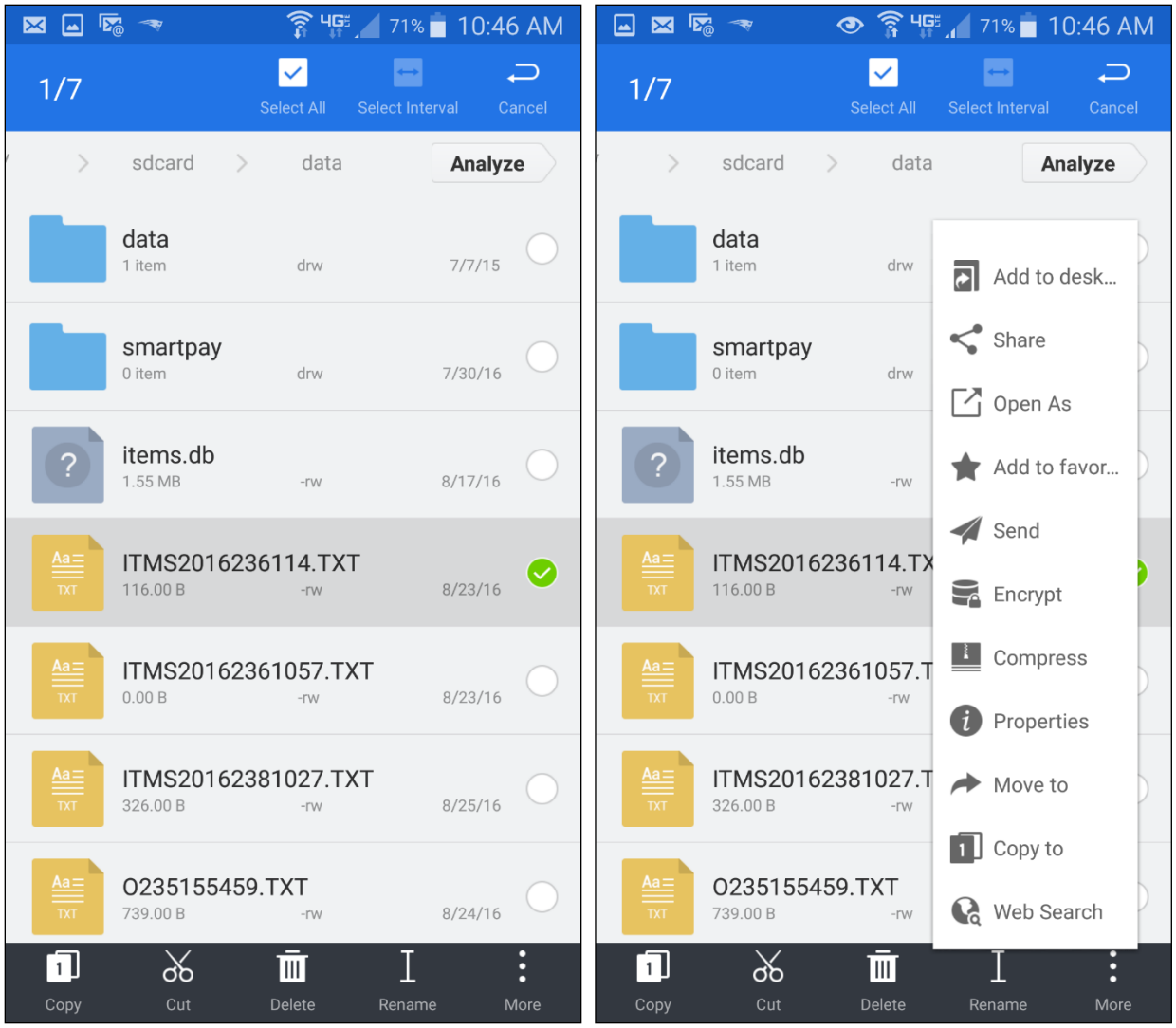
Depending on where you decided to store your data in the setup, you will tap either the drive #0 to the left (this is the phone's internal storage), or the one next to it, 3833-6538 to navigate to your external storage (MicroSD card in your phone).



In the above left, you will see a list of folders. Scroll down that list until you find the folder labeled Data and then tap on that. The screen on the right shows you the Data folder and its contents, which is the data and export files for PBS Mobility. In the top level, you see there are four TXT files. These contain the data that we've exported along the way and they can now be:

- Emailed
- Direct transferred via the network (assuming you've set yours up to do so)
- Using the FTP server option in ES File Manager, your IT manager can reach out to your device and grab the files directly with no interaction from you.

NOTE: Notice in the image to the left below that the menu appears on the bottom of the display. When you tap More, another menu opens up (right) with many options for moving your files.


71% 10:46 AM
1/7
Select All
Select Interval
Cancel
sdcard
data
Analyze
data
1 item drw 7/7/15
smartpay
0 item drw 7/30/16
items.db
1.55 MB -rw 8/17/16
ITMS2016236114.TXT
116.00 B -rw 8/23/16
ITMS20162361057.TXT
0.00 B -rw 8/23/16
ITMS20162381027.TXT
326.00 B -rw 8/25/16
O235155459.TXT
739.00 B -rw 8/24/16
Copy
Cut
Delete
Rename
More
Add to desk...
Share
Open As
Add to favor...
Send
Encrypt
Compress
Properties
Move to
Copy to
Web Search