Mobile Quick Reference Guides
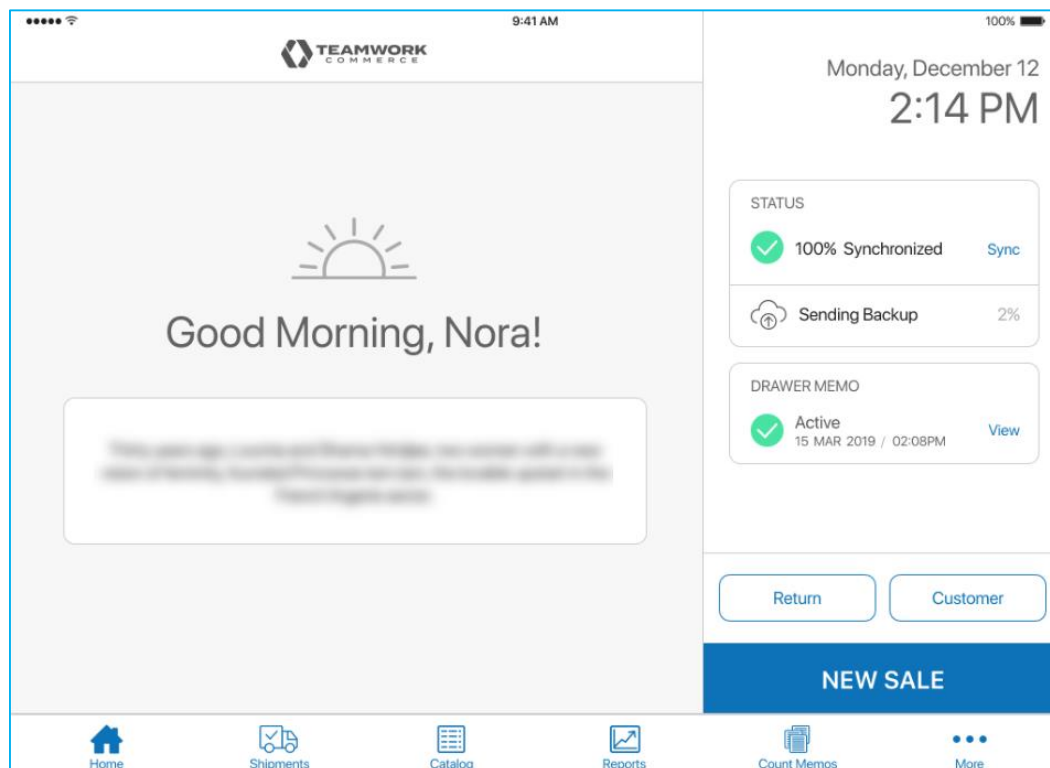
Version 6.15

Orientation to POS

If you are running POS Pro for the first time or you have logged out, you will need to log in.

To do so, in POS Pro:

1. Find and then tap your username.
2. Enter your password and tap **Log In**.

Alternatively, you can type in your username and password in the corresponding fields and then tap **Log In**.

3. Tapping **Log In** will open the app's **Home Screen**:

To open a POS area (for example, **Catalog** or **Shipments**), tap the required button in the navigation panel at the bottom of the screen.

Alternatively, tap **More** in the bottom right corner. In the fly-out menu that opens, tap the required area.

Additionally, in the fly-out **More** menu, it is possible to:

- add or change your photo
- update your password
- open the POS **Settings** area
- log out

Checking item availability for company

The information on item quantities that are available for the whole company can be found in the **Availability** area of POS Pro. To access the area:

1. Tap **Catalog** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings). Tapping **Catalog** opens the **Item Search** screen.

2. Search for the required item.

There are two ways you can search for an item:

a. In the **Item Search** field, enter the item's UPC, PLU, CLU, or your item's description.

b. Tap the **barcode scanning** icon to scan the item's tag.

Once the input has been made, the items matching the search criteria will display. You can sort to find the required item by tapping any of the columns' headers.

PLU	UPC	Category	Subcategory	Store Description	Color	Size	Offer Price
123456	1234567890120			MELLAH Long Flared Dress	Navy	SML	$49.99
123457	1234567890120			MELLAH Long Flared Dress	Navy	MED	$49.99
123458	1234567890120			MELLAH Long Flared Dress	Navy	LRG	$49.99

3. Tap the required item to open the **Availability** (Real Time Availability, or RTA) view. On initial opening, the top grid in **Availability** displays quantities for the initialized location.

To see item quantities for the whole company, in the **Locations** list at the bottom, tap **Get Other Locations**:

Code	Location	Available	Held	Commit	On Hand	Incoming	Distance ▲
100	Clearwater Store	14	0	1	13	20	0
101	Tampa Store	18	0	0	18	50	12

Once the list of all store locations appears, tap the **Company** row.

Additionally:

- From **Availability**, you can print tags. To do so, tap **Print Tag** in the top right corner of the screen.

  In the **Print Tags** dialog that opens, you can configure printing settings. It is possible to select a printer, choose a template for your tag as well as specify the number of copies you want to print.

  Having configured the settings, tap **Print**.

- In **Availability**, you can change the default name of the columns. To do so, tap **Options** in the upper right corner of the view.

  Then, in the **Options** dialog that opens, select the column's alias.

  Tap **Done** for the changes to take place.

Checking item availability for company's locations

The information on item quantities that are available for other locations can be found in the **Availability** area of POS Pro. To access the area:

1. Tap **Catalog** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings). Tapping **Catalog** opens the **Item Search** screen.

2. Search for the required item by manually entering your item's UPC, PLU, CLU, or any part of the item's description in the **Item Search** field.

Alternatively, tap the **barcode scanning** icon next to the **Item Search** field and scan your item's tag.

Once the input has been made, the items matching the search criteria will display. You can sort to find the required item by tapping columns' headers.

4. Tap the required item to open the **Availability** (Real Time Availability, or RTA) view. On initial opening, the top grid in **Availability** displays quantities for the initialized location.

5. To see item quantities for the whole company, in the **Locations** list at the bottom, tap **Get Other Locations**:

Locations						Search ⌄
Code	Location	Available	Held	Commit	On Hand	Incoming	Distance ▲
100	Clearwater Store	14	0	1	13	20	0
101	Tampa Store	18	0	0	18	50	12
				Get Other Locations			

On tapping, all available store locations appear in the list:

Locations						Search ⌄
Code	Location	Available	Held	Commit	On Hand	Incoming	Distance ▲
100	Clearwater Store	14	0	1	13	20	0
101	Tampa Store	18	0	0	18	50	12
102	Orlando Store	22	0	0	22	0	87
103	New York City Store	4	1	2	1	100	879

To search for a store location by location code or location name, tap **Search**.

For a location's available quantities to be displayed in the top grid, tap the required location in the list.

To hide the **Locations** list, tap the arrow button in the upper right corner.

Orientation to Shipments

In the **Shipments** area of POS, you can manage your store's incoming (for example, Purchase Receipts, ASNs, etc.) and outgoing (for example, Ship Memos, Transfer Orders, Purchase Returns, etc.) documents.

1. To open the area, on the iPad POS app's **Home Screen**, tap the **Shipments** button. According to your custom settings, it can be located:

- in the navigation panel at the bottom
- in the fly-out menu that opens on tapping **More**
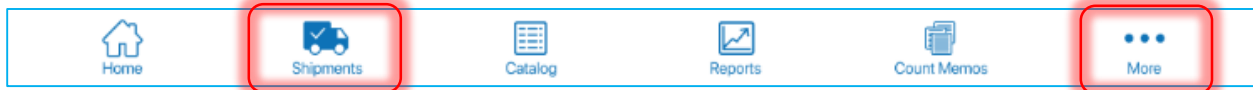
The badge app icon (red circle) next to the **Shipments** button shows a total of outgoing and incoming documents that require your attention.

Once the **Shipments** button is tapped, the documents will appear in the **Shipments** area.

The **Shipments** area consists of three tabs:

a. *Outgoing*: contains documents with items that go out from your location
b. *Incoming*: contains documents with items that your store is receiving
c. *History*: contains both incoming and outgoing documents that are finalized
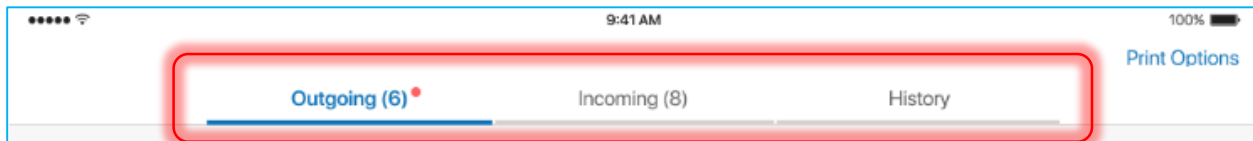
2. To <u>refresh</u> the information in any of the above tabs, pull the page down.

3. To <u>configure</u> a document's <u>default printing options</u>, tap **Print Options** in the upper right corner of the screen. The settings are configured for a specific document type.
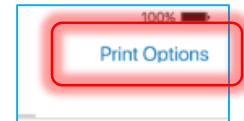

4. To <u>search</u> for documents, use the **Search** field in the upper left corner. You can manually enter **Document #**, **Order #** or any other descriptive element to identify the document. Alternatively, it is possible to use the device camera or scanner.

5. <u>Filtering</u> is available in the **History** tab. By default, the documents that were created within the last 30 days are displayed.

To change the time span, tap **Filter** next to the **Search** field.

6. If you've opened a document in **Shipments** and need to put down your device for a while, you can <u>lock the screen</u>.
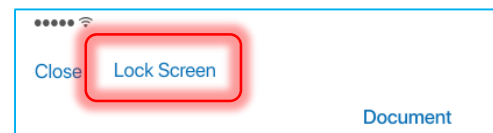
To do so, when viewing any document, tap **Lock Screen**.

On tapping, you'll be logged out, while the document will remain open.

When you return, just log back in and you will be brought back to wherever you left in the document.

Incoming – Transfer In

Transfer In is used to receive items sent from another location. To update your location quantities, it is required to finalize a Transfer In.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Shipments**, tap **Incoming** at the top of the screen.

3. In the **Incoming** tab, find the required Transfer In (T-IN) and tap to open it.

If the Transfer In has a carton number, scan it or enter in the search field to find an exact match. Alternatively, scan or enter the number of the associated Transfer Order to see all the Transfers In related to it.

4. Tap **Items** at the top-right of the screen.

Tapping **Items** will open the list of merchandise that has arrived from another location.

For each item on the list, the **Pack Qty** column displays what the other location has sent to you.

5. Then, you need to receive the items. To do so, perform one of the following:

- In the **Item Search** field (see the screenshot) enter the item's UPC, PLU, or ALU

- Scan the item's barcode

Receiving the item using any of the above methods will increase that item's **In Qty** value by 1.

Alternatively, to receive all the Transfer In items at once, tap the **Receive All** button (Tapping the button will automatically match the values of **Pack Qty** and **In Qty**). The button is located on the right above the item list.

Also, it is possible to change the item's **In Qty** manually. To do so, swipe the item row left and tap **Edit**. In the **Edit** dialog that opens, change the **In Qty** value and tap **Save** in the top right corner.

6. Tap **Finalize** to update the quantities at your location.
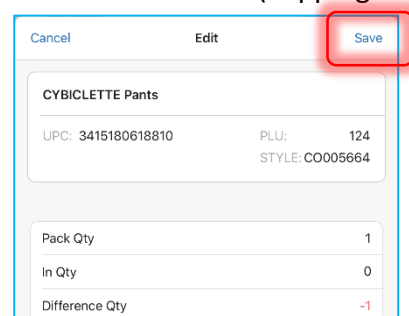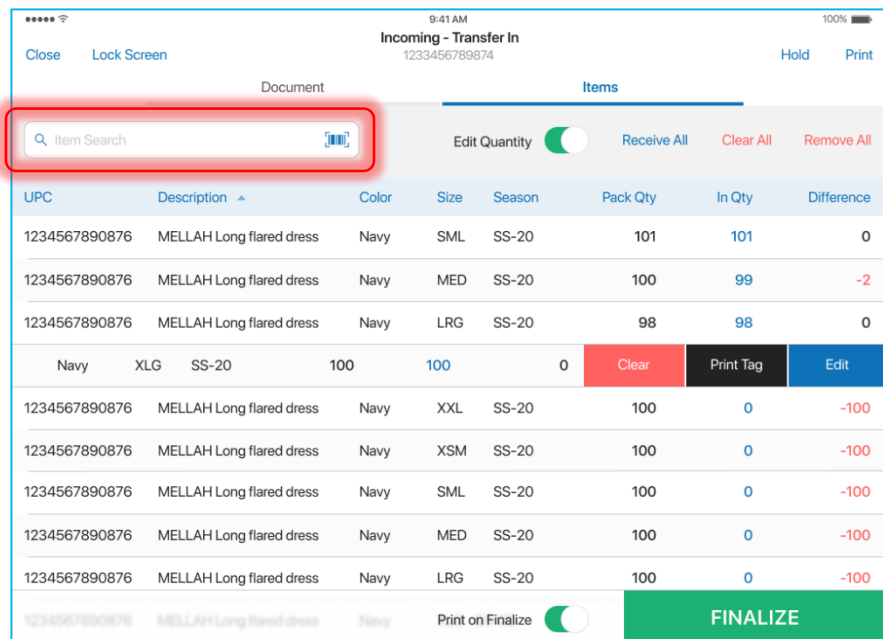
Outgoing – Transfer Order

Transfer Order is a <u>request</u> to your location to send out inventory to another location.

To confirm changes in item quantities and finish processing a Transfer Order, you will need to finalize it.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In the **Shipments** area, tap **Outgoing** at the top of the screen.

3. In the **Outgoing** tab, find the required Transfer Order (TO) and tap to open it.

4. In the **Document** tab of the Transfer Order:

- select a ship method (required)
- enter the tracking number of your transfer (required)

5. Then, tap **Items** located at the top right of the screen.

6. Tapping **Items** will display the list of items that are to be sent out to another location.
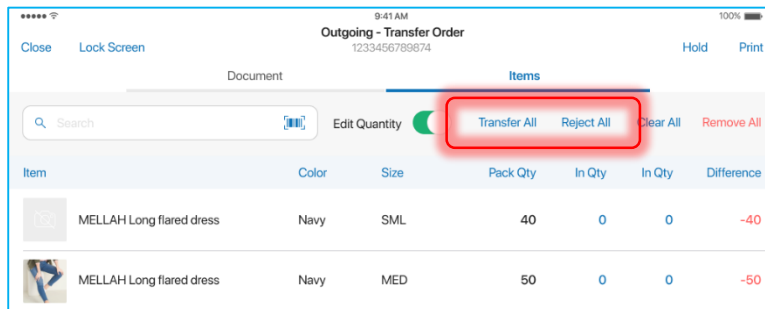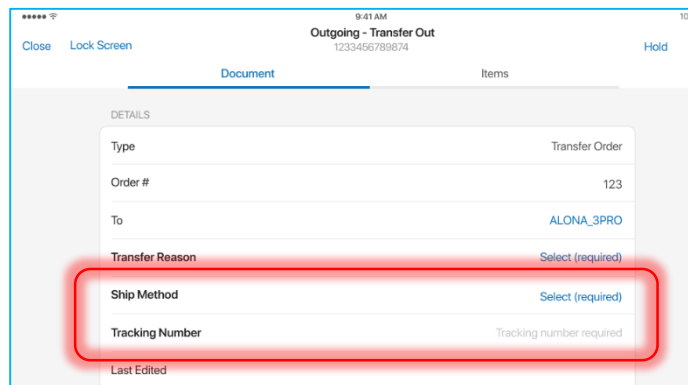
In **Items**, you can do the following:

- Tap **Transfer All** to include all the Transfer Order quantities (**Out Qty** will equal **Ord Qty** for each item)
- Tap **Reject All** if you are unable to transfer any items (**Rej Qty** will equal **Ord Qty** for each item)

Quantity modifications are available for individual items as well. Scan in your item or enter the item's UPC, PLU, or ALU into the **Item Search** field. If the item is found, the item's **Out Qty** value will be increased by 1.

Also, it is possible to swipe the item row left and change **Out Qty**, **Reject Qty**, and **Reject Reason**. Once done, tap **Save** in the **Edit** dialog.

6. Tap **Finalize**.

## Outgoing – Creating a Transfer Out

Transfer Out contains items that your store is sending to another location. In POS Pro, it is possible to create a Transfer Out without a Transfer Order.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

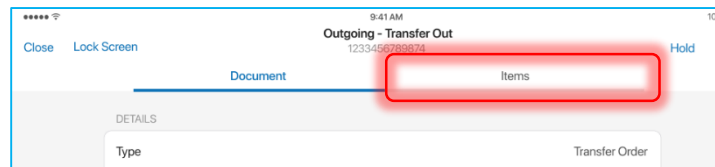2. In the **Outgoing** tab, tap **New Outgoing**.

3. In the **New Outgoing** dialog that opens, define the target location and tap **Create** in the upper right corner.
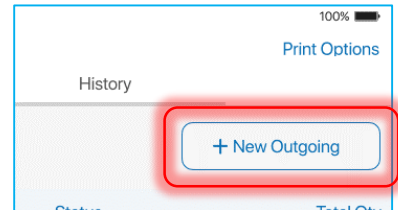
4. Once the Transfer Out has been created, its **Document** tab will display. In that tab, indicate:

   - transfer reason
   - ship method
   - tracking number

5. Tap **Items** to open the **Items** tab.
Initially, the **Items** tab contains no items. There are two ways you can add items to the list:

   - scan the item's barcode (<u>preferred</u>)
   - enter the item's UPC, PLU, CLU, or your item's description in the **Item Search** field

6. You can scan each item (multiple quantities), or once an item has been added, you can manually configure its **Out Qty**. To do so, swipe the required item row left and tap **Edit**.
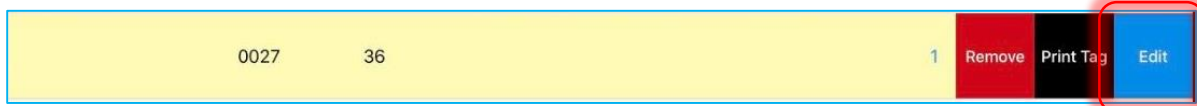
7. If necessary, to print tags for all items or a mailing label, tap **Print** in the upper right corner of the screen.

Also, to automatically print a transfer memo on finalizing, turn the **Print on Finalize** switch on.

8. To save the Transfer Out without finalization, tap **Hold** in the upper right corner. On tapping, the Transfer Memo Out is automatically sent to the email address defined for that location in CHQ.

9. Tap **Finalize**.

Incoming – Purchase Receipt without Purchase Order

A Purchase Receipt (PR) is used to add items received from a vendor to inventory.

Usually, a Purchase Receipt will be created automatically once a Purchase Order (PO) is finalized. In that case, the resulting PR is associated with that PO.

In POS Pro, however, it is possible to create and finalize a new PR without an existing PO.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Shipments**, tap **Incoming** at the top of the screen.

3. In **Incoming**, tap **New Purchase Receipt**. Tapping the button will open the **Vendor** dialog.
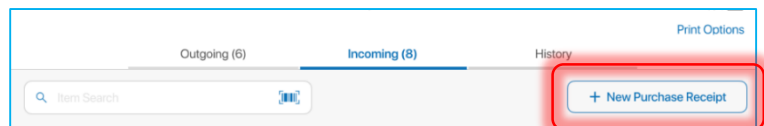
4. In the **Vendor** dialog, find and then tap the required vendor. Once selected, you will be redirected to the **Incoming – Purchase Receipt** area.
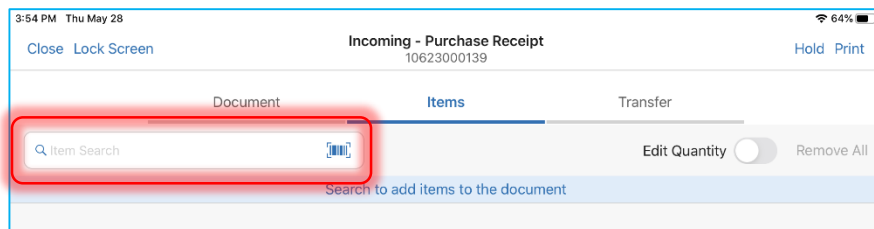
5. Under **Incoming – Purchase Receipt**, tap **Items**.
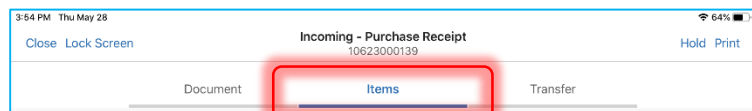
6. Add the items to the Purchase Receipt by scanning their bar codes.

Alternatively, enter the item's UPC, PLU, or CLU in the **Item Search** field.

Receiving the item via any of the above methods will increase that item's **Receive Qty** by 1.

Also, you can change the item's **Receive Qty** manually. To do so, swipe the item row left and tap **Edit**.

In the **Edit** dialog that opens, change the **Receive Qty** value. After that, tap **Save** in the top right corner of the dialog.
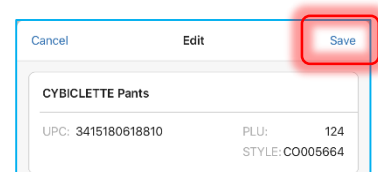
Additionally, you can transfer all the items right from the Purchase Receipt to another location.To do so, tap **Transfer.** Then, in the **Transfer** tab that opens, turn the **Automatically Transfer Out** switch ON and fill out the required fields (**To**, **Ship Method**, **Tracking #**).
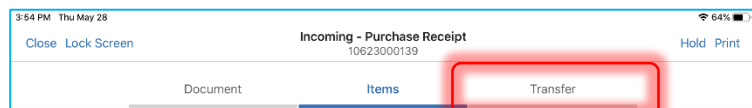
The above allows for the automatic creation of a Transfer Out upon the Purchase Receipt's finalization.

7. Tap **Finalize**.

Incoming – ASN

Advanced Shipping Notice (ASN) contains merchandise that a vendor is sending to your store. On finalizing an ASN, a Purchase Receipt associated with that ASN is created.

To finalize an ASN, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).
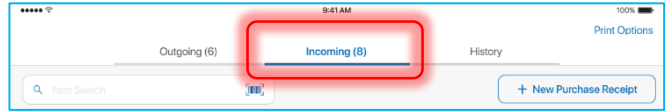
2. In **Shipments**, tap **Incoming** at the top of the screen.

3. In the **Incoming** tab, find the required ASN and tap to open it.

4. Tap **Items** at the top of the screen.

Tapping **Items** will open the list of merchandise that has arrived from the vendor/manufacturer.

For each item on the list, the **Pack Qty** column displays what the vendor/manufacturer has sent to you.

5. Then, you need to confirm receiving the items. To do so, perform one of the following:

- Scan the item's barcode
- In the **Item Search** field enter the item's CLU, UPC, or PLU

Receiving the item via any of the above methods will increase that item's **Receive Qty** by 1.

6. Alternatively, to receive all the items at once, tap the **Receive All** button on the left above the item list.
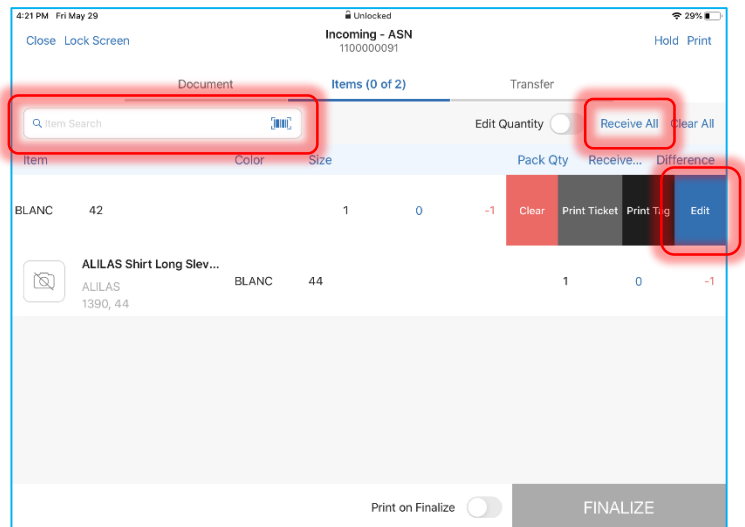
Tapping the button will automatically match the values of **Pack Qty** and **Receive Qty**.

7. Also, it is possible to change the item's **Receive Qty** manually. To do so, swipe the item row left and tap **Edit**. In the **Edit** dialog that opens, change the **Receive Qty** value and tap **Save** in the top right corner.

Additionally, you can transfer all the items right from the ASN to another location. To do so, tap **Transfer.** Then, in the **Transfer** tab that opens, turn the **Automatically Transfer Out** switch ON and fill out the required fields (**To**, **Ship Method**, **Tracking #**).
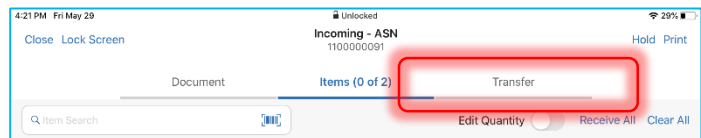
The above allows for the automatic creation of a Transfer Out upon the ASN's finalization.

8. Tap **Finalize**.

Outgoing – Purchase Return

Purchase Return (RET) is used to remove items from inventory for shipment back to the vendor.

To create a Purchase Return, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).
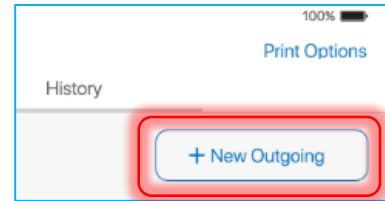
2. In **Shipments**, tap **Outgoing** at the top of the screen.

3. In **Outgoing**, tap **New Outgoing**.

4. In the **New Outgoing** dialog that opens, select **Purchase Return** in the **Type** field. Then, select the vendor and tap **Create** in the upper right corner.
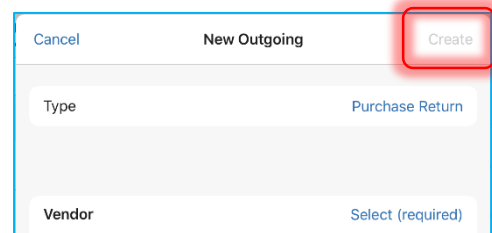
5. Once the Purchase Return has been created, its **Document** tab will display. In that tab, indicate the required ship method and tracking number.

6. Tap **Items** at the top-right of the screen.
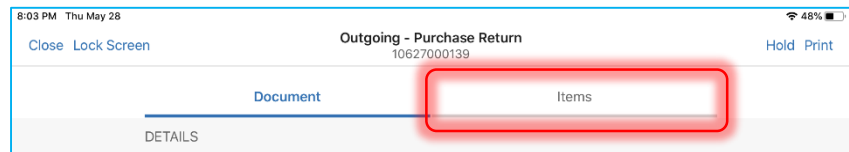
7. Initially, the **Items** tab contains no items. There are two ways you can add items to the list:

- scan the item's barcode (preferred)
- in the **Item Search** field, enter the item's UPC, PLU, CLU, or your item's description

8. You can scan each item (multiple quantities), or once an item has been added, you can manually configure its **Return Qty**. To do so, swipe the required item row left and tap **Edit**.
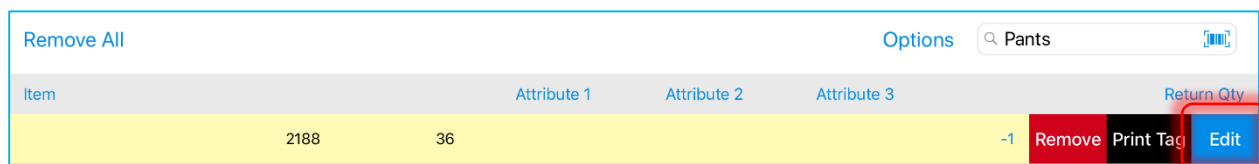
9. If necessary to print a Purchase Receipt or tags for all items, tap **Print** in the upper right corner.

10. Also, to automatically print any of the above on finalizing, turn the **Print on Finalize** switch on.

11. Tap **Finalize**.

Incoming – Purchase Receipt on Purchase Order

A Purchase Receipt is automatically created on finalizing the receipt of merchandise on a Purchase Order (PO). The resulting Purchase Receipt is associated with that Purchase Order.

To receive against a Purchase Order, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).
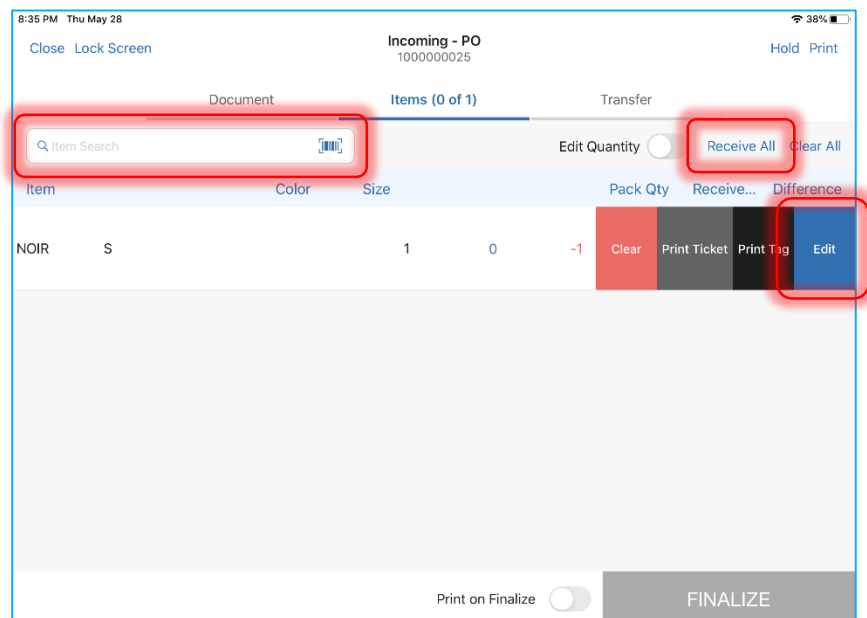
2. In **Shipments**, tap **Incoming** at the top of the screen.
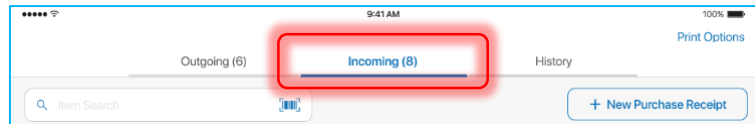
3. In the **Incoming** tab, find the required Purchase Order and tap to open it.

4. Tap **Items** at the top of the screen.

Tapping **Items** will open the list of merchandise that has been ordered from the vendor.

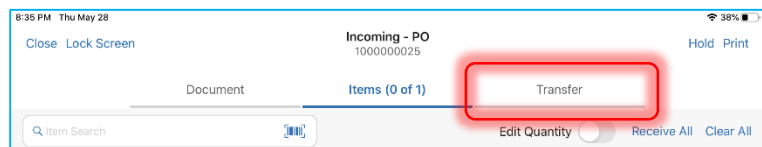5. Then, you need to confirm receiving the items. To do so, perform one of the following:

- Scan the item's barcode (preferred)

- In the **Item Search** field, enter the item's UPC, PLU, or ALU

Receiving the item via any of the above methods will increase that item's **Receive Qty** by 1.

Alternatively, to receive all the items at once, tap the **Receive All** button on the right above the item list. Tapping the button will automatically match the values of **Order Qty** and **Receive Qty**.

6. Also, it is possible to change the item's **Receive Qty** manually. To do so, swipe the item row left and tap **Edit**. In the **Edit** dialog that opens, change the **Receive Qty** value and tap **Save** in the top right corner.

Additionally, you can transfer all the items right from the Purchase Receipt to another location. To do so, tap **Transfer.** Then, in the **Transfer** tab that opens, turn the **Automatically Transfer Out** switch ON and fill out the required fields (**To**, **Ship Method**, **Tracking #**).

The above allows for the automatic creation of a Transfer Out upon the Purchase Order's finalization.

7. Tap **Finalize**.

Orientation to Adjustments

In the **Adjustments** area of POS Pro, it is possible to create and manage Adjustment Memos. Adjustment Memo allows you to change quantities of your store's merchandise that has been stolen, damaged, found, etc.

To access the **Adjustments** area in POS Pro:

1. Tap **Adjustments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).
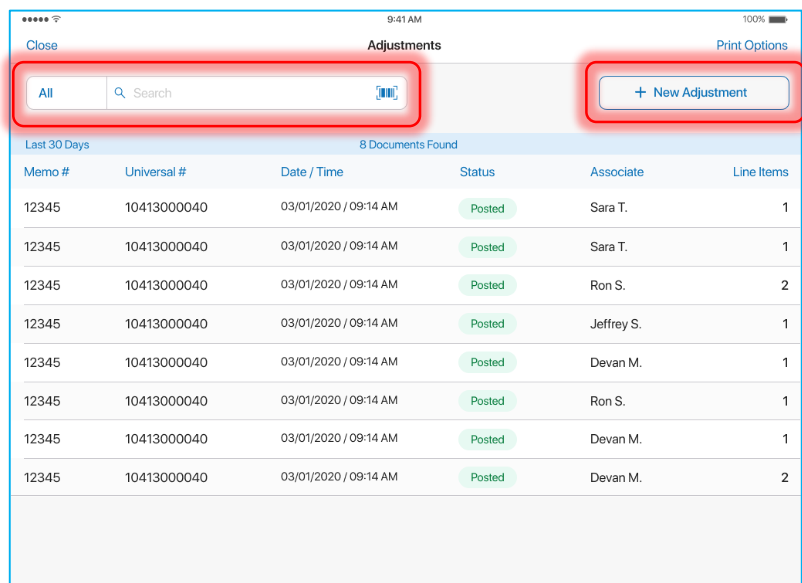
Once the icon is tapped, the list of existing Adjustment Memos will open.

2. To refresh the information displayed, pull the page down.

3. To create a new Adjustment Memo, tap **New Adjustment** in the upper right corner.

4. To search for memos, use the **Search** field in the upper left part of the screen. You can scan in the memo or manually enter your document's **Memo #** or **Universal #**.

5. To select the time span for which historical Adjustment Memos will display, tap **Filter** next to the **Search** field. By default, the memos created within the last 30 days are displayed.

Memo #	Universal #	Date / Time	Status	Associate	Line Items
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Sara T.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Sara T.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Ron S.	2
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Jeffrey S.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Devan M.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Ron S.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Devan M.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Devan M.	2

6. Adjustment Memos are available with the following statuses:

- **Held**: displays if a document is held; it is possible to edit and discard such memos
- **Posted**: displays if a document is finalized; it is possible to only view such memos
- **Editing**: displays if the document has been opened for editing and not closed; it is possible to edit such memos

To view, edit, or discard a memo, swipe that memo's row left and tap the corresponding button.

7. To configure the memos' default printing options, tap **Print Options** in the upper right corner of the screen.

Adjustment Memo creation

Adjustment Memos are used to record changes in quantities of the merchandise if, for example, some of your store's items have been stolen, damaged, found, or returned to another store.

To create an Adjustment Memo, in POS Pro:

1. Tap **Adjustments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).
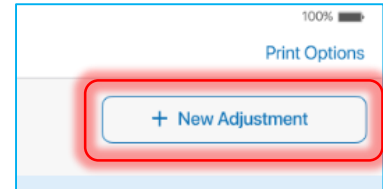
2. In the **Adjustments** area, tap **New Adjustment** at the top-right.

3. On tapping **New Adjustment**, select the required adjustment reason. Once the reason is selected, the **Document** tab of the created Adjustment Memo will open.
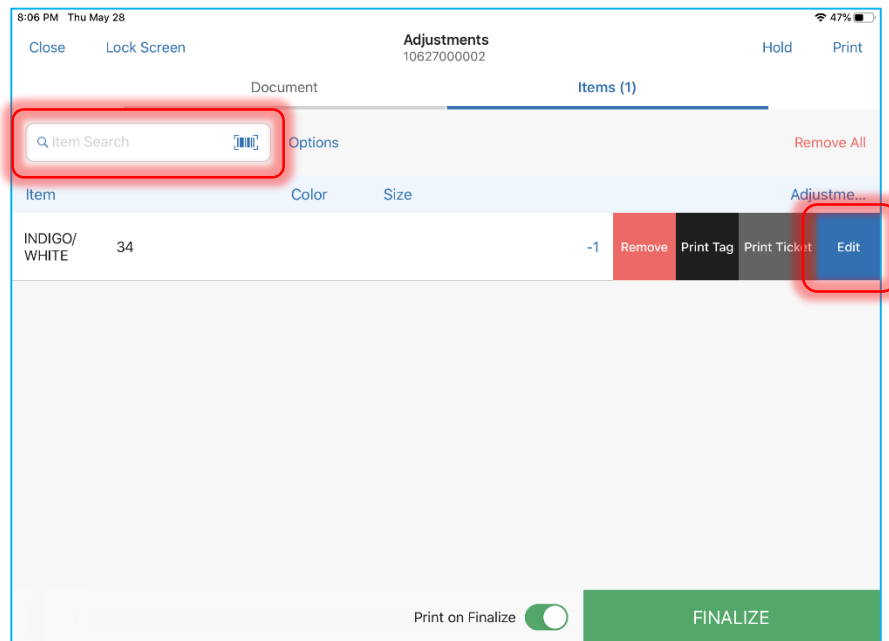
4. Tap **Items** at the top-right.

Initially, the **Items** tab contains no items. There are two ways you can add items to the list:

- scan the item's barcode (preferred)

- enter the item's UPC, PLU, CLU, or your item's description in the **Item Search** field

5. To manually specify **Adjustment Qty**, swipe left the item's row and tap **Edit**.

Once the quantity is indicated, it is possible to set the value to be positive or negative. To do so, in the **Edit** dialog, tap the **+/-** button on the numeric keyboard.

Once done, tap **Save**.

Alternatively, to set the item value to either positive or negative by default, tap the **Options** button next to the **Search** field. In the **Default Item Value** field of the **Options** dialog that opens, select the required option.
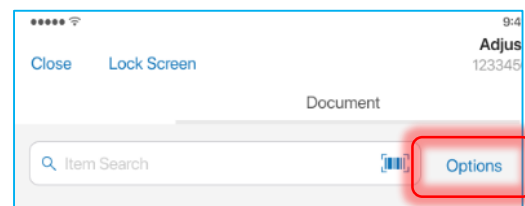
6. If required, to print the Adjustment Memo, tap **Print** in the upper right corner.

Also, to automatically print the Adjustment Memo on posting, turn the **Print on Post** switch on.

7. Tap **Post**.

Outgoing – Store Pickup finalizing

A Store Pickup Memo (PKUP) contains merchandise that a customer will pick up from your store.

To finalize a Store Pickup Memo, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Outgoing**, find the required Pickup Memo (PKUP) and tap to open it.

3. Tap **Items** at the top of the screen.

Tapping **Items** opens the list of merchandise that the customer will pick up.

4. Mark the items either as picked up or rejected.

To do so, at the top right of the screen, tap **Pick Up All** to mark all the Pickup Memo items as picked up or **Reject All** to reject those.

On tapping **Reject All**, the Pickup Memo will be saved with the "Rejected" status.

Alternatively, it is possible to pick up or reject each item manually. To do so, swipe an item's row left and tap the blue **Edit** button.

In the **Edit** dialog that opens, define **Ship Qty**, **Reject Qty** and **Reject Reason**.

5. Tap **Print** in the upper right corner of the screen to select and print one of the documents: a Pick List, Packing Slip, or Pick Up Label.

To automatically print the selected document on saving, turn the **Print on Save** switch on.

Additionally

When the merchandise is being collected, it is possible to capture the customer's signature. To do so, tap **Pick Up** at the top-right of the **Outgoing – Ship Memo** screen. Then, in the **Pick Up** tab, select **Tap to Capture Customer Signature**. Once a signature is drawn, tap **Accept Signature**.

6. Tap **Pick Up Ready** once the order has been prepared and is ready for pick-up.

Tap **Picked Up** once the order has been picked up by the customer.
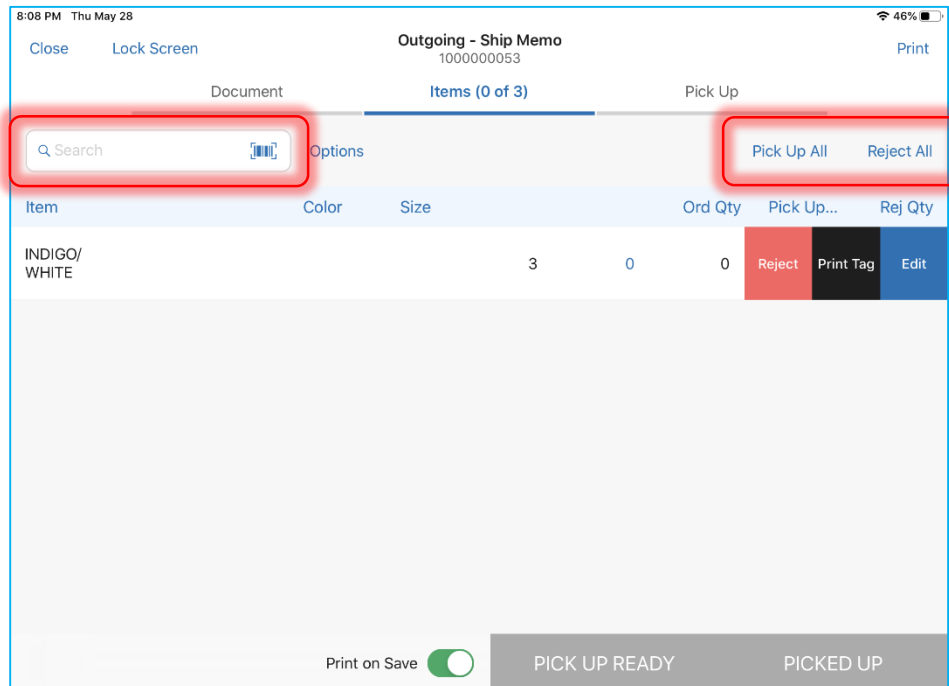
Outgoing – Ship Memo finalizing

A Ship Memo (SHIP) contains merchandise that needs to be shipped to a customer.

To finalize a Ship Memo, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Outgoing**, find the required Shipment Memo (SHIP) and tap to open it.

3. Tap **Items** at the top of the screen.

Tapping **Items** opens the list of merchandise that needs to be shipped to the customer.

4. Mark the items either as shipped or rejected.

To do so, at the top right of the screen, tap **Ship All** to mark all the Ship Memo items as shipped or **Reject All** to reject those.

On tapping **Reject All**, the Ship Memo will be saved with the "Rejected" status.
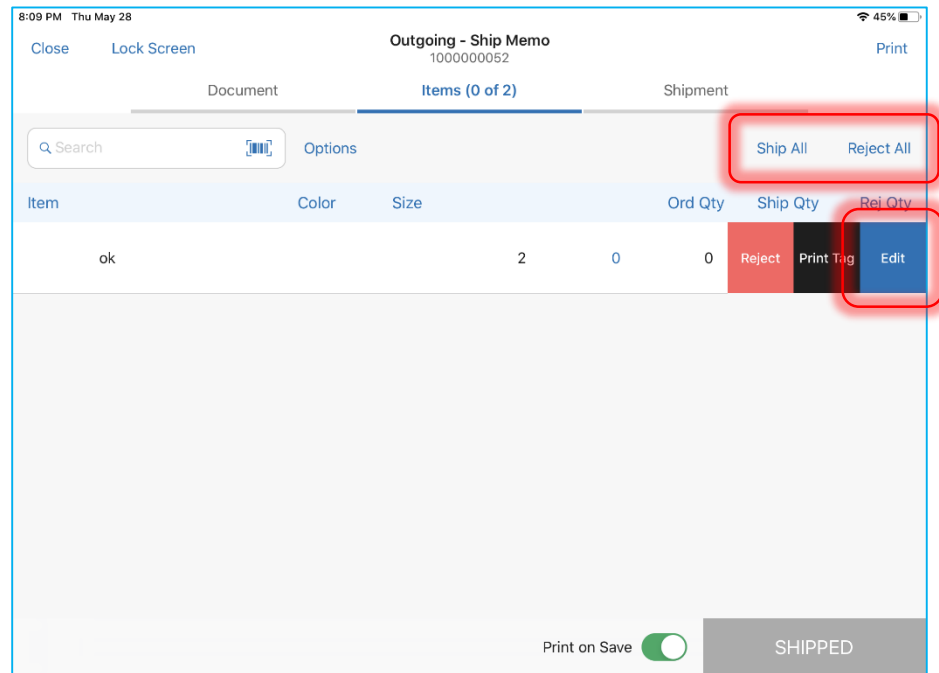
Alternatively, it is possible to ship or reject each item manually. To do so, swipe an item's row left and tap **Edit**.

In the **Edit** dialog that opens, define **Ship Qty**, **Reject Qty** and **Reject Reason**. Once done, tap **Save** to confirm changes.

5. Tap **Shipment** at the top-right of the screen. If your **Delivery Method** is "Manual Ship", define
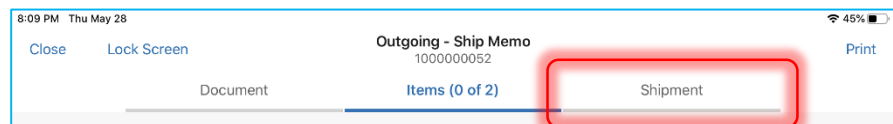
Ship Method and **Tracking #**. If "ShipStation" or "ShippyPro", define the weight and dimensions of the package and tap **Get Label**.

6. Optionally, tap **Print** in the upper right corner of the screen to select and print one of the documents: a Pick List, Packing Slip, Shipping Label, or Mailing Label.

To automatically print the selected document on saving, turn the **Print on Save** switch on.

7. Tap **Shipped**.

Outgoing – Creating multiple Transfers Out against a Transfer Order

Transfer Out (T-Out) contains items that your store is sending to another location. In POS Pro, it is possible to create multiple Transfers Out on finalizing a Transfer Order (TO).

The resulting number of Transfers Out will be the same as the number of cartons on the document that you define for packing the merchandise.

To assign a carton number to an item:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Outgoing**, find and tap the required Transfer Order (TO).

3. Tap **Items** at the top-right.

4. Swipe left the row of the item you are assigning a carton number to and tap **Edit**.
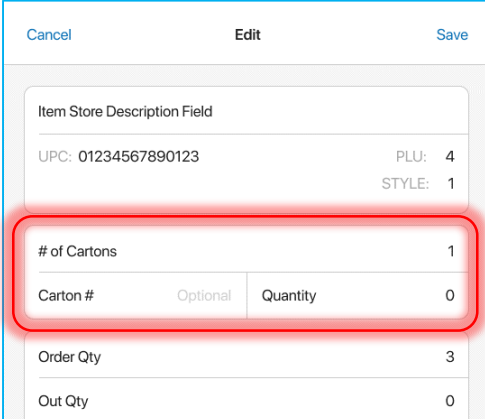
On tapping, the item **Edit** dialog opens.

Firstly, in the **# of Cartons** field, define the total number of cartons in which that item will be packed (valid values are *1* to *999*).

Then, in each **Carton #** field, define the sequence number of a carton (valid values are *1* to *999*).

One sequence number can be assigned for two different items on the document. However, it's not possible to use one sequence number twice for one item.

Also, in each **Quantity** field, define the item quantity that will be packed in the corresponding carton. The sum of all **Quantity** fields displays in the **Out Qty** field below. If **Out Qty** is less than **Order Qty**, you will need to define a reject reason.

5. Once done, tap **Save** in the upper right corner of the dialog. The assigned cartons display in the item's row:

6. To print multiple Transfer Memos on finalizing, in the **Items** tab, turn the **Print on Finalize** switch on.

7. In the **Items** tab, tap **Finalize** at the bottom-right.

Finalizing documents with acknowledgement

In POS Pro, finalizing certain documents may require entering your credentials (manager override) and/or capturing your signature. Such documents include Transfer Order, Transfer In, and Transfer Out, Purchase Order, Purchase Receipt, and Purchase Return as well as Adjustment Memo.

To finalize a document when acknowledgement is required:

1. Tap **Finalize** or **Post** in the document (depending on your document type).

On tapping, the **Acknowledgement** dialog with several acknowledgement statements displays:
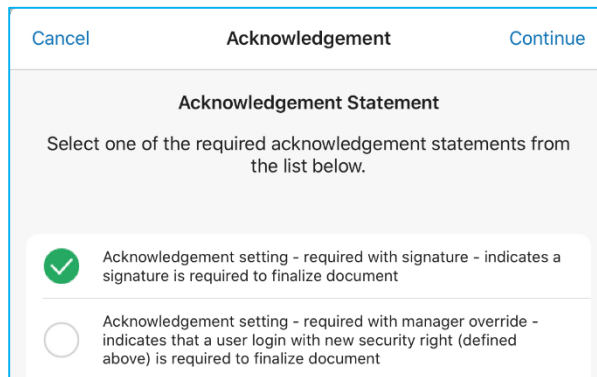
2. Select the required statement and tap **Continue** in the upper right corner of the dialog.

3. Then, if manager override is required, the **Manager Override** dialog displays. In the dialog, enter your username and password and then tap **Log In**.

Please note that to perform the manager override, you must be granted with the **Allowed to acknowledge transaction** right.

4. If capturing signature is required, the dialog for drawing a signature displays next:
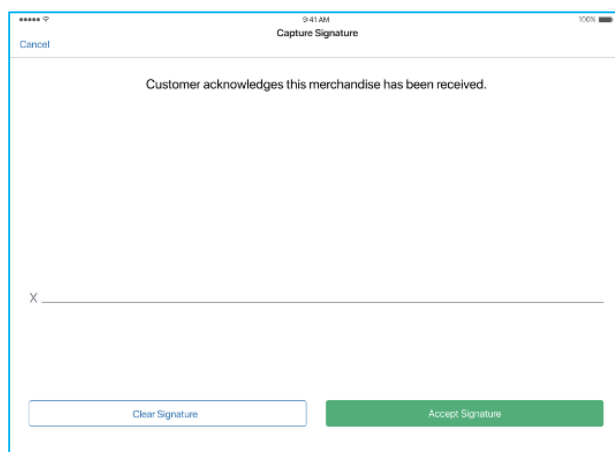
In the dialog, draw your signature in the blank space.

5. Once done, tap **Accept Signature** at the bottom of the dialog. Alternatively, tap **Clear Signature** to start the signature over.

Orientation to Count Memos

In the **Count Memos** area of POS Pro, you can view, create, edit, and archive Count Memos. A Count Memo (CM) is a document that records changes in merchandise quantities for the initialized location.

To open the **Count Memos** area in POS Pro:

1. Tap **Count Memos** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).
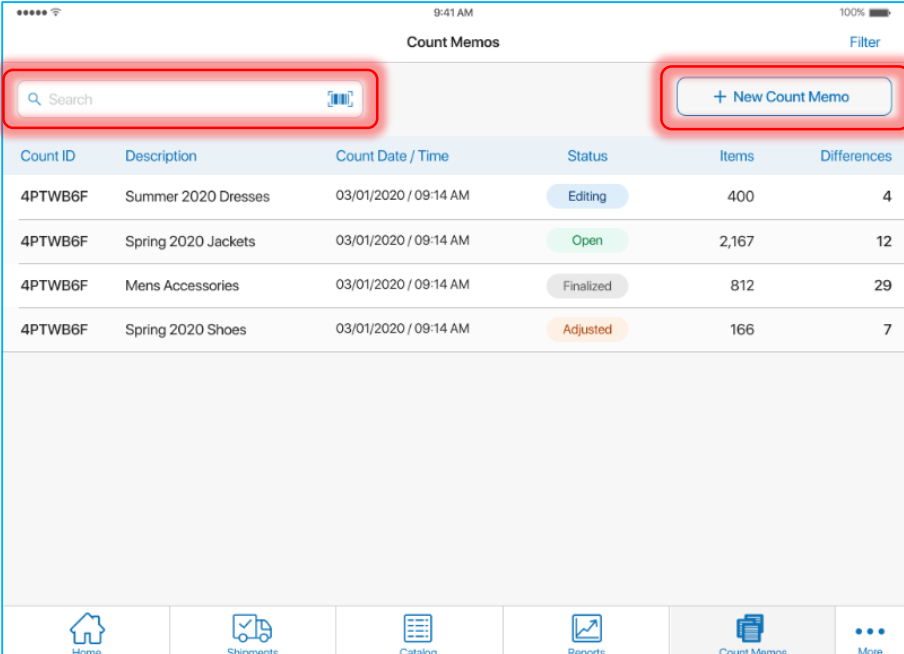
On tapping, the list of all Count Memos for the initialized locations opens.

2. To refresh the information displayed, pull the page down.

3. To create a new Count Memo, tap **New Count Memo** in the right upper corner.

4. To search for Memos, use the **Search** field in the left upper corner. You can search by **Count ID** and **Description**.

5. Count Memos are available with the following statuses:

- *Open*: the memo has been just created
- *Editing*: the memo is being edited
- *Finalized*: the memo has been finalized
- *Adjusted*: an Adjustment Memo has been created for that Count Memo

7. To edit a Count Memo, tap the row with that memo.

If you try to edit a memo that is open on another device, the **Document is Being Edited** dialog displays.

In the dialog, if you select **Continue to Edit**, changes made to the memo on another device will be lost.

Count Memo creation

A Count Memo (CM) is a document that records changes in merchandise quantities for the initialized location.

In POS Pro, to create a Count Memo:

1. Tap **Count Memos** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. Once the list of Count Memos is open, tap **New Count Memo** in the upper right corner.

In the **New Count Memo** dialog that opens, fill out the fields in the **FILTER** section to only include items with specific properties into the memo.

Alternatively, leave the fields blank to include all catalog items in the memo.

Once finished, tap **Save** in the upper right corner.

3. Once the resulting Count Memo opens, tap **Items** at the top. In the **Items** tab, there are two ways to search for an added item:

- enter that item's ID in the **Item Search** field in the upper left corner

- tap the **barcode scanning** button and scan an item

To filter items by quantity difference or override quantity, tap **Filter** next to the **Item Search** field.

4. In the **Items** tab, you can only edit **Override Qty** and delete item scans.

To do so, tap the required item row. Once the **Edit** dialog opens, in the **Quantity** tab, enter the required **Override Quantity**. Please be advised that Override Quantity is given priority over the count quantity when quantity difference is determined.
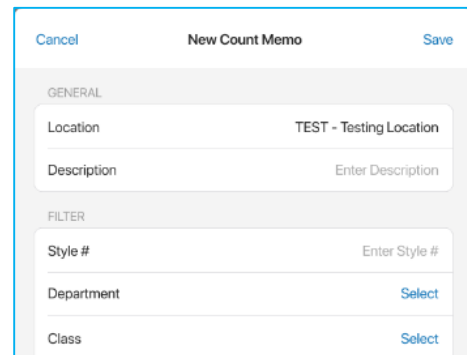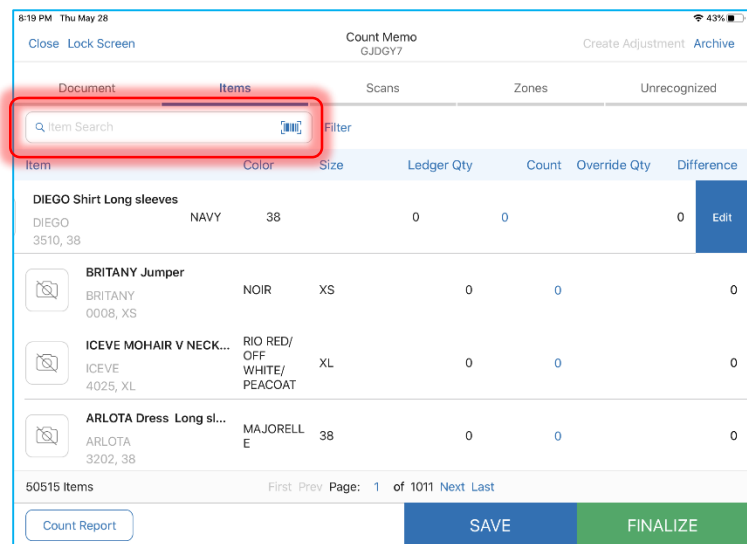
To delete an item scan, in the **Edit** dialog, tap **Scans**. In the **Scans** tab, tap the required item row and then tap **Delete Scan**. Once done, tap **Save** in the upper right corner.

5. It is possible to delete all item scans associated with one zone in the **Zones** tab. To do so, in the **Zones** tab, tap the required row and then select **Delete Zone Scans**.

6. Once finished configuring the memo, tap **SAVE** at the bottom to save changes and close the memo.

To assign the "Finalized" status to the memo (no further edits will be possible), tap **Finalize**.
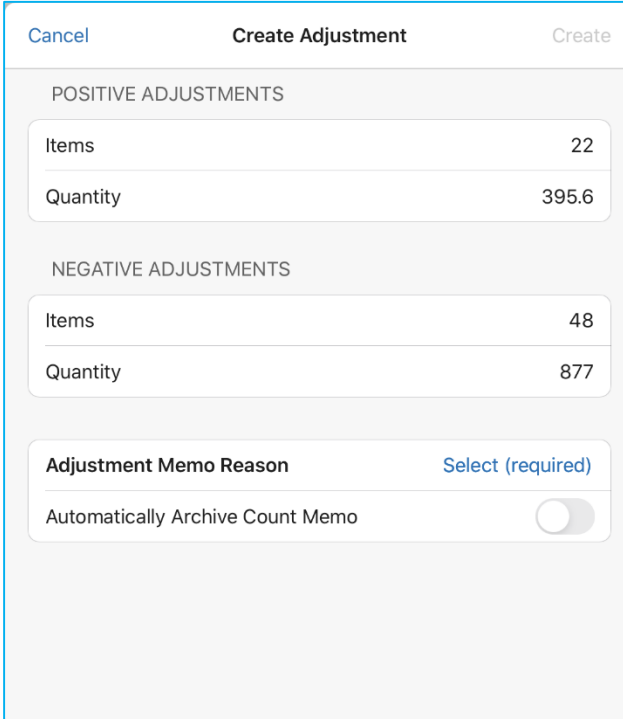To archive the memo (an archived memo can only be viewed), tap **Archive**.

Performing adjustments from Count Memo

In POS Pro, it is possible to create an Adjustment Memo from a Count Memo. The Adjustment memo updates the stock ledger quantities based on the Count Memo item difference.

To create an Adjustment Memo from a Count Memo:

1. Tap **Count Memos** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Count Memos**, tap the required Count Memo to open it.

3. In the required Count Memo, tap **Create Adjustment** at the top. On tapping, the **Create Adjustment** dialog opens:

In the **Create Adjustment** dialog that opens:

- the **Items** fields show the number of PLUs affected
- the **Quantity** fields show the total item quantity being adjusted

To define a reason for adjustment, tap **Select** in the **Adjustment Memo reason** field (required).

Optionally, to archive the Count Memo on creation of the Adjustment Memo, toggle the **Automatically Archive Count Memo** switch on.

Once done, tap **Create** in the upper right corner of the dialog.

Finalizing Ship Memos with ShippyPro integrated

A Ship Memo can have ShippyPro defined as the shipping service. Then, in the **Shipment** tab, ShippyPro displays as **Delivery Method**.

To finalize a Ship Memo with ShippyPro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. Once the **Outgoing** area of **Shipments** is open, find and tap the required Ship Memo.

3. In the Ship Memo, tap **Shipment** on the upper-right.

In the **Shipment** tab, enter the weight of your package in the **Weight** fields (<u>required</u>).
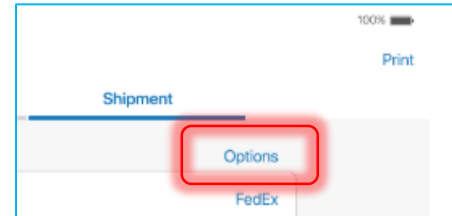
To select weight units, tap **Options** on the upper-right.

Then, enter the size of the package in **Dimensions** (<u>required</u>).

Alternatively, to automatically fill out **Dimensions**, tap the required label of a default box size**:**

4. To change the ship-to address of the Ship Memo, tap **EDIT** next to the **Ship To** field. It is only possible to edit the ship-to address before the shipping label is retrieved.
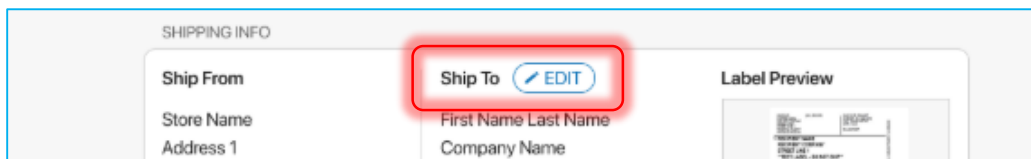
5. Then, tap **Get Label**. On tapping, both shipping label and return shipping label are retrieved.

On retrieving, in the **Label Preview** section, a preview of the shipping label displays.

6. To void labels and edit the **Weight** and **Dimensions** fields again, tap **Void Labels** in the **Tracking #** field.

7. To print the shipping label or return shipping label, tap **Print** on the upper-right.

8. Once finished, tap **Shipped** on the bottom-right to finalize the Memo.
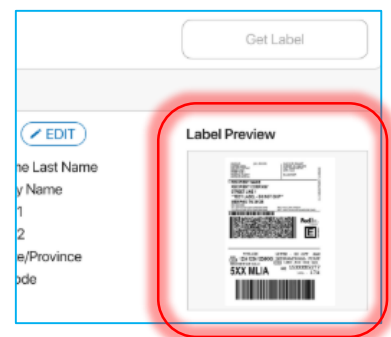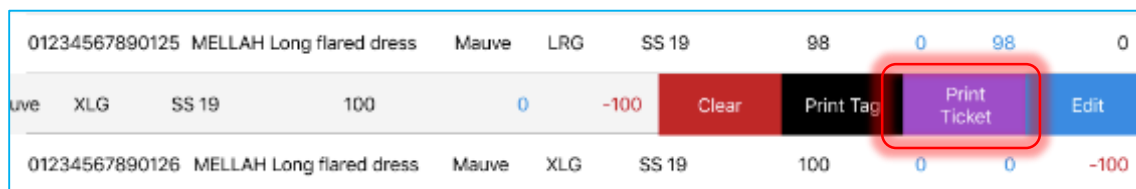
Printing an item ticket

In POS Pro, it is possible to print a ticket for an item without saving the whole document. The ticket can contain important information about the item, for example if it is damaged.

It is possible to print item tickets in the following documents:

- Transfer Out, Transfer Order, Transfer In
- Purchase Receipt, Purchase Return, Purchase Order
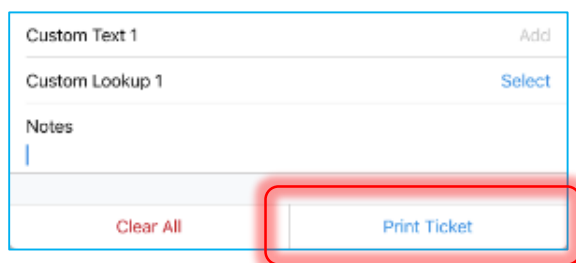- ASN
- Adjustment Memo

To print an item ticket:

1. Open the required document in **Shipments** or **Adjustments**.

2. In the document, tap **Items** at the top.

3. In **Items**, swipe left the required item row. Then, tap **Print Ticket**:
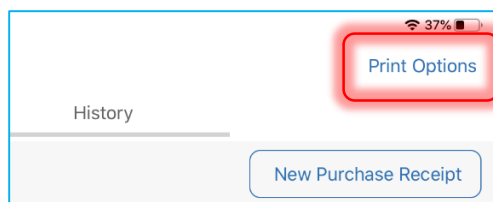

Alternatively, to add notes to the item ticket, swipe left the item row and then tap **Edit**.

In the **Edit** dialog, fill out the **Notes** field and then tap **Print Ticket**:

Additionally

To configure default settings for printing an item ticket, in **Shipments** or **Adjustments**, tap **Print Options**:

In the **Printing Options** dialog that opens, choose the required type of ticket (**Transfer Item Ticket**, **Purchasing Item Ticket**, or **Adjustment Item Ticket**) and configure the settings.