

# BEAN COUNTING

The physical inventory counting system

<http://bean.perceptus.ca>

*Bean Counting is so easy for your scanning team,  
that physical inventory counts **almost** become fun!*

Version 1.7.1

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# Administrator's Guide

## Introduction

Welcome to Bean Counting, the physical inventory counting system for small and medium sized retailers. This document will help you start using our software to conduct your own in-house physical inventory counts. The first part of this document steps the administrator through the process of installing and configuring the Bean Counting package. The second part of this document is an end-user guide that you are welcome to customize and use for your scanning team's training. If you wish to know what Bean Counting is like for the end user, you may wish to skip ahead. The appendixes include a sample Area Tags and a sample store map.

A few definitions for terms that we use in the rest of this document:

- Terminal - the portable data collection terminal. There are several devices that are compatible with Bean Counting, including the Cipherlab CPT-711, the Metrologic ScanPal2, and the HandyScan 2000.
- Computer - a personal computer running a relatively recent version of Microsoft Windows. The Terminals typically come with a serial cable. Your computer will need either a comm. port or a USB port and an inexpensive third-party USB-to-Serial adaptor.
- Program Folder - the folder where you installed the Bean Counting software. By default, this is "C:\Program Files\Bean Counting".
- End-user - the people who will be conducting the inventory scan

## Support and Training

Included with your Bean Counting package is an optional training session over the phone and web. To get the most value from the training session, we require that users read through this document and try to complete the installation of the program on their own so that the training session can focus on the details of the system.

For end-user support calls, please ensure that the physical inventory scanning team, contacts your organizations internal technical or physical inventory count support before contacting Perceptus.

Please have your complete contact information, company name, version of the Bean Counting software, and a description of error or the steps leading to the problem prepared before contacting us at either of the following:

Email: [support@perceptus.ca](mailto:support@perceptus.ca)  
Phone: 604-780-1480

## What to Read Next

To get a feel for the actual inventory counting process with Bean Counting, skip ahead to the "[Scanning Team Guide](#)"

Or continue reading the next section for the initial setup and configuration guide.

## Initial Software Install

If you are reading this document, chances are that you have already downloaded and run the Bean Counting installation. If not, please visit <http://bean.perceptus.ca> and download the latest version of the software. Then run (i.e. "double click" on the BeanCount-1.n.exe file). Use the default options unless instructed otherwise.

Note: If you do not have Microsoft Access installed, please contact us to get an alternate download that includes the MS Access Runtime. It is a larger download that we do not make generally available on our website. You can tell if you have MS Access installed by looking at your programs list – typically it is listed with the other Microsoft Office applications such as Excel or Word.

After installation, you should find a menu in your programs (Start → All Programs in Windows XP) list called "Bean Counting."

## Configuring a new Terminal

**WARNING:** these steps will install Bean Counting onto your portable Terminal. This process will erase **all** data and programs from previous versions of Bean Counting, or other applications that are on the Terminal. Do not complete this process until you are certain that you no longer require the information on the Terminal.

1. Connect the Terminal to your computer with the special data cable. This cable is typically bundled with the Terminal.
2. Determine the correct communications port to use. If you are unfamiliar with serial ports, you may read Appendix D for help in determining the correct port to use.
3. Turn on the Terminal in "System" mode by pressing and holding 7 and 9, and then pressing power (bottom right button), i.e. a total of three keys are to be used at the same time. The Terminal should say "System Menu" at the top. If you have successfully started the terminal in System mode, then turn it off – no, that is not a typo.
4. Then start the Terminal in "Kernel Mode" by pressing and holding 1 and 7, and then pressing power. The Terminal should say "Kernel Menu" at the top of the screen.
5. Select "1. Program Download" and press Enter. Unless specifically instructed otherwise, select RS232 on the "Download Program" screen and 115200 on the "Baud Rate" screen. You should see "\*Ready to Download\*" on the screen.
6. On the PC, open Download.exe (a shortcut, "Download", is installed in your Start menu by the Bean Counting Windows installer) to send the BASIC interpreter (BC711.shx) to the Terminal. The BC711.shx file can be found in your Bean Counting program folder (the default is "c:\Program Files\Bean Counting"). The default settings are usually correct – if they do not work, try COM2 instead of COM1.
7. If your settings are correct, you will see a progress bar on your PC screen. When the download is complete, the Terminal will display "\*\*\*\*Complete\*\*\*\*" and your PC will have a "Downloaded completely" message. Note: this task is normally done only once per device to enable the Terminal to run the Bean Counting program.
8. Next we send the Bean Counting program, to the Terminal.

**If you have just done step 7 above:** The Terminal should automatically skip to the "Baud Rate" prompt and then the wait for a Basic program mode if you press a key after the "\*\*\*\*Complete\*\*\*\*" message. If it doesn't, do the alternate instructions below.

**Alternate:**

Turn off the terminal by holding down the power button for about a second. Turn it on again in "System" mode (see step 2, 7+9+Power). Select 6. to "Download". Select 2 for "Basic". Select 1 for "RS232", this is the cable connection from the Terminal to the computer. Select 115200 BPS.

9. On your computer, open SynLoad.exe (a shortcut is in your Start → Bean Counting menu) to send the Bean Counting program (CompilerFile.syn in your Bean Counting program folder) to the Terminal.
10. Enter the Bean Counting unlock key that corresponds to the Terminal's serial number. To do this, you must visit <http://bean.perceptus.ca>. Create a login account (if you don't have one already). Then send an email to [sales@perceptus.ca](mailto:sales@perceptus.ca) so that we can have your license activated and associated with your account. Once the license has been added to your account, you should login to our website again. Then enter the Terminal's serial number, and add a Bean Counting Inventory program license to the device. Finally, retrieve the unlock keys. Alternatively, email [sales@perceptus.ca](mailto:sales@perceptus.ca) the serial numbers of all of your Terminals and we will create the login account and other entries for you. Enter the unlock key on the Terminal from the Options (5), then Keys (2), then Inventory (1) menus. Without the unlock key, the device will remain in trail mode. Up to 30 barcode scans are allowed in this mode.
11. Turn on the Terminal. Press a key to get past the Perceptus branded splash screen. When you get to the main menu of Bean Counting, look at the date and time. If they are incorrect, follow these steps to change it: Turn off the Terminal. Turn it on in System mode (7+9+Power). Change the time in the settings. Note: The time displayed in Bean Counting is only for user convenience, so its configuration is optional.

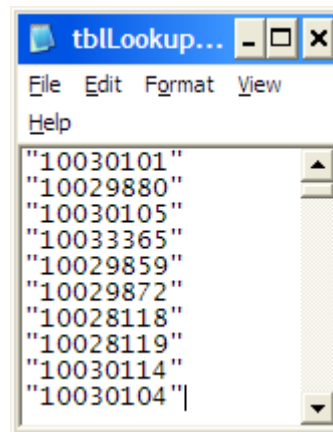
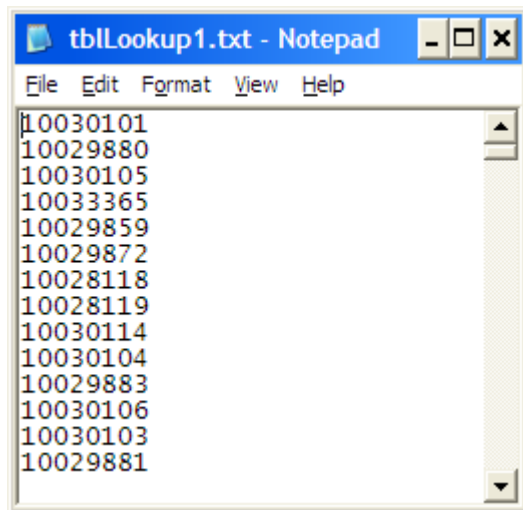
## Installing a new version of Bean Counting

1. To upgrade the computer side software, first back up the Bean Counting database manually. Browse to your Bean Counting installation folder (default: "C:\Program Files\Bean Counting\") and copy the "Bean-Counting.mdb" file to a safe place. This will save any customizations that you have made so that you can refer to them later. Then download and run the new installation file for Bean Counting.
2. To upgrade to a newer version of the Bean Counting application on the Terminals, you need to repeat the steps from "Configuring a new Terminal"; however, begin at Step 7.

## Installing the SKU lookup list

Using the optional SKU lookup feature allows you to check that the barcode that is scanned is one that is recognized by your other systems. Unless otherwise instructed, the SKU lookup list should contain the exact same text that is read by your POS barcode scanner. These steps will provide hints on how to create the list of SKU's from your POS system, and then how to put the list onto the Terminal.

1. Using either the Bean Counting Application on your computer, or your POS vendor provided software, create the SKU List.
2. The SKU list is a simple text file with **only** a single SKU on each line. You may have double quotes around the SKU, but no other formatting is permitted.
3. Bean Counting supports SKU's up to 20 characters in length. SKU's longer than this will be truncated. We generally recommend that no more than 20 000 SKU's be in the lookup list. In some businesses, you may need to filter out inactive SKUs from your file.
4. Export the list to a text file.
5. Open the text file in a text editor such as Notepad to make sure that it is in a compatible format. It should look like one of the following:



**Note:** Notepad is a basic text editor. For large operations, a more advanced editor can be orders of magnitude faster. We suggest Crimson Editor. It is freely available at this website: <http://www.crimsoneditor.com/>.

6. We now upload the SKU Lookup to the terminal. If you are installing a new SKU lookup list over an old one, you should delete the original file from the Terminal. On the Terminal, select (5), then "Mem/Files", then "Delete", then select SKU Lookup.
7. On a Terminal which already has the Bean Counting Software running, select 5, "Other", 6, "Receive Lookup". Press 1 to put the Terminal in waiting mode.
8. On the PC, run FileTransfer.exe (a link is installed in your Programs menu). Select "Download Lookup." Select "Start."

## Creating Scanning Slips

Open the Bean-Counting Database. Use the tools there to create scanning slips. Scanning slips are used to help break down the store into areas and sub areas for the inventory count.

For most users, the standard scanning slips will be fine. In the Bean-Counting Database, click on "Configure Slip List". Select a slip type of "Normal" and a slip count as high as you like, say 100. You will require one slip per area of a store – 100 slips are usually sufficient for a 2000 square foot store. Close the configuration form, and then click on "Preview and Print Slips". A preview of the slips to be printed will be generated. Now, selectively print whichever pages you need through the regular Windows printer dialogs.

Sample inventory slips are provided in a separate PDF (Sample Inventory Slips.pdf). These should be sufficient for your testing and evaluation of Bean Counting. An overview of how to use the slips is in the end-user documentation.

If you need fewer than 200 Area Tags, you can use the "Simple Inventory Counting Slips.pdf" file – a link to this file is normally created in your Programs menu when Bean Counting is installed. It is a PDF file that you can print for your inventory slips.

**Note:** You must use **differently numbered slips for each store** that will be scanned by the Terminals without an intermediate data unloading. To clarify, it is OK for two sites to use Area Tag 001 if the portable Terminal is unloaded between site counts. However, it is **not** OK for two sites to use Area Tag 002 if the same Terminal will be used to scan both sites before returning to the Office to remove the physical inventory count data – the running counts will still reflect the scans at the first store, so they will be "wrong" at the second site.

## Scanning the Inventory

If you are following this document from beginning to end, then at this time, you are ready to scan your inventory. Skip to the End-User Guide, Appendix A, where we have provided end-user scanning documentation. It is intended to be suitable for editing and then distributing to your physical inventory staff as a training manual.

## Program Settings

There are several options in the Terminal Software that are not documented in the End-User Guide, Appendix A for brevity and to keep some features "known" to only the administrators of the physical inventory counts.

The important ones are these:

- Quantity entry. Enabling this option will prompt for the quantity of items scanned after each SKU is read. This is useful, and probably desirable for warehouse situation where there are a lot of identical items in a well organized fashion, but probably undesirable for a store setting.  
[Main] → Other (5) → Options (1) → Prompt for Qty. (4).
- SKU Validate. This enables/disables the checking of the scanned SKU against the SKU Lookup list that is optionally installed on the Terminal.  
[Main] → Other (5) → Options (1) → SKU Validate (1).
- Custom Fields. These can be used for anything such as the Employee Number of the user, the Site ID, the date, etc. Each field has a maximum of 5 alphanumeric characters. All custom fields are appended to each scan, and are transmitted to the PC for later reporting and archiving.  
[Main] → Other (5) → Custom Fields (5)

## Receiving Scanned SKUs from the Terminal

Once you have scanned all the items of which you are taking inventory, you need to follow these steps to upload the data from the Terminal to your computer.

1. Plug in the cable or cradle between the Terminal and the computer.
2. Open FileTransfer.exe. (Start → Programs → Bean Counting → FileTransfer)
3. Set the COM port. This depends on the computer, see *Appendix D: Determining the Correct Communications Port*.
4. Set the Baud rate to 115200.
5. Select "Upload Count Data".
6. Click on *Start*. You will be prompted for a name and location to save the incoming file.
7. We recommend that you include the date, the stores scanned, and a unique portion of the portable Terminal's serial number in the filename. E.g. "20041215-Store101-SN401.txt."
8. Once you have clicked "Save" in the file selection window, the PC program will enter a waiting mode.
9. On the Terminal, from the Main Menu, select "Send to PC" (2)
10. Press a key on the Terminal to get past the information screen.
11. You should see a progress bar with the status of your upload.
12. You will end up with a simple, comma separated value, text file on your PC.
13. Repeat the previous steps for each Portable Terminal.  
Now you can use the "Import Uploaded File" and "Export Scans" buttons of the Bean Counting PC software to combine and format your scans to better match your POS software.
14. To import each file:
  - a. Open the Bean Counting Application.

- b. Click on "Import Uploaded File" from the Main Menu.
  - c. You must now import all files from your scanners one at a time.
  - d. Choose a common "Scan Round" that describes the series of scans that you are currently analyzing. Use a description that applies to your entire organization or division. E.g. "2005-01".
  - e. Click on the Open Folder icon to browse and select the first data file.
  - f. Enter a File Description that applies to the specific file, e.g. [SiteID] + [Terminal ID].
  - g. Then click on "Start Import" to process the first file.
  - h. Now import all of the other files from the current site. Use the same "Scan Round" name but use a different "File Description" for each file.
15. To use your scan data, there are three options, listed in order of preference: importing the files directly into your POS; creating and exporting a summarized Excel or .csv file for importing into your POS; or creating a variance report with Bean Counting and entering the variance into your POS. Importing the files directly into your POS is the preferred option since it involves fewer steps. Each option is described separately below.

## Exporting a Summarized Inventory Count

1. Go to the Main Menu of the Bean Counting Application. Then click on "Export Scans".
2. Most users will use the "Scan Export - SKU and Quantity Only" report. Double click on the report name to open it. The default configuration for the report is as displayed in this screenshot:

The screenshot shows the 'QBF - Query Builder' window. At the top, the 'Report Name' is 'Scan Export - SKU and Quantity Only', the 'Author' is 'Perceptus', the 'Data Source' is '<tblScans>', and the 'Date' is '2004-12-17'. There is a 'Run Report/Query' button and a checked 'Totals' checkbox. Below this is a text box: 'You can filter and sort with this form. The most frequently used filter fields are the "ScanRound" and "Custom\*" fields. After (optionally) customizing the filters, click "Run Report/Query".'

Select a Field (dbl-click to delete)	Sort	Operator	Total	Show Data	Criteria Value	2nd Value (if Between)
SKU	1		Group By	<input checked="" type="checkbox"/>		
Quantity	N		Sum	<input checked="" type="checkbox"/>		
ScanRound	N		Where	<input checked="" type="checkbox"/>	January	
Custom1	N		Group By	<input checked="" type="checkbox"/>		
*	N			<input type="checkbox"/>		

At the bottom, the status bar shows 'Record: 1 of 1 (Filtered)'.

In the screenshot, a filter "January" for the ScanRound field has been added. This will limit the report to only records which were imported with "January" in the Scan Round field. You may also wish to add a site ID filter by selecting the Custom\* field in the "Select a Field" column and entering the Site or Location ID in the "Criteria Value" field.



Then click on "Run Report/Query" to preview your Scan Export. On the next screen, you will have the option of saving your file to an Excel file, a plain text file, printing the file, and some other options. Choose the method that will be compatible with your business processes and POS software.

## Import Your Data Directly Into Your POS

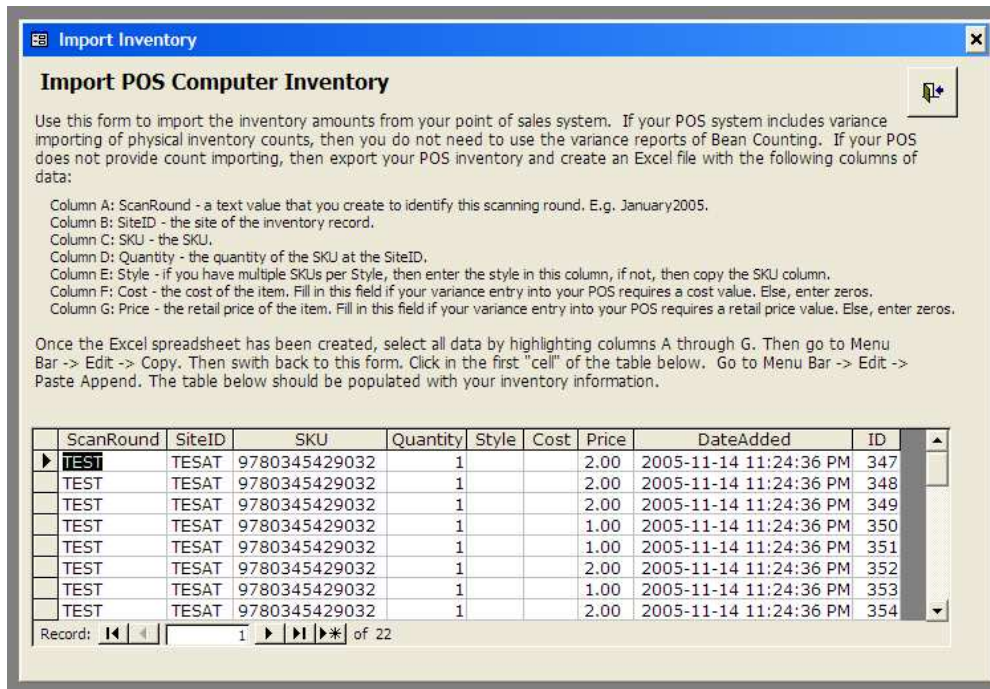
Your POS system may be able to read the Bean Counting Terminal files directly. A good file importer will be able to map columns to the correct fields required by the POS. If you choose to do this, the following file tips and information will be handy:

1. Avoid using Excel or other spreadsheet software to manipulate your data files. They often remove leading zeros without notice. At the very least, double check the values after you have edited a scan file with a spreadsheet program.
2. The order of the fields in the SKU upload text files is: "Areatag", "Line", "SKU", "Quantity", "Custom1", "Custom2", "Custom3", "Custom4".
3. For most POS systems, the critical fields are "SKU", "Quantity", and sometimes, the custom field which was used to store the site or location ID.
4. Each row in the text file represents a single "scan" (that has not been deleted). If the quantity prompting is disabled, then each row will have a quantity of 1, if prompting is enabled, the quantity field will vary appropriately. Each field is separated by a comma.

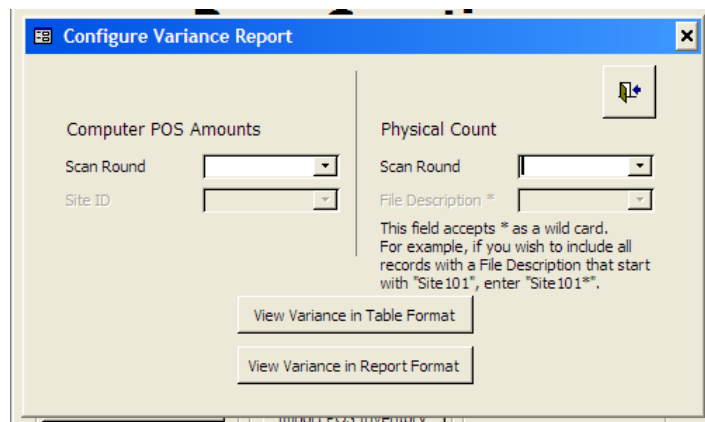
## Creating a Variance Report in Bean Counting

You can create a variance report using the some special tools in the Bean Counting Application.

1. You first need to create an inventory export from your POS. The method varies by POS system. Some POS systems have inventory exports to Excel or .csv, others will have a report which you can mangle into an Excel file, while others may prefer to connect to the database directly with an export tool. If you need help figuring out a methodology, contact your POS vendor first. Alternatively, we at Perceptus might be create a solution for you.
2. We recommend finalizing your inventory file in Excel. Create and arrange a worksheet with the following columns to match our import specifications:
  - **Column A:** ScanRound - a text value that you create to identify this scanning round. E.g. January2005.
  - **Column B:** SiteID - the site of the inventory record.
  - **Column C:** SKU - the SKU.
  - **Column D:** Quantity - the quantity of the SKU at the SiteID.
  - **Column E:** Style - if you have multiple SKUs per Style, then enter the style in this column, if not, then copy the SKU column.
  - **Column F:** Cost - the cost of the item. Fill in this field if your variance entry into your POS requires a cost value. Else, enter zeros.
  - **Column G:** Price - the retail price of the item. Fill in this field if your variance entry into your POS requires a retail price value. Else, enter zeros.
3. Open the Bean Counting Application. Click on *Import POS Inventory*. You will see the screen below.



4. In Excel, select all of your data columns. Then Go to the Menu Bar → Edit → Paste Append to add your inventory to the inventory table in Bean Counting.
5. Close the *Import Inventory* form. Then open the *Configure Variance* form. Screenshot below.



6. Select the inventory records and which physical scan records to include in the variance report.
7. Then click on either *View Variance in Table Format* or *View Variance in Report Format* to generate a variance report.
8. Then transfer these values into your POS software by whatever means is supported by it.

## Clearing the Terminal Data

Once you have downloaded your data from the scanner, and you are absolutely certain that you don't require the data any longer, you can delete the scanned files.

1. On the Terminal, select "Other" (5), then "Mem/Files" (3), then "Delete" (1), then select "Clear Scanned!" (4). This action will erase **all** scan data that is on the portable Terminal. Be extremely cautious when doing this!
2. Also clear the "Backup Log" (1). The Backup Log keeps track of most actions that affect the scanned data. It is different from the regular data file in that it also records deletions and various timestamps. See Appendix E for instructions on how to retrieve this information. The Backup Log is automatically trimmed; however, if you are completely finished processing a scan, it is safe to purge the backup log.

## Scanning Team Guide

### The physical inventory counting system

## Introduction

Sometime during the next several minutes, you will probably wonder “Why all this equipment to do an in house, physical inventory count?” The biggest reasons are time and accuracy – the scanners and barcodes make collecting data much quicker than a manual tabulation, and the processes include many checks to avoid many potential errors that can occur when doing an inventory count.

## The Device

To avoid some confusion, we’ll cover the basics of the device:

- The barcode scanner is embedded at the top of the device.
- The largish yellow button is the barcode scanner trigger. In Bean Counting, you only need to press this button, i.e. do not hold it down.
- The power button is at the bottom right. You need to hold it down for about 1 second for it to do anything (this prevents accidentally powering on or off the device).
- The “Enter” key is below the “3”. Different models have different labels for the button.
- “BS” is the backspace key for text entries, and it has special uses within Bean Counting.
- Pressing “Alpha” allows you to enter letters and symbols instead of numbers via the keyboard.



## Scanning a Store Pre-work

1. Affix the Scanning Slips to shelves, tables, racks, etc.
2. Circle the section type of the Area to which the Scanning Slip belongs.
3. Fill in box “# Lines Used” with the number of lines in the area – this helps to avoid missed sub areas during the inventory count.
4. Prepare a store map so that you know how many slips have been used, and where they were placed.
5. Before scanning ensure that all devices have the same version of the software. This is displayed on the Power On splash screen.
6. If you are validating each SKU that is scanned, make sure that you have a SKU Lookup table by going to the “Other” (5) menu, then “Mem/Files” (3). Look for a non-zero value for the SKU lookup. Note that the actual number of records will vary slightly if unrecognized SKU’s are added to the list during the inventory count (“Add NOF to Lookup” option).

7. Ensure that the Terminal has a validated Bean Counting serial number entered. If it is not, you will be unable to scan more than 30 items. There are warning prompts when you turn on the Terminal, and a second one before you start Scanning if the key is missing.
8. For quicker scans, you may wish to organize your stock so that the barcodes are easily accessible.
9. Much of this pre-work can be done before the "scanning day".

## Scanning – The folks with Portable Scanners

1. Turn on the portable Scanner (the power button has must be held down for about a second – this helps to prevent accidental power ups).
2. Set the store location. Go to "Other" (5). Then "Custom" (5). Then "User Field 1" (1).
3. **Enter your store number.** This number will be saved with each scan so that we can differentiate the records, later, at the office.
4. Press "ESC" as many times as necessary to return to the Main Menu.
5. Now we begin scanning. Select "Take Inventory (1)".
6. You are prompted to scan an Area Tag – this is the barcode that is on the Scanning Slips that were affixed during the pre-work.
7. You will then be prompted for the line number.
8. Next, you begin scanning the barcodes of your inventory. Press (do not hold) the big button to trigger the barcode scanner. Scan systematically to minimize errors. For instance, use "hard" boundaries for the division between areas and work from top to bottom, left to right.
9. You should hear a "nice" beep when it reads the barcode and recognizes it. The running totals for the area and line are updated at the bottom of your screen.
10. If you get a "SKU Not Found" error, the SKU was not in the SKU lookup file. It may be an old SKU, a vendor SKU, or some other error. Check if the value on the screen matches the barcode on the tag. If they do not match, cancel the scan and try again. If they do match, either move the item out of the area for examination later, or select "Yes" to accept the barcode.
11. If the barcode is missing, or can not be scanned, you can do a manual entry of the SKU by pressing "FN" and "1" simultaneously. Then key in the SKU with the keypad and hit enter (this also works everywhere a barcode scan is requested, such as when scanning an Area Tag).
12. If you think that you have made an error, you can press the "." key to browse the values that you have scanned within the line. Arrow up or down. To delete a record, press the "BS" key. You can clear the entire line by pressing "7". Press "." to go back to scanning in that line. Note: This is a shortcut. The longer equivalent is to escape back to the Main Menu, select Browse/Delete (3), scan the area tag, enter the line, browse and delete, then Escape back to Main Menu, etc.
13. When you have completed a line, read the running total at the bottom of the screen and write that value on the Scanning Slip in the "Line" column.
14. Press ESC and you will be requested to enter the next line number. Once entered, you can begin scanning to this new line.
15. When an area is complete, copy the running total from the screen to the Scanning Slip, box beside "Total". Fill in the "Scanner Initials" box; write the scanner's abbreviated serial number in box "Terminal ID", and move on to the next area.
16. Press ESC twice to get back to the Area Tag prompt. Scan the next Area Tag.
17. Rinse and repeat from step 5 as necessary.

## Scanning – The folks doing the Cross Count

1. The persons doing the cross count are the ones who will make this entire system accurate – make sure these people can count to at least 30 with confidence and reliability.☺

2. Go to a line and manually count the number of items within the line. If your count matches the "Scan Quantity", put a check mark in the "Quantity Checked" column.
3. If all the line totals have been verified, initial the sheet and move on.
4. If they count does not match, coordinate with the Scanner to establish a "Verified Quantity". Use the "Browse/Delete" menu of the scanning program to find and correct the discrepancy. Records can be deleted in the Browse/Delete menu, and added from the scanning menu (you can still use the "." Shortcut between Browse and Scan modes).

## **Miscellaneous Notes and Tips**

1. The optimum distance at which to hold the scanner varies by the size and type of the barcode – invariably, it gets easier for the scanners as you get used to the device.
2. Ambient lighting makes a difference. Bright, direct sunlight can cause problems, as can too dim lighting. Move stuff, use your shadow, or turn on additional lights.
3. Barring hardware defects, there is no data loss if batteries die and need to be replaced (there should be a backup battery built into the device). However, we recommend fresh batteries for each store scan – you can use the partially used batteries in other things.
4. Keep the people who are scanning separated to have more room to work. It also makes it easier to hear the "scan successful" beeps.
5. If the device has a problem, such as a lock up or the barcode scanner ceases to scan, you can reboot it by powering it on and off, just like your PC. Again, your data *should* be safe during the reboot.
6. You can browse the list of area tags used by pressing zero ("0") from the first screen after entering the Browse/Delete from the Main Menu.

# Appendixes

## Appendix A: Sample Area Tag



\*0000\*

### Circle Section Type

4'          8'          roll bar   2 way   4 way   bunker  
 shelves   table   window   slat wall   access   jewelery  
 manual ticket

Notes \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Line	Scan Quantity	Quantity Checked	Verified Quantity
1			
2			
3			
4			
5			
6			
7			
8			
9			
Total			

# Lines Used

Scanner Initials

Verifier Initials

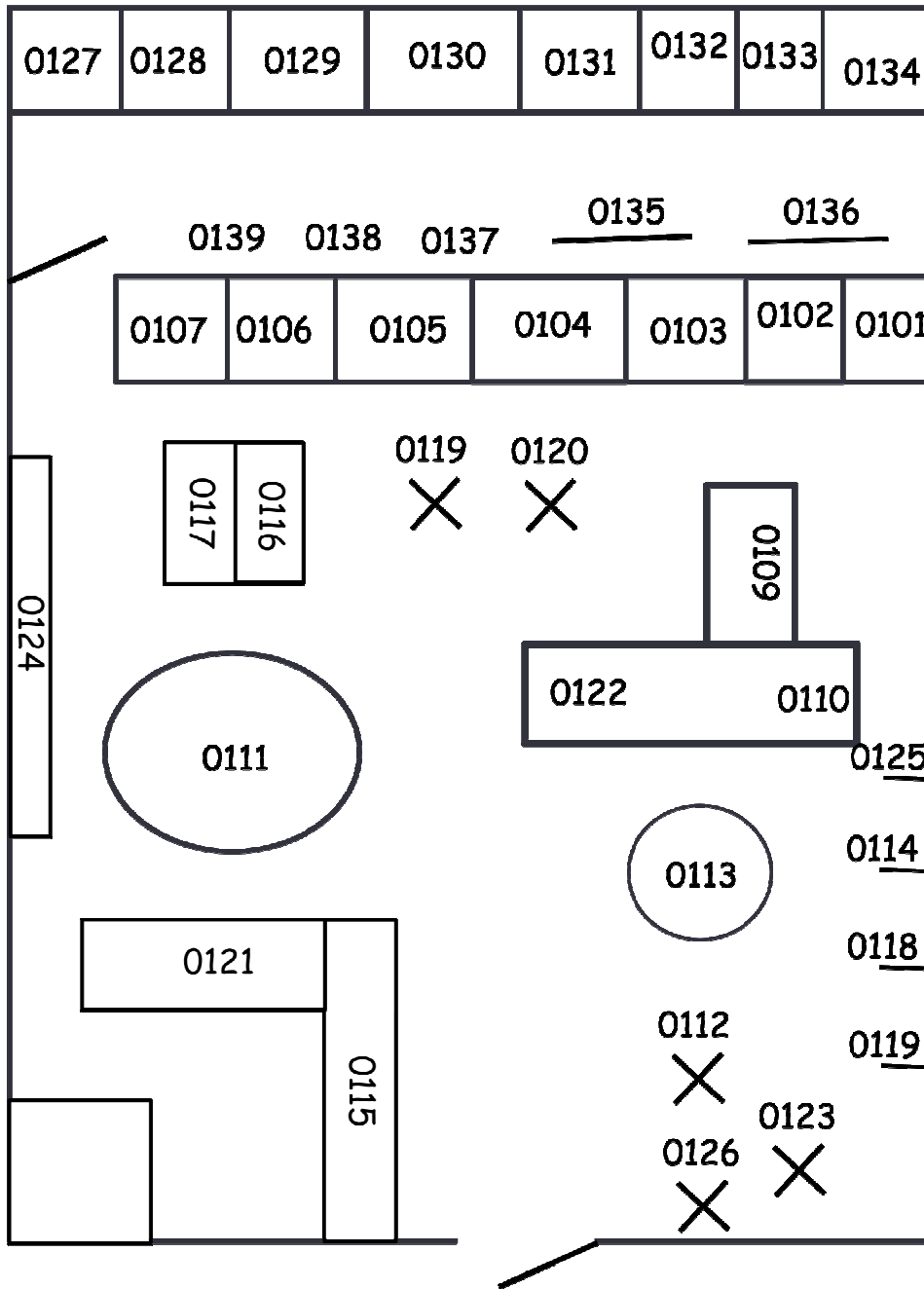
Terminal ID



\*0000\*

## Appendix B: A Sample Store Map

A store map helps the scanning team keep track of how many Area Tags were used in the store. It also helps in planning for the physical inventory scan. Don't forget to include things like your back room storage, boxed stock, display cases, and hidden drawers.





## Appendix C: Creating Barcodes

Do you have some stock that does not have barcodes? If you want, you can create barcodes in Bean Counting itself.

On the Main Menu of the Bean Counting program, click on the "Barcode Label Printer" button. "Edit the Barcode List" by simply entering the values for your barcode and the quantities for each barcode. Then preview and print your labels by clicking on the Printer icon. The report is designed for Avery 5160 labels. If you have the full version of Microsoft Access you can customize this report to use different labels or make other design changes.

The barcodes in Bean Counting are in code 39. The "Free 3 of 9" barcode font was installed with Bean Counting. It is available here: <http://www.squaregear.net/fonts/free3of9.shtml>

## Appendix D: Determining the Correct Communications Port

If you are plugging the cable that came with your Terminal cable directly into your computer, you are using one of your computer's serial ports. Often, the serial port number is embossed near the port. If not, you can determine the correct port through a bit of guessing and testing.

First, find out how many serial ports your computer has and what port numbers are assigned to them. In Windows 2000/XP, click on "Start" and then "Run". In the little window that appears type in "devmgmt.msc" and click OK. Expand the "Ports (COM & LPT) branch of the tree. There you will see a list of all Comm Ports installed and their Port #. There usually are not more than 3. Test each one with our software.

If you are using a USB to Serial adaptor, do the exact same steps. Each USB-to-Serial vendor has their own driver. Usually you can configure the Comm port that the device uses. To change this, usually one would right-click on the USB-to-Serial device and click "Properties". Then browse the tabs and option windows (such as "Advanced") until you find an option to choose the port to use. We recommend the lowest available port number that is port 4 or lower.

## Appendix E: Viewing / Saving the Backup Log

The Backup Log is primarily a development tool; however, it is also a useful tool to help insure against tragic user error. It records an abbreviated version of your scans plus other run time information such as deleted records and device settings.

You can view the Backup Log on your PC by using any standard terminal program and using "Backup Upload" (2) from the "Mem/Files" menu.

A good, free terminal program that we recommend is Tera Term Pro. Visit this site to get and install a copy of Tera Term Pro ver. 2.3 for **Windows 95/NT**  
<http://hp.vector.co.jp/authors/VA002416/teraterm.html>.

Close any other Bean Counting programs that are open. Then open the Tera Term program and create a new connection with the same port settings that you use for FileTransfer.exe. Once that is setup, use the "Backup Upload" (2) option from the "Mem/Files" menu. You should see your

scan information, SKU lookup list, and other data scroll in the window as it is uploaded from the portable – it should be in "readable" text and numbers. If it looks "greek", then you need to check the port speed settings. Make sure that you are using 115200 bps, 8 data bits.

Once you are able to view the data, the next step is to record the data to a file. Do this by creating a new log file from the File menu. Then run the upload from the Terminal again. When it is done, close the program and open the "log" file in a text editor.

The actual file consists of several different files that we upload. You are welcome to view the data.

## **Appendix F: SKU Info Viewer**

The Bean Counting software has a bonus module, the SKU Info Viewer. You can create a specially formatted data file which will let you use the handheld Terminal to look up color, size, price, description, and some custom information of your inventory. It is useful for retailers who do bulk markdowns in stores and need to create price tags with the discount prices. You will need to contact Perceptus for details on the import specifications for this feature. The device has a capacity for about 8000 SKU Info records.

Once the SKU info file is loaded, follow these steps to use the SKU Info Viewer:

- Turn on the Terminal (press and hold the bottom right button for about a second).
- Press 1 to go past the splash screen.
- From the Main Menu, press 4 for "SKU Info Tool"
- You will be prompted to "Scan a SKU to Lookup". Just press the big button in the centre to trigger the barcode scanner. You can also do a manual entry with FN+1.
- After a successful barcode scan, the style, regular price, sale price ("Cur Price"), and some other information will be listed. For markdowns, you will use the "Cur Price" to make the new price sticker.
- You can press barcode trigger (or do a manual entry) while the previous SKU information is on the screen.
- If you have trouble, try turning the Terminal off and on with the power button.