QuickStore Mobile Counting

Using the WDT2200 with QuickStore
to take a physical inventory or cycle count.
Professional Version Only

Table of Contents

Introduction

Welcome to QuickStore Mobile Counting. Using Wasp's WDT2000 you are able to walk around your store and count your inventory and upload that count to QuickStore. This feature produces very accurate counts while reducing the time it takes to count the inventory. In addition, the integrated scanner feature helps you to reduce errors by eliminating manual data entry problems. QuickStore is simple to use and, with the help of this guide, you should master it in no time. This guide takes you through installing and setting up the WDT2200 and teaches you how to use the device to count your inventory and upload the data to QuickStore.

Understanding Physical Inventory vs Cycle Counts

The first step to efficiently using QuickStore is to understand the difference between a Physical Inventory and a Cycle Count in QuickStore. Definitions of both follow.

- **Physical Inventory:** A Physical Inventory is usually used after store hours to count every item in the store. It is often referred to as a store audit or inventory count. In QuickStore if an item is not counted as part of the Physical Inventory its quantity will be set to 0. When performing a Physical Inventory it is very important to note that if an item is not counted its quantity in QuickStore will be set to 0, even if it previously had quantity.

- **Cycle Count:** Cycle counting occurs when a small portion of your inventory is counted on one day, a different portion is counted on another day, etc. You can count your subset of items daily, weekly, monthly or on whatever schedule you like. This method provides you with constant data on your inventory counts and, with careful scheduling, allows all inventory to be counted several times a year. As an added benefit, it does not require the business shut down that a full, yearly physical count of all your inventory requires; therefore, you may find this method less disruptive to your overall business needs. With cycle counting you can also have higher-priced or faster-moving merchandise counted more often so you can make sure these items are always adequately stocked. Cycle counting works well for larger businesses for which a total shut-down to count inventory is not practical. With this form of counting, if an item is not counted its quantity is not changed.

You need to decide which form of counting you will be using before you begin and stick with that method. When you are done counting, double-check that you have selected the correct method in QuickStore before accepting the counts. If you count 20 of your 200 items and accidentally pick Physical Inventory as the Operation Type in QuickStore, the quantity of the other 180 items will be set to 0.

Installation

1. Install DTComm

On the machine you will be using to upload the inventory counts you need to install a program called DTComm that is used for initial setup of the WDT2200.

The DTComm installer can be found on the CD that came with the WDT2200 or on the CD that came with QuickStore in the support\ AppGen.

You can run the DTComm installer directly from either CD. You do not have to copy it to your machine. Double click on APGins.exe and follow the prompts to install DTComm on your machine.

Note: You do not have to install DTComm on the machine with QuickStore since the counts are stored in a file that you can move to the machine that has QuickStore installed on it. However, it does make the process easier and this guide is written assuming the machine you are installing DTComm on also has QuickStore installed on it.

2. Install QS.exe onto the WDT2200

After DTComm is installed on your machine you need to copy the programs to the WDT2200 that allow you to count your inventory. You only have to do this once for each WDT2200 unit you will be using. If a unit is every completely reset or if the program is erased, then you will need to complete this step again.

Wasp sells two versions of the WDT2200. You must check each WDT2200 and make sure the correct program is put on the device. If you get the wrong program on a device, the program will not run and it will let you know it is the wrong version. You can tell if you have the WDT2200C or the WDT2200G by looking on the back of the device on the top of the yellow sticker. The 2200G is capable of having 8MB of data and has a faster processor. Check each device before you copy the program to it.

Use the Quick Start Guide that came with the WDT2200 to setup the device and to install the battery, charge the unit and connect the device to the computer. After the unit is charged and connected you can turn it on and copy the programs to it.
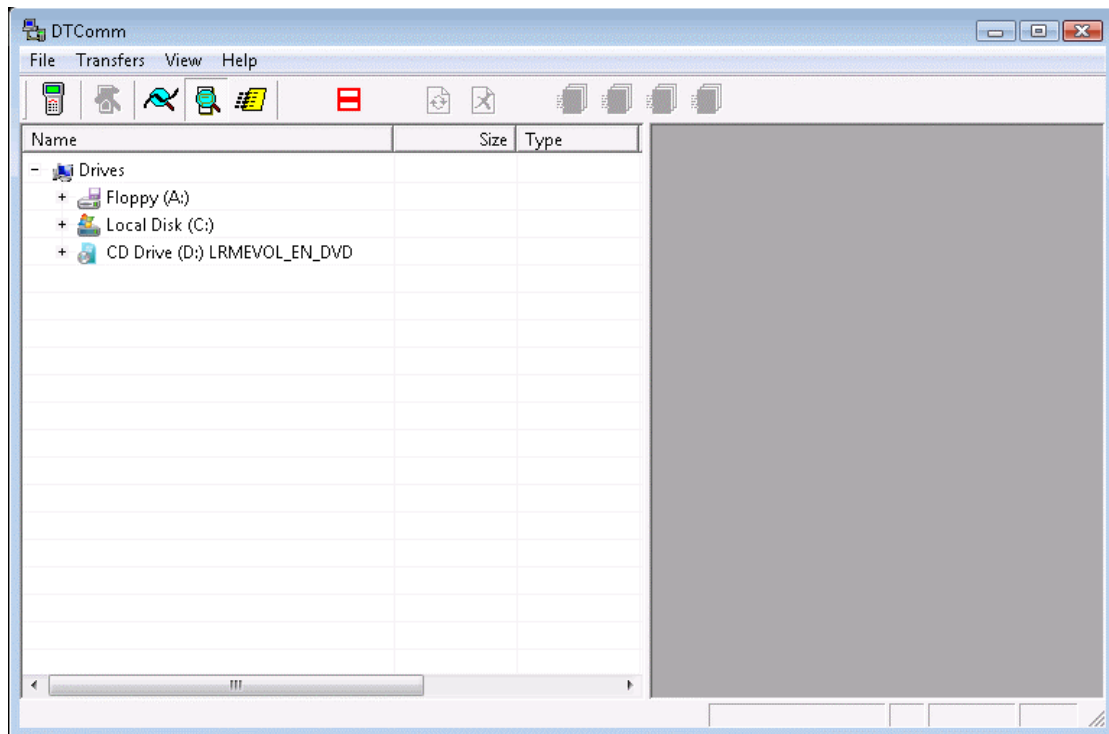
To copy the programs:

    a. Start DTComm by clicking on the icon in:
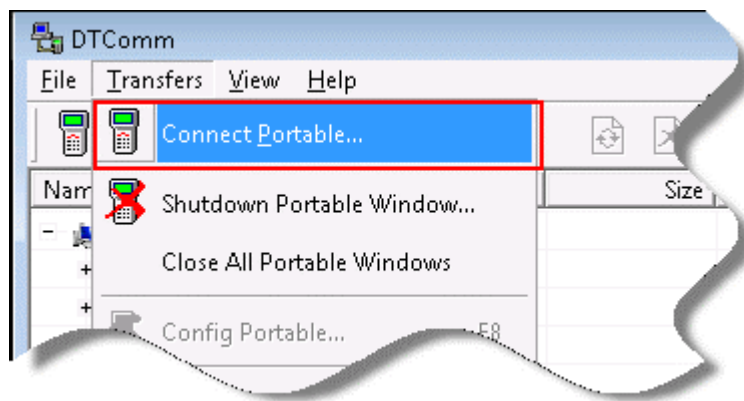
        Start/All Programs/AppGenPro/DTComm

        The DTComm window is similar to Windows Explorer:

b. **Configure DTComm and Connect to it**

From the DTComm application click on the **Transfers** menu and select **Connect Portable**.

The **Open Portable Window** appears.

c. For **Device** select the **WDT-2200** from the list.

d. The **Address** box can always remain **A**.

e. In the **Com Port** field, you will usually enter COM1 (unless you have connected the device to a different port).

f. The three check boxes should be selected.

g. Click **OK** and then the *WDT2200* should beep and you should see the device window open on the right side of the DTComm application.
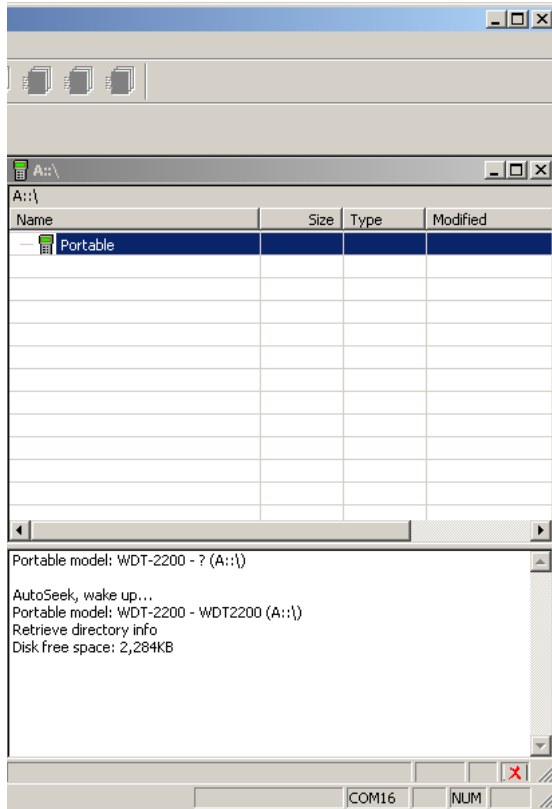
If the device does not connect you may have the wrong COM port, the device may not be connected properly or may not be charged.

Note: If you are using a USB to Serial adapter, please see **Using the WDT2200 with a USB to Serial Adapter** section.

3. **Install the counting application**

   a. In the left hand browser window **in DTComm**, navigate to the application files on the QuickStore CD in Support\WDT2200G or Support\2200C depending on your device type. In the folder you will see two files:
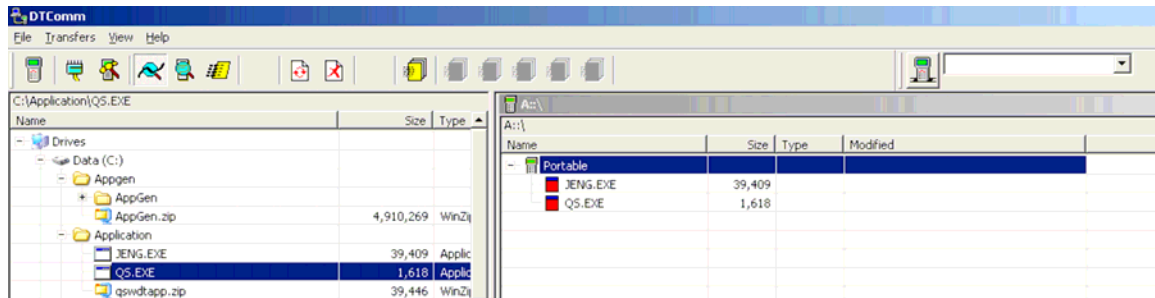
      JENG.EXE
      QS.EXE

   b. Drag the files to the WDT2200 device window as directed:
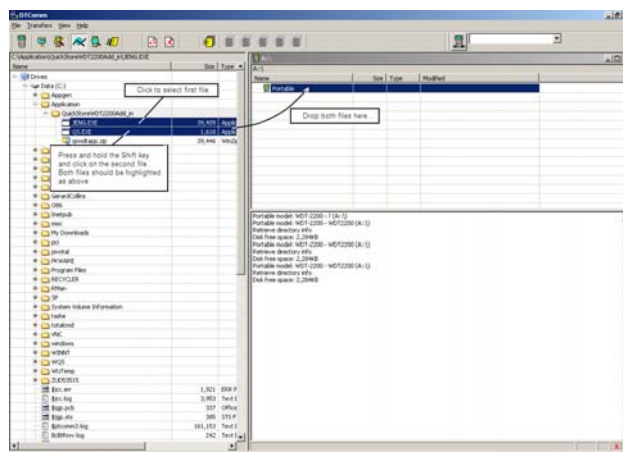
The device window will show the files on the portable device:

4. **Launch the Inventory count application on the WDT2200**

The *WDT2200* screen should display:

**WDT2200 V1.20
MEM…
>**

Press and hold the *CMD* key on your WDT to get the following menu:

**1. RUN 2. TER
3. COM 4. DIR
5. ERA   6. TYP
7. CPY   8. SET**

Press 1. to select **1. RUN**
You should get the following menu:

**< RUN PROGRAM >
JENG.EXE**

On the WDT, press on the right arrow key [->] until you see:

QS.EXE

Press [ENT]
You should see *Loading…*
And then:

**Quick Store
Inventory 1.0
F1=Collect
F2=Upload**

5. Count inventory Using the Mobile Device

Press the [F1] key to start your inventory count
You should get the following screen:

Item:

— — — — — — — — — — — — — — — —

Once you scan your first item, you will get the corresponding barcode value on the first line:

Item:
_1234 _ _ _ _ _ _ _ _ _ _ _ _
QTY:

_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

Enter the correct quantity and press the [ENT] key to go to the next count.

Item:

_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

The program will loop until you press the [ESC] key.

When you press the [ESC] key you will get back to the start menu:

Quick Store
Inventory
F1=Collect
F2=Upload

6. Configure QuickStore

You are now ready to send the data collected to your QuickStore application.

Before you proceed you need to setup your WDT2200 within *QuickStore*.

To do this:

    d. Click **Setup>This Computer**. The **Changing Computer Settings** screen appears.

    e. Select the **Scanner** tab and set the scanner to serial to the same serial settings as entered in the *WDT2200* setup.
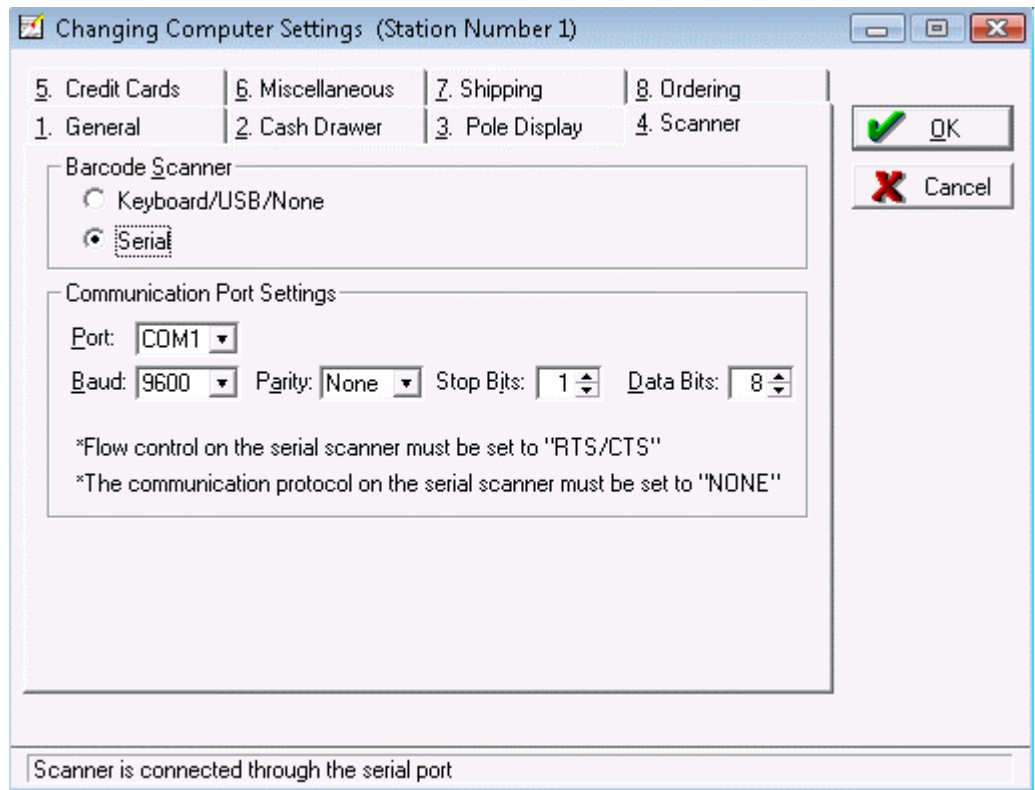
f. Click **OK** to save your changes. Now you are ready to use QuickStore to upload your physical inventory or cycle count (see following sections).

Conducting a Physical Inventory

To perform a general stock count or full stock count for a selected supplier (vendor):

Important Note: Please backup your database before performing a stock count or updating the database. This allows you to recover your data, if necessary.

1. Open *Quickstore* and go select **Activities > Physical Inventory**. A screen similar to the following appears:
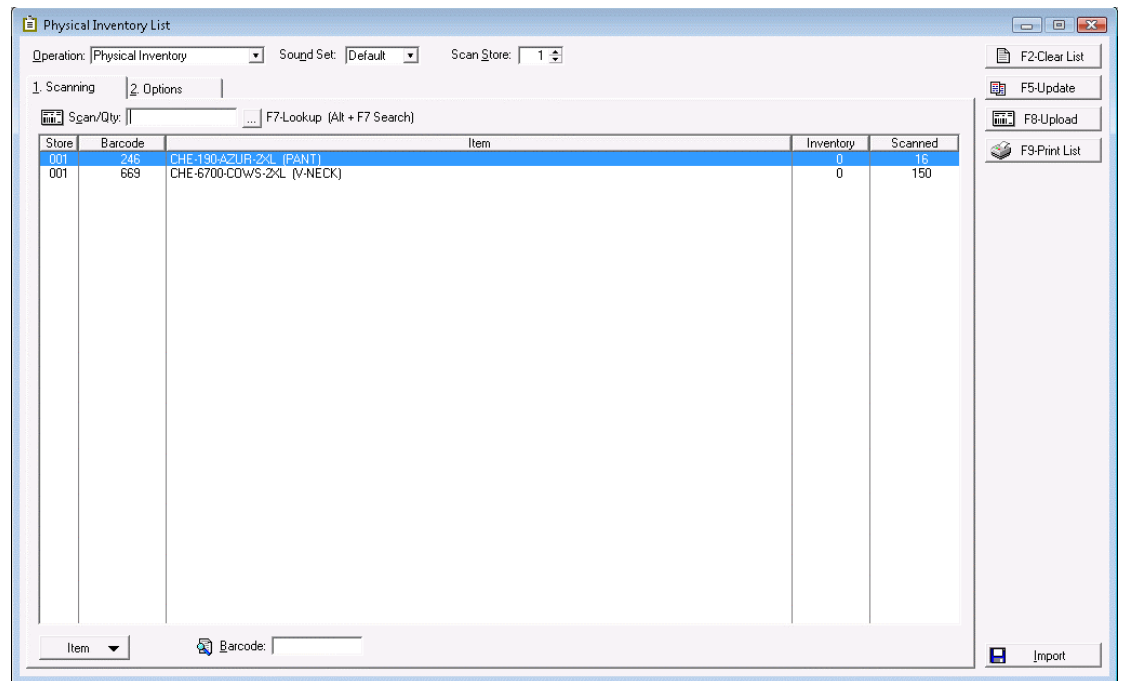
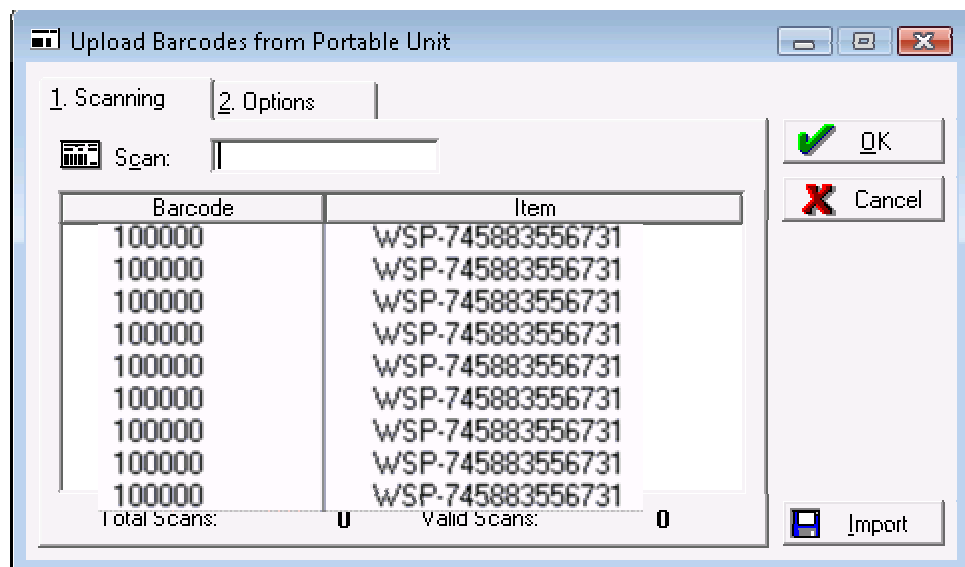2. To upload the collected data, click **F8 – UPLOAD**.
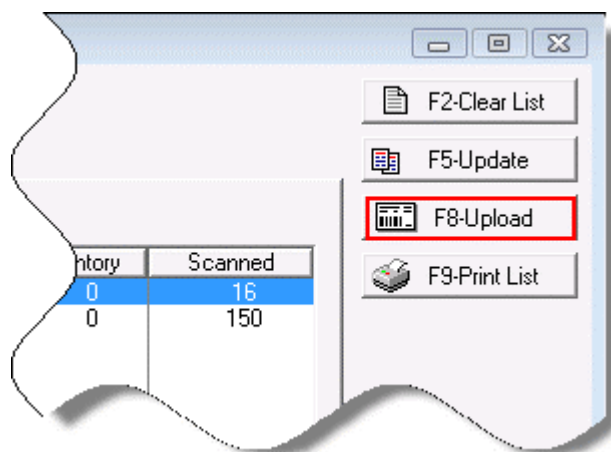
The following screen will appear:
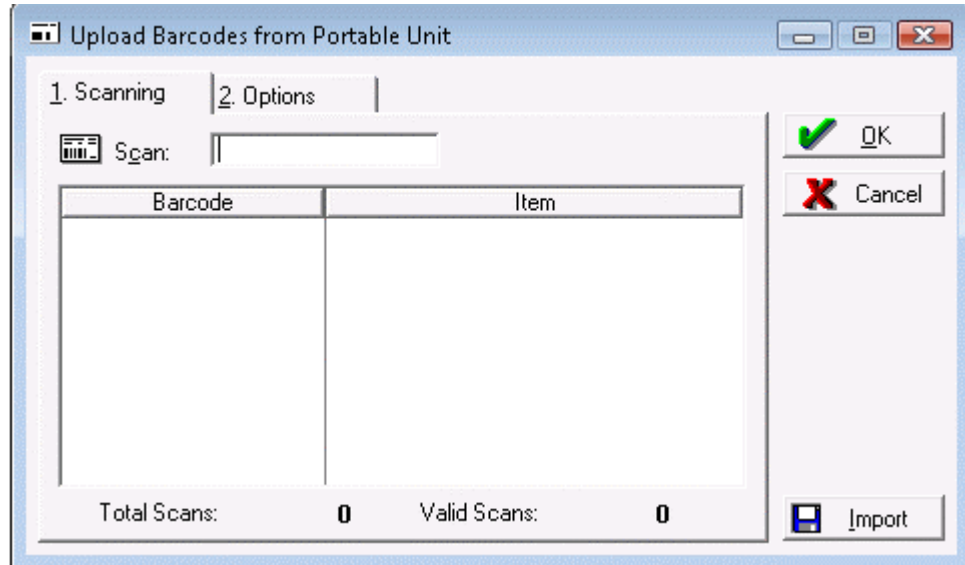
3. On the *WDT* Press the **[F2] Upload** key. The following screen displaying all the scanned items will appear:


4. Click **OK** on the **Upload Barcodes from Portable Unit** screen. A screen will appear displaying the following message:

   "The barcodes you uploaded from the portable unit will now be copied into physical inventory.

   Are you sure you want to continue?"

5. Click on **Yes** on the message screen. A message will appearing displaying the number of items added and the number of invalid scans (if any).

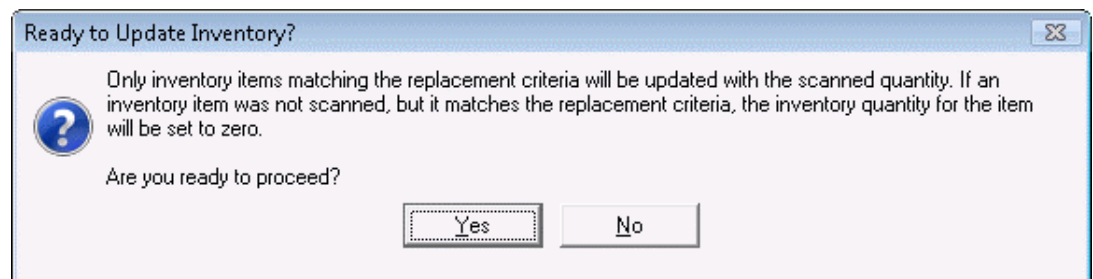6. On the **Physical Inventory List**, click the **F5 Update** button.
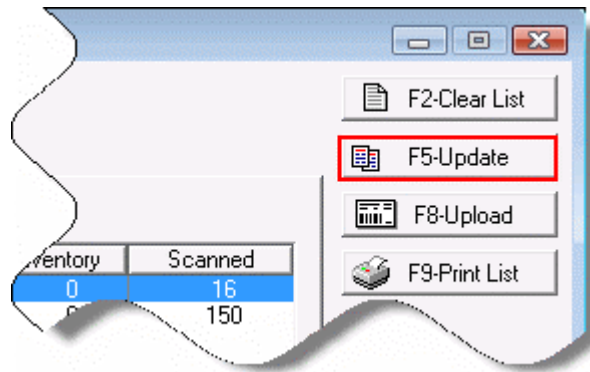
The **Update Inventory** with **Scanned Count** screen appears.
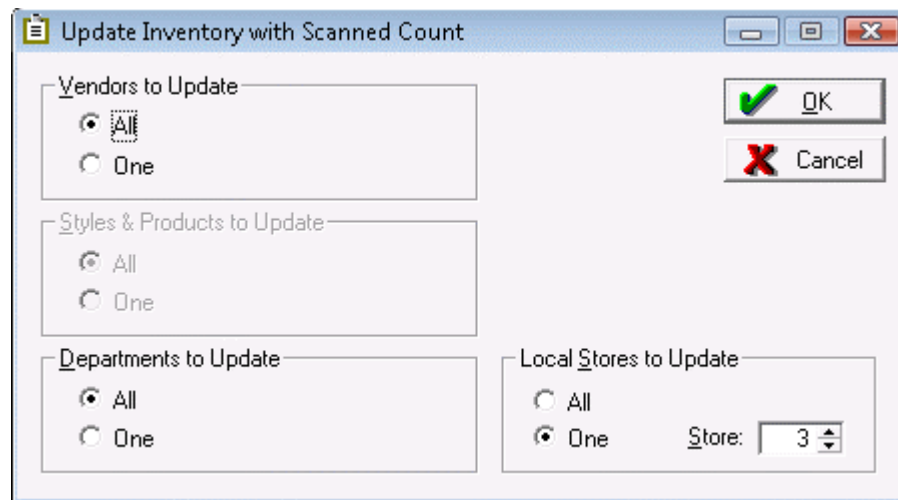
7. On the **Update Inventory** with **Scanned Count** screen, choose what you want to add.

    Note: If you select **ALL vendors/ALL Styles and Products/All Departments**, it will update all of your stock. If you intentionally did not, or forgot to scan some items, it will reset the corresponding quantities to zero. The easiest way to update may be to update the stock per vendor.
   If you want to perform a partial count only, please see the Cycle Count section in this guide.

8. Click **OK** to proceed. The following warning will appear.

    Reminder: Please backup your database before performing any stock counts or trying to update the database.

9. Click on **Yes** to proceed. A confirmation will appear when the update is successfully completed.

10. Click **OK** on the confirmation message. Now the **Inventory** and **Scanned** quantities on the **Physical Inventory List** will match.

11. At this point you can update the inventory for another vendor (if you opted to only update one vendor previously) by clicking the **F5 Update** button on the **Physical Inventory List**. The **Update Inventory with Scanned Count** screen will appear again.
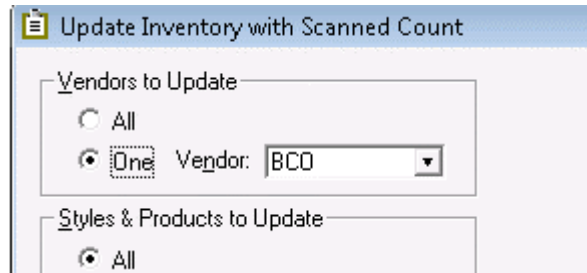
12. Select the **Vendor** you want to update from the drop down list, then click **OK**. The Inventory and Scanned quantities for that vendor will now match on the Physical Inventory List.

13. When you are done updating, click on **F2-Clear List**. A confirmation screen will appear.

14. Click **Yes** on the message screen.

After you have finished your count, also delete the data collected on the *WDT2200* by following the steps below:

1. Press on the **[ESC]** key for the screen showing the collected data, you should now have:

   Delete File (1-Y/0-N)

2. Press **[1]** + **[ENT]** on the WDT to confirm.

3. Then **[ENT]** on the *WDT* to confirm when prompted **Erase All** ?

   The *WDT2200* should display **Done**

4. Press **[ESC]** to get back to the main menu and switch the *WDT2200* off if you finished your stock count.

# Conducting a Cycle Count (Partial Count)

Instructions for performing a partial count and update quantities only for the counted items.

Note: This function is available in the Professional version only.

1. On the WDT2200, follow the steps indicated in the previous section to perform your stock count.

2. Open *Quickstore* and go **Activities > Physical** Inventory.

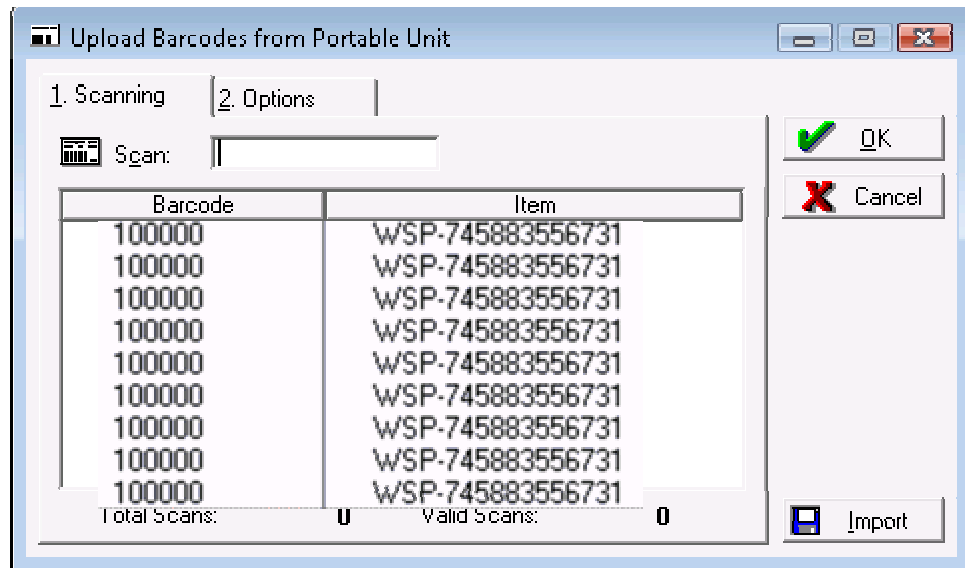3. In the **Operation** drop down list, select **Cycle Count**.
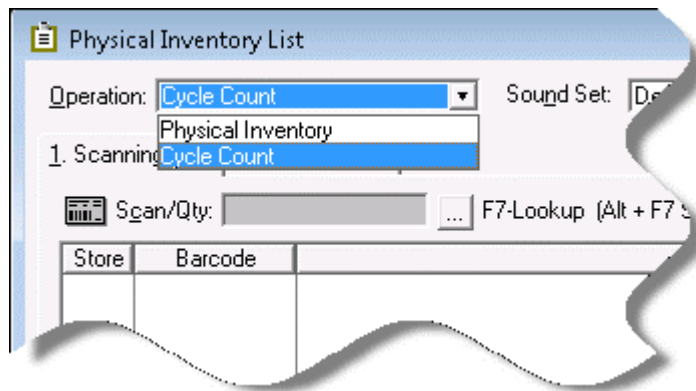
4. To upload the collected data, click on **F8 – UPLOAD**. The following screen will appear:
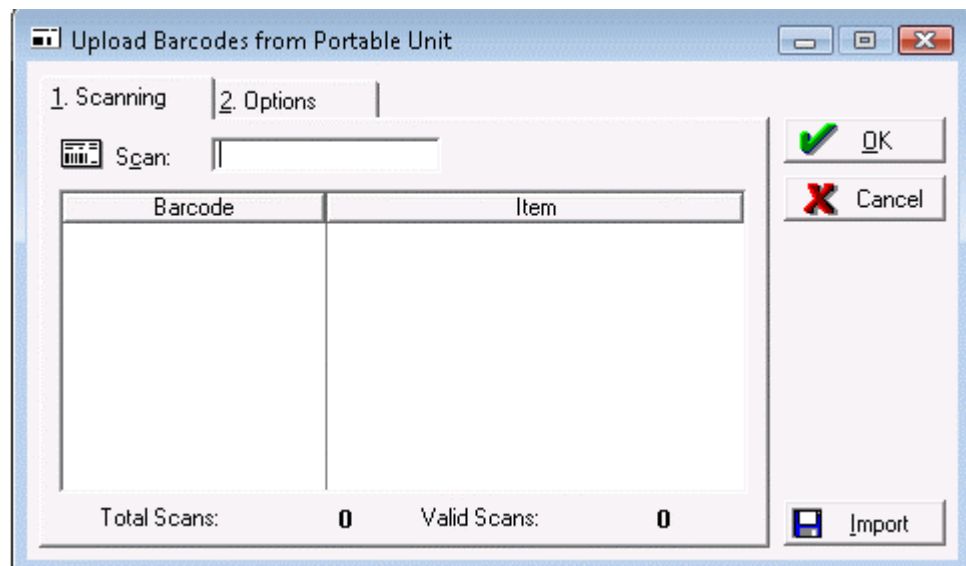
5. On the *WDT* Press the *[F2]* **Upload** key. You will see the following screen displaying the scanned items:

6. Click **OK** on the **Upload Barcodes from Portable Unit** screen. A screen will appear displaying the following message:

    "The barcodes you uploaded from the portable unit will now be copied into physical inventory.

    Are you sure you want to continue?"

7. Click on **Yes** on the message screen. A message will appearing displaying the number of items added and the number of invalid scans (if any).

8. Click **OK** on the message screen.

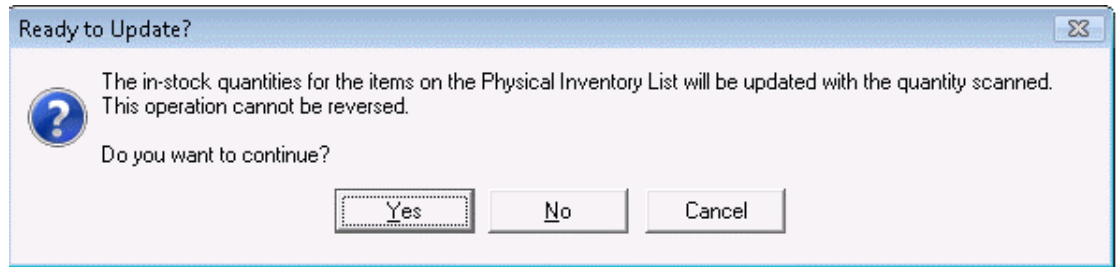9. On the **Physical Inventory List**, click the **F5 Update** button.
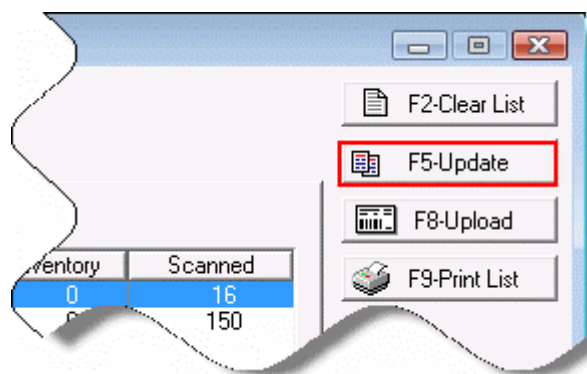
The following message will appear:

14
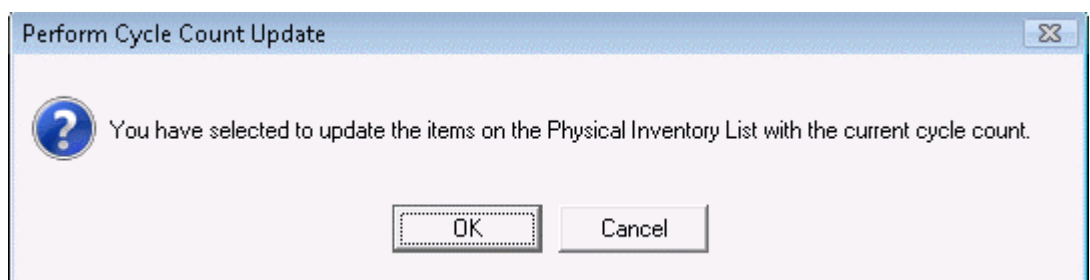
10. Click **OK** on this message. The **Ready to Update** screen appears next.

11. Click **Yes** to proceed.

12. After the update is complete, press **F2 – Clear List** to clear the list and close the *Physical Inventory List* window.

13. Press the **[ESC]** key on the *WDT2200* to exit the program.

14. Clear the data on the *WDT* (Select **1** in the following menu:

   **Delete File (1-Y / 0-N)** Confirm and press **[ESC]** to go back to the main menu.

Your *WDT2200* is now ready for a new *Inventory* or for a new *cycle count* or can be switched off.

Using the WDT2200 with a Wasp USB to serial adapter

This section contains instructions on how to use a *COM* (Serial) port with a *USB to serial adapter*. (If you use a standard COM port please go to page 2.)

If you use a USB to serial adapter the COM port address will be different from COM 1 or 2. To find out the available *COM* port address(es):

1. On your computer, navigate to (for XP) **Start>Control Panel>Performance and Maintenance>System>Hardware tab>Device Manager**

   or

   (for Vista) **Start>Control Panel>Hardware and Sound>Device Manager**.

2. In **Device Manager** then go to **Ports** (COM LPT). Below is an example of the Device Manager in Vista:
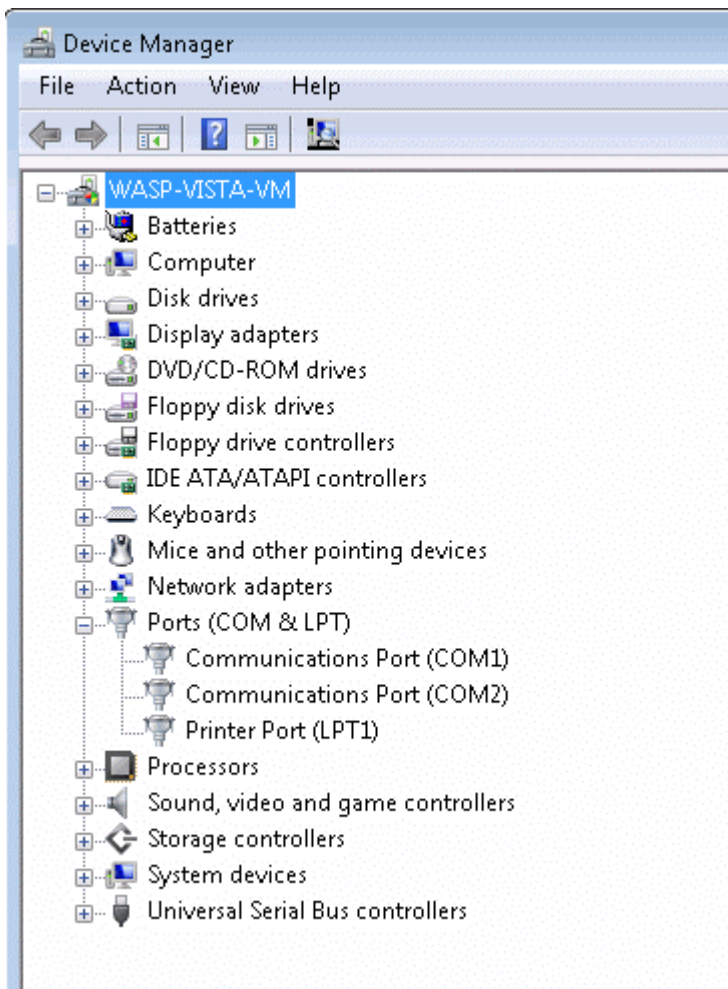
In the example below you, have 1 COM ports: *COM1,* plus 1 USB COM ports: *COM2*

In this case the *COM* port at the back of you PC would be *COM1*.

In this example nothing is plugged into a USB port, so you can choose *COM2.*