

Inventory Service In-A-Box™

Inventory Service In-A-Box (ISB) is the sole property of Inventory Science Systems of Bellingham, WA.

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ISB is a Windows application of a commercially available database called Alpha-5. (Alpha-5 is the trademark of Alpha Software -www.alphasoftware.com) By using a database program to create this application, it allows fast and extremely reliable development of ISB. Application modifications can often be done in minutes or hours, not days or months as would be expected from a more traditional approach of a stand-alone program. Reliability is also greatly increased compared to a stand-alone program because of the larger user base than could be expected from such a topic-specific application such as ISB.

ISB is distributed with the run-time version of the Alpha-5 database program. A “run-time” version of Alpha-5 means that the user of ISB can run all the operations, reports, etc. of ISB but cannot create any new operations, reports, etc. on a customized basis. Should you wish to customize ISB, you must purchase and install the full version of the Alpha-5 database program. At the time of this writing, it runs about \$ 349.00 USD.

ISB is easily used for needs such as internal auditing or warehousing among others. However, ISB is an application ideally suited for an Inventory/Stocktaking service.

Some Inventory/Stocktaking services may wish an application to simply collect the inventory information and they'll take care of the rest. Other services need an application to not only process the data but take care of data-archiving, customer/inventory information, create forms and even run the day-to-day operations of their Inventory Auditing service. ISB can handle these diversified needs or anything in between.

Many useful features of ISB are built-in the Alpha-5 database such as switching between a form-view and a browse-view (similar to a spreadsheets' rows and columns) or sorting data, etc. To learn more about how Alpha-5 works, consult the manuals included on the installation CD. Please keep in mind that not all features of Alpha-5 are enabled in the run-time version included with ISB. Consult the Alpha-5 tech support or their very helpful bulletin board to post questions to other Alpha-5 users.

Your Service Name
Inventory Service In-A-Box™ Version 2.92

ISB Setup Menu

Data Collection Menu

Business Operations Menu

ISB Help Menu

Inventory Science Systems

Quit ISB



July 22, 2002

Upon opening ISB, you will see the Main Menu screen. After configuration and after ISB has been re-started, "Your Service Name" will be replaced by your company's name. The ISS logo will likewise be replaced by your logo. The date displayed will be the system date (current date) of your computer.

Buttons are color-coded to indicate their function:

BLUE: Navigates between various forms, programs, etc. Clicking these buttons effects no data.

RED: This will destroy data (erase files for example). You will be required to confirm any deleting of data.

TEAL: Performs a function on data such as importing files, altering data, etc.

GREEN: Prints reports, forms, etc. All reports will show a preview prior to printing.

DARK RED: Functions that could, if used incorrectly, corrupt data. This is an uncommon function.

Click  . You'll see the screen below.

ISB Setup Menu	Exit
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The data that you enter here will be used in various places. Some data will appear in reports or letters such as invoices, inventory reports, etc. Other data will appear in drop-down list boxes where the user may choose from the available list or speed-enter data by entering the first few characters.

Inventory Service Information	Information about your company will appear in reports, etc.	Countries	This is the drop down list of countries that you service.
Employee Manual Entry	View/Enter data for your employee manual.	General Business Titles	Your customers and contacts titles.
Payment Terms	What payment terms does your company offer to customers. This appears on invoices, etc.	BusinessTypes	What type of business' do you serve?
Maps	What maps do you use to locate a customer. This will be used for directions to the job site.	Employment Termination Reasons	Why would employment be terminated and is an employee eligible for re-hire?
Job Titles	In your company, what job titles are used? This will be used in the Employee table.	Inventory Frequency	How often will an inventory/job be performed?
States	The state names and abbreviations will be used on several tables. Default set to U.S. States.	Time Frame	How is an employees pay calculated?
Miscellaneous Job Types	A list of all your possible services to your customers.	Rate-Per	How a customers invoice is determined?
Inventory Types	What types of inventory does your company perform.	Priced-At	What prices may be used in the inventory count?
		Phone Types	Function of specific phone numbers; fax, cellular, etc.

A description of each function is described next the respective button. The majority of these functions will not need any modification whatsoever. Let's cover each button:

Inventory Service Information: Your company's name, address, logo, etc. are entered from this option. This information will appear frequently various places such as inventory reports, invoices, etc. The company name and logo will appear on the Main Menu the next time ISB is opened. Note: The logo must be a bitmap format (*.bmp). Right-click the logo image and then select "Import Bitmap". Select the image file and click "Open" when ready. Save your data when finished.

Employee Manual Entry: This option lets you create and print an employee manual. An employee manual is generally a very good idea to avoid or reduce exposure to lawsuits, and clarify employee rights and responsibilities.

Payment Terms: If you are using ISB to invoice your customers, various payment terms are part of a drop down list. These terms include "Net 30 days", C.O.D., etc.

Maps: To help the auditing crew to arrive at the job site, it is helpful to let them know which map to use along with the coordinates of that map. List the maps that your company uses. This information will appear on a "Packet Cover". The "Packet Cover" shows various information such as address, direction to job-site, etc.

Job Titles: The job titles that your company uses. This is used in the employee table to indicate their position with your company.

States: This drop-down list of States and their abbreviations will appear in various forms to make data entry easier. The default States are U.S. states. These will need to be modified for non-U.S. countries.

Miscellaneous Job Types: When setting up job data, non-inventory type work may be chosen from the drop-down list. This will appear on "Packet Covers".

Inventory Types: Again a drop down list for "Packet Covers", invoicing of customers, auditor reference, etc. You will probably never need to modify this list.

Countries: Various countries covered by your inventory service. International mailing etc. will require a country listed. For nearly every company, just make sure your country is listed.

General Business Titles: To expedite data entry for Business contacts and Customer data, this list of job titles is handy.

Business Types: A list of business types for "Packet Covers", general reference, etc.

Employment Termination Reasons: If you are using ISB to keep track of your employees, this will expedite data entry.


Inventory Frequency: How often will the inventory/job be done? Yearly, quarterly, etc. For data entry and general reference purposes.

Time Frame: For data entry purposes and for tracking employee data, etc.

Rate-Per: This is how an invoice is calculated -hourly, flat rate, for each \$ 1,000.00 of inventory, etc. To expedite data entry.


Priced-At: Another way to expedite data entry and for invoice calculation purposes. Retail, Cost, etc. are on the list.

Phone Types: A list of phone types such as Office, Home, Cellular, etc. is used for business contacts, customers, and such.

After entering or modifying all the data, click the "save data" button or the  icon. Then "Exit" back to the "Main Menu".

Click the  button. You'll see the screen below:

Your Service Name
Inventory Service In-A-Box™ Business Operations Menu

Business Contacts	Bid on Inventory/Job	Exit
Employee Manual	Customer Information	 July 26, 2002
Employee Information	Inventory/Job Data	
External Applications	Billing Information	
ISB Help	Auditing Instructions	
Paper Forms	Terms and Definitions	
Utilities		
General Ledger		

Business Contacts: Information on miscellaneous business contracts is placed here for reference.

Employee Manual Menu: View or modify your employee manual for this option. You may also print the employee manual from here.

Employee Information: Keep track of all the information about your employees such as address, emergency info, rate of pay and so on.

External Applications: Click a button to open any number of other applications. These include applications that you already have on your computer: Notepad, Wordpad, Internet Explorer, MS Paint, Windows Explorer, Windows Media Player or a Direct Cable Connection. You can also open applications included with ISB: Calendar, ScanDevil/Inventory Portal, RFU, Barcode Creator or Calendar program.

ISB Help Menu: This opens the same Help Manual from where you generated this manual.

Paper Forms Menu: Numerous paper forms can be printed from here. Where applicable, your company logo will appear on these forms. These forms are designed to help auditors, office personnel, quality control and basic daily operations.

Utilities: Various functions such as changing file names, etc. can be done from here

General Ledger: A simple general Ledger (Income and Expenses) along with income and expense reports are included from here.

Bid on Inventory/Job: Before a customer becomes a customer, you will need to give them a bid on the inventory/job. This table stores information about these potential customers. Once they become a customer, this information can automatically fill in the customers' data in the Customer information table below. You can also generate follow-up letters from here.

Customer Information: Just about everything you'd ever want to know about a customer is here. It includes everything from their address to directions to the job-site to contact information. This information will appear on the inventory reports, invoices, etc. A simplified version of this screen is available under the Data Processing portion of ISB.

Inventory/Job Data: This is specific inventory/job information such as date, time, etc. There is also productivity and quality control information that can be entered and calculated. Invoices and Packet Covers can be printed from here. A simplified version of this screen is available under the Data Processing portion of ISB.


Billing Information: Often an invoice is sent to a separate address than the job-site address such as a corporate headquarters for a store chain. This portion of ISB will coordinate Billing to a separate address.

Auditing Instructions: When doing an inventory audit, you must know which procedures to follow such as; count at cost price, and so on.

Terms and Definitions: Various Terms and their definitions can be found here.


Back to the Main Menu

A rectangular button with a blue border and the text "Inventory Science Systems" in blue.

Click  for contact information for Inventory Science Systems.

Inventory Science Systems Web-Site: This will automatically connect to Inventory Science Systems' Web-Site.

A rectangular button with a blue border and the text "Data Collection Menu" in blue.

Click . Most of the work done in ISB will be done from this menu or a sub-menu of this option.

External Applications: Just a convenient shortcut to the same External Applications screen as mentioned above.

Utilities Menu: A shortcut to the Utilities Menu.

Home Inventory Menu: Home/House Inventories can be done from here. You can create definitions for physical location and categories that appear as drop down lists when entering data into the Home Inventory Table.

Data for Home/House Inventories is manually entered into this database table. It is not collected via a ScanDevil Data Collector but is, generally, first written on paper and then transferred to the Home Inventory Application. Photos of the items counted can be included in the various reports generated from this application.

Asset Inventory Menu: Similar to the Home/House Inventory except with more data fields, photos, etc. as well as definitions of buildings for a drop down list. Asset Inventories are typically used for businesses that require more information than a household inventory.

Customer/POS Specific Table Maintenance: Occasionally, inventory procedures or requirements can become complex and may require the creation of new database tables to define additional relationships of data.

The vast majority of inventory counts will never need this option. Creation of any new customer specific tables will require the full version of Alpha-5 mentioned at the beginning of this document.

Customer Information: This is the bare-bones version of the Customer Information covered in the Business Operations portion above. This minimal information will appear on inventory reports.

Inventory/Job Data: The bare-bones minimum for describing to ISB the specifics for an inventory-count/job. Note: Customer information (above) must be entered for a customer before entering the information for that specific inventory -this is so information posted from a drop-down list of customers will fill-in data fields in the inventory/job data form.

Calculations Menu: Inventories seldom occur exactly on the book cutoff date. Calculate the amount to adjust the inventory for inventory counts before or after the cutoff date. You may also calculate Mark-Up or Mark-On factors. And, you can generate a quick category report from here as well.

Data Processing Menu: This is a very important menu. Everything from generating reports to defining product categories to SKU Master file maintenance. To make this manual easier to follow, these processes will be covered at the end of this manual.

Inventory Portal: Shortcut to open the ScanDevil/Inventory Portal program.

ISB Help Menu

Click **ISB Help Menu** to view either printed manuals such as this or Video Training to learn more about ISB or other ISS software and hardware products. Also, manuals for Alpha 5 and XBasic for Alpha 5 are included.

Quit ISB

Click **Quit ISB** to close the ISB application. It is important that you exit ISB with this option because temporary files are cleared and other software maintenance occurs when the Quit ISB button is pressed.

Data Processing Menu

As mentioned before, the bulk of time spent with ISB will be spent in the Data Processing section of ISB or its sub-menus.

Physical and Categorical Definitions: These definitions may be backed up for later use when the user can restore them when necessary. Category and Section definitions may also be saved to the Inventory/ScanDevil Portal where their information may be downloaded to the ScanDevil machine to ensure that only pre-approved Sections and Categories are entered as data into the ScanDevil.

These physical and categorical definitions are presented in reverse order as to refinement. For example; you may have numerous Categories in a General Category but only one General Category per Category. They are presented in reverse order because a Category must be assigned to a General Category so therefore the General Category must be defined first.

First, you should know that you will need to name your backup files. As more and more backup files are created, it will become apparent that you will need a system for naming these files. Simply naming the files after the customers' name will eventually cause difficulties because many customers may have the same name (most inventory services have several Quik-Mart stores for example) ISB does not impose any system on the user but it is strongly suggested that you use the following guidelines. This should apply not only to the Physical and Categorical definition mentioned here but to Counting Instructions and Data backup as well.

If you do not wish to use this system, use an orderly system of your own design and then stick to it. An orderly system will save time, energy and greatly reduce mistakes.

Generic Definition should be used first. If your inventory service uses a standardized set of Categories for typical Convenience Stores, then the name of the backup file might be "Convenience Store" in this case.

Chain/Corporate Definition should be used next. If the ABC Corporation owns the XYZ mini-markets, then the name of the backup files should be something like "ABC Corporation"

Customer Number Definition should be used when these files are specific to one specific customer. Typically the customer number is used to avoid duplicate or similar names being used. Don't use this for data backup for specific inventories.

Inventory Number Definition would be used for data backup only. This will indicate the unique number assigned to each inventory audit.

General Category: This is a larger grouping of data based on type of item inventoried. A common example would be inventory data counted by Cigarettes, Cigars and Chewing Tobacco (snuff) but grouped under the "General Category" of "Tobacco".

A unique General Category ID must be assigned for each description. Typically a simple numbering system such as 1, 2, 3, 4, etc is used.

A General Category is not part of the data collected by the ScanDevil at the Auditor level; it is grouped in reports after the inventory count. It is not required that data be entered for the General Category Definitions unless reports based upon General Category are to be used.

A "Mark-Up" percentage may be entered for those reports that require backing off a certain percentage to determine cost from retail. If not needed, leave blank and a value of 0.00% will appear as the default value.

Category: This is the smallest data grouping of item-types. Typically, something

like; Liquor, Groceries, Miscellaneous and Tobacco could be common Categories. These definitions may also be sent to the ScanDevil Portal. It is suggested that the same orderly naming system be applied to these ScanDevil files as well as the ISB files.

As with General Category, you may wish to enter a Mark-Up percentage for reports requiring reducing Retail to Cost.

But you will also be required to assign a General Category definition to the Category definition. Press ENTER to bypass assigning the General Category definition; a default value will automatically be assigned to the Category definition.

Furthermore, an additional description may be assigned to the Category. This could be printed along with the Category ID and Title to clarify to the auditor in the field exactly which items are to be inventoried in which Category.

Wherever possible, a simple numbering system for the Category ID should be used. Since the ScanDevil during data entry uses Category IDs, numbers are ideal because the auditors are most familiar and fastest entering numbers rather than letters or symbols. No limits are required by ISB other than a maximum length of 10 characters.

Area: The largest of the physical grouping. A common use might be; Salesfloor, Stockroom, Outside Storage Units.

Region: The second largest physical grouping. Typically, it might be; Store Perimeter, Checkstands, etc.

Section: A Section is normally the physical area assigned to an auditor to count in a reasonable amount of time. As with Categories, Section definitions may also be saved to the Inventory Portal to be loaded into a ScanDevil for verification of validity.

Sub-Section: Sub-Sections are usually a shelf or bay (vertical portion, 4-8 feet wide). While data is collected on the ScanDevil, Sub-Section definitions are not loaded onto the machine for verification. An orderly numbering system will make life easier with fewer mistakes. A suggested numbering system is to use numbers for a shelf and letters for a bay. B7 would indicate the second bay, 7th shelf. Whichever way that you decide to organize, stay with that organized system and you'll be better off.

SKU Master Control Menu: SKU Master data may be used in certain reports to affix a description to a SKU value or be loaded into the ScanDevil for SKU/Price Verification purposes.

SKU Master Data: This option will let you view, edit or add to the SKU Master.

Backup: As with Physical and Categorical definitions, SKU Master files may be backed up for future use.

Backup for ScanDevil: As with Section and Category definitions, SKU Master definitions may be saved to the ScanDevil/Inventory Portal for verification/validation.

Restore: After backup, SKU Master files may be restored for future use. Any SKU Master data that is currently loaded, will be deleted/destroyed.

SKU <==>PLU: The PLU and SKU fields are switched allowing reports to use the PLU value instead of the SKU.

Import User SKU Definitions: During SKU Verification on the ScanDevil, new/undefined SKUs may be defined. These definitions may be uploaded to ISB and added to the SKU Master file.

Update From Uploaded Data: Without using SKU-Verification on the ScanDevil, the uploaded SKU data will update the SKU Master file.

Use SKU or PLU: If PLU data might be collected, this option will create new entries in the SKU Master file where PLU values are placed into the SKU field. This allows either SKU or PLU data to be captured.

Update From SKU Master Build Configuration: Multiple SKU Master files may be combined into a single, larger, more complete SKU Master file.

Delete: The current SKU Master file is deleted/erased. As long as you backed it up first, you may restore it at any time.

Customer Specific SKU Master Import: Certain Customers/POS systems may provide your service with their SKU Master file in their own data format. Customized one-click importation of their SKU Master data may be created by users with the full version of Alpha-5.

Import External SKU Master File: Importation of your customers SKU Master files can be a one-click process provided that they provide the SKU Master file in one of the formats provided.

Uploads Control Menu: From this menu, you will import the inventory data from the ScanDevil Portal into ISB, edit entries, backup and restore data among other functions.

Import New Inventory Data: This operation will let you select the data file from the ScanDevil Portal and import that data into ISB for processing, etc. Any inventory data currently in ISB will be deleted so be sure to back it up before importing any new data.

Import Data without Deleting Current Data: This option, if used incorrectly, can result in duplication of data or combining data from different inventories. So, use it with caution.

It works like the import button mentioned above except that the old inventory data is not deleted prior to importing the new data. Typically, this is used when multiple data uploads are saved as separate files in the ScanDevil Portal instead of one single file. This may be done because post-inventory-count adjustments may be saved separately although other reasons to use this option may be possible.

Upload Data -Full Screen: Every field possible field of data collection will show on this screen for viewing/editing. Unless "Optional" fields are used, it is suggested to you one of the Upload Data screen below. They will not display as much information but are easier to read.

Upload Data -SKU Level: Best used for viewing/editing typical SKU inventory data.

Upload Data -Financial Level: Best used to view/edit financial inventory data.

Backup: Archive your inventory data for future reference.

Restore: Restores your backed-up data.

Quick Sum Totals: The grand total value and pieces using the collected (not SKU Master) price. Customer and inventory information will not appear on these reports. They are for reference uses only.

Quick Section Totals: Same as above but broken down by Sections.

Quick Category Totals: Same as above but broken down by Categories.

Customer/POS Specific Supplemental Processing: In the unusual circumstance that the normal data processing of ISB is insufficient, users with the full version of Alpha-5 can create operations to process the inventory data to their customers requirements. Those operations may be saved a one-click button for ease of use.

Export Data: The inventory data will be exported to this path:

C:\ISB\Exported Data\invdata.asc

Any edits or additions made to the data will appear in the output file.

Import Inventory Records From Claw: For those ISS customers that use our old inventory system (Raptor/Claw), the Claw inventory data files may be imported into ISB from here.

Data Embedding: Some of your customers may require that the data provided to them contain data that was not actually collected as part of the inventory count. When the Master Data Export is performed, this data will become part of each record. Various Text, Dollar, Number Logic and Date fields may have data entered into them.

Memo Totals: These account for those situations where totals are included in the report but not included in sum total amount. They may include bottle deposits, spoils, etc. Various notes can appear in reports as well. Not all reports support Memo Totals.

Customer/POS Specific: Sometimes Customers or POS systems are more easily handled by placing all their required operations on a single screen. Users with the full version of Alpha-5 may do this or even add specific operation required by their customers.

Prior Inventories Menu: After running the “Compile” command below, you can choose up to four previous inventory counts. These counts can be compared to your current totals after compiling for prior inventories is complete. Comparison reports are available under Reports/Prior Inventories

Compile Records For Processing: This operation is required prior to generating reports, exports, etc. It will bring together all the inventory data, SKU Master data, Physical and Categorical definitions as well as the inventory information, customer information and your inventory service information. This compiled data will create a new database table from where all reports are based. If you make any edits to the inventory data or any of these other tables, you will need to run "Compile" again to update the data.

Reports Menu: Printed reports are generated from here. Reports are divided by sub-menu to more easily find the reports that you need. Those with the full version of Alpha-5 may add new reports as needed.

Exports Menu: Various data exports can be generated from here. Note: The “Edited Uploads Master” will generate a file with all the “Compiled” data. The “Send Uploads Data To Custom Inventory Database” command will send the Compiled data to a special database where full-version Alpha-5 users can create any number of custom options without the possibility of upgrades to ISB damaging their custom applications. Other Exports are available from this menu.

Imports Menu: Importing inventory data from other applications may be done from here.