V7 Polling Tablet Interface

(Preliminary Documentation)

V7 Polling can be configured to support 10-inch/8-inch Windows touchscreen tablets for operations such as store-floor price edits, item additions, and stock updates on the SAM4s SPS 520/530 register(s). Due to the tablet's viewable area size limitation, other operations are not recommended without the use of a mouse and external keyboard. It is also preferable to have V7 Polling installed on a standard PC (or server) and configure the tablet as a secondary PC that accesses data stored on the standard PC.   Larger sized Windows tablets can be used either with the standard-sized view or tablet view.

Contained Within this Document:

Materials

- 8-inch (or larger) Windows tablet (Testing was done on the Hisense tablets from CRS. 10-inch tablets with built-in/attached scanners are preferable).
- WiFi enabled on the tablet.
- A network that is accessible to the tablet, the server PC (if one is being used), and the register(s).
- The SAM4s SPS 520/530 register(s) setup for TCP/IP polling. *(Additional register models may be added based upon demand. Please contact sales@technology4retailers.com to make a request.)*
- Scanner either USB or built-in (preferred).
- Access to a keyboard – the Windows OnScreen keyboard, built-in tablet keyboard or an external keyboard.
- V7 Polling build 7.3.1.402 or higher installed on both the server PC (if one is being used) and the tablet.
- If you are new to using V7 Polling please review https://www.technology4retailers.com/t-pcpollv7docs.aspx to learn more about general operations before enabling the tablet view.
- The system requirements are similar to a standard Polling PC:
    - Microsoft Windows 7/Windows 8/ Windows 8.1/ Windows 10
    - Processor: Pentium Class 1 GHz or faster
    - Memory: 1 gigabyte (GB) (32-bit) or 2 GB (64-bit)
    - Hard drive: 16 GB (32-bit) or 20 GB (64-bit)
    - WiFi connectivity
    - 10-inch screen (preferred)
    - Built-in scanner set to emulate keyboard wedge operations (preferred)
- *Recommended*: Complete most of the initial setup/configuration for the tablet with a keyboard and mouse or on server PC (if a server is being used).

Enabling Polling Tablet View

1. After the software is installed on the tablet contact Tri-Tech for a release code. (Additional PC charges do apply.) The tablet will need to be configured with a **Custom – Pre Poll** release code.

2. After the code has been entered, go into Preferences and check the **Enable Tablet UI** option. Also select **Landscape** or **Portrait** depending on the orientation, screen resolution and overall size of the tablet being used. Either option can be used with either screen orientation. The **Portrait** option has smaller screens, smaller buttons, the entry areas are closer together and the middle divider is further down on the screen. (Images below are using the Landscape option.)

3. Other Preferences can be configured at this time.
4. Close/Exit and re-open V7 Polling. The interface will now be updated.   The menu buttons will be larger and the maintenance area screens for PLU have been enhanced. (Currently the PLU enhancements only apply to SAM4s SPS 520/530 register screens.)
5. Maximize the screen, if desired.
6. If needed, create a machine & save all programs back to the software. Or, update the Data Location on the tablet to share data with the server PC.
7. Depending on the number of PLUs in the register(s) and the specifications of the tablet, the PLU maintenance area may take 10-20 seconds to fully load.
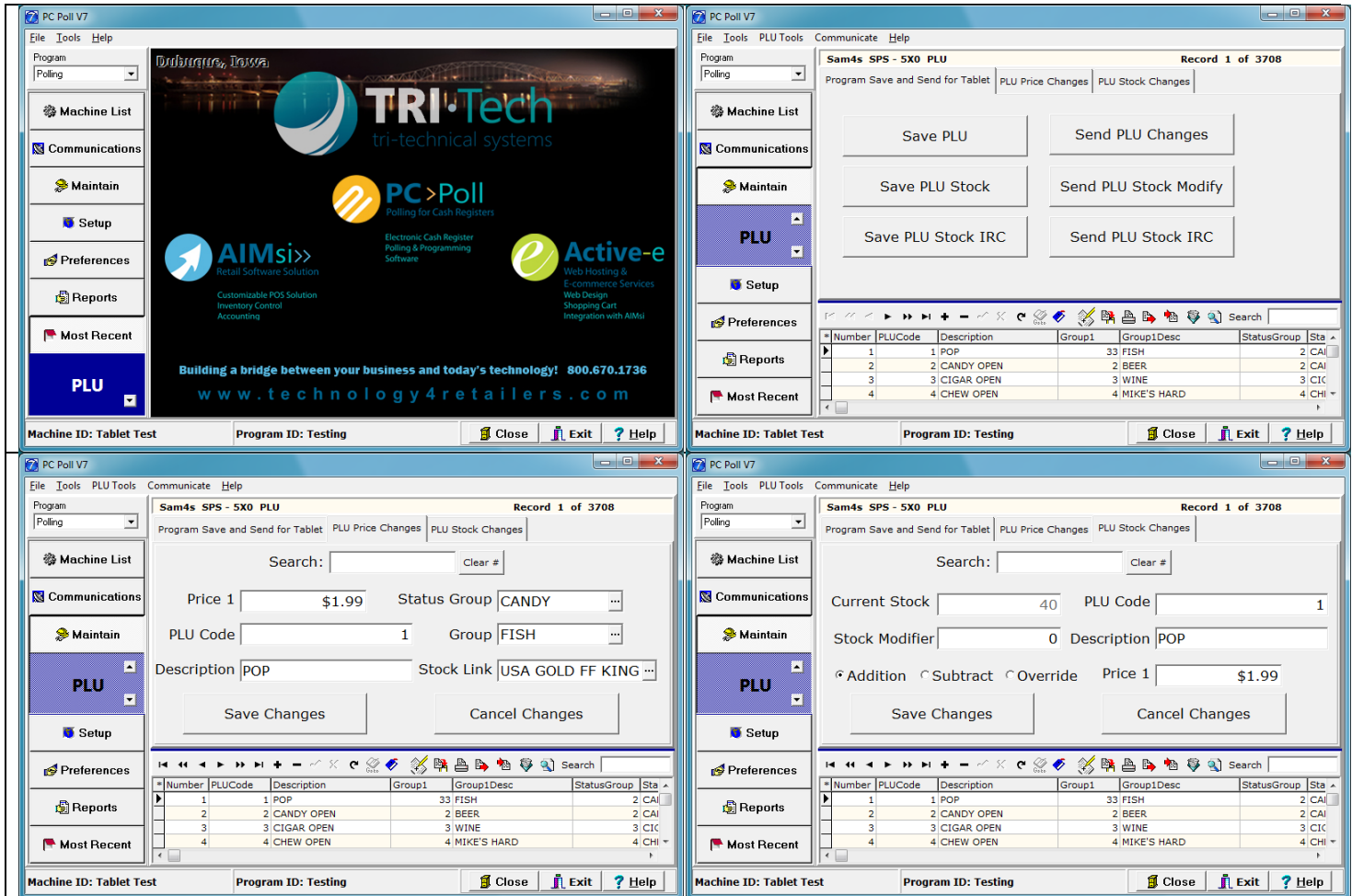
Maintenance Area Features

- From the Maintain PLU area's **Program Save and Send for Tablet** tab users can save and send PLU and PLU Stock values to and from the register. The tablet will need to be on the same network as the register(s) and TCP/IP polling must be enabled on the register(s). Before updating any Stock values it is recommended that users **Save PLU Stock** or **Save PLU Stock IRC** (use the IRC option if your registers are connected in an IRC).
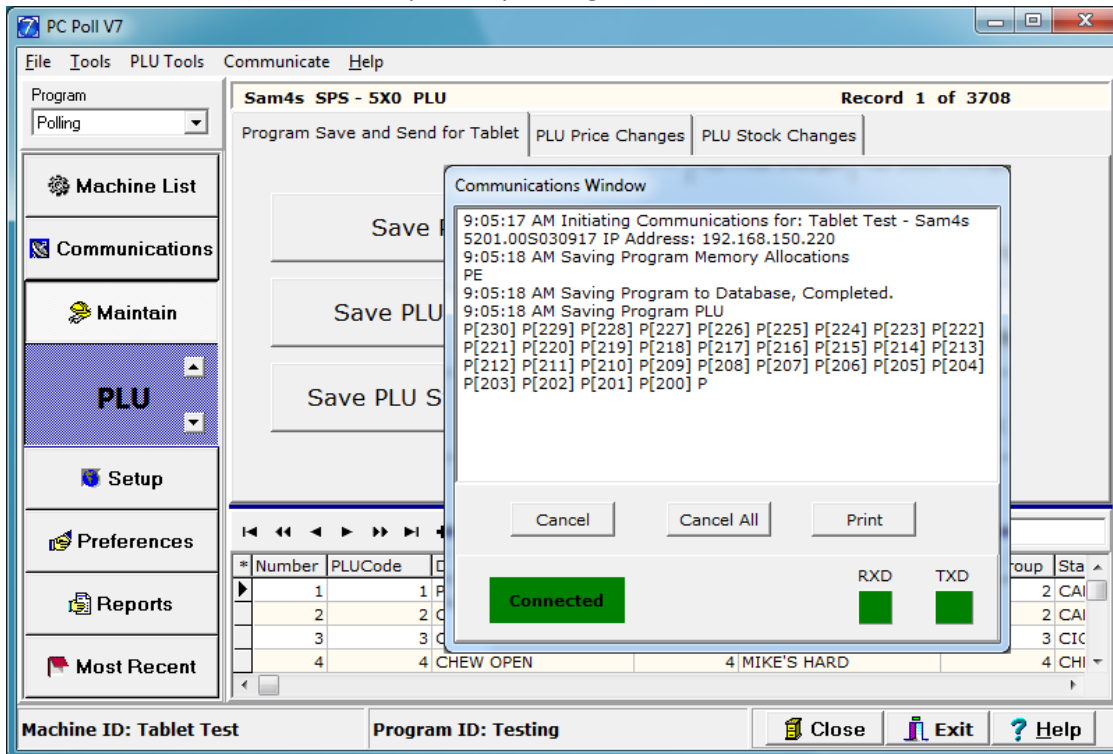
- From the **PLU Price Changes** tab users can scan or type a PLU code into the **Search** box and press **Enter** to have the software locate the record. If using a scanner, it can be programmed to add a carriage return automatically. Once the record is found, users can navigate to the **Price 1** field or use the **Tab** key to advance the cursor. Using the tablet's keyboard or an external keyboard, **Price 1** can be updated. At this point users can **Save Changes** or edit other fields. If errors are made press **Cancel Changes**. Repeat the process as desired for multiple items.
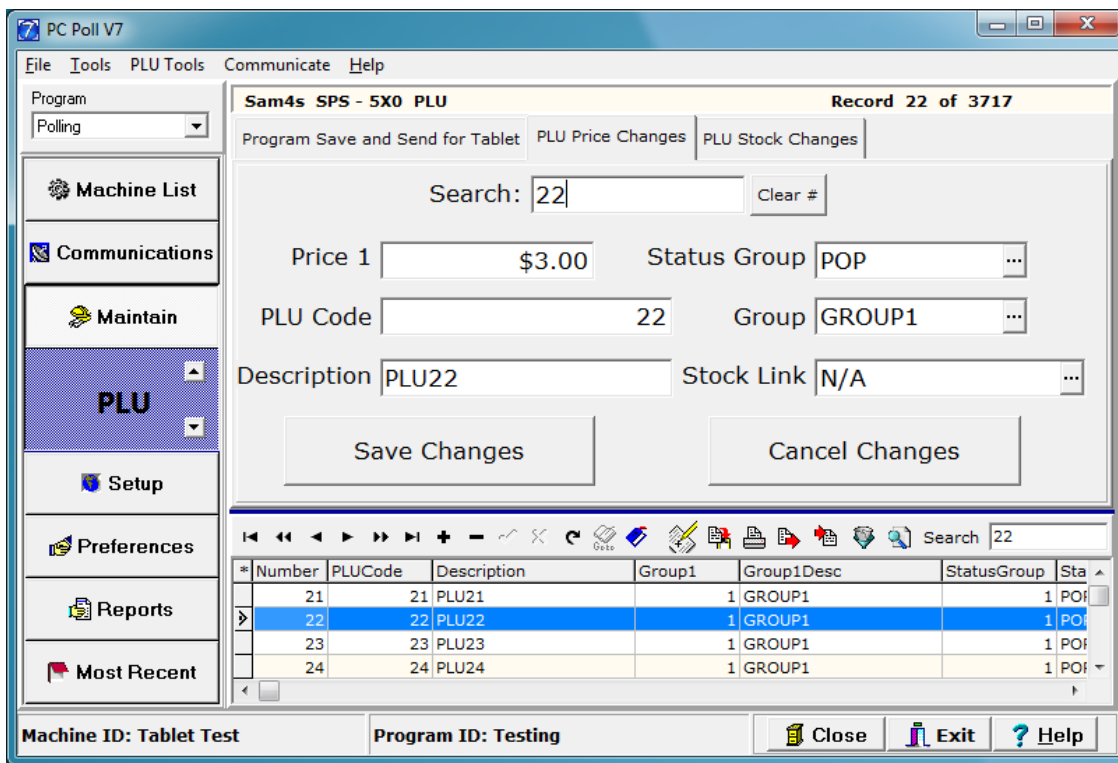
- If the item is not found, the software will prompt to add the item via an Information screen (see below). Pressing **OK** will add the item to the database. Use the **PLU Price Changes** tab to edit the item. Additional fields can be edited via the server PC. The additional fields will be auto-populated with register defaults. Pressing **Cancel** will return the cursor to the **Search** box. Press the **Clear #** button to remove the code from the search box.
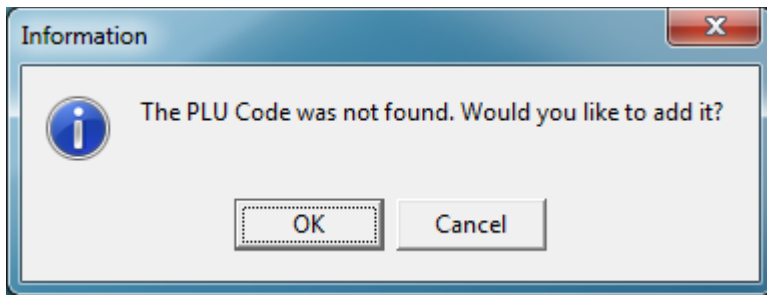
- On the **PLU Price Changes** tab there are also a few popup menus. The **Status Group**, **Group** & **Stock Link** areas will display a **Field Selection** grid when depressed. Use the **Field Selection** grid to update these fields. The top entry box can be used in conjunction with the **Find Item** button to locate the desired selection. Users can also scan or type a value into the entry box and press the **Enter** key to have the software locate the record. Press the **Clear #** button to remove the code from the search box. The navigator tools can be used to navigate the list. When done, press **OK** to update the PLU record. Pressing **Cancel** will close the window & not update the selected field.

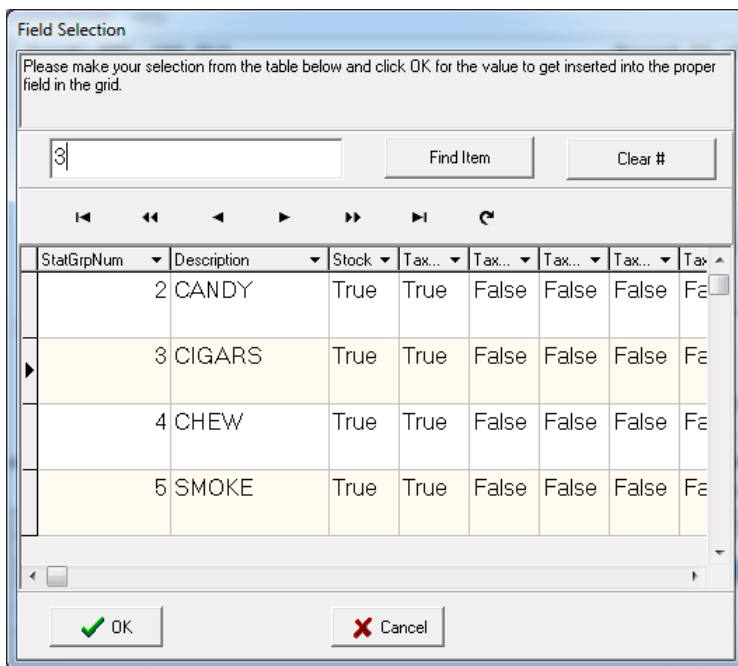- If an item is not found on the **Field Selection** grid a message will be displayed.

- From the **PLU Stock Changes** tab users can scan or type a PLU code into the **Search** box and press **Enter** to have the software locate the record. If using a scanner, it can be programmed to add a carriage return automatically. Once the record is found, users can navigate to the **Stock Modifier** field or use the **Tab** key to advance the cursor. Using the tablet's keyboard or an external keyboard, **Stock Modifier** can be updated. Next, select if the **Stock Modifier** value should be an **Addition** to the current stock value, **Subtraction**, or **Override** the stock values currently in the register(s). At this point users can **Save Changes** or edit other fields. If errors are made press **Cancel Changes**. Repeat the process as desired for multiple items.
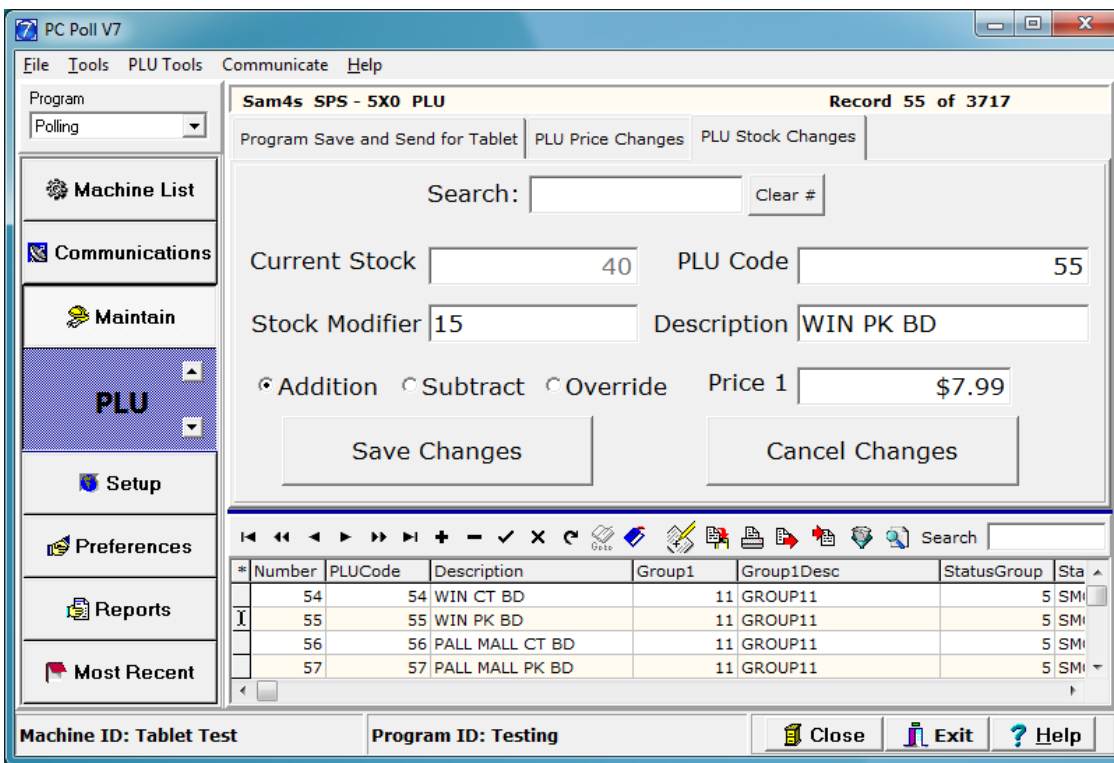
- New items can also be added from the **PLU Stock Changes** tab. If the item is not found, the software will prompt to add the item. Pressing **OK** on the Information screen (see previously pictured Information screen) will add the item to the database. Use the **PLU Price Changes** and the **PLU Stock Changes** tabs to edit the newly added item. Additional fields can be edited via the server PC. The additional fields will be auto-populated with register defaults. Pressing **Cancel** will return the cursor to the **Search** box. Press the **Clear #** button to remove the code from the search box.
- Once all edits are made they can be sent to the register(s) via the **Program Save and Send for Tablet** tab. Or, if the databases are shared with a server PC, the changes can be sent via that computer.

General Procedures for Item Updates

It is recommended that users choose one method for making PLU item updates/additions, either at the register directly or via the Polling software. These steps assume the changes are being made via a PC with the Polling software.

1. **Send PLU Changes** to the register.
2. (Optional) **Save PLU** back to the PC. (This is just in case edits were made at the register directly since the last save.)
3. Make the desired edits within the Polling software **Maintain | PLU.**
4. **Send PLU Changes** to the register.
5. Verify that there were no communication errors in this process **Communications | Comm History.**
6. Verify a few of the changes at the register.

General Procedures for Stock Updates

Stock values are updated with every sale and thus always changing. The software only displays the values since the last time the PLU Stock program was saved. These steps are for adding/receiving stock or subtracting/wasting items. For tips on taking Physical Inventory or overriding values, please contact support.

1. **Send PLU Changes** to the register. (To verify that all items are in the register.)
2. (Optional) **Save PLU** back to the PC. (This is just in case new items were added at the register directly since the last save.)
3. **Save PLU Stock.** (If the registers are in an IRC **Save PLU Stock IRC.** Wait for the software to fully complete the process. Multiple programs will need to be saved if the system is an IRC.)
4. Verify that there were no communication errors in this process **Communications | Comm History.**
5. Return to the **Maintain** area to view the data.
6. On-hand values will be displayed in the **Current Stock** field.
7. Make the stock edits to each item by using the **Stock Modifier** field as well as selecting **Addition** or **Subtraction** as the **Modifier Type.**
8. Repeat for all desired items.
9. (Optional) if item barcode tags are needed for the new items go to **PLU Tools | Print New Stock Barcode Labels** - complete standard barcode printing procedures. Note: It is best to print labels BEFORE sending stock values to the register(s) since barcode label count values reset after the stock values are sent. If printed after sending, values will need to be entered manually.
10. If you added new PLU items in the process, **Send PLU Changes** to the register.
11. **Send PLU Stock Modify** (If the registers are in an IRC **Send PLU Stock IRC).**
12. Verify that there were no communication errors in this process **Communications | Comm History.**
13. Verify a few of the changes at the register.

Hints and Recommendations

➢ **Server PC & Data Location:** To fully take advantage of V7 Polling it is recommended to install the software on a desktop (server) PC and then link the tablet to the desktop's data folders or a commonly shared network location. This way any edits made on the server will automatically update the tablet and vice versa. To change data folders go to Setup | Data Location. Learn more: https://www.technology4retailers.com/images/document/PcPoll/pdfs/setup_area_data_location.pdf

➢ **Maximize screen:** The tablet's desktop shortcut can be configured to open the Polling application Maximized.
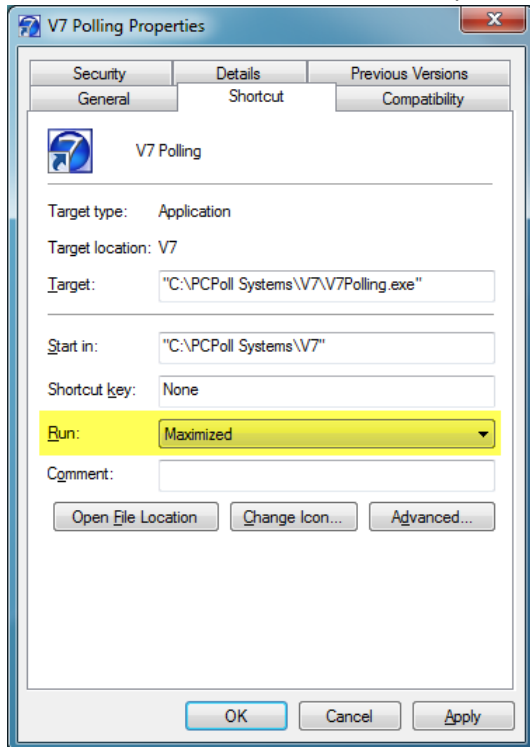

➢ **Scanner setup:** The Polling software works best when the tablet's built-in scanner is setup to emulate keyboard wedge operations. On the Hisense 10-inch tablet the COM-Text_V2.1 software application may need to be started prior to using the scanner. It is also recommended to place the scanner in an auto-detection mode. On the Hisense tablet the 2D scanner has a "Sense" mode and for the 1D scanner there is "Blink" mode. For hardware setup, please contact CRS directly (or the supplier of the hardware device if using a scanner other than the Hisense).
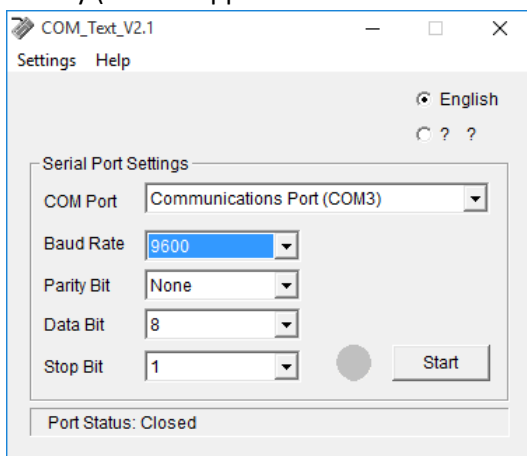

➢ **Resize popups:** Popup menus, such as the **Status Group**, **Group** & **Stock Link** areas can be resized and the software will retain the settings. Using a mouse, or your finger on a touchscreen, drag to resize the screens. Close the software to save the settings. The resized screen applies to all popup menus.

➢ **Resize grid columns (Preferences):** The column widths on the main maintenance area grids can also be resized for readability. Enable the **Save grid settings in INI File** preference. Press **Close** to save the setting. In the maintenance area resize the columns as desired. Grid fields can also be reordered. Simply drag the fields into the desired position. To hide fields, use the **Viewable Fields** button within the navigator toolbar.
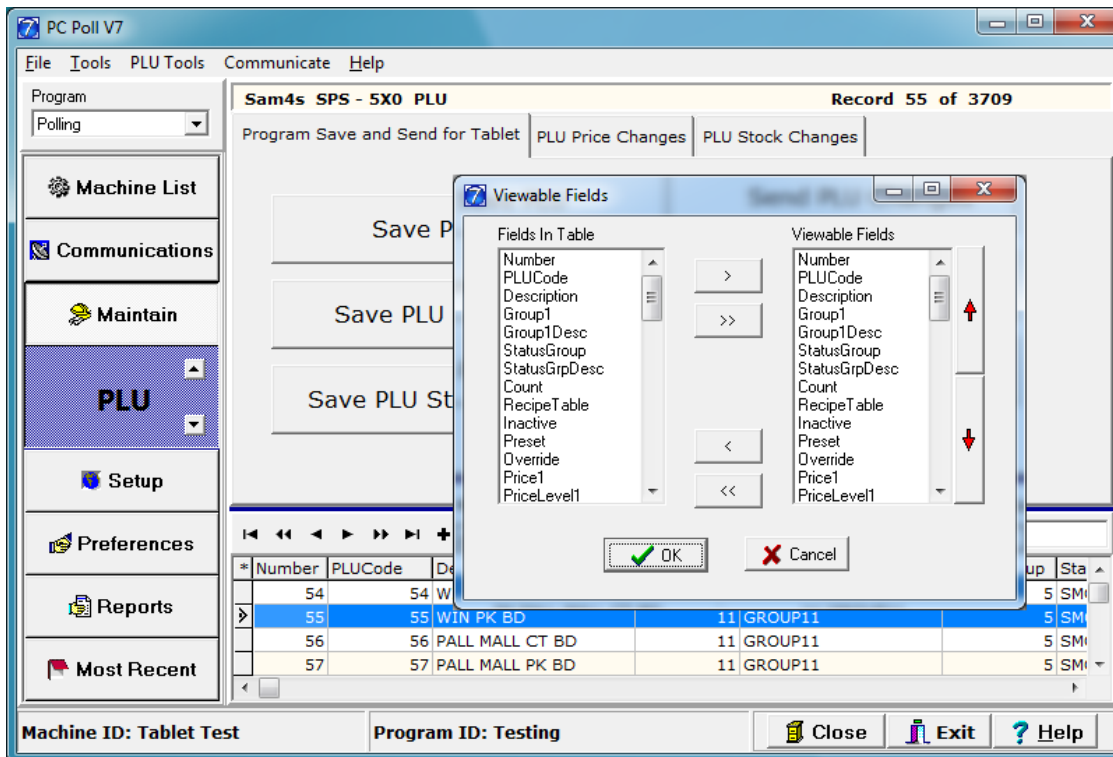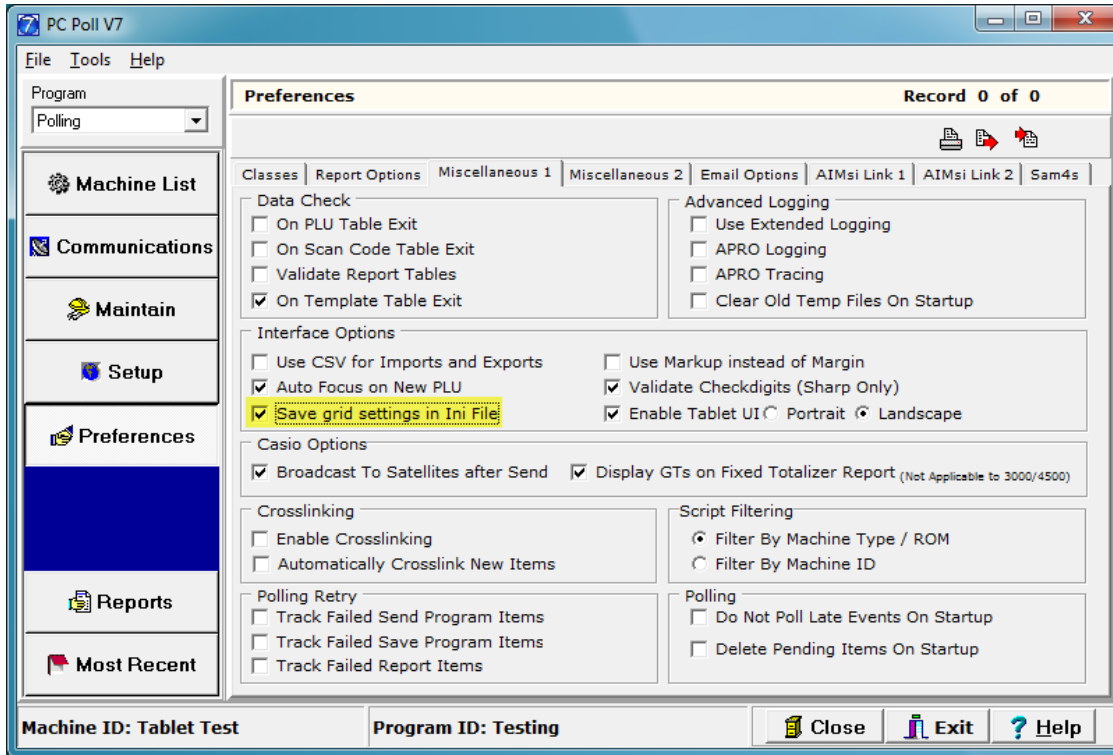
➢ **Security:** To reduce the number of programs displayed within the Maintain area of the software, security can be used. The **Show Communication Menu** must be active to allow the software to save and send programs while in tablet view. By design, with Security on, the Most Recent menu is not accessible. Other areas can also be disabled to increase the
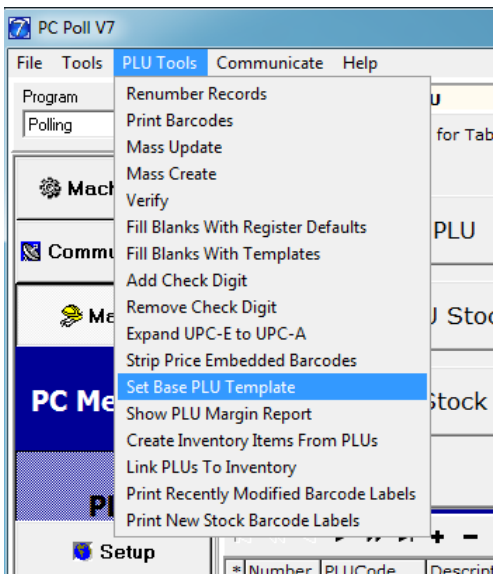
size of the side menu. In the example below, Communicate, Preferences & Reports have been disabled.   To learn more: https://www.technology4retailers.com/images/document/PcPoll/pdfs/administrator_rights_and_security.pdf
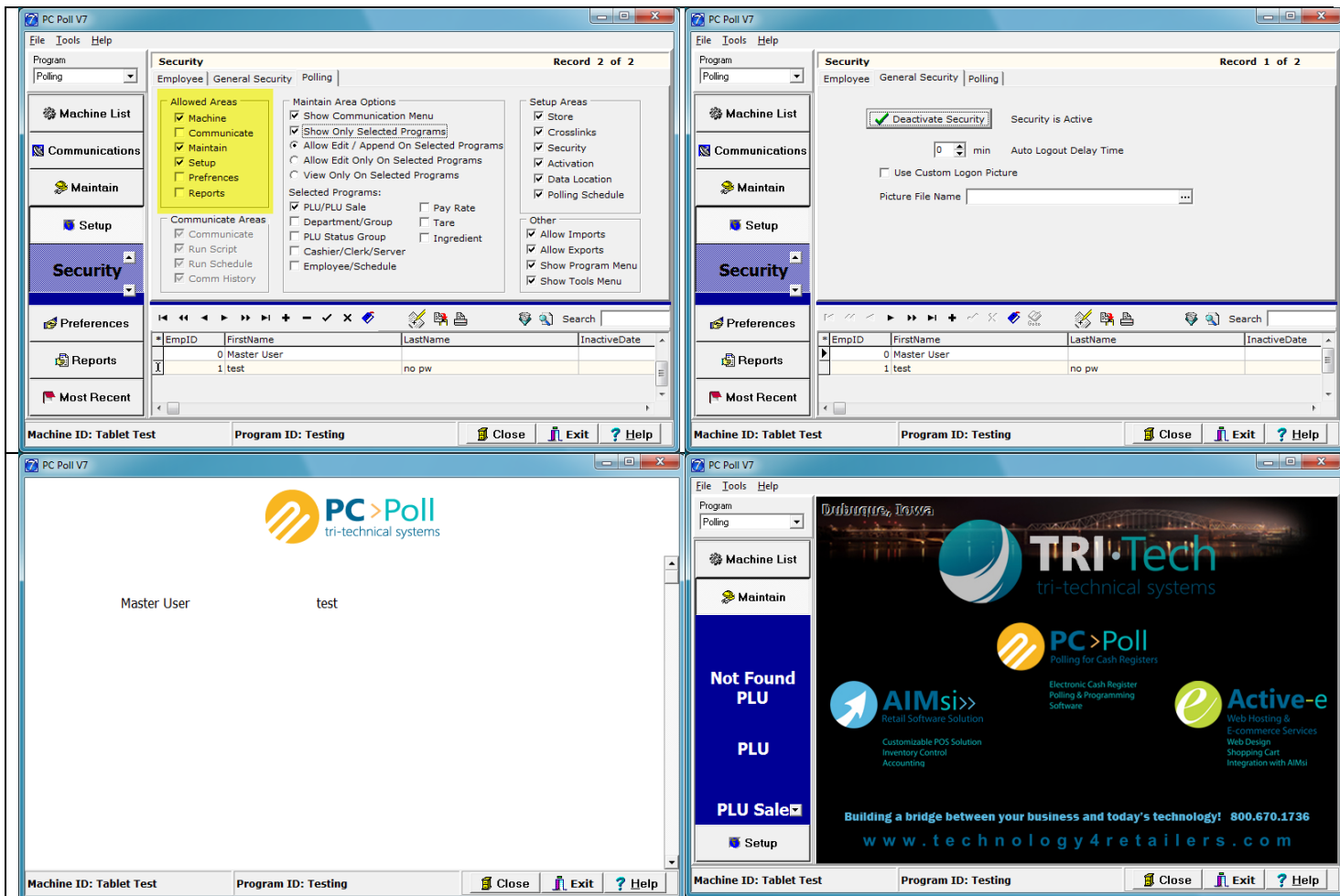
- ➢ **Security Log Out:** When the security feature is enabled, a Log Out/Sleep option will be added to the Setup menu.

- ➢ **Using Templates:** Users can customize the default values of newly added PLUs by making use of PLU Templates. After a template is created a base template can be set within PLU Tools | Set Base PLU Template. When new items are added the default values will inherit the settings of the selected template. To learn more: https://www.technology4retailers.com/images/document/PcPoll/pdfs/Advanced%20V7%20Polling%20Options.pdf

- ➢ **Command Line Scripts:** Script operations, such as program saves, sends and report polling can also be conducted via a desktop shortcut or command line operations. To learn more: https://www.technology4retailers.com/images/document/PcPoll/pdfs/Command%20Line%20Events%20Info.pdf
- ➢ **Screen Settings:** Most tablets allow users to customize the display. If you are having trouble seeing all the fields on the screens see if there is a text size setting. By default, the 8-inch Hisense is set to 125%. Changing to 100% should allow all the fields to display properly.