am LABELS Limited

USER GUIDE

Setting up Pass Stock control (V1.1)

1. Validate the software

The first step in validating the software is to ensure the dongle provided is correctly installed into an available USB port. Once this is complete, start both the Pass link (plink) and Pass stock control applications. If either display their status as set as demo mode, record the Key ID displayed in pLink (Click Help, Program authorisation), the Key ID displayed in PASS Stock control (click set-up, Program authorisation) and the Key ID listed on the dongle itself (should be written on the dongle), and contact AM Labels for a valid program authorisation code which can then be entered into the same screen as where the Key ID was obtained. In situations where the dongle and program keys do not match up, please contact AM Labels for more information.

If the dongle is not recognised after this (i.e. the software is still displaying that it is in demo mode), ensure that the HASP drivers for the USB dongle have been installed. These can be acquired from the following website address:

ftp://ftp.aladdin.com/pub/hasp/hl/windows/installed/redistribute/drivers/HASP_HL_driver_setup.zip

2. Set-up Pass Link

Pass link (pLink) is used to communicate data between the hand held terminal and the PC application. It must be open for any communications to take place. Prior to first communicating, you must set-up pLink. This can be done by selecting Settings, communications, Port 1 within pLink. Each of the settings here must be synched with the COM port that the cradle is connected to. All of them can be found by checking the port properties within windows device manager (In Windows, Control panel, System select the Hardware tab and then click the device manager button). If you are using the USB cradle, look for an item named CP210xUSB to UART bridge controller which should be listed under Ports – COM and LPT and make a note of the settings there, including the port number (for example, COM3).

Once you have these settings, mirror them in the Plink system, setting the Serial Port drop down to equal the COM port that the cradle is using, and setting each of the other items to be exactly the same as the ones you noted. When each of the settings have been entered, click ok to save the settings and then restart the pLink application. As it starts up the program will display a read out of its progress. When it stops the final line in the text display should indicate System Ready. If it does not, please contact AM Labels technical support.

3. Setup Pass Stock Control

The following section describes the best way to configure and set-up a newly installed PASS Stock control system.

3.1. Setup settings

Once the application has opened, select Set-up and then Program set-up. The main items to check are,

User defined fields – Each of these fields can be renamed as additional fields to hold extra information on your products. They're pre-set by default, but can be changed by entering in your required new fields into the four boxes.

Comms – It's a good idea to check the 'Start PASS Link when not running Stock' option. This will save you having to start PASS Link every time you use Stock.

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All of the other fields can be altered depending on your preferences. It's worth flicking through each and altering them if required. **NOTE** all of these fields can be adapted later if required.

3.2 Add users

The default hand held user name is admin. To set-up additional held-held users, select the set-up user's option in the set-up menu within Pass stock control. Right click and select add to add a new user. Existing users can be edited and removed by selecting them, right clicking and then selecting edit or delete.

3.3 Data Entry

Once the core settings are defined, the next job is to enter in the data that the system requires to run on a daily basis, the order this needs to be done is,

Location Groups – Select Edit, Location Groups. Location groups are a good way of grouping locations which are held together, for example a warehouse or a specific length of racking. To add a group, simply select Add and enter the name of the group.

Locations – With your location groups configured, the next job is to enter details regarding your locations. Select Edit, Locations and click add to add a new location. When the entry box is displayed, enter the name of the location. Additionally you must apply the location to at least one location group. To do this click the add button, select the location group from the drop down list and click ok.
NOTE It's advisable to give locations simple names such as A1. This makes it easier to manually enter them if you ever need to.

The following 4 items are optional but should be done in this order if they are required,

VAT Codes – Select Edit, VAT Codes. A default zero value VAT code is included as standard. You can add additional VAT codes by clicking the add button, followed by entering a name for the code, and the % value, clicking the Ok button to save the details.

Suppliers – Select Edit, Suppliers. A default supplier is included as standard. To add additional suppliers, select the Add button, and enter the details of the supplier.
Suppliers also have branches and a supplier MUST have a branch to be saved. If you try to save a supplier record without first adding a branch, the system will create one anyway using the data you have entered about the supplier. To add a branch manually, click the add button, enter in the required information and click Ok to save the record.
When all the required branches have been set-up and the supplier details entered, click the Ok button to save the supplier record.

Customers – Customers work in exactly the same way as suppliers so please refer to the suppliers' overview above for information on specifying customers. A default customer record of Cash Sales is available by default.

Product Categories – Select Edit, Product Categories. Product categories can be used to segregate products as required. A series of categories is provided by default which can be used to break products down by the speed in which they are likely to move from goods in to goods out. These can all be removed using the delete button, and new categories added using the add button, entering the product category name, and then clicking the Ok button.

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The final set-up item is required by default:

Products – Select Edit, Products. To add a product, click the Add button. Products have a large amount of settings that can be set-up or left blank, the main things to look for are,

Stock Code and Supplier Code – The scanner will recognise both of these when you are selecting products when receiving or issuing on the hand held device. It's important to put the known and often used code in the Stock code field, using the supplier code for a product barcode. The reason for this is, is that the stock code is what's used to search for, or order products within PASS Stock control.

Product – The name of the product

Stock Type – Three selections are available, Commodity, serial and batch. Note that commodities can be configured as kits whilst the other two can not. Serial items can be provided with a serial number.

Container – The type of container the product is supplied in, e.g. Box.

Global re-order level – Can be used to flag products on the Products screen when their stock level is low. Enter a number here and when the global stock level falls below the provided figure, the product will be highlighted.

Product is a kit Check box – Check this if you wish to define a product as being a kit, i.e. made up of other products. When set as being a kit, you can click the edit button to present a window which allows you to assign other products in the database (**NOTE** you must save the product and re-edit it to set the kits products). Kits can be used join items, and will adjust stock levels accordingly on the kit items if a kit is taken into or removed from stock.

For further information or assistance, please contact AM Labels using the following means:

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