

LoadMate™ 4.5

Operators Manual



Technology for the Moving Industry

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Preface

LoadMate 4.5 is a fourth generation product that has evolved from earlier versions of **LoadMate** and before that **FASTest T/L** and as such reflects over eight years of refinement. LoadMate is one in a family of products offered by **TechMate International**.

Following is a summary of some of the features of **LoadMate**:

- The transportation mode (Road, Air, Sea, Storage or Local) can be designated for each lot number in a shipment. In addition, there is ***no practical limit on the number of lot numbers*** per Customer.
- LoadMate can optionally be operated in and print reports in ***English, French, German, Italian, Portuguese and Spanish***.
- The bar coded template includes a ***Packer's Inventory***. In addition, you can record the Packer that packed each Carton or Article.
- An options ***user defined template*** is available that allows you to defined up to ***375 articles, 130 symbols*** and ***30 cartons*** of your own.
- An ***IN-CARTON*** capability that allows you to ***list the contents of a Carton with each Article having its own conditions***.
- LoadMate can print a ***customized BINGO SHEETS*** with the name of each item on the form.
- The ability to ***show the Location of Articles*** is provided. This can be used to produce a report showing which Articles are in specific storage vaults or to indicate the room Articles are from.
- All user defined Articles, Cartons and Symbols can be entered by simply scanning a bar-code on the template (they can be edited and deleted in SETUP).
- ***Exceptions at Destination or unloading) can be entered*** while unloading and will be printed in the Exceptions at Destination Column.
- ***Report Printing after Errors***. All printer errors are immediately detected and printing can be started again from the point of error.

- **Report Printing after Changes.** Report printing can be started at any previously printed page as long as there have not been any changes.
- **Model # and Serial # automatically prompted for.**

Other products offered by TechMate are **TrakMate™**, **SalesMate™** and **FirstMate™**. **SalesMate** is a fifth generation product for Survey and Sales. **FirstMate** is a new PC Product that allows Inventories to be transferred from and to **LoadMate** and **TrakMate**. A special configuration called **OmniMate** allows **LoadMate** and **SalesMate** to operate in the same hand held computer. Contact TechMate International for additional information.

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1.0 INTRODUCTION

LoadMate[™] is an easy to use computer-based inventory system designed for Household Goods Van Operators and Packing Crews that accurately aids the driver or packers in the inventory of household goods. LoadMate is a technological solution to the mind-numbing, labor-intensive task of handwriting the name of each article and it's specific condition or content on a multi-part form.

The inventory is taken using a small 12 ounce TELXON[®] PTC-600 (pronounced "tells on") hand-held computer and a laminated bar-coded household goods inventory template.

Using conventional or bar coded inventory stickers, an inventory sticker is placed on an item, and the article's name and its condition are entered by simply scanning bar-codes on a bar-coded template. The computer remembers the inventory and produces a clear, four-part paper inventory by connecting it to the printer.

The bar-coded template uses both sides, with the grey side designed for Packers. This side of the template provides a rich set of Contents that are normally placed in Cartons. In addition, you can now specify the Packer for each Carton or Article.

With LoadMate's multi-lingual capabilities, inventory reports can be produced in any supported language on the spot making costly language translations in your office unnecessary.

Most LoadMate users find that the time it takes to inventory is significantly reduced. Reports of reducing inventory time up to 50% are not uncommon.

LoadMate will help in reducing claims because the inventory is an easy to read computer printout. Any problems you may have had with regard to spelling or penmanship are essentially eliminated. LoadMate allows you to print all the conditions and locations in English making the conditions entered for articles easily understandable by your customer. Symbols used with old forms are foreign to a customer and create a feeling of mistrust. Your customers will know that you are not trying to sneak anything by them.

LoadMate allows you to record the location of Articles. This can be used in the warehouse to show the location of Articles in Vaults, during loading to show the rooms the Articles are in or at transfer or destination to show the new location of Articles.

The Descriptive Inventory is accepted by all major Carriers and contains all necessary information for use with military moves. In addition, LoadMate can be used to prepare inventory riders with exceptions at transfer, destination or warehouse. In addition, LoadMate can print a Carton Summary for you.

1.1 GETTING STARTED

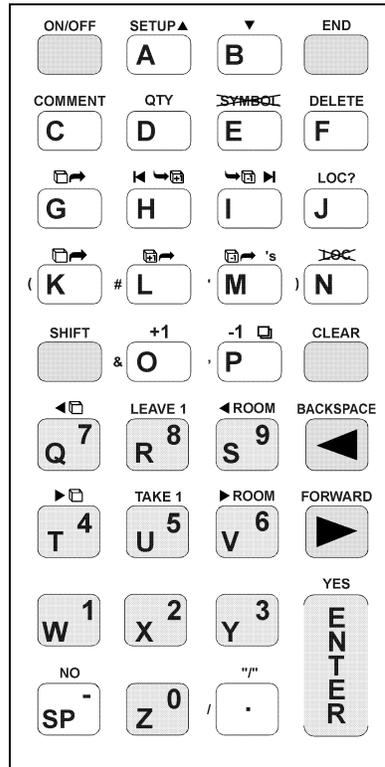
If you are a first time user, you should read the following sections in the order listed and perform the operations described in the shaded boxes.

- KEYPAD OVERVIEW
- WHERE AM I?
- CONTRAST CONTROL
- DATA ENTRY using KEYPAD
- BAR-CODE SCANNING & PRACTICE
- SETUP
- AGENT/DRIVER SETUP
- EDITING USER SYMBOLS, ARTICLES & CARTONS
- PRINTER SELECTION
- CUSTOMER ACTIVE
- SHIPPER INFORMATION
- * INVENTORY
- * ENTERING A LOT NUMBER
- ENTER THE ITEM NUMBER
- ENTER THE ARTICLE
- CONDITIONS FOR AN ARTICLE
- PRINTING REPORTS
- LOADMATE MENU

Exercises described in the shaded boxes are designed to teach you how to use your LoadMate system within a few hours. It is important that you read the sections in the order shown above. You will be directed where to go next at the end of each section, unless you are to proceed directly to the next section.

1.2 KEYPAD OVERVIEW

The keys located at the corners of the keypad and the blue keys are the main keys used to move within LoadMate. *Each key's function is described either by the letter or number on the key itself or by the description directly above the key.*



The TELXON PTC computer is turned ON and OFF with the [ON/OFF] key (the upper left key on the keypad). If unused for 2 minutes, the computer will turn OFF to conserve its batteries. When turned back ON, it will return to where it was (note that if you are entering data (e.g. a name) when the computer turns off, any partially entered data will be cleared).

The upper right key is the [END] key. It is used to end what you are doing. If you press the [END] key repeatedly you will always return to the home position (see **WHERE AM I ?** or **LoadMate Menu**).

The middle blue key on the right is the [CLEAR] key. It is used to initiate entry or re-entry of data (e.g. enter a new Customer) when appropriate. Think of it as clearing

out a field for entry of new data.

The two blue keys below [CLEAR] are the [BACKSPACE] (or \backslash) and [FORWARD] (or \cup) keys. These two keys are used to move backward or forward through choices or items in the inventory.

The big red key at the bottom right is the [ENTER] or [YES] key. When you are entering information, this key will be referred to as **E** in this manual and is used to complete data entry. This key also used to enter a function or to answer **YES** to a Question (e.g. EDIT Inventory?).

The key at the bottom left (marked [SP]) is also the [NO] key and is used to answer *NO* to Questions.

1.3 WHERE AM I ?

LoadMate uses the top and bottom lines of the display to tell you where you are in the program.

The home position is the **LoadMate Menu**. This is where customers are entered, deleted and selected. It's easy for the first time user to get lost in the system. *No matter where you are, pressing the [END] key will eventually return you to the LoadMate Menu.* Note the top line on the following display:

```
-LoadMate Menu-  
->[JOHNSON ] 125  
BILL JOHNSON
```

If there are no Customers, LoadMate will remain at the display shown below, prompting for a new Customer. *You must have at least one Customer entered in order to move from the prompt for a new Customer (this includes entering SETUP).*

```
^LoadMate Menu-  
->[ _____ ]  
New Customer
```

Refer to the **Customer Menu** section for additional details on what you can do at the LoadMate Menu.

Turn your TELXON Computer ON at this time. If you are not at one of the two prompts above (the Customer name and numbers will vary) press [END] until you are at one of the two prompts above. If you are at the first prompt, press [CLEAR] and you should be at the prompt for a New Customer.

At the prompt for a New Customer, type in **smith** followed by **E** to complete the entry. If you get an ALARM followed by the display of

SMITH on the **LoadMate Menu**, SMITH has already been entered as a Customer. If you want to start training from the beginning, either press [CLEAR] and use a different customer name or delete SMITH by pressing [DELETE] and then press [YES] at the prompt to **DELETE Customer ARE YOU SURE ?**.

You have just entered a new customer and the display should look like the following example. If so continue reading, if not repeat this section.

When a new customer has been entered or when an existing customer is selected, that customer becomes active and the Customer ID (**SMITH** in this example) and **active** are displayed on the top line.

```
SMITH      active
EDIT      Shipper
          ?
```

Refer to the **Customer active** section for additional details on what you can do when a Customer is active.

1.4 CONTRAST CONTROL

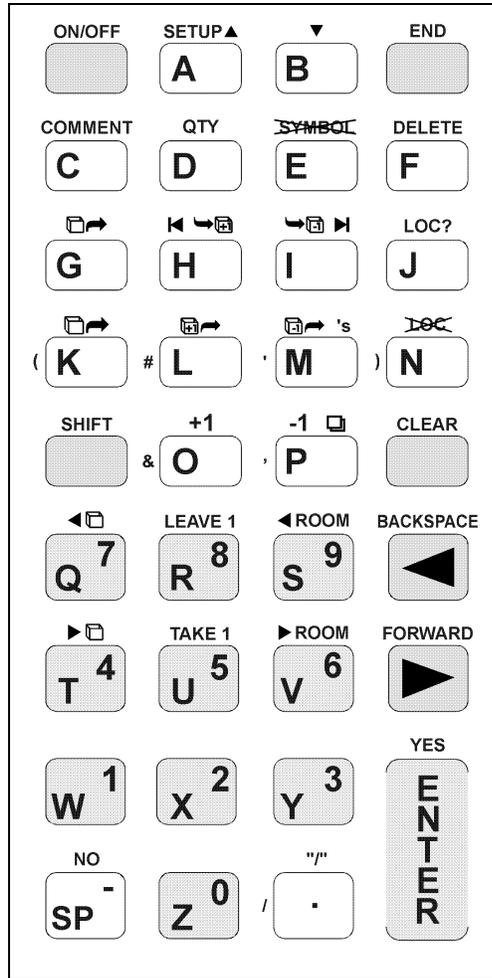
The σ and τ keys are used to control the **CONTRAST** of the TELXON PTC-600's display. They are only active when you are in **SETUP** in order to prevent the screen's contrast from being changed accidentally. Each time σ and τ are pressed while you are in **SETUP**, the contrast is changed. This will result in the background and characters getting lighter or darker.

Press [SETUP] (the **a** key) to enter **SETUP** (note Setup is displayed on the bottom line of the display along with the amount of available memory). Now press the σ key and see what happens. The display should get darker each time it is pressed. Now press τ and the screen will get lighter. Continue with the σ and τ keys until the contrast is comfortable for your viewing. Press [END] to exit Setup.

1.5 DATA ENTRY using KEYPAD

The keypad has a limited number of keys so that some keys are used for either Letters or Numbers and special characters. The [SHIFT] key is similar to Caps Lock on a typewriter and is used during entry of data to control if keys are being used for Letters or Numbers. Special symbols such as parentheses, comma, pound sign, etc. are considered Numbers and will be generically called Numbers for the remainder of this manual. The special characters are shown in the margin just to the left of the key (e.g. just to the left of the I key is the character "#"). Space, [SP] in the bottom left corner, and period (the . key) are considered Letters. An “^” will be displayed in the top left corner of the display if the keypad is used for Letters. If the top left character of the display is not “^”, the keypad is being used for entry of Numbers. Again, [SHIFT] is used to switch the keypad between Letters and Numbers.

LoadMate will automatically set the keypad to Letters for data fields where it logically makes sense (e.g. Shipper’s name) or to Numbers for data fields that normally start with numbers (e.g. Dates or Addresses).



If you make a mistake during data entry, the ⌫ key will backspace and erase the last entered character or you can use the [CLEAR] key to clear the entire field and start over. **Data entry of a field is completed when either the field is filled or the E key is pressed.**

Use of the v key during data entry is not recommended as the location of the cursor is not highlighted. If the current entry cursor is

at the end of entered data, the `v` key will move the entry cursor to the first character and then the `v` key will move the entry cursor forward one character position and entered characters can be overwritten. If you lose track of where the cursor is, press `[CLEAR]` and start over.

Your TELXON Computer will turn itself off if not used for two minutes (this is to conserve batteries). To resume operation, simply turn the Computer ON.

You should be at the following prompt.

```
SMITH      active
EDIT Shipper
          ?
```

This is a question (do you want to edit the Shipper?). Press `[YES]` (the big red key) to start editing the Shipper. The first prompt is for the Shipper's name. The first SMITH that we entered at the New Customer prompt was just to identify this Customer (like the name you would write on a file folder). You need to now enter the full name that will be printed on reports!

```
^MITH      active
Name >
---Shipper ---
```

Now let's enter the Customers name. Note the “^” in the upper left corner indicating entry of Letters. Type `joe [SP] smith` and the display should appear as follows. If it does press `E`, if not, press `[CLEAR]` and try again. ***Note that if you let the computer time out (turn itself off) before you press E, any partial data you have entered will be cleared.***

```
^MITH      active
Name >JOE SMITH
---Shipper ---
```

You are now being prompted for the Date. Since you will most likely enter the date starting with a number, the prompt for the Date starts out set for Numbers (notice the lack of the “^” in the top left corner of the display).

```
SMITH      active
Date
---Shipper ---
```

Lets enter a date (e.g. 7/4/97) using “/” as a separator. The . key is used to enter the “/” while you are entering Numbers. Enter **7.4.97** and press **E** to complete the entry (of course you can use the current date if you want). You will then advance to the prompt for the Origin Address (Orig >).

```
SMITH      active
Orig >
---Shipper ---
```

Let’s enter an address of "427 MAIN ST. #2". Since most addresses start with numbers, the initial data entry screen is set for Numbers (again notice the lack of the “^” character in the top left corner of the display).

1. Press **427** and the display should be as follows:

```
SMITH      active
Orig1>427
---Shipper ---
```

2. Press the [SHIFT] key to switch to Letters in preparation for entering a space [SP] and the street. The top left character will change to “^” to indicate letters:

```
^MITH      active
Orig >427
--- Shipper ---
```

3. Press [SP] (bottom left key) followed by **main** [SP] **st.** [SP] (if you make a mistake, use the ␣ key to backspace and erase one character at a time or the [CLEAR] key to clear the entire field and start over at step 1). Note that even though the field for the address wraps from one line to the next, the address will print as one line on reports. You should have the following:

```
^MITH      active
Orig >427 MAIN S
T.
---Shipper ---
```

4. Press the [SHIFT] key to switch back to Numbers in preparation for entering #2. Then enter "#" using the | key and then **2**. The display should be as follows:

```
SMITH      active
Orig >427 MAIN S
T. #2
--- Shipper ---
```

5. Press **E** to complete the entry and LoadMate will advance to the next field prompting for the City, State & ZIP (City+>). To review the address you just entered, press the ␣ key (notice that there are no underscores). If an error was made, you can press the [CLEAR] key and go back to step 1.

```
SMITH      active
Orig >427 MAIN
ST. #2
---Shipper ---
```

6. Let's assume we are done editing the Shipper. Press [END] and you will end editing the Shipper, return to the **Customer active** menu and advance to **EDIT Inventory**.

1.6 BAR-CODE SCANNING

With proper technique, the success rate of reading bar-code will be close to 100%. Place the template on a firm surface (e.g. clipboard). To scan a bar-code, the bar-code scanner (visible red light) is scanned horizontally through the bar-code. The scanner is a contact scanner so the tip of the wand should be in light contact with the bar-code. For best results, the scanner should be fairly close to perpendicular with the template. ***Do not press hard*** as this may eventually damage the template.

If you are a first time user and unfamiliar with reading bar-code with a hand held contact scanner, read the next section **BAR-CODE SCANNING, PRACTICE** carefully and practice until your scans are successful at least 8 out of 10 times.

Note that with a contact scanner you must move the scanner across the bar-code and the bar-code is read by the scanner sensing the amount of reflected light during the scan. The scanner needs to sense the start and end of the bar-code so it is necessary to scan blank space both before and after the bar-code. When moving the scanner across the bar-code, a constant speed is essential and faster is usually better. Bar-codes may be scanned in either direction.

The bar-code scanner can be mounted for either left or right handed operation. For right handed operation, the tip of the bar-code scanner should point to the left. For left handed operation, the tip should point to the right.

1.6.1 BAR-CODE SCANNING, PRACTICE

You should be at the **EDIT Inventory** prompt. If you are, skip to the next paragraph. If you are not, press the [END] key until you return to the LoadMate Menu. Then, locate Customer SMITH (using the \uparrow and \downarrow keys if necessary) and activate it by pressing the **E** key (if a customer named SMITH has not been entered, press [CLEAR] and enter the

customer SMITH. Customer SMITH will then be active. Press v once and you will be at **EDIT Inventory**.

```
SMITH      active
EDIT      Inventory
          ?
```

Press the **[YES]** key to start editing the Inventory. You will first be prompted to enter the Inventory lot number. The bar-code scanner is active at this time so this is a good place to practice. Try scanning the bar-codes on this page or any of the bar-codes on the template, if successful you will hear one or two beeps.

Start the scan by placing the tip of the scanner in light contact with the template so the red beam is at least 1/4 inch to either side of the bar-code (try in the circle above) and then move the beam through the bar-code **at a constant speed**, making sure to continue at least 1/4 inch beyond the bar-code (continue to the end of the arrow).

To develop a rhythm, count 1 as you place the scanner in light



Scan in either direction

contact with the template (allows time for the scanner to wake up) and then count 2 as you scan across the bar-code. Each count should be approximately 1/4 second (a rapid scan will produce better results than a slow scan). You will hear a beep when a bar-code is read successfully.

When you are done practicing, press **[END]** to return to the **Customer active** menu. Continue reading the next few sections and we will pick up again in **SETUP**.

1.7 AVAILABLE MEMORY

Your LoadMate system has ample memory to accommodate all of the item/articles that can be put in your van. In fact, you could probably inventory 3 full vans. ***It is recommended that Inventories are deleted after they are unloaded.***

Available memory is shown on the bottom line of the display when you are in SETUP. Available memory is shown in bytes. Each Item/Article that is entered takes a minimum of 25 bytes.

1.7.1 LOW MEMORY WARNING

When the amount of available memory is low or is insufficient to perform an operation, the warning message **MEMORY IS LOW DELETE CUSTOMERS** will be displayed for a few seconds. You should proceed directly to the **LoadMate Menu** and look for Customers to delete to free up memory. Refer to **DELETE CUSTOMER** for details.

1.8 LOW POWER/BATTERIES

If batteries are low, the computer gives a **LOW POWER** warning and stops operation. You should immediately change or charge the batteries at this time. ***It is recommended that a spare set of alkaline batteries be kept on hand in case the batteries run low.*** If you are using rechargeable batteries, refer to the Guide to Maintaining NiCd Batteries manual for details on charging and changing batteries.

CAUTION: Please note that TELXON PTC-600's memory is protected for only 15-20 minutes once batteries are removed. Leaving the TELXON PTC-600 without batteries will result in the loss of all Customers and Setup!

It is possible for the computer to “*hang up*” if operated or stored with low batteries. ***If this happens refer to Section 8.5 and carefully follow the steps for getting to the unit's system prompt and restarting LoadMate.***

2.0 SETUP - OVERVIEW

SETUP is used to select (or enter) a Carrier, set Agent/Driver and Van Number, edit user defined symbols, articles and cartons and to set default system parameters (e.g. the type of printer being used).

SETUP can be entered from either the **LoadMate Menu** (except new Customer entry) or the **Customer active** menu by pressing [SETUP] (the **a** key). The first parameter in SETUP is the Carrier (only the first 16 characters of the Carrier's name are shown):

```
--LoadMate 4.5--  
Carrier    ? ----  
-Setup    115,821-
```

Press [SETUP] (the **a** key) to enter Setup. If you do not enter Setup, press [END] until you return to a **Customer active** or **LoadMate Menu** display and then press [SETUP].

You should be at the display show above (a Carrier may be displayed). If the Carrier is wrong, don't worry, we will set the Carrier later. Read on at this time.

The bottom line of the display informs you that you are in Setup and displays the amount of available memory in bytes (or characters). While you are in Setup, you can adjust the screen's contrast with the σ and τ keys.

Following is a summary of the SETUP parameters:

- CARRIER ?
- AGENT/DRIVER ? (this also includes VAN NUMBER)
- SYMBOLS in ENGLISH (Yes or No) - (US Version only)
- EDIT (user defined) SYMBOLS ?
- EDIT (user defined) ARTICLES ?
- EDIT (user defined) CARTONS ?
- PRINTER
- CP Cartons ("Carrier Packed", "CP" or suppress)
- SPEAKER (Yes of No)
- User's ID (only used when using with *FirstMate*)
- Language Selection

- Top margin and Paper Selection (**Letter**, A4 or Legal)
- Bottom margin & choice of margins on **1st page only** or on all pages
- Location/Vault (**Yes** of No)

From within SETUP, pressing [END] will eventually exit SETUP and return to where you were before you entered SETUP.

The v and w keys are used to scroll forward and backward through SETUP.

Parameters with choices (CARRIER ?, SYMBOLS in ENGLISH, PRINTER, and SPEAKER VOLUME) are changed by pressing [NO].

If you want to review or edit the parameters for the Carrier or Agent/Driver press [YES]. Go to **CARRIER SETUP** and **AGENT/DRIVER SETUP** for details.

The CARRIER and Agent/Driver parameters have another choice. As stated above, the current selection is shown on the display and [NO] is used to change to another Carrier or Agent. [CLEAR] is used to initiate entry of another Carrier or Agent.

User defined symbols, articles and cartons are entered or edited from the **EDIT Symbols**, **EDIT Articles** and **EDIT Cartons** prompts. Go to **EDIT USER SYMBOLS**, **EDIT USER ARTICLES** or **EDIT USER CARTONS** for details.

If the Carrier is not correct, press [NO] until your Carrier is displayed. When your Carrier is displayed, proceed directly to **AGENT/DRIVER SETUP** by pressing the v key. If your Carrier is not found or you also operate under your own authority, you will need to add your Carrier. Read **NEW CARRIER SETUP** and enter your Carrier.

2.1 CARRIER SETUP

```
--LoadMate 4.5--
Carrier   ? ----
-Setup   115,821-
```

To change to another Carrier, press [NO] and you will advance to the next Carrier (assuming they have been entered).

To review the entire name of the Carrier, Press the [YES] key at the **Carrier ?** prompt.

2.1.1 NEW CARRIER SETUP

To add a Carrier press [CLEAR] at the **Carrier ?** prompt. You will be prompted for the Id (probably the Carrier's SCAC code) of a "**NEW CARRIER**". Simply key in the Carrier's Id, name and registration number.

- LINE A (for Agent)
- LINE 2

2.2 AGENT/DRIVER SETUP

Agent and Driver information (name and Van number) are entered in Setup and are printed on Inventory Reports under the headings **Agent:** and **Van Number:**. There are two lines available for Agent/Driver information and a separate prompt for the Van Number. The Agent/Driver information is prompted for simply as A> and 2> (lines 1 and 2).

- LINE A (for Agent)
- LINE 2
- VAN NUMBER

To change to another Agent (if more than one have been entered), press [NO] and you will advance to the next Agent. The Driver and Van Number are common to all Agents!

The first 16 characters of the Agent/Driver fields line A and line 2 are displayed. Following is an example:

```
--LoadMate 4.5--  
Agent ? 001  
LYTTLES TRANSFER  
BILL DRIVER
```

Agent/Driver and Van Number can be reviewed and changed (if necessary) at any time. Press [YES] at the **Agent/Driver ?** prompt and you can then review the fields with the `v` and `w` keys and change any of them by pressing [CLEAR].

Press `v` to advance to the prompt for **Agent/Driver ?**. When your system is first initialized, Agent/Driver and Van Number are blank and the Agent/Driver prompt will be as follows:

```
--LoadMate 4.5--  
Agent ? -----  
  
---- Setup ----
```

Press [CLEAR] and you will be prompted for your Agent's code. Enter it (and press **E** if it is less than 8 characters) and you will be prompted for the first line of the Agent/Driver information.

```
^LoadMate 4.5--  
A> _____  
_____  
--Agent/Driver--
```

If you are associated with an Agency, you will want to put the Agency name on the first line, if not you will want to put your name on the first line. In addition you may want to include your name and driver number. Enter line **A** at this time and press **E**. You will then advance to the prompt for the second line.

```
^LoadMate 4.5--  
2> _____  
_____  
--Agent/Driver--
```

Enter your name now and **E**, or if you want this line to be blank, simply press **E**. You will advance to the prompt for your Van Number.

```
--LoadMate 4.5--
VAN NUMBER
[      ]
--Agent/Driver--
```

Enter your Van Number and press **E**. You will advance to SYMBOLS in ENGLISH prompt if you are using the US Version or directly to the EDIT Symbols prompt if you are using the International Version.

2.2.1 NEW AGENT SETUP

To add a new Agent press [CLEAR] at the **Agent ?** prompt. You will be prompted “**New Agent**”. Enter the Agent’s Id and you will move to the prompt for the name of a new Agent. *Note that the Driver name and van number are common to all Agents.*

2.3 SYMBOLS IN ENGLISH

This option is only provided with the US Version of LoadMate.

LoadMate allows for all symbols to be printed in English so they can be easily understood by the Shipper. Traditionally, hand written inventories have used cryptic symbols to reduce the amount of writing necessary. The resulting inventories using these symbols are very difficult for Shippers to read. With LoadMate, the use of symbols is no longer necessary. *We highly recommend that you print symbols in English.*

```
--LoadMate 4.5--
SYMBOLS in ENGLISH
YES
---- Setup ----
```

LoadMate will print traditional symbols as codes on the report. When this option is selected, a legend showing the codes for symbols is also printed. The symbols that have codes are shown on the template with their code. All other symbols will be printed in English. *If you print all symbols in English, no legend is printed so the number of pages*

required to print the Customer's inventory will be not be any longer than if codes are used.

To change the setting YES to NO (or from NO to YES), press the **[NO]** key.

2.4 EDITING USER SYMBOLS, ARTICLES & CARTONS

LoadMate has a rich set of symbols, articles and cartons on the template, but no matter how hard we try, we can't satisfy everyone, so LoadMate allows you to define symbols, articles and cartons of your own. User defined symbols are utilized by simply scanning one of the user defined bar codes on the template while doing the inventory. There are 28 user defined Symbols on the standard template, located under the heading **User defined** in the Symbols section of the template (14 on each side of the template). There are 20 user defined Articles at the bottom of the standard template (10 on each side of the template). There are 6 user defined Cartons in the Carton section of the standard template (they are the same on both sides of the template). User defined Symbols, Articles and Cartons are defined on line when a bar-code is scanned for the first time. Once entered, they can only be changed or deleted in Setup. To review or change user defined Symbols, Articles or Cartons in Setup, first use the **v** and **w** keys to **EDIT Symbols ?**, **EDIT Articles ?** or **EDIT Cartons ?**. You can also enter the number of the user defined and go directly to it.

An extended user defined template is available that allows you to define up to 357 Articles, up to 130 Symbols and up to 30 Cartons. This feature is available with **LoadMate V4.5c**.

If you want to change the name of a user defined Symbol, Article or Carton press **[CLEAR]** and you can enter a new name. If you want to remove a user defined Symbol, Article or Carton, press **[DELETE]**.

Press **[END]** when you are done reviewing user defined Symbols, Articles or Cartons.

2.5 PRINTER SELECTION

LoadMate currently supports Okidata 182, 184 or 520 Microline serial printers, Okidata 184 IBM parallel printers, Canon BJC printers, and Hewlett Packard Laser Jet II, III and IV printers.

The PRINTER parameter in SETUP must be set to the proper printer. To change the printer, simply press [NO] at the following prompt and you will advance to the next supported printer.

```
--LoadMate 4.5--  
    PRINTER  
OKIDATA 184/520  
-Setup 115,800-
```

Make sure the printer is set properly. Press \downarrow until you advance to the selection of the printer display shown above. If the printer shown is wrong, press [NO] until the proper printer is shown.

2.6 PRINT Carrier Packed, CP or nothing

When a Carton is entered, "Carrier Packed" will be printed out automatically unless PBO is scanned or a PBO Carton is scanned. If you want to print out "CP" instead or to suppress the automatic printout of "Carrier Packed" or "CP", press [NO] to change the option. Choices are "Carrier Packed", "CP" or Suppress. The default is "Carrier Packed".

```
--LoadMate 4.5--  
    CP Cartons ?  
``Carrier Packed``  
-Setup 115,800-
```

You can press \downarrow to view this and following parameters in SETUP if you like. Read on.

2.7 SPEAKER ON/OFF

The Computer's speaker can be turned ON or OFF. No matter what the setting of this parameter is, the speaker will always be ON when Editing the Inventory.

We recommend that you leave the Speaker ON until you are thoroughly familiar with LoadMate. If you find the speaker's volume to be annoying, it can be muted by placing a piece of electrical tape over the speaker opening.

2.8 LANGUAGE

LoadMate is multi-lingual. Currently English, French, German, Italian, Portuguese and Spanish are available for use with LoadMate. This parameter in Setup controls which language is used for LoadMate displays. To change the language used for displays (if more than one language has been installed), press [NO] at the following display.

```
---LoadMate 4.5--  
  
-> ENGLISH  
-Setup 115,800-
```

2.9 ENABLE LOCATION OF ARTICLES

LoadMate has the ability to show the location of Articles. If you want to use LoadMate to show the location of Item/Articles, this parameter must be set to YES. If you do not want to use this capability, it can be turned off by pressing [NO] at the following display:

```
--LoadMate 4.5--  
Location/Vault  
YES  
-Setup 115,800-
```

Go to **LOCATION OF ARTICLES** in for details.

3.0 LoadMate MENU

The home position is the **LoadMate Menu**. This is where customers are entered, deleted and selected. *No matter where you are, pressing the [END] key will eventually return you to the LoadMate Menu.*

Press [END] until you return to the **LoadMate Menu** and our customer SMITH should be displayed.

3.1 NEW CUSTOMER ENTRY

New Customers are entered from the **LoadMate Menu**. To enter a new Customer, press the [CLEAR] key and you will be prompted for a new Customer. *If there are no Customers in memory, LoadMate will remain at the prompt for a new Customer.*

```
^LoadMate Menu-  
->[_____]   
New Customer
```

Each Customer is identified with a 1 to 8 character ID. The last name of the Customer is typically used (the ID is only used to uniquely identify the Customer).

Enter a new Customer ID and the Customer will become active. See **Customer active**.

Let's enter another Customer. Press [CLEAR] and you will be at the prompt show above. Press **jones** and **E** and you have added Jones. Note that the new Customer becomes active.

Press [END] to return to the **LoadMate Menu**.

3.2 CUSTOMER DISPLAY & SELECTION

Customers in LoadMate are displayed in the **LoadMate Menu** by showing the customer ID, the number of items in the inventory and the customer's name (if the customer's name has not been entered, question

marks will be shown in place of a name). The \uparrow and \downarrow keys are used to scroll forward and backward through customers (they are in alphabetical order). To work with the customer being displayed, press the **[YES]** key and the customer will become active.

```
-LoadMate Menu-  
->[SMITH ] 17  
JOE SMITH
```

Refer to the **Customer active** section for additional details on what you can do when a Customer is active.

You should be at the display shown above (except the quantity may not be 17). Try pressing the \uparrow and \downarrow keys and you will display other customers that have been entered (you should at least have “JONES and “SMITH”. Again, customers are sorted alphabetically and you will hear an ALARM when there are no more in the direction you are moving. Reposition to customer “JONES” and continue.

3.3 DELETE CUSTOMER

Customers are deleted from the **LoadMate Menu**. *When you delete a Customer from the LoadMate Menu, all information (e.g. Name, addresses and Inventories) for the Customer is deleted.*

Use the \uparrow and \downarrow keys to locate the customer to be deleted and press **[DELETE]** (the **f** key). The following “are you sure ?” prompt is made to insure that you really want to delete the customer:

```
^LoadMate Menu-  
DELETE CUSTOMER  
ARE YOU SURE ?
```

Respond [YES] and the Customer and all of the Customer’s files will be deleted. Any other key will abort the deletion.

Let's delete the customer we just entered. You should be at the LoadMate Menu showing "JONES". Press **[DELETE]** and you will be prompted **DELETE CUSTOMER ARE YOU SURE ?** as show above. Press **[YES]** and JONES is deleted.

Now reposition to "SMITH" if necessary and press **[YES]** to make SMITH active.

Continue reading, training will pick up in **CUSTOMER ACTIVE**.

3.4 CONNECT TO FirstMate

If you are using *FirstMate* you can *connect to FirstMate by pressing the "B" key on the keypad while at the LoadMate Menu* or by pressing **[END]** three times from the LoadMate Menu and you will be asked if you want to Connect to Computer as follows:

```
-LoadMate Menu-
  Connect to
  Computer ?
```

Press **[YES]** to start communications with FirstMate. Refer to the FirstMate Operators Manual for details.

3.5 EXIT LoadMate

You can exit *LoadMate* by pressing **[END]** four times from the **LoadMate Menu** and you will then be asked if you want to **End LoadMate?**.

```
End LoadMate?
```

If you respond [YES], you will return to a shell program that will allow you to start Download files from *FirstMate*, start *LoadMate* or start *SalesMate* (if you are running *OmniMate*) or LoadMate.

Please note that 512K of RAM (random access memory) is required to have both LoadMate and SalesMate in the same TELXON Computer. Use of 512K is also required if you are using multiple languages with LoadMate.

4.0 CUSTOMER ACTIVE

When a new customer is entered or when an existing customer is selected from the **LoadMate Menu**, that customer becomes active and you are in the **Customer active** menu. Things to do for the customer (e.g. enter his name, address, etc.) are selected from the Customer active menu. They are summarized as follows:

- EDIT Shipper
- EDIT Inventory
- PRINT Inventory
- Carton Summary
- Location Report
- Display voided items
- Bingo Sheet
- Unload Inventory
- Display unloaded items

When a customer becomes active, the first choice is to edit the Shipper. The top line of the display shows the Customer ID of the active customer.

```
SMITH      active
EDIT Shipper
          ?
```

The `v` and `⌘` keys are used to move forward or backward through the available functions. Only those functions that make sense will be prompted. For example, if there are no items in the inventory, you will only be prompted for Edit Shipper and Edit Inventory. Press [YES] to perform the function that is displayed.

```
--- JOHNSON ---
EDIT Inventory
          ?
```

Turn your Computer ON (if necessary). You should already be in the **Customer active** menu. Press the `v` key and note that you move forward through the options available (since there is no inventory, you

will only see **Edit Shipper** and **Edit Inventory** at this time). Continue until you end up at **Edit Shipper** and read on.

4.1 SHIPPER INFORMATION

The Shipper's name, Inventory Date, Origin and Destination address information, the appropriate reference numbers are entered in the Shipper's information.

LoadMate keeps track of which fields have been entered. If the field being displayed has not been entered and no fields after it have been entered, it will be automatically cleared for entry. When a field is entered, you will advance to the next field. If it has been entered, the entered data will be displayed (this includes entering blanks for a field). Use the `v` and `w` keys to review the fields that have been entered. To change a field, press the [CLEAR] key and enter the desired information (the [END] key will abort the change and leave the field as it was).

Information about the Shipper is printed on each page of the report. Following is the initial prompt for the Customer's Name and a summary of the fields:

```
Customer active
Name>_____
_____
---Shipper ---
```

- Name
- Date
- Orig (Origin Address)
- City+ (Origin City, State and ZIP code)
- Dest (Destination Address)
- City+ (Destination City, State and ZIP code)
- Carrier's Reference Number
- Contract/GBL Number
- Govt. Order Number

Turn your Computer ON. You should be at the prompt to **EDIT Shipper**. Press [YES] (yes, you want to edit information about the

shipper). Since we entered a name earlier, the name you entered should be displayed as follows:

```
^MITH      active
Name>JOE SMITH
---Shipper  ---
```

Press the `v` key and you will advance through fields that you entered earlier (name, date and origin address). Continue pressing `v` until you hear an alarm, you should be at the prompt **City+>** for the Origin City and State. The `+` after City is an indication that you need to enter City and State (and ZIP if you want) at this time.

```
^MITH      active
City+>_____
_____
---Shipper  ---
```

Enter your City and State now. To enter “LAGUNA HILLS, CA” you would press **laguna** [SP] **hills** [SHIFT] **p** [SHIFT] [SP] **ca** and then **E**. After pressing **E**, you will advance to the prompt for the Destination Address.

```
^MITH      active
Dest >_____
_____
---Shipper  ---
```

Let's assume we don't know the address yet, so press **E** to enter blanks and you will move to the prompt **City+>** for the Destination City and State.

```
^MITH      active
City+>_____
_____
---Shipper  ---
```

Enter a Destination City and State and press **E**. You will advance to the prompt for the Carrier's Reference Number as follows:

```
^MITH      active
Reference #
_____
---Shipper  ---
```

Let's enter A12345 as the Reference number. Press **a12345** and then **E**. You will now advance to the prompt for a Contract or General Bill of Lading Number.

```
^MITH      active
Contract/GBL #
_____
---Shipper  ---
```

This prompt and the next prompt for Government Order Number are the only fields remaining. Let's assume they are not needed so press [END] at this time to end editing the Shipper (or press [ENTER] twice) and you will return to the Customer active Menu and advance to the prompt **EDIT Inventory ?**.

4.2 EDIT INVENTORY

To enter or review the Customer's Inventory, press [YES] at the prompt to **EDIT Inventory**.

```
SMITH      active
EDIT Inventory
      ?
```

Refer to Section **5.0 INVENTORY** for details.

Training resumes in **Section 5.0 INVENTORY**. You may proceed directly there at this time if you are in a hurry. If you have the time, we recommend you at least skim the following sections.

4.3 MOVE INVENTORY

To use LoadMate to track the transfer or unloading any portion of the Inventory, press [YES] at the prompt to **MOVE Inventory**.

```
SMITH      active
MOVE Inventory
?
```

LoadMate can be used to check off articles as they are unloaded and to enter exceptions. If the Inventory has not been closed, you will be prompted if you are all done with the inventory and want to close the Inventory.

```
SMITH      active
ALL DONE
Close Inventory?
```

Press [YES] at the previous prompt and the Inventory will be closed. You will be prompted "ARE YOU SURE?". During transfer or unloading, you are not allowed to change the inventory in any way, except to show the location of the Article or to add or edit exceptions at transfer or destination. The first time Move Inventory is entered, "unloaded" will be automatically added as a Location and set as the Active Location. You may add or set the Active Location to other location(s) as desired.

Items are marked as unloaded when the item numbers are scanned or entered. Items checked as unloaded are shown as follows:

```
A12345  -Blue
101+  _ unloaded
Harvest Bench
unloaded
```

If an item is checked as unloaded by mistake (or is reloaded), press [**LOC with a / through it**] to cancel the location.

4.4 PRINT INVENTORY

To print an inventory, press [YES] at the following prompt from the **Customer active** menu:

```
SMITH      active
PRINT Inventory
      ?
OKI184-parallel
```

The printer that has been selected is shown on the bottom line of your display. If the setting is wrong, go to Setup and change to the proper printer.

Go to the **PRINT REPORTS** section for details.

4.5 CARTON SUMMARY

A summary of Cartons in the inventory can be printed if desired. Press [YES] at the following prompt.

```
SMITH      active
Carton Summary
      ?
```

Go to the **PRINT REPORTS** section for details.

4.6 LOCATION REPORT

If Locations or Packers have been used in the Customer's Inventory, a summary of Articles sorted first by Location and then by Item number will be printed. Columns for Locations and/or Packers will be added if they have been used or selected. Press [YES] at the following prompt.

```
SMITH      active
Location Report
?
```

Go to the **PRINT REPORTS** section for details.

Then next sections are on displaying voided item numbers and the using LoadMate for transfer and unloading. We recommend that you proceed directly to Section **5.0 INVENTORY** at this time.

4.7 DISPLAY VOIDED ITEMS

To aid the loading process, the display of all items that have not been identified (missing or voided items) is provided.

```
SMITH      active
Display
voided items ?
```

Press [YES] at the prompt **Display voided items ?** and voided items will be displayed. You will proceed directly to the display of voided items if there is only one lot number. If there is more than one lot number, you will be prompted individually for each lot number (following is an example).

```
A12345      Green
Display
ARE YOU SURE ?
--voided items--
```

Following is a sample display of voided item numbers:

```
A12345      Green
100>112-132-
<155
--voided items--
```

The example shown above shows that the first item number in the lot is 100, the last item number in the lot is 155, and that items numbers 112 and 132 have not been entered and are considered voided.

If there are more missing items than can be shown on a single display, the last lot number will not be displayed. In this case, press `v` to display additional missing item numbers. The `⌘` key will return to a display of voided items starting with the first missing item in the inventory.

Press `[END]` to exit the display of voided items for the lot number.

4.8 INVENTORY CONTROL FORM (BINGO SHEET)

With LoadMate you can print customized Inventory Control Forms (BINGO SHEET) for full inventory tags that you have entered. Only the item numbers in the inventory will be printed. Each Item will include a description of the Article associated with the item number. Voided items will be marked with “--”.

In addition, you can print a bingo sheets for tags that have been prepared by some other means (e.g. Packing Crew). You have the option of printing “Carton” for each item or leaving the description blank. After being prompted for each full inventory tag, you will be prompted for a generic bingo sheet as follows:

```
??????      ??????
  BINGO SHEET
      ?
```

4.9 DISPLAY ARTICLES NOT MOVED/UNLOADED

To aid in the unloading process, the display of items that have not been unloaded is provided.

```
SMITH      active
  Display
unloaded items ?
```

Press [YES] at the prompt **Display unloaded items ?** and all items that have not been checked as unloaded will be displayed. You will proceed directly to the display of unloaded items if there is only one lot number. If more than one lot number is defined with full inventories, you will be prompted individually for each lot number (following is an example).

```
A12345      Green
           Display
           ARE YOU SURE ?
           --not unloaded--
```

The display of unloaded articles shows two articles at a time. Following is an example:

```
SMITH      active
025-High Chair
122-Footstool
           --not unloaded--
```

To display additional unloaded articles, simply press the `v` key. The `w` key will return to display articles that have not been unloaded starting at the first of the lot.

Press [END] when done displaying items that are not unloaded.

5.0 INVENTORY

The inventory process in LoadMate involves putting an inventory sticker on each item, entering the item number, and then entering the article's name and it's condition into LoadMate (as easy as 1-2-3).

Following is an example of the main display of an item number that has been entered into LoadMate:

```
A12345  Roger  
121+   ____  
Dining Table  
---Inventory ---
```

The lot number, mode to transport (e.g. RO for Road) and color of the stickers are shown on the top line of the display. The item number is shown on the second line and the name of the article is shown on the third line. The "+" on the second line signifies that condition(s) have been entered for this article.

The bottom line of the display will show the type of inventory (either Inventory or Rider) or it will show the Active Location and/or Active Packer if either one has been selected. The display of Active Location and Active Packer will be covered in the sections for Locations and Packers.

In the example above, the lot number is A12345, the mode of transport is Road and the stickers are Green. Item number 121 is a Dining Table with conditions (we will find out later how to see what the conditions are) and a Full Inventory has been selected.

Before we get into the actual inventory, this section first gives overviews of the bar-coded template and use of the keys on the Computer's keypad during the inventory process. Then we will cover the definition of inventory lot numbers, entering item numbers, entering articles and then entering conditions for the article.

```
Turn your Computer ON (if necessary). You should be at the EDIT  
Inventory ?. If you are, skip to the next paragraph, If you are not,  
press [END] until you return to the LoadMate Menu. Then, locate  
Customer SMITH (using the  $\alpha$  and  $\nu$  keys if necessary) and activate it by  
pressing [YES] (if a customer named SMITH has not been entered, press
```

[CLEAR] and enter the customer SMITH. Customer SMITH will then be active. Press v until you are at the **EDIT Inventory ?** prompt.

```
SMITH      active
EDIT      Inventory
          ?
```

This is a question (do you want to Edit the Inventory?). Press [YES]. Since we are starting with an empty inventory, you will be prompted for the lot number. Continue reading at this time, training will resume with the definition of the lot number. If you are impatient, you can proceed directly to **KEYS USED DURING INVENTORY** and read the material in-between later.

5.1 INVENTORY STICKERS

Part of the inventory process is placing an inventory sticker on each item. It is assumed that inventory stickers come from either a roll or sheets that have a common lot number and color with unique item numbers from 001 to 999. LoadMate allows you to use multiple lot numbers for a customer. Following is an example of a conventional inventory sticker:

```
A12345      001
YOUR IMPRINT HERE
```

Bar-coded inventory stickers are also available. With bar-coded stickers, the bar-code can be a combination of the Lot Number - Mode of Transport - Item Number or simply the Lot Number - Item Number.

```
|||||
|||||
A12345 001 your imprint
```

With LoadMate and the use of bar coded inventory tags, each article can be uniquely identified. TechNet's **FirstMate** system can be used to produce bar coded tag stock in your Agency. When bar coded tags are used, **LoadMate** or **TrakMate** can be used at storage or destination for check off and tracking. **TrakMate** used a laser scanner to facilitate reading the tags. Contact TechMate for availability.

5.2 BAR-CODED TEMPLATE

LoadMate's bar-coded template is two sided with each side divided into sections for **SYMBOLS** (Descriptions, Contents, Conditions and Locations), **SPECIAL COMMANDS**, **CARTONS**, **PACKERS** and **ARTICLES-CONTENTS**.

The second side of the template is intended to be used by Packers with the **ARTICLES** section replaced by **CONTENTS** (articles you would normally pack in Cartons).

5.2.1 SYMBOLS

Symbols are located at the top of the bar-coded template. They are divided in logical groupings to help you find them. These areas are general symbols, symbols used as contents (e.g. Artificial Flowers), symbols used as conditions (e.g. Scratched) and symbols used as locations (e.g. Top). No matter how hard we try, we can't satisfy everyone, so LoadMate allows you to define 10 user defined symbols of your own. User defined symbols are set in Setup and are entered by scanning one of the ten bar-codes on the template (located under the heading **User Defined**).

If you can not find the symbol you want, you can enter a miscellaneous symbol by scanning the bar-code with all underscores in the symbol section of the template just under the **Conditions** heading. Miscellaneous symbols can be up to 16 characters in length and they will be displayed and printed on the report in the same order that they are entered.

5.2.2 SPECIAL COMMANDS (BAR-CODES & KEYS)

Several special command bar-codes are located just under SYMBOLS on the bar-coded template. Most of these are available from the computer's keypad. Following is a summary:

| <i>Template</i> | <i>Keypad</i> | <i>Description</i> |
|-----------------|---------------|--|
| Loc. ? | LOC? | Change the Active Location to the next location. If no Locations have been defined, this will prompt for the definition of a Location. |
| new | | Prompt for the definition of a new Location. |
| cancel | | Cancel the Location of a specific Item/Article. If scanned immediately after Loc. ? , the Active Location is canceled. |
| tag + 1 | +1 | Advance to the next Item Number. |
| copy | | Copy last entered Item/Article. |
| care! | CARE! | Mark an Item/Article for special care or handling. |
| “?” | “?” | Separator between Symbols in Conditions. |
| plural | | Make a Symbol plural. |
| d/symbol | SYMBOL | Delete current (or last) Symbol. |

5.2.3 CARTONS

Cartons are shown in a separate area on the template (under the heading **CARTON**). They are arranged with carrier packed (CP) cartons on the left and middle and packed by owner (PBO) cartons on the right. When a CP carton is scanned the words “Carrier Packed” will automatically be printed. The user defined Cartons will be assumed to be “Carrier Packed”. When PBO cartons are scanned, “Packed by Owner” will automatically be printed. If a carton without a CP or PBO designation (in the middle portion

of the template) is scanned, it will be assumed to be carrier packed unless the PBO symbol is scanned.

Any carton scanned from the **CARTON** section of the template will be included in the carton summary (if printed). Remember that a carton summary can only be printed for full inventories.

5.2.4 SPECIAL PACKER BAR-CODES

Several bar-codes are located just under **CARTONS** on the bar-coded template. These are used to define Packers and to allow you to show the Packer of Cartons and/or Articles. Refer to **SETTING THE PACKER OF ARTICLES** later in the section for directions on using this feature. The bar codes are used to define Packers, set an Active Packer to be automatically assigned to Cartons or Cartons and Articles, to manually assign a Packer to an Article or to delete the Packer of an Article. Following is a summary of the bar codes:

| <i>Template</i> | <i>Description</i> |
|-------------------|--|
| auto | Use to Set a Packer to be assigned to any Carton or Article Scanned (there are two modes: Cartons only or All Articles). |
| manual | Assignment of a Packer to an Article is done manually by scanning a Packer's bar-code when the Item/Article is displayed. |
| Packer 1-6 | You can have up to six (6) Packers defined per Customer. Packers are defined by 1 to 3 characters (this could be the packer's initials). |
| delete | used to delete the Packer shown for an Item/Article. |

5.2.5 ARTICLES

Most articles found in households are included in the **ARTICLES** section of the bar-coded template. These articles are entered by scanning the bar-code just to the left of the articles name. Additional Articles are shown on the Packer's side of the Inventory under the heading **CONTENTS**.

If you can not find the name of an article on the template, simply scan the miscellaneous bar-code located just under the heading **ARTICLES** and you can enter any name you want from the keypad (up to 16 characters).

In addition, LoadMate allows you to enter up to twenty user defined articles (ten on each side on the template). These can also be set and edited in Setup and once entered, are permanent until changed.

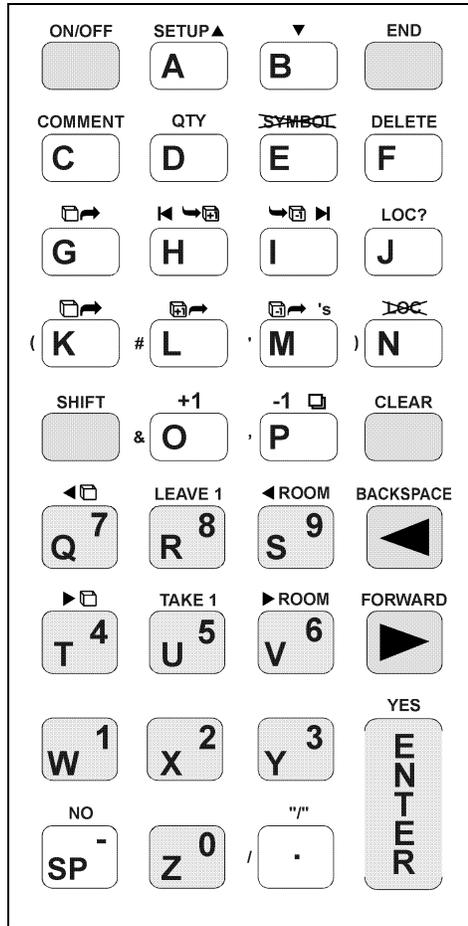
5.2.6 PACKER'S INVENTORY

The back side of the bar-coded template is specially designed for Packers. The CONTENTS section of the template has articles that would commonly be put inside of Cartons. They can be used as Articles, IN-CARTON Articles and as Contents (i.e. Symbols).

User defined Symbols and Articles are not duplicated from the other side of the template. User defined Cartons are the same on both sides of the template.

5.3 KEYS USED DURING INVENTORY

Some of the keys on the keypad take on special meaning when you are editing the Inventory. *The function of these key is shown on the keypad overlay just above the key.* As a quick overview, σ and τ (the **a** and **b** keys) are used to review symbols for an item/article. The **[COMMENT]** key is used to enter a miscellaneous symbol. **QTY?** is used to enter a number (e.g. show multiple quantities of an Article). **[SYMBOL with a / through it]** is used to delete a symbol from the conditions for an article. **[DELETE]** is used to delete an article from the inventory. **[FIRST]** and **[LAST]** are used to move directly to the first or last item in the inventory. **[LOC?]** is used to control the setting of the location of articles. **[LOC with a / through it]** is used to cancel the change in Location of an Article (e.g. unloading). **[CARE!]** is used to mark an article for special handling or attention on the report. **[PLURAL]** is used to make a symbol plural. **[SHIFT]** is



used to shift from one lot number to another (if more than one lot number is being used). **[+1]** advances to the next item number and **[COPY]** (note the symbol for copy above the **P** key) will copy the last article you entered to the current item number. **[CLEAR]** is used if you want to enter a second or third set of lot numbers for a customer and **[SHIFT]** is the used to switch from one lot number to another. **[“”]** (the **.** key) is used as a separator between symbols.

The σ and ν keys are used to review backward or forwards through the inventory one article at a time.

5.4 ENTERING A LOT NUMBER

The inventory stickers used in an inventory need to be defined. This consists of entering the lot number, the color of the stickers and the type of inventory (full inventory or an inventory rider) and verify or enter origin and destination addresses. The initial prompt for the lot number is as follows:

```
_____  
Lot Number ?
```

A lot number can be any combination of 1 to 7 characters. After the lot number is entered you need to select the mode of shipment and enter the color of the stickers.

Turn the Computer ON (if necessary). You are being prompted for the lot number (if you are still at Edit Inventory ?, press [YES]). Enter **a12345** at this time and press **E**. The lot number is displayed on the top line and you need to enter the mode of shipment from the following display:

```
A12345      ? _  
1-Road 2-Sea  
3-Air  4-Storage  
5-Rail 6-none
```

If the lot number was entered wrong, you can press the ω key and re-enter it. Now, select the Mode of Transport (e.g. for sea freight, press **2**). The codes used for mode of shipment are **RO for Road, SE for Sea Freight, AI for Air, ST for Storage, RA for Rail and blank for none**. The code will be displayed on the top line of the display and can be used in bar coded tag stock. The mode of shipment is printed on reports. After selecting the mode of shipment, you will advance to the display for the color:

Lets assume the mode of shipment is Road. Press **1** for Road and you will advance to the selection of the color of the tags.

```
A12345 RO ? _  
Blu,Green,Orange  
Red,White,Yellow
```

If the Mode of Transport was entered wrong, you can press the $\text{\textcircled{M}}$ key and re-enter it. Now for the color.

The most common sticker colors are displayed for your convenience. To select one of the colors in the legend, press the capitalized letter of the color on the keypad (e.g. for Green, press **G** on the keypad).

To enter a color that is not displayed, press [CLEAR] when the color legend is displayed and you can enter any color you want.

```
^12345 RO _____  
Color
```

Lets assume that our inventories stickers are green. Press **G** to enter green. Note the color displayed on the top line.

You now need to indicate if you are doing a Full Inventory or an Inventory Rider, press **1** for a full descriptive inventory or **2** if you are doing a rider. If you are doing a Rider, you will subsequently be prompted if the Rider is at Transfer, Destination or Warehouse.

```
A12345 ROGreen  
1-Full Inventory  
2-InventoryRIDER
```

Pressing [END] at any point during the definition of the inventory stickers will result in the entry being aborted.

We are going to select a full inventory so press **1**. You are now being prompted if you want to enter alternate addresses.

LoadMate allows each lot number to use the Origin and Destination Address entered in EDIT SHIPPER or to enter alternate Origin and/or Destination addresses. *If you enter alternate addresses, be careful in entering them because they can not be changed once they are entered.* There are two additional prompts as follows (these are questions, do you want to use the Origin and/or Destination Addresses entered for the Shipper?):

```
^12345  ROGreen_  
USE  Shipper  
Orig Address  ?  
---Inventory ---
```

To use the origin address already entered in EDIT Shipper, press [YES]. If you want to enter a different address, press [NO] and you will be prompted for the Origin Address and City+.

```
^12345  ROGreen_  
USE  Shipper  
Dest Address  ?  
---Inventory ---
```

To use the destination address already entered in EDIT Shipper, press [YES]. If you want to enter an alternate address, press [NO] and you will be prompted for the Destination Address and City+.

Press [YES] in response to both of these prompts and you are ready to start the inventory for this lot number.

After completing definition of the Lot Number, you will advance to prompt for the 1st Item Number as follows:

```
A12345  ROGreen  
_____- <-  
1st Item Number  
---Inventory ---
```

5.4.1 FULL DESCRIPTIVE INVENTORIES

With a full inventory LoadMate assumes that any number that is not entered between the first item number and the last item number entered is a voided item number. When there are no items in the inventory for this tag, you will be at the following prompt for the 1st Item Number:

```
A12345  ROGreen
____ <-
1st Item Number
---Inventory ---
```

You should be at the prompt above. Let's enter 001 as the first and lowest item number. Press **1** and then **E** (note that it is not necessary to enter 001). You will now be prompted for the article.

```
A12345  ROGreen
001
  ARTICLE  ?
---Inventory ---
```

Let's assume that item number 001 was placed on a Chair. Locate Chair on the template and scan the bar-code just to the left of it and you will have the following display.

```
A12345  ROGreen
001
Chair
---Inventory ---
```

You may read the next section on inventory Riders if you desire. The lesson will continue in **ADDING ADDITIONAL LOT NUMBERS**.

5.4.2 INVENTORY RIDERS

If an inventory rider is selected, you are prompted if this is an exception rider at transfer, storage or destination as follows:

```

S12345      Green
1-at Xfer 2-Dest
3-Warehouse [_]
---- Rider _----

```

Riders (exceptions at transfer, destination or warehouse) are produced essentially the same as full inventories. Their are two differences. The first is that there is no concept of voided item numbers. If there are no items entered in the inventory rider you are simply prompted for an item number on an article with exceptions.

```

^12345      Green
____ <-
Item Number
---- Rider ----

```

The second difference between doing a rider and a full inventory is that an entry can be made for an article with a missing inventory sticker for rider. If zero is entered as an item number by keying **0 E**, you will be prompted for an article with the item number set to "NO#".

```

S12345      Green
NO#
_Scan ARTICLE
---Inventory ---

```

5.4.3 ADDING ADDITIONAL LOT NUMBERS

LoadMate allows you to have multiple lot numbers for a customer. If you want to use the lot number as a order number you can, or you can use different lot numbers. *The combination of the lot number and the mode of transport must be unique.* While you are doing the inventory, the addition of a new lot number is initiated by pressing [CLEAR], and you will be prompted for a new lot number. The prompts are shown in the previous section **ENTERING A LOT NUMBER**. Remember that pressing [END] at any point during the entry and definition of a lot number will abort the entry and return to the current lot number.

If you are using bar-coded inventory stickers, scanning a sticker with a different lot number will initiate the entry of the lot number for this customer if it is not already being used by the customer (in which case, LoadMate will automatically change to the lot number scanned).

Turn your Computer ON and let's enter a second lot number. Press **[CLEAR]** and you will be prompted for an additional lot number (this is identical to entry of the first lot number).

```
Lot Number ?
```

You are being prompted for the second lot number. Enter **a12345** and press **E**. The lot number is displayed and you need to enter the mode to transport.

```
A12345      ?  
1-Road 2-Sea  
3-Air  4-Storage  
5-Rail 6-none
```

Let's select Storage by pressing **4**. The code for Storage "ST" is displayed after the Lot Number. You are now being prompted for the color.

```
A12345  ST  [ ]  
Blu,Green,Orange  
Red,White,Yellow
```

Lets assume that these stickers are white. Press **W** to enter "White" and you will continue to the selection of the type of inventory.

```
A12345  STWhite  
1-Full Inventory  
2-InventoryRIDER
```

We are going to select a full inventory again so press **1**. You have now added the second set of inventory stickers and are being prompted for the first (and lowest) item number of the new inventory stickers.

```
A12345  STWhite
_____ <-
1st Item Number
---Inventory ---
```

Now press [YES] twice to indicate using the same addresses as entered for the shipper to complete the entry of the second lot number. If this was a real inventory, you could enter an alternate address for items going into Storage.

5.4.4 SWITCHING LOT NUMBERS

If more than one lot number has been entered for a Customer, you can easily switch back and forth between them. Simply press the [SHIFT] key and you will be prompted if you want to **Change Inventory ARE YOU SURE ?**. Press [YES] and you will change to the next lot number (pressing any other key will abort the change).

If you are using bar-coded inventory stickers, LoadMate will automatically switch to the lot number of the sticker that is scanned.

We entered the second lot number in order to show you how to switch from one lot number to another. Turn your Computer ON (if necessary) and press [SHIFT] and you will be prompted if you want to Change lot numbers as follows:

```
A12345  STWhite
Change Inventory
ARE YOU SURE ?
---Inventory ---
```

Press [YES] and you will switch back to A12345 - ROGreen

```
A12345  ROGreen
001
Chair
---Inventory ---
```

Let's try it one more time. Press **[SHIFT]** and then **[YES]** and you are back to A12345 - STWhite.

```
A12345  STWhite
<-
Item Number
---Inventory ---
```

5.4.5 DELETING LOT NUMBERS

If more than one lot numbers has been entered for a Customer, you can delete any one of them. If there is only one lot number defined, it can not be deleted.

To delete a lot number, first switch to the lot number you want to delete. Then press **[SHIFT]** and you will be prompted if you want to Change Inventory. If you now press **[DELETE]**, you will be prompted **Delete Inventory ARE YOU SURE ?** for deletion of the lot number and all item/articles in that Inventory.

If you only have one lot number and you want to delete it, you must first enter another lot number. Then you can Switch to the original lot number and delete it.

We are going to delete the second lot number that was entered. Turn your Computer ON (if necessary) and you should be at the following display.

```
A12345  STWhite
___ <-
Item Number
---Inventory ---
```

Press **[SHIFT]** and you will first move the prompt to **Change Inventory**.

```
A12345  STWhite  
Change Inventory  
ARE YOU SURE ?  
---Inventory ---
```

Now press **[DELETE]** and the prompt will change to **Delete Inventory** (the lot number shown on the top line).

```
A12345  STWhite  
Delete Inventory  
ARE YOU SURE ?  
---- Rider ----
```

Press **[YES]** to delete the lot number. The lot number we just deleted was empty, but if it hadn't been, the lot number and all items in it would have been deleted. Note that we have now switched back to the original lot number.

```
A12345  ROGreen  
001  
Chair  
---Inventory ---
```

5.5 ENTERING THE ITEM NUMBER

Since inventory stickers are usually placed on articles a few at a time as the inventory is being taken, the next item number used will normally be the next sequential number. Therefore LoadMate has both a key on the keypad and a command bar-code to advance you to the next sequential item number. If the inventory is not being done sequentially, you can key in new item numbers on the keypad. In addition, if you are using bar-coded stickers, you can simply scan the bar-code on the Sticker. The ways of entering an item number are summarized below:

- Scan the command bar-code **tag +1**

- Press the **[+1]** key on the keypad.
- Enter the item number on the keypad and press **E**.
- Scan a bar-coded inventory sticker.

When an item number is entered that has already been defined, that item number and article will be displayed. If the item number has not been previously defined, LoadMate prompts for the article as follows:

```
A12345  ROGreen
002
_Scan ARTICLE
---Inventory ---
```

At the **Scan ARTICLE** prompt, *you must enter an article before anything else can be done* (see **ENTERING THE ARTICLE**). Pressing **[END]** will abort the entry for this Item Number.

Press **[+1]** on the keypad and you will advance to **Scan Article** for item number 002 (as shown in the display above). Continue reading, we will enter the article later.

5.5.1 MISSING ITEM TAG (NO#)

This is for Exception Riders only. When LoadMate is used for Exception Riders, item number 0 is used to enter articles that are missing an inventory sticker. Keying in item number **0**, **00** or **000** followed by **E** will result in **NO#** being used for the item number. You will be prompted for the article as follows:

```
A12345  ROGreen
NO#
_Scan ARTICLE
---- Rider ----
```

Articles with no item number (missing inventory sticker) are shown in the rider after articles with item numbers. **NO#**'s are reported in the order they are entered. They can be located and reviewed by using the **v** and **w** keys. Remember that the **[LAST]** key can be used to move directly to the end of the inventory (this includes articles with **NO#**).

Again, at the **Scan ARTICLE** prompt, you must enter the article before anything else can be done (see **ENTERING THE ARTICLE**).

5.6 ENTERING THE ARTICLE

After a new item number has been entered you will be prompted “**Scan ARTICLE**” and you need to enter (scan) the article.

```
A12345  ROGreen
002
_  ARTICLE  ?
---Inventory ---
```

The article can be entered in a number of ways.

- Scan the bar-code to the left of an article on the bar-coded template.
- Scan the miscellaneous bar-code and key in the article.
- Press [COMMENT] on the keypad and key in the article.
- Enter a user defined article by pressing a single digit followed by **E**.
- Press [COPY] or scan the **copy** bar-code on the template.

At the **Scan ARTICLE** prompt, you must enter an article before anything else can be done. *You can abort the entry of the item number by pressing [END].*

```
You should be at the prompt to Scan ARTICLE for item number 002.
Let's abort the entry by pressing [END]. You will return to the display of
item number 001.
```

The different methods of entering articles are covered in the following sections.

5.6.1 SCAN ARTICLE ON TEMPLATE

Most articles you will need are on the bar-coded template. At the prompt **Scan ARTICLE**, locate the article on the bar-coded template and scan the bar-code just to the left of the article.

Turn you Computer back ON. You should have a display of Item 001. Let's get ready to enter item number 002. Scan the **Next Tag #** bar-code on the template. You should now be at the **prompt Scan ARTICLE** for item number 002. Locate "Microwave" on the template and scan it at this time. You should have the display shown below.

After the article has been scanned (e.g. Microwave), the name of the article will be displayed along with the item number as follows:

```
A12345  ROGreen
002      _____
Microwave
---Inventory ---
```

At any time that an Item/article is displayed during loading, conditions can be entered (see **CONDITIONS FOR AN ARTICLE**), or you can enter an new item number for entry of an new article or review of an existing Item/article.

Be patient, we will get to conditions later. For now we are going to explore the various ways of entering item numbers.

5.6.2 MISCELLANEOUS ARTICLES

If you can not find the article you want on the bar-coded template, you can enter the name directly from the keypad by scanning the Miscellaneous bar-code (the one with all underscores directly under the heading **ARTICLE**) when you are at the **Scan ARTICLE** prompt.

```
A12345  ROGreen
003      _____
Scan ARTICLE
---Inventory ---
```

After scanning the Miscellaneous bar-code you will be prompted for the name of the article. You have 16 characters available for the name. If you press **E** without entering a name, "Miscellaneous" will be entered as the name of the article. Pressing the [END] key at the prompt for the name will abort the entry.

We left off at Item 002. Press **[+1]** on the keypad to advance to **Scan ARTICLE** for item number 003 shown above. Now let's try a Miscellaneous article. Scan the bar-code with no description (all blanks) just under the title **ARTICLE** on the template.

```
A12345  ROGreen
003  ARTICLE ?
-----
---Inventory ---
```

You are now ready to key in the name of the article at the prompt above. Now key in **pc** [SP] **monitor** and press **E**. You have entered "PC MONITOR" and should have the display shown below:

```
A12345  ROGreen
004      ____
PC MONITOR
-----
---Inventory ---
```

5.6.3 USING USER DEFINED ARTICLES & CARTONS

If you find that there are Articles or Cartons that you use often that are not on the bar-coded template, you can define your own. User defined Articles and Cartons User defined articles can be defined while doing the inventory the first time the user defined is scanned. They can be also edited in Setup (see **ENTERING USER SYMBOLS, ARTICLES & CARTONS**).

User defined Articles and Cartons are used when you are at the **Scan ARTICLE** prompt by simply scanning a user defined bar code. If the Article has been defined, it will be used. If the Article or Carton has not been defined, you can define it directly while doing the Inventory.

```
A12345  ROGreen
006
_Scan ARTICLE
-----
---Inventory ---
```

Let's assume that inventory sticker 004 has been damaged so it can not be used. To advance to Item 005, enter **5** and **E** and you will be at the prompt shown above to **Scan ARTICLE**.

The first 10 user defined Articles can also be accessed by pressing a single number **0** to **9**, followed by **E** at the **Scan ARTICLE** prompt. The current setting of the appropriate user defined Article will be used. **Note that when user defined articles are changed in Setup, the changes will not affect previous uses of the articles.** Following is an example of a user defined article (note that the name is all Capital letters):

We defined user article #0 as "DOG HOUSE" in Setup, so let's use it now. At the **Scan ARTICLE** prompt, press **0** and **E** and you should have the following:

```
A12345  ROGreen
006      _____
DOG HOUSE
---Inventory ---
```

5.6.4 COPY LAST ENTRY

Copy last entry is designed to speed up the inventory process. When you are at the **Scan ARTICLE** prompt, press the **[COPY]** key or scan the **Copy Last #** bar-code to copy the last entered or modified article and all its symbols to this item number. **If you want to make more than one copy the last entered or modified article you can press the [QTY] key** and entered the number of copies to be made (they will be made sequentially starting at the Item Number shown).

```
A12345  ROGreen
006
_ Scan ARTICLE
---Inventory ---
```

Let's assume that we have three Dish Packs that were packed by owner and have stickers 006, 007 and 008. We left off at Item 005, so press **[+1]** to advance to the **Scan ARTICLE** prompt for Item 006 (as

shown above). Now scan the bar-code by “Dish Pack ^{PBO}” in the **CARTONS** section of the template to enter the first Dish Pack.

```
A12345  ROGreen
006
Dish Pack    PBO
---Inventory ---
```

Now press **[+1]** again to advance to **Scan ARTICLE** for Item 007 and press **[COPY]**. You have now entered a second Dish Pack with Item 007.

```
A12345  ROGreen
007
Dish Pack    PBO
---Inventory ---
```

Copying can also be done by scanning command bar-codes on the template. Scan the **Next Tag #** bar-code to advance **Scan ARTICLE** for Item 008 and then scan the **Copy Last #** bar-code. You have now entered a third Dish Pack with item number 008.

```
^12345  ROGreen
008
Dish Pack    PBO
---Inventory ---
```

If you leave the inventory or shift to from one lot number to another, **[COPY]** is not available until another article has been entered or modified.

5.6.5 REVIEWING ITEM/ARTICLES

The **v** and **w** keys are used to review forward and backward through items in the inventory one item at a time.

We should be at the display of item number 008. Press **w** and you will move back to item number 007. Press **w** three more times and you

will move to item numbers 006, 005 and then 003 (note that item number 004 was not entered).

You can move directly to an article that has already been entered by simply keying in the item number followed by **E**. If that item number has been entered you will move to it. If that item number has not been entered, LoadMate will assume you are entering it and will prompt for the article.

Let's assume that you want to move directly to item number 002. Press **2 E** on the keypad and you will move directly to the display of item number 002.

The **[FIRST]** and **[LAST]** keys will move directly to the first item (lowest item number) or the last item (highest item number).

Press **[+1]** and note that you move to a display of item number 003. Remember that **[+1]** or **Next Tag #** will advance to the next item and that this may be a display or the entry of a new item number.

Let's assume we are ready to resume taking the inventory, press **[LAST]** to move to the highest item number that has been entered (this should be item number 008).

When an item is displayed, the conditions for the article can be entered, reviewed or deleted. The σ and τ keys are used to review symbols that have been entered for the article. This is covered later in the section **EDITING CONDITIONS (SYMBOLS)**.

5.6.6 DELETING AN ITEM/ARTICLE

An item can be deleted by pressing **[DELETE]** when the item is being displayed. When **[DELETE]** is pressed, you will be asked to confirm the deletion. If you are at the main display for an item, the confirmation prompt will be as follows:

```
A12345  ROGreen
108    <- Delete
Dish Pack    PBO
ARE YOU SURE ?
```

If you are displaying symbols entered for the article, the confirmation prompt will be shown as follows:

```
003CHAIR      1
DELETE ARTICLE
  ARE YOU SURE ?
Front
```

Press [YES] to delete the item. Pressing any other key will abort the deletion.

Let's delete the last Dish Pack. You should be at the display of item number 008. Press [DELETE] and you should have one of the prompts above. Press [YES] to confirm deletion of the item. You will now be at the display of item number 007.

5.6.7 SPECIAL CARE ARTICLES

Articles can be marked for special care or handling (e.g. early out) by scanning "care!" on the template when the article is displayed. If the article is already marked for special care or handling, scanning "care !" again will remove the Item's being flagged for special handling. Articles marked for special handling are displayed with the item number being displayed in inverse video (white letters on with a black background). In this manual, inverse video is represented by the field being in bold italics as follows:

```
A12345  ROGreen
007
Dish Pack      PBO
---Inventory ---
```

Items flagged for special handling are printed on the inventory with an "*" before the item number.

Turn your Computer ON and scan "care!" on the template. Note the item number 007 being displayed as white on black (inverse video). This article has been marked for special handling. An example of how this will be printed is show below.

| <u>ITEM CHECK ARTICLES</u> | <u>CONDITION AT ORIGIN</u> |
|----------------------------|----------------------------|
| *007 Dish Pack | Packed by Owner |

5.7 IN-CARTON ARTICLES

The **IN-CARTON** bar code in the Carton section of the template allows you to itemize Articles that are in Cartons or Articles. In-Carton Articles do not have a unique Item Number, but will be listed on reports with the Article shown in the Article Column with their own conditions. Following is an example:

| <u>ITEM CHECK ARTICLES</u> | <u>CONDITION AT ORIGIN</u> |
|----------------------------|----------------------------|
| 007 3 Cubic Ft | Carrier Packed |
| -01 Computer | Model: HP-P133 |
| -02 ZIP DRIVE | Model: HP-Z600B |

To enter an Article that is in a Carton, simply scan the **IN-CARTON** bar code when you are displaying an Article. You will then be prompted to **Scan Article**. If you want to show more than one Article in a Carton, you need to scan **IN-CARTON** for each Article in the Carton (or in another Article).

5.8 CONDITIONS FOR AN ARTICLE

The description and/or condition of an article is entered by scanning symbols on the template while the item is being displayed. Symbols are located at the top of the bar-coded template. They are divided in logical groupings to help you find them. These areas are general symbols, symbols used as contents (e.g. Albums), symbols used as conditions (e.g. Scratched) and symbols used as locations (e.g. Bottom). No matter how hard we try, we can't satisfy everyone, so LoadMate allows you to define 10 user defined symbols of your own that you use regularly. Finally there is a miscellaneous symbol so you can enter anything you want. In addition to the symbols, there are command bar-codes and special keys on the keypad for entering or altering symbols. With LoadMate, it is possible to construct virtually any set of descriptions and conditions for an article. *All symbols will be printed on the household descriptive inventory in the order they are entered.* Following is an example of a Condition at Origin that can be prepared with LoadMate:

121 Television ZENITH / Model: BX3434Z2 / Serial No: A143444 / Front
Legs Gouged / Top Right Front Corner Scratched /
VOLUME KNOB Missing

In addition to the symbols on the top portion of the template, *any Article, Content or Carton can be scanned as a symbol for an Article*. You need to be careful that you intend to use an Article of Carton as a symbol rather than as a new Article. In order to notify or warn you when you do this, *LoadMate gives a second beep whenever you use an Article, Content or Carton as a Symbol*.

5.8.1 SCANNING SYMBOLS

To enter a symbol, simply locate the desired descriptive, condition, content or location symbol on the bar-code template and scan the bar-code just to the left of it. Assuming the location "Right" was scanned as the first symbol, the following would be displayed:

| | |
|--------------|---|
| 001CHAIR | 1 |
| Right | |

When you are entering or editing symbols for an item, the item number and the first 10 characters of the article's name are shown on the top line of the display. The symbol shown on the bottom line of the display is the active symbol. It is shown in inverse video on the computer's display. The number at the top right corner of the display is the position of the active symbol in the condition list.

Let's try this. Press **[FIRST]** to move to item number 001. Now locate "Right" in the **Locations** section of the **SYMBOLS** area of the template and scan the bar-code. You should now have the display show above. The "1" displayed at the top right corner indicates that you are looking at the first symbol for the article.

Assuming after scanning "Right", the location symbol "Arm" was scanned, you would have "Right Arm" as follows:

```
001CHAIR      2
Right
Arm
```

Locate and Scan “Arm” and you will have the display show above.

In the last example Arm is the second symbol for Chair. The previous one or two symbol(s) will also be displayed.

LoadMate will not allow the same symbol to be entered as a duplicate symbol (e.g. Top Top).

Now scan the condition symbol “Broken” and you will have completed the phrase “Right Arm Broken”.

```
001CHAIR      3
Right
Arm
Broken
```

5.8.2 MISCELLANEOUS SYMBOLS

If you can not find the symbol you want, you can use the miscellaneous symbol to enter any description you want.

To enter a description, condition or location that is not on the bar-code template, scan the miscellaneous bar-code in the **SYMBOLS** section of the template (it is the one with all underscores just under the heading **Conditions**) or press **[COMMENT]** on the keypad and you can enter any description you want (up to 16 characters). If **E** is pressed without entering a description, “Miscellaneous” will be entered as the description. Following is an example of the prompt for a Miscellaneous symbol (all underscores on the bottom line of the display):

```
001CHAIR      4
Arm
Broken
```

We are going to enter the phrase “CANE Seat Worn”. Since “CANE” is not on the template, we need to use the miscellaneous symbol. Press [COMMENT] and you will have the display show above. Now key in cane and E and “CANE” is entered as the fourth symbol for the Chair.

```
001CHAIR      4
Arm
Broken
CANE
```

Now let's complete a phrase by scanning “Seat” and then “Worn”. You should have the following displayed:

```
001CHAIR      6
CANE
Seat
Worn
```

With the help of the miscellaneous symbol, you can create any condition line you want. Remember that *miscellaneous entries will be printed in the order that they are entered.*

5.8.3 USING USER DEFINED SYMBOLS

When a user defined symbol is used, the symbol's definition set in Setup will be used (see **EDIT USER SYMBOLS**). *Note that if the definition of a symbol is changed in Setup it will not affect previous uses of the changed Symbol.*

To use user defined symbols, simply scan one of the Numbered bar-codes under the **User Defined** heading in **SYMBOLS**. If the user defined symbol scanned has already been defined, it will be used as a symbol on the condition line. If the user defined symbol has not been defined, you will be prompted to define the symbol number scanned, and if defined, entered as a symbol in the condition line.

Let's define Symbol #1. Scan the bar-code directly under the heading **User Defined** (it has a small ¹ following it, this is user symbol #1). Enter “ALL” as the name and press Enter. Then you will be prompted

“ARE YOU SURE”. If you entered ALL Correctly, press [YES]. You now have “ALL” as a symbol. You should have “ALL” displayed as follows:

```
001CHAIR      7  
Seat  
Frayed  
ALL
```

Let's now finish the phrase “ALL Legs Marred”. Scan “Leg” and you will have:

```
001CHAIR      8  
Frayed  
ALL  
Leg
```

We are going to move ahead a little. Press [PLURAL] on the keypad and you will change “Leg” to “Legs”.

```
001CHAIR      8  
Frayed  
ALL  
Legs
```

Now finish the phrase by scanning “Marred”. You should have the following:

```
001CHAIR      9  
ALL  
Legs  
Marred
```

5.8.4 EDITING CONDITIONS (SYMBOLS)

LoadMate allows you to edit the list of symbols that have been entered for an article and delete, insert or modify them.

At the main display of an Item/article, an “&” will be displayed after the item number if there are conditions for the article.

```
A12345  ROGreen
001  &  ____
Chair
---Inventory ---
```

Press **[END]** and you will return to the main display for the item (shown above). Note the “&” indicating that there are conditions for the article.

The σ and τ keys are used to review symbols that have been entered for the article being displayed. If you press the τ key when you are looking at the main display of an article with conditions, you will move to a display of the first symbol. If you press σ when you are at the main display, you will move to the last entered symbol for the article.

You should be at the main display for item 001. Press σ and you will move to display the last entered symbol as the active symbol as shown in the following example:

```
001CHAIR      8
ALL
Legs
Marred
```

While symbols are being displayed for an article, the τ key will move forward through the symbols one at a time. You will receive an ALARM when you have reached the last entered symbol. Pressing the σ key will move you backwards through the symbols one at a time. When you reach the first symbol, pressing σ again will result in the active symbol number to go to 0 (this is to allow you to insert symbols at the start of the condition list). Press σ again and you will move to the main display for the article.

Press the τ key and you will hear an ALARM as you are at the last symbol. Now press σ and the seventh symbol “Legs” will become the active symbol.

Press **[END]** to return to the main display for the item. Now press τ and you will advance to a display with the first symbol as the active symbol. Now press σ and you will move to a display with the active symbol set to 0 (again, this is for inserting symbols at the start of the condition list).

5.8.5 INSERTING SYMBOLS

When a symbol is scanned or entered and you are looking at the Main display of an Item/article, it will be added at the end of any symbols that have already been entered. If you enter a new symbol while symbols are being displayed, the new symbol will be added or inserted after the active symbol (the active symbol is displayed on the bottom line of the display). Again, the σ and τ keys are used to position to any symbol in the condition list.

In order to insert symbols at the beginning of the condition list, you need to position before the first symbol. This is done by pressing σ when symbol #1 is the active symbol and the display will then show symbol #0 as the active symbol (inverse video on the third line of the display). A new symbol entered now will become symbol #1.

We left the display showing symbol #0 as the active symbol. Now scan the symbols “Left” and “Leg” and note that they have been entered as symbols 1 and 2 as shown below:

```
001CHAIR      2
Left
Leg
```

5.8.6 DELETING SYMBOLS

To delete a symbol, position the symbol as the active symbol by using the σ and τ keys and press **[SYMBOL]** or scan the **Delete Symbol** bar-code and *the symbol will be deleted without confirmation*.

If you scan **Delete Symbol** or press **[SYMBOL]** while you are looking at the main display of an article (without displaying any symbols) you will delete the last entered symbol without confirmation.

Whenever a symbol is deleted, the previous symbol will become the active symbol.

Let's delete the two symbols we just entered. Press **[SYMBOL]** and "Leg" will be deleted and "Left" will become the active symbol. Now scan the command bar-code **Delete Symbol** and "Leg" will be deleted and you are left in position to insert symbols at the first of the condition list.

5.8.7 REPLACING SYMBOLS

If you want to replace a symbol, first position to the symbol you want to replace using the σ and τ keys. When the symbol you want to replace is shown on the bottom line as the active symbol, delete it by pressing the **[SYMBOL]** key or by scanning **Delete Symbol**. Then simply enter the a new symbol and it will be inserted in the same position as the symbol that was just deleted.

Let's change the phrase "CANE Seat Worn" to "CANE Seat Frayed". Press the τ key until Worn is the active symbol as shown below:

| | |
|------------------|---|
| 001 CHAIR | 6 |
| CANE | |
| Seat | |
| Worn | |

Now press **[SYMBOL]** to delete "Worn" as shown below:

| | |
|------------------|---|
| 001 CHAIR | 6 |
| Broken | |
| CANE | |
| Seat | |

Now scan the bar-code for "Frayed" and the phrase has been changed to "CANE Seat Frayed".

| | |
|------------------|---|
| 001 CHAIR | 6 |
| CANE | |
| Seat | |
| Frayed | |

5.8.8 PLURAL COMMAND

Most symbols can be made plural by scanning the **plural** bar-code or by pressing **[PLURAL]** on the keypad while the symbol is the active symbol. If you are viewing the main display for the article, the last entered symbol will be affected.

If the symbol you are looking at has been made plural with **PLURAL**, it can be returned to singular by scanning or pressing **PLURAL** again.

Press **[PLURAL]** and note that nothing changes. This is because “Frayed” can’t be made plural. Press σ to make “Seat” the active symbol. Now press **[PLURAL]** and “Seat” will be changed to “Seats”. Now press **[PLURAL]** again and “Seats” will be changed back to “Seat”.

5.8.9 “/” SEPARATOR

In order to make it easier to separate symbols or phrases within the conditions for an article, the “/” separator bar-code is provided. If after scanning “Right Arm Broken” you scanned the “/” separator while “Broken” was the active symbol, and then entered “CANE Seat Frayed”, “**Right Arm Broken / CANE Seat Frayed**”. would be printed on the report. The separator can also be entered by pressing the “/” key (the . key).

| | |
|------------------|---|
| 003 Chair | 3 |
| Right | |
| Arm | |
| Broken | / |

The separator is displayed in the 16th character position for the symbol after which the “/” will be printed. If a separator is entered for the last entered symbol, it will not be printed on the report.

Let's now go back and separate the phrases that we have entered. Press σ until symbol #3 "Broken" is the active symbol. You should have the display shown above. Now press "/" and the separator has been added after "Broken". Now press τ three times to get "Frayed" as the active symbol as follows:

| | |
|------------------|---|
| 001 CHAIR | 6 |
| CANE | |
| Seat | |
| Frayed | |

Press "/" and the separator will be added after "Frayed".

| | |
|------------------|---|
| 001 CHAIR | 6 |
| CANE | |
| Seat | |
| Frayed | / |

The condition line for Chair will now print out as:

001 Chair Right Arm Broken / CANE Seat Frayed / ALL Legs Marred

5.8.10 CP and PBO SYMBOLS

Carrier Packed and Packed by Owner symbols receive special treatment by LoadMate. Cartons that have CP or PBO following their names on the bar-coded template are automatically marked as "Carrier Packed" or "Packed by Owner". All other cartons are assumed to be carrier packed ("Carrier Packed" will be printed on the inventory) but can be changed to "Packed by Owner" by scanning the "PBO" symbol or permanently marked as "Carrier Packed" by scanning the "Carrier Pack" symbol. LoadMate will not allow a carton to be marked as both carrier packed and packed by owner.

5.8.11 Qty ? COMMAND

The **Qty ?** command allows you quickly designate quantities up to 99 (e.g. 4). After pressing the **Qty ?** key on the keypad, LoadMate will automatically prompt for a quantity. If you enter a two digit quantity, it will be entered automatically. If you enter a single digit you will need to press to complete the entry. Following are examples:

```
008Table Legs 1
  <--
```

If **4 E** were entered, *4 will be entered as a symbol (see the example below).

```
008Table legs 1
4
```

Let's try this. Press **[LAST]** to move to the last item number in the inventory. Now press **[+1]** to advance to **Scan ARTICLE** for item number 008. Scan "Table Legs" and then press the **Qty ?** key to indicate more than one, and you should be at the display shown above.

Now press **4 E** and "4" has been entered as a symbol.

The **Qty ?** command replaces the **ON [?]** feature that was provided with previous versions of LoadMate.

5.8.12 MODEL: and SERIAL No:

When either the **Model:** or **Serial No:** bar-codes are scanned, you will automatically be prompted for the model or serial number. The heading and the number are separate symbols. Following is an example:

```
009Television 3
ZENITH /
Model:
RS34CA2
```

Let's try these. Scan **Next Tag #** and then the article "Television". First we need to key in the brand name, so press **[COMMENT]** and key in **zenith E**. Now press **"/"** for the separator and then scan the "Model: ___" bar-code and you will be prompted for the model number as follows:

```
^09Television 2
ZENITH /
Model:
_____
```

Enter "ABC123" as the model number (key in **abc [SHIFT] 123** and **E**). Then press **"/"** again to insert a separator after the model number. You should now have the following:

```
009Television 2
ZENITH /
Model:
ABC123 /
```

Now let's enter a serial number. Scan the Serial No: ___ bar-code and you will be prompted for the serial number.

```
^09Television 4
ABC123 /
Serial No:
_____
```

We need to enter the serial number (let's try "12345"). Note that the prompt starts out using Letters. Press **[SHIFT] 12345** and **E**. Now press **"/"** again and you are set to key in conditions. Let's enter "Electrical Condition Unknown", scan the bar-code "Elec Cnd ?". You should now have the following:

| |
|-------------------------|
| 009 Television 6 |
| Serial No: |
| 12345 / |
| Electrical Condi |

Congratulations, you have completed an inventory. We have not covered the use of Locations and Packers in the basic training. We recommend that you go to Section 6.0 at this time and print the inventory you have just done.

After a good nights sleep, return to LOCATION OF ARTICLES and learn about keeping track of the Articles location and how to show the Packer of Articles. You may want to schedule a training session with TechMate for this training.

5.9 LOCATION OF ARTICLES

The ability to show the location of Articles has been added to LoadMate V4.3. There are three bar codes on the template for the definition, changing and deleting of locations. The first bar code is **Loc ?** that is used to change from one location to another. The second bar code **new** is used to define new locations. The third bar code **cancel** is used to delete the location of an Article or to cancel the active location.

To assign a Location to an Article, the Location first must be set as the Active Location. The Active Location will be shown on the 4th line of your display in inverse video (shown in Italics in this manual). When an Active Location has been set, it will be assigned as the Location to any Article that is entered or has it's Item Number entered.

5.9.1 DEFINE NEW LOCATIONS

To define a new Location, either Scan the **new** command bar code, or press the **Loc ?** key and then press **[CLEAR]** and you will be at the following prompt for the definition of a Location:

```
^23456      Yellow
Location      ?
```

The prompt above is for entry of a new Location. Location ID's are limited to 10 characters.

Since the name of Locations can not be changed after they are entered, you are prompted **ARE YOU SURE ?** to confirm the name of the Location you just entered as shown in the following example. Press [YES] if the name of the Location is correct.

```
A23456      Yellow
Location      ?
ARE YOU SURE ?
VAULT-0012
```

After a new location has been entered, it will become the Active Location and will be displayed on the bottom line of the display in inverse video.

```
A23456      Yellow
023
Chest
VAULT-0012
```

To show that an Item is in the Active Location, simply enter the Item Number. In this case, enter **23 E** and Item 023 will be shown in Active Location. The current location of an Item is shown on the second line of the display.

```
A23456      Yellow
023 VAULT-0012
Chest
VAULT-0012
```

5.9.2 CHANGING ACTIVE LOCATION

To change the active Location, you can scan the **Loc ?** bar code or press the **Loc ?** key on the keypad and the active Location shown on the 4th line of your display will advance to the next defined Location (assuming more than 1 location has been defined). If the Location you want has not been defined previously, you will need to define it (see **DEFINE NEW LOCATIONS**).

If there are no Locations entered with **Loc ?** is used, you will be prompted to define a location.

5.9.3 CANCEL AN ARTICLES LOCATION

To cancel the Location for an Item/Article, scan the **cancel** bar code or press the **c/Loc** key on the keypad. The Location of the article will be cleared. If an Active Location is set, it will not be affected by canceling the Location of an Article.

5.9.4 CANCEL THE ACTIVE LOCATION

To cancel the Active Location displayed on the bottom line of your display, either scan the **Loc ?** bar code and then immediately scan the **cancel** bar code or press the **Loc ?** key on the keypad and then immediately press **c/Loc** or **⏏** key or **[NO]**. In either case, the Active Location will be canceled. This action will have no effect on the Location of the Article being displayed.

5.10 SETTING THE PACKER OF ARTICLES

LoadMate allows you to designate the Packer of Cartons and Articles. There is a special command line on the bar coded template that is used for the definition and assignment of Packers to Cartons and Articles. If you designate the Packer of Articles, the Packer's ID will be displayed on the display with the Article's name and will be printed on Location Reports.

Assignment of a Packer for Articles can be done either automatically or manually. If assignment is done automatically, an Active Packer needs to be set and once set will be shown on the 4th line of your display. In automatic mode you can have the Active Packer assigned to Cartons only or

to all Articles (the Active Packer's ID will be preceded with a "+"). When an Active Packer is set, it will be assigned to any Carton, and non Carton if the Active Packer is preceded with a "+") that is entered or has it's item number entered.

Packer's can also be assigned manually (when an Active Packer is not set) by simply scanning a Packer's ID bar code when the Item/Article is displayed.

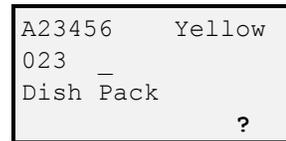
5.10.1 DEFINITION OF PACKERS

Up to six Packers can be defined per customer by using the six bar-codes numbered 1 to 6 on the Packer command line of the template. The first time one of these is scanned, you will be prompted to define the Packer with up to three characters (it is expected that the initials of Packers will be used).

5.10.2 AUTOMATIC SETTING OF PACKER - CARTONS

When Automatic assignment of Packers is set for Cartons only and a Packer ID has been chosen as the Active Packer, the Active Packer will be assigned whenever a Carton is entered or it's Item number entered.

To activate automatic setting of Packers to Cartons, scan the Packer's **auto** bar and you will have a prompt similar to the following example with a ? in the lower right portion of the display:



```
A23456      Yellow
023
Dish Pack
?
```

Now scan one of the six Packer ID bar codes to indicate which packer is the Active Packer. If you scan a Packer ID bar code that has not been defined, you will be prompted for the definition of the Packer (see the next two sample displays). If the Packer has been previously defined, that Packer will become the Active Packer. Following is the prompt for the definition of the Packer's ID (the number after Packer will be 1 through 6):

```
A23456    Yellow
023
Dish Pack
Packer 1?     
```

Since the Packer's ID can not be changed after it is entered, you will be prompted ARE YOU SURE ? to confirm the Packer's ID as follows:

```
A23456    Yellow
023
ARE YOU SURE ?
Packer 1? LHP
```

Once an Active Packer has been assigned, the Packer's ID will be displayed on the bottom right portion of the display. The Active Packer will now be assigned to all Cartons that are entered or have their Item Numbers entered.

```
A23456    Yellow
023
Dish Pack
LHP
```

The display above indicates an Active Packer for Cartons only. If **auto** is scanned when an Active Packer is already scanned, the setting will be switched back and forth from Cartons only and All Articles (refer to the next section).

To show the Item 023 was Packed by the Active Packer simply enter the item **23 E**.

```
A23456    Yellow
023
Dish Pack    LHP
LHP
```

5.10.3 AUTOMATIC SETTING OF PACKER - ALL

When Automatic assignment of Packers is set for all Articles and a Packer ID has been chosen as the Active Packer, the Active Packer will be assigned whenever any Article is entered or it's Item number entered. A "+" sign will precede the Active Packer if all Packers are set (see display below).

To activate automatic setting of Packer for all Articles, scan the **auto** bar code a second time (or from the display shown in the section above) and the Packer's initials will be preceded by a "+" indicating the automatic setting of all Articles.

```
A23456      Yellow
023      VAULT-0012
Chest
                        +LHP
```

5.10.4 MANUAL SETTING OF PACKER

When assignment of Packers for Articles is set to manual, an Active Packer will not be displayed on the bottom line of the display. In manual mode, to assign a Packer to an Article, scan one of the six Packer bar codes while the Article is being displayed. This will cause the Packer for the Article being displayed to be set or changed. If the Packer scanned has not been defined, you will be prompted for the definition of the Packer and the Packer will not be assigned to the Article being displayed (if you want to assign this Packer to the Article, scan the Packer's bar code again).

```
A23456      Yellow
113
3 Cubic Ft      CP
```

To show the Item 113 was Packed by a Packer, scan the bar code for the desired Packer (1 - 6) and it will be assigned for the Item being displayed. Following is an example:

| | |
|------------|--------|
| A23456 | Yellow |
| 113 | |
| 3 Cubic Ft | LHP |

5.10.5 DELETE AN ARTICLES PACKER

To delete the assignment of a Packer for an Article, scan the **delete** bar code in the Packer command line of the template or press the d/Loc key on the keypad while the Item is displayed.

6.0 PRINTING REPORTS

LoadMate provides for the printing of full descriptive inventories, carton summaries for full inventories, Location Reports for full inventories and exception riders. Printing of all reports is started from the **Customer active** menu.

6.1 INVENTORY REPORT

The Inventory can be printed at any time by responding [YES] to the prompt **PRINT Inventory** in the **Customer active** menu.

Press [END] to exit the inventory and you should be at the prompt to **PRINT Inventory ?**. If you were displaying symbols for an article, you may have to press [END] twice to exit the inventory.

If there is more than one lot number being used, you will be prompted whether to print each Lot in turn. If there is only Lot you will be Prompted as follows:

```
A12345      Green
Start at Page 1
ARE YOU SURE ?
```

Connect LoadMate to the printer cable. Make sure the printer is turned on (the POWER light is green), the paper positioned properly, and the select light is green (if not press the select button). Then press [YES].

It is recommended that the printer be turned off when it is first connected to the TELXON PTC. Get your printer ready at this time, put in some paper and align the top of the paper with the tear line on the cover. It is necessary to remove the cover to load the paper. Now connect the TELXON PTC to the printer cable. Turn the printer ON and the press [YES] at the prompt to **PRINT Inventory ?**. Since there is only one Lot Number, printing should start immediately.

If the report is not proper, turn the printer off and back on again, make sure the cable is firmly seated, make sure the paper is aligned at the top of

the page, make sure that the proper printer is set in Setup. Also check your print ribbon.

When printing is complete you will be at the prompt **Carton Summary ?**. You can print one if you want (we entered two Dish Packs).

6.2 CARTON SUMMARY

A carton summary can be printed for all full inventories that have cartons. All cartons in the carton portion of the bar-coded template are included in the carton summary.

A carton summary can be printed at any time by responding [YES] to the prompt **Carton Summary** in the **Customer active** menu. If there is more than one lot number defined for the customer, you will be prompted if you want a carton summary for each lot.

If Packers have been used in the Inventory, you can include a summary of which Packers packed with Cartons on the Carton Summary. In this case you will be prompted **Packer Summary?** (respond YES or NO). If you request the Packer Summary, only those Packers who have packed Cartons will be included.

Congratulations, you have completed Basic Training. We recommend that you do a small practice inventory from start to finish and you should be ready to go. ***If you have any questions, now is the time to call TechMate International.***

We would appreciate your comments on LoadMate and especially the training portion of this manual.

6.3 LOCATION REPORT

If Locations or Packers are used for a Customer's inventory, you can print a Location report that will show the inventory sorted by Location. Locations or Packers can only be used for full inventories.

A Location Report can be printed at any time by responding [YES] to the prompt **Location Report** in the **Customer active** menu. If there is more than one lot number defined for the customer, you will be prompted if you want Location Report for each lot.

7.0 COMMON PROBLEMS

Question: The display on my TELXON PTC-600 is difficult to read as it is either too dark or too light?

The σ and τ keys are used to control screen contrast for PTC-600 computers when you are in Setup. Enter Setup and press the σ and τ keys until the display is optimized for your viewing.

Question: My computer has hung up. It will not respond when I press keys and I can not turn it off. What do I do?

Check to see if any keys are stuck. If this does not correct the problem, it is very important that you attempt to restart your system exactly as directed as there is a slight chance that you can lose the data in your system. Go to Section 8.5 and carefully follow the steps for getting to the unit's system prompt and restarting LoadMate.

Question: When I scan the **plural** bar-code, the "s" is added to the symbol and then the display flashes and the "s" goes away?

When you scan **plural**, the symbol will be made plural or if it is already plural it will be made singular. You may be scanning the **plural** bar-code twice.

8.0 STARTING LoadMate

The LoadMate program, inventory and dictionaries files are normally burned into an EPROM. TELXON PTC-600 computers use a flash EPROM which is not removable. A Site Maintenance kit (FLASH CABLE or FLASH BOX and cables) and a Personal Computer with Windows or DOS is required to update a TELXON PTC-600. If you do not have a Site Maintenance Kit, TELXON PTC-600 computers need to be returned to TechMate International for updating.

8.1 DISPLAY OF 62>, 66>, 68> or 99>

These are TELXON Computer Operating System prompts. In unusual circumstances, the computer can exit LoadMate and return to the Computers Operating System and you will have one of these prompts. The number is the version number of the TELXON Operation System in your TELXON PTC Computer. In the remainder of this manual, this prompt will be referred to as “nn>”. To start LoadMate, go to either **STARTING LoadMate from “nn>”**.

If you press a wrong key from one of these prompts and get lost, pressing the [CLEAR] key repeatedly should eventually return you to one of the three system prompts.

8.2 GETTING TO DISPLAY OF “nn>”

The following procedure is used to exit the LoadMate application and return to the TELXON Computer’s Operating System prompt. The number is the version number of the Computer’s Operation System.

1. Wait at least 5 seconds with the Computer off (if the Computer is on, turn it off and wait 5 seconds). If the unit will not turn off, kill power by temporarily removing a battery (also remove battery charger if it is being used). ***After replacing the batteries do not attempt to turn the PTC on but follow the following steps carefully.*** You will need to use both hands.
2. Depress the [ENTER] and [SP] keys at the same time and wait for at least 5 seconds.
3. Continue to hold the [ENTER] and [SP] keys and now press the [ON/OFF] key and hold all three keys down for at least 5 seconds.

4. Continue to hold the [ENTER] and [SP] keys and let up on the [ON/OFF] key and again wait at least 5 seconds.
5. You can now let up on all keys and you should see **nn>** on the display. ***If you do not get this display, start again at step 1.*** If this procedure does not work, you should check your batteries.

8.3 INSTALLATION OF NEW RELEASES

Before a new release is installed, all inventories in the computer should be up-loaded to FirstMate or printed as they will be erased during installation of the new release.

New releases for TELXON PTC-600 users of LoadMate can be distributed on a floppy disk. A Site Maintenance kit (FLASH CABLE or FLASH BOX and cables) and a Personal Computer (Windows or DOS) are required to update a TELXON PTC-600. If you do not have access to a Site Maintenance Kit, the TELXON PTC-600 computer needs to be returned to TechMate International for updating.

8.4 STARTING LOADMATE from “nn>”

To start LoadMate if you have a TELXON PTC-600:

1. Press the **6** key at the **nn>** prompt one time and then the [ENTER] key repeatedly until you see the display **LoadMate.Y**. If you go past **LoadMate.Y**, you need to press the [CLEAR] key until you return to the **nn>** prompt and start over.
2. At the **LoadMate.Y** display, hold down the **3** key and allow the unit to beep three times and LoadMate will be started (let up on the **3** key).

8.5 LOADMATE HUNG or LOCKED UP

If your TELXON Computer is hung with a display that will not change or it will not turn off, it is necessary to kill power and restart LoadMate. To kill power, remove the battery door on the back of the unit and temporarily remove a battery (the battery charger must be disconnected). After putting the battery back in, the display should be blank. ***Do not attempt to turn your Computer ON at this time as data may be lost.*** Now go to

GETTING TO DISPLAY OF “nn>” and follow the directions carefully starting with step 1.