

Getting Started

This section is intended to guide you through the initial setup of your AccuBar system. The system is made up of two parts: the AccuBar handheld scanner, which is the primary data collection unit for the system, and your AccuBar web account, which is used to perform many of the system's management and reporting functions. This guide is not intended to replace the full user's guide, but it will address getting started with both the handheld and the website. If you need any assistance during setup, call AccuBar Support at (800) 643-9517.

Overview

Below are the general steps you will need to perform in order to get started. Please see the detailed instructions on the following pages.

1. **Set Up the Handheld** – The handheld is shipped with the AccuBar software installed and configured for your AccuBar account.

You Will Need To

- Install and charge battery
- Connect cradle to PC and to power
- Install sync software on PC (see Quick Start Guide)

2. **Configure AccuBar Account** – Your AccuBar account is web-based, meaning all your data is stored on the secure AccuBar servers. To access your account you need a computer that has either Internet Explorer or Firefox and an active internet connection.

You Will Need To

- Create Locations
- Customize Categories

3. **Scan Your Items** – Your AccuBar account will have no items in it when you begin, allowing you to populate it with only product that you carry. To add items to your account you will use the handheld to scan and count your items. This will be your first full inventory.

You Will Need To

- Scan Items
 - Refresh Locations to the handheld
 - Use handheld to scan bar-coded items
 - Upload to your AccuBar account

4. **Assign Item Properties** – Any time you add new items to your account you need to assign properties for those items. At minimum you should set the unit cost, category, and volume size.

You Will Need To

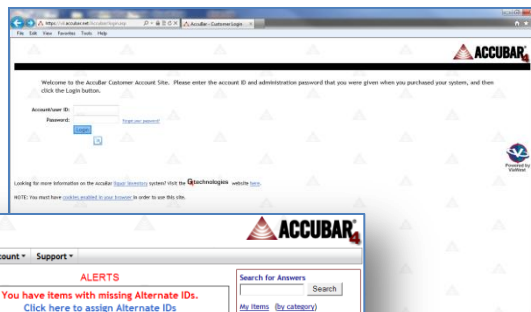
- Log on to your AccuBar account and assign item properties to each item

Setup the Handheld

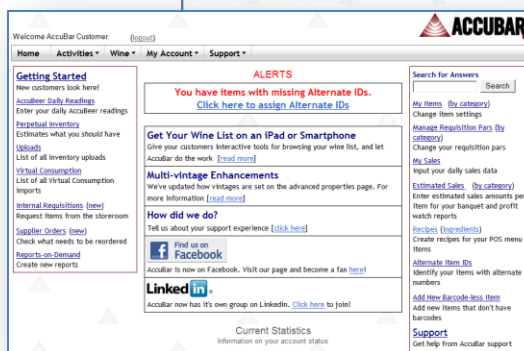
Your handheld scanner was shipped to you with the AccuBar software installed and configured for your account. Your first step should be to follow the **Quick Start Guide** that came in the box to get the handheld connected to your computer so it can communicate with your AccuBar account online. Call AccuBar Support (800) 643-9517 if you need assistance connecting the handheld.

Configure your AccuBar Account

To login to your AccuBar account, open **Internet Explorer** or **Firefox** and enter v4.accubar.net into the address bar. This will bring you to your AccuBar login page. Enter the **Account ID number** and **website password** from the "Welcome to AccuBar" message that was emailed to you. This is case sensitive, so make sure CAPS LOCK is off. Click **Login**.



***The AccuBar home page has many navigation links. While you are following this guide we will always use the five main tabs (Home, Activities, Wine, My Account, Support) located on the upper left just under the logout link. ***

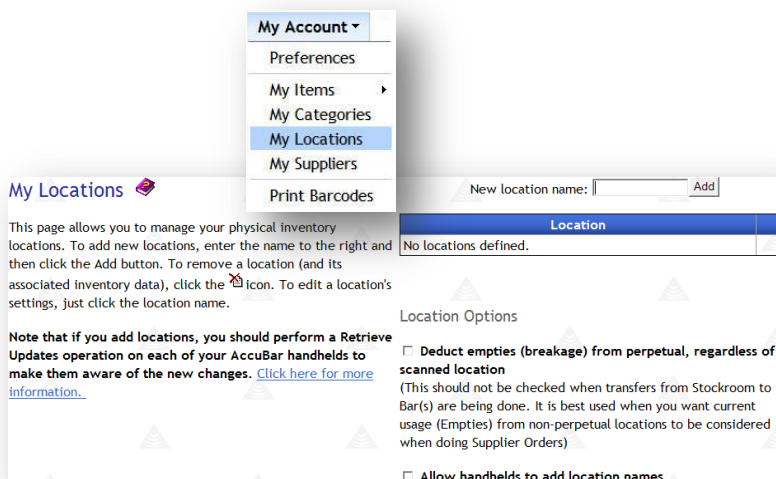


Create Locations

AccuBar defines a location as a physical area that has clear dividing lines, where you are going to inventory, regardless of the product that is stored there. Common locations are: Storeroom, Main Bar, Lobby Bar, Walk-In, Liquor Room, Office, etc. The only restriction when creating locations is the name must be 20 characters or less.

Navigate to **My Account/My Locations**

Click in the **"New Location Name"** box, enter your location name and click **Add**. Repeat for all locations.



Create Categories


AccuBar categories are used to organize the items you inventory in a logical manner. There are main categories and sub categories. Main categories can have many sub categories. Your account has some generic categories already created; you can use these or customize your own. Most places create categories in AccuBar that reflect the categories in their POS

system. The main categories would be Beer, Liquor and Wine, with sub categories for Beer of Bottle and Draft, and sub categories for Liquor of Gin, Vodka, Rum, and so on.

Navigate to **My Account/My Categories**














Custom Item Categories

The AccuBar system uses categories and subcategories to broadly group sections of your inventory. This grouping can be setup along the same lines as your POS system or cash register keys so that the cost data provided by AccuBar can be correlated to your sales data.

This page allows you to add your own item categories. To add a new category, click the link at the top of the page. To delete categories, click the  icon to the right of the category name.

After you define the categories here, you need to go back to [My Items](#) and assign a category to each item.

[Click here to add a new category](#)

Category	
Beer-Bottle	
Beer- Keg	
Liquor-Bitters	
Liquor-Gin	
Liquor-Grappa	
Liquor-Liqueur	
Liquor-Rum	
Liquor-Tequila	
Liquor-Vodka	
Liquor-Whiskey	
Wine-Red	
Wine-Rose	
Wine-Sparkling	
Wine-White	

Edit Category

General

Interface

Wine

Main Category Name:	Beer
Sub Category Name:	Bottle
Slow Movers Cutoff:	0.10
Supplier Order Group:	
Calculate Variance:	<input checked="" type="checkbox"/>

Save Changes

Cancel

To **edit** an existing category, **click on the category name**. On the general tab, **click in the main or sub category name field**, make your change, and then click **Save Changes**.

To **delete** an existing category **click the red x icon** to the right of the category name, **click Yes** to confirm delete.

To **add** a new category click on "**Click here to add a new category**" at the top of page, and then enter the main and sub category name then **click Save Changes**.

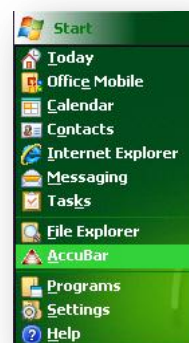
Scan Your Items

If you have not yet followed the Quick Start Guide for the handheld, please do so now and let the unit charge for approximately 6-7 hours before beginning to scan your items.

Open AccuBar on the handheld.

On the handheld screen tap the windows flag in the upper left corner, and tap the AccuBar icon to start the program. If AccuBar is not on the menu list click Programs, then tap the AccuBar icon.

AccuBar opens to the 'Choose a task' screen. To update the handheld with the changes you made on the website, tap **Refresh Items from Server**. When the message appears asking to get all new/modified items from the server now, tap **Yes**. A progress indicator will begin and alert you to when the update is complete. If you get an error message, check that you are connected and synced to the sync software on your computer. Call AccuBar Support at 800-643-9517 if you cannot connect.



After the handheld gets the updates from the server, tap on **Do Inventory**. Choose “Normal” as the inventory type, and then select the location you are going to inventory and click **OK**.

This opens the ‘Scan a Barcode’ screen. To scan the barcode on the bottle, point the top of the handheld at the barcode on the bottle and press either of the blue buttons on the sides of the unit or tap the “scan” button on the screen. The handheld will beep when the scan is good.

Scanning barcodes takes practice and you may need to move the handheld closer to or further from the actual barcode or up and down until it reads it; generally a distance of about 8” is best.

You will only be scanning items that have barcodes for now. **DO NOT** scan barcodes of case products. Make a note of any items that **DO NOT** have a manufacturer barcode on the bottle, you will add these items later using your AccuBar account online.

When the scanned barcode is recognized you will see the count screen.

Confirm that the name in the upper left corner matches what you actually scanned. The four numbered boxes allow counts to be entered for full bottles; the bottle shape to the right is to count a partial bottle.

To enter a count of four full bottles tap the number 1 four times, the number 4 will be entered in the Qty field.

To enter a partial bottle count, use the stylus to tap the bottle shape and a line will appear. Drag it up or down to represent how much liquid is in the bottle.

You can count multiple full bottles and one partial bottle at the same time, you **CANNOT** however count two partial bottles at the same time.

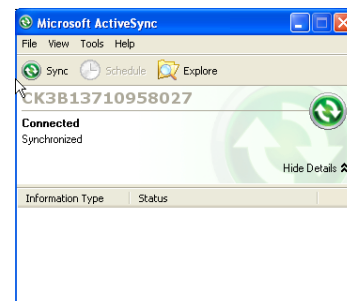
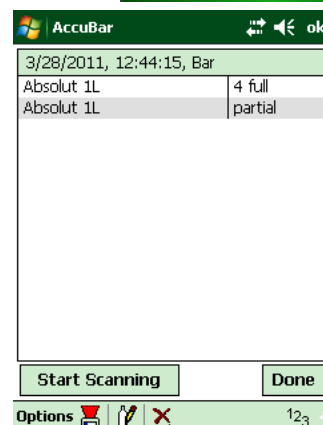
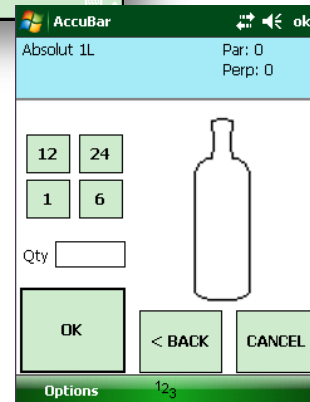
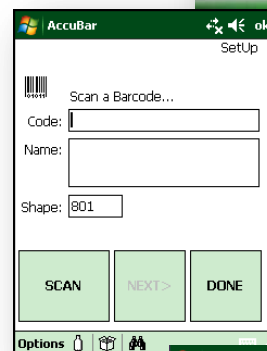
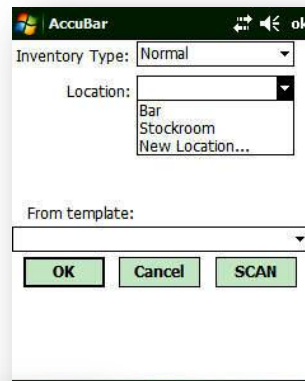
After entering the count for the scanned item tap **OK**, then scan the next item and enter a count, repeat this for all single items that have manufacturer barcodes.

When you have finished scanning your product and are back to the ‘Scan a Barcode’ screen, tap **Done**. All the items you scanned will be displayed as a list with the most recent scan at the top. Tap **Done** to save and backup the inventory.

Upload Inventories to your AccuBar Account

Place the handheld in the cradle and be sure you have a connection to the sync software you downloaded and installed on the computer. When the handheld is connected and synced properly it will look like one of the two images to the right.

If you are having trouble getting connected, call AccuBar Support at 800-643-9517.




To send the inventory to your account online, leave the handheld in the cradle, open AccuBar on the handheld and on the 'Choose a task' screen, and click on **Send Inventories to Server**. You will be prompted with the options to Send All, Choose or Cancel; click **Send All**. A progress bar will appear and notify you when the upload is complete. Click **OK** to the "updates complete" message.



Assign Item Properties

Your AccuBar account will now be populated with the items that you scanned and counted in the uploaded inventory. To view your Item list and assign item properties, login to your AccuBar account and navigate to My **Account/My Items/Manage My Items**. Click the 'show all' navigation link at the bottom of the page to display your entire item list alphabetically, 10 items at a time.

My Items  Search:


This page lists all items that have ever been included in an inventory. The "letter" links below allow you to navigate through the list a letter at a time. Just click one of the links below to get started. If there are more than 10 items under a specific letter, you will see an additional set of links for navigating through the items in groups of 10.

Also, you can type a word into the "Search" field above to jump to a listing of bottles that contain your word in the name. So to display all items that contain the word Cuervo, just type it in the search field and click the Go button.

Finally, **make sure you click Save Changes after changing things or your changes will be lost** (you can click another letter or enter a different prefix and your changes are saved automatically, though)

















































































[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [0](#) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [\[show all\]](#) [\[deleted\]](#) [\[S0\]](#) [\[cases\]](#) [\[wine fields\]](#) [\[desc\]](#) [\[image\]](#) [\[featured\]](#)

Each column, except the Barcode column, is editable and will need to be populated with the correct information. If a column is not visible, at the bottom of the page for 'Show Columns' check the box for each column you want to see. To move to the next page of items use the Items drop down box or click the double arrows to the left or right. **Always click Save Changes before navigating to another page.** Once your items are in the My Items list and you have populated the information, they will remain there unless you delete them.

My Items  Search:

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [0](#) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [\[show all\]](#) [\[deleted\]](#) [\[S0\]](#) [\[cases\]](#) [\[wine fields\]](#) [\[desc\]](#) [\[image\]](#) [\[featured\]](#)

| << < Items: 1-10 > >> |

Brand	Bin #	Barcode	Volume	Par	Reorder Point	Order Unit	Category	Unit Cost	Supplier	
1554 12oz		ACC4730851	12 oz	0	0	1	Beer-Bottle	\$ 1.25	Beverage Distributors CO LLC.	       
1800 Anejo 750ml		ACC4730852	750 ml	0	0	1	Liquor-Tequila	\$ 25.00	Beverage Distributors CO LLC.	       
1800 Reposado 750ml		ACC4730853	750 ml	0	0	1	Liquor-Tequila	\$ 25.00	Beverage Distributors CO LLC.	       
1800 Select Silver 750ml		ACC4730854	750 ml	0	0	1	Liquor-Tequila	\$ 25.00	Beverage Distributors CO LLC.	       
1800 Silver 750ml		ACC4730855	750 ml	0	0	1	Liquor-Tequila	\$ 25.00	Beverage Distributors CO LLC.	       
4 Roses Bourbon 750ml		ACC4730856	750 ml	0	0	1	Liquor-Whiskey	\$ 35.00	Beverage Distributors CO LLC.	       
42 Below 1L		ACC4730857	1 ltr	0	0	1	Liquor-Vodka	\$ 12.50	Beverage Distributors CO LLC.	       
5 Barrel Pale Ale 12oz		ACC4730858	12 oz	0	0	1	Beer-Bottle	\$ 1.25	Beverage Distributors CO LLC.	       
5 Lizard 12oz		ACC4730859	12 oz	0	0	1	Beer-Bottle	\$ 1.25	Beverage Distributors CO LLC.	       
90 Shilling 12oz		ACC4730860	12 oz	0	0	1	Beer-Bottle	\$ 1.25	Beverage Distributors CO LLC.	       

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| << < Items: 1-10 > >> |

Show Columns: ☒ UPC ☒ Bin # ☒ Volume ☒ Par/Unit ☒ Category ☒ Cost ☒ Supplier

Show Controls: ☒ Top navigation links

If needed, assign the Volume, Category and Supplier fields (using dropdowns), as well as adding unit cost to all items from this window.

The initial setup of your account is now complete. To schedule your Jumpstart training, contact AccuBar Support at (800) 643-9517.

For more information on any of the steps above please see the AccuBar User Guide located on the Support Home page of your account or call the Support number listed above.