

# Getting Started

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This document 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 as a 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 or configure handheld for wireless (see QuickStart 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, Chrome, Safari or Firefox browsers 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. If you have purchased an item import, please contact AccuBar Support for more details.

### 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

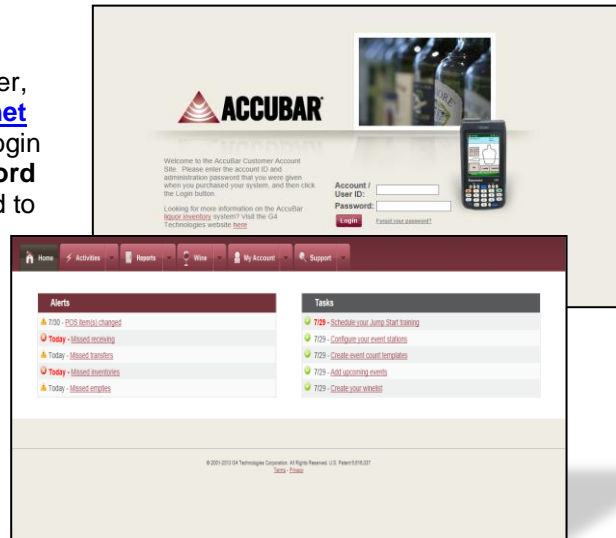
## 1 - Setup the Handheld

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.

## 2 - Configure your AccuBar Account

To login to your AccuBar account open the Internet Explorer, Chrome, Firefox or Safari browser and enter [v5.accubar.net](http://v5.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. The password is case sensitive, so make sure CAPS LOCK is off. Click **Login**.

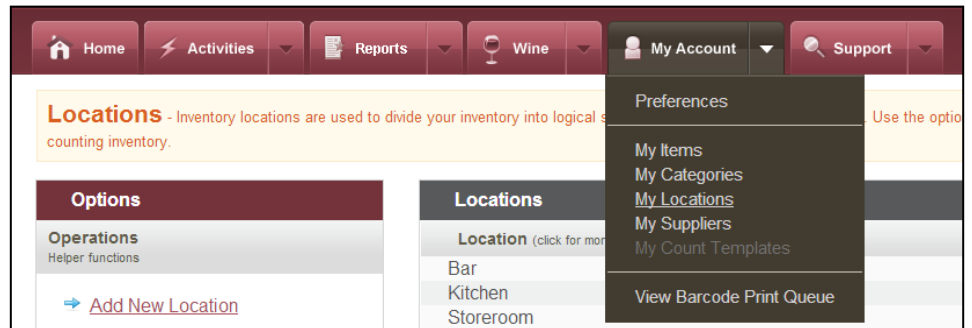
This will take you to the AccuBar Home page, which will eventually display Tasks and Alerts based on your account configuration.



## 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, Cooler, Liquor Room, Office, etc. The only restriction when creating locations is the name must be 20 characters or less.

The image shows a screenshot of the 'Location Settings' dialog box. It has a title bar with 'Location Settings' and a close button. Below the title bar, there are two input fields: 'Inventory Location Name' and 'Alternate ID'. Below these fields, there are three tabs: 'Options', 'Interface', and 'Hours'. The 'Options' tab is selected, showing a list of checkboxes with labels and question marks: 'Default Receiving Location', 'Include in Perpetual', 'Allow Requisitions', 'Default Requisition Source', 'Default Sales Location', 'Banquet Storeroom', 'Include in Auto-Generated Profit Watch', and 'Include in Auto-Generated Inventory Report'. At the bottom of the dialog, there are two buttons: 'Save Settings' and 'Cancel'.

Navigate to **My Account>My Locations**

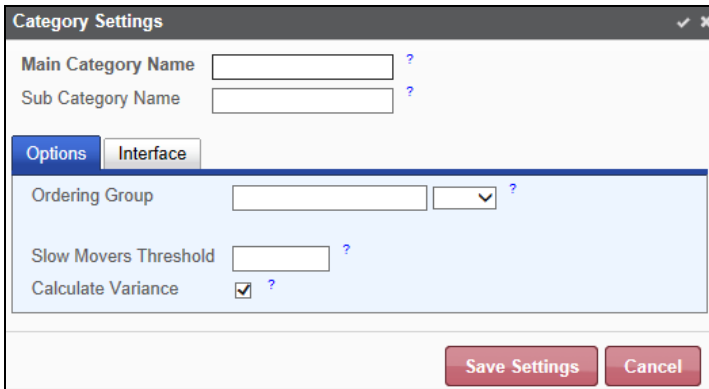
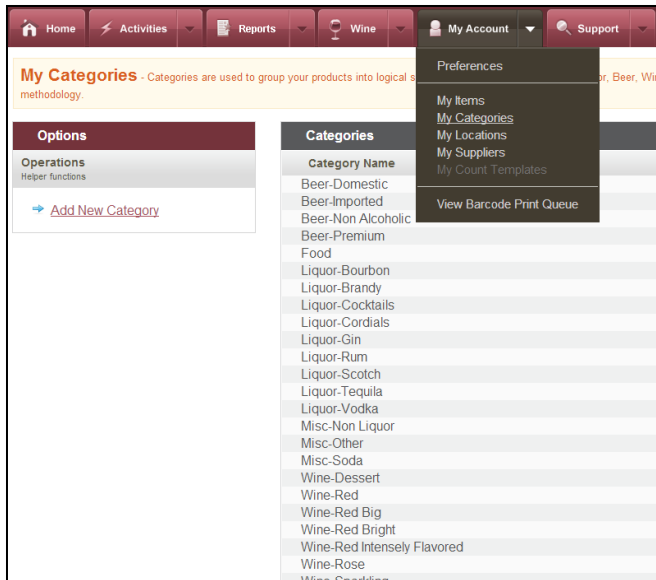
Click on the **Add New Location** link, enter your location name and click **Save Settings**. Repeat for all locations.

## Create Categories

AccuBar categories are used to organize the items you inventory in a logical manner. There are main categories and sub categories. A main category 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**

To add a new category click on **Add New Category** in the left options panel. Click in the main and sub category name fields to add the information and then click **Save Settings**.

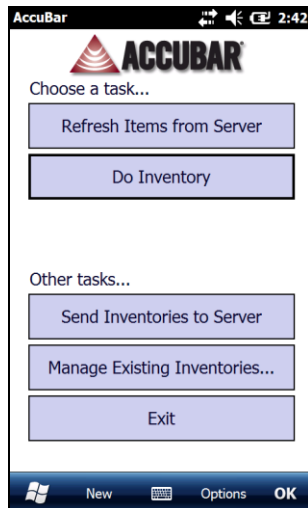


To edit an existing category, click on the category name and then select **Edit Category**. Click in the main or sub category name field, make your change, and then click **Save Settings**.

To delete an existing category, click on the category name and then select **Delete Category**. Click **Yes** to confirm delete.

## 3 - Scan Items using AccuBar on the Handheld

If you have not yet followed the **Quick Start Guide** for setting up 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 main handheld screen, tap the windows flag in the bottom 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.

### Refresh Locations to Handheld

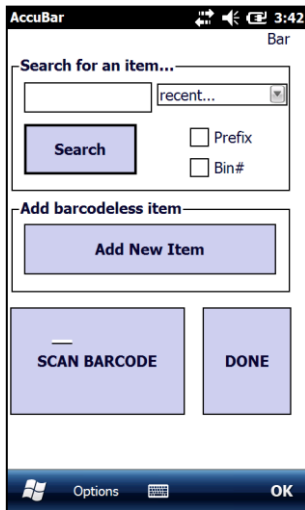
AccuBar opens to the 'Choose a task' screen. To update the handheld with any changes made on the website, tap **Refresh Items from Server**. When the message appears asking to get all new/modified items from the server now, tap **Yes**. A progress indicator will begin and alert you to when the update 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.



## Scan Items

After the handheld gets the updates from the server, tap **Do Inventory**. Choose **Inventory** as the Count Type, and then from the Location dropdown, select the location you are going to inventory and click **OK**.

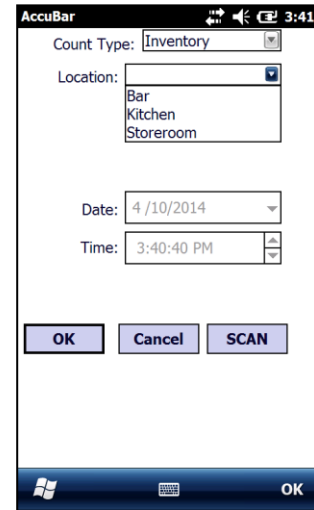
This opens the screen where you can scan, search or add a new item. To scan the barcode on the bottle, point the top of the handheld at the barcode on the bottle and press either of the buttons on the sides of the unit or tap the “scan barcode” button on the screen. The handheld will beep when the scan is successful.



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 at this time.

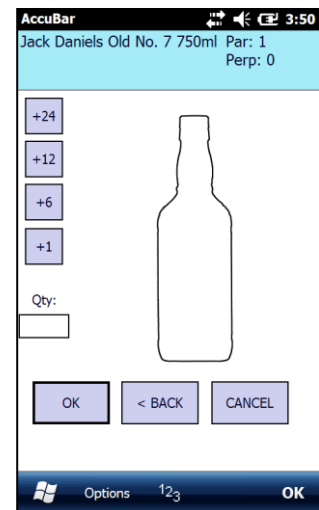
NOTE: For any items that do not have a manufacturer barcode on the bottle, you can click on the Add New Item button and go through the New Item wizard, or you can make a note of these items to add them later using your AccuBar account online.

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 used 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.

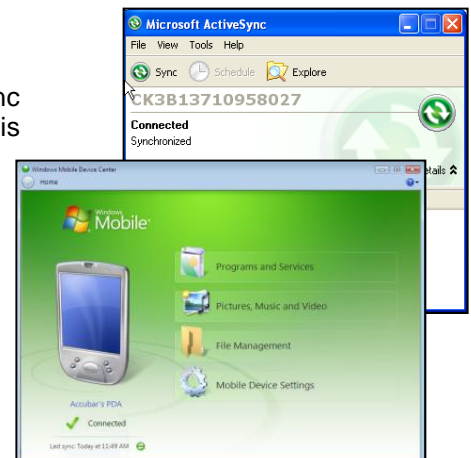


When you have finished scanning your product and are back to the scan screen, tap **Done**. All the items you scanned will be displayed as a list with the most recent scan at the top. Tap **Done** again to save and backup the inventory.

## 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 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.



## 4 - 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**. The options panel on the left side allows you to perform multiple tasks associated with your items. You can use the search box to find a particular item or even filter your items by a certain category or supplier. Click **Show Items** to display your item list alphabetically.

Each column, except the Barcode column and Status column, is editable and will need to be populated with the correct information.

Click the [select columns] link to choose the columns you wish to edit and click on the **Edit Items In-Place** link.

As needed, assign the cost, volume, category and supplier (optional). Click **Save Changes** and **Stop Editing**.

Item Description	Bin	Volume	Unit Cost	Category
10 Cain Rum		1L	\$49.95	Liquor-Rum
10 Cane Rum		750ml	\$35.95	Liquor-Rum
30-30 Reposado		1L	\$18.83	Liquor-Tequila
471 IPA		12oz	\$1.66	Beer-Domestic
99 Apples		750ml	\$15.46	Liquor-Cordials
A Lisa Patagonia [2008]	225	750ml	\$15.50	Wine-Red
Absolut		1L	\$22.67	Liquor-Vodka
Absolut 100 Black		1L	\$22.67	Liquor-Vodka
Absolut Apeach		1L	\$22.67	Liquor-Vodka
Absolut Citron		1L	\$22.67	Liquor-Vodka
Absolut Kurant		1L	\$22.67	Liquor-Vodka
Absolut Mandarin		1L	\$22.67	Liquor-Vodka
Absolut Pears		1L	\$22.67	Liquor-Vodka
Absolut Peppar		750ml	\$22.67	Liquor-Vodka
Absolut Peppar		1L	\$22.67	Liquor-Vodka
Absolut Raspberri		1L	\$22.67	Liquor-Vodka
Absolut Ruby Red		1L	\$22.67	Liquor-Vodka
Adelsheim Auxerrois Blanc		750ml	\$14.99	Wine-White
agave wheat		12oz	\$1.16	Beer-Domestic
Alma Negra		750ml	\$24.99	Wine-Red
Alto Almanzora Este		750ml	\$9.99	Wine-Red
Amaretto di Saronno		750ml	\$25.33	Liquor-Cordials
Amaretto di Saronno		750ml	\$25.99	Liquor-Cordials
Amstel Light Btl		12oz	\$1.06	Beer-Imported
Apple Crisp		0ml	\$0.00	Liquor-Cocktails
Appleton Estate VX		1L	\$19.95	Liquor-Rum
Appleton White Jamaica Rum		1L	\$9.99	Liquor-Rum

Item Properties: Jack Daniels Old No. 7

General Settings [barcode: 082184080466]

Item Name: Jack Daniels Old No. 7

Volume: 750 ml

Shape: 114 Shape Library

Category: Liquor-Bourbon

Unit Cost: 0.00

Item Type: Inventory Item

Par: 1

Reorder Point: 1

Order Unit: 1

Supplier: Republic National

Notes:

Validate and Copy to Global Database

Include description in validation

Save Changes Cancel

To input your items without barcodes, click **Add New Item**. Enter the item name and volume. Assign the appropriate shape number (refer to Shape Library link). Set the category, cost and supplier (optional). Click **Save Changes** to add the item to your list. Repeat for all items without barcodes.

The initial setup of your account is now complete.

To schedule your Jumpstart training, contact AccuBar Support at 800-643-9517.