CStoreOffice® Mobile App

For Petrosoft Users

Version 3.3

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ABOUT CSTOREOFFICE® MOBILE APP

CStoreOffice® Mobile App is a mobile application that keeps retailers connected to their store and retail chain data and allows them to make important inventory and business decisions from anywhere. With CStoreOffice® Mobile App, retailers can run their business with peace of mind at home, on the road or wherever their business or life takes them.

With CStoreOffice® Mobile App, you can use the following features:

Menu Section	Features
Location Summary	View the back-office merchandise and fuel dashboard and access major management reports
Docs and Files	Scan invoices and add them to the Petrosoft data center
Pricebook	View and edit Price Book items
	Prepare shelf tags sheets
Inventory	Perform itemized inventory
Loss Prevention	View video records from the cameras set up at the store (LPA)
	View the POS journal (LPA)
QwickServe	Check devices and the orders queue (QwickServe)

CStoreOffice® Mobile App features are permission-based. For details, see Granting Permissions to CStoreOffice® Mobile App Functionality.

CStoreOffice® Mobile App can be run on Android and Apple iOS devices. However, the portrait mode (vertical orientation) is supported only by mobile phones while the landscape mode (horizontal orientation) is supported only by tablets.

For details, see Installing CStoreOffice® Mobile App and Logging In.

INSTALLING CSTOREOFFICE® MOBILE APP AND LOGGING IN

To start working with CStoreOffice® Mobile App, you need to install the application and log in to it.

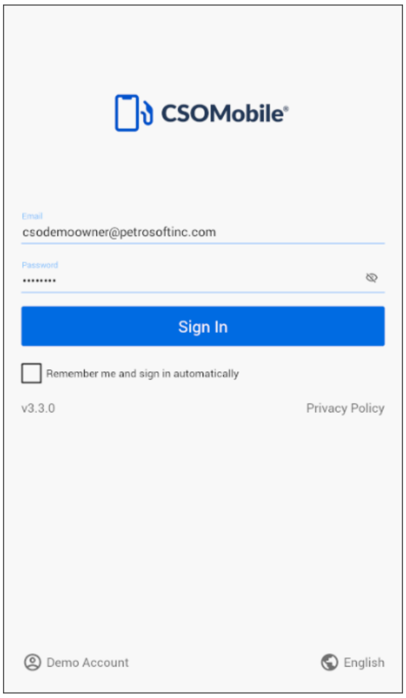
CStoreOffice® Mobile App can be run on Android and Apple iOS devices. You can download the application from Google Play Market or iTunes Store and install it on the device.

Depending on the device where CStoreOffice® Mobile App is installed, the following modes are supported by the app:

- Mobile phone: The app works only in the portrait mode (vertical orientation).
- Tablet: The app works only in the landscape mode (horizontal orientation).

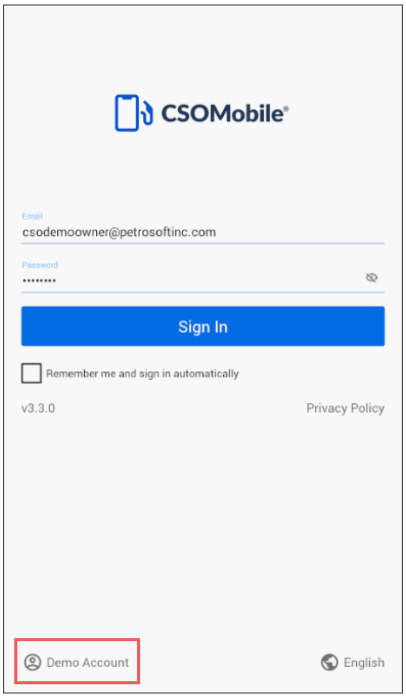
To log in to CStoreOffice® Mobile App:

1. Open the application installed on your device.
2. In the **Email** field, type the email address of your Petrosoft account.
3. In the **Password** field, type the password of your Petrosoft account.
4. To view the privacy policy terms, tap **Privacy Policy**.
5. If necessary, switch to another language: at the bottom right corner of the logon view, tap the language icon and from the list, select the language.
6. Tap **Sign In**.



To automatically log in to the application using the specified account, under the **Sign In** button, tap **Remember me and sign in automatically**.

If you want to evaluate CStoreOffice® Mobile App capabilities, you can log in to the application using the demo account. To do this, at the bottom left corner of the logon view, tap **Demo Account**.



To learn what features are available in the new CStoreOffice® Mobile App version, under the **Sign In** button, tap the version number.

CSTOREOFFICE® MOBILE APP: REQUIREMENTS FOR ENDPOINTS

Communication between the applications and Petrosoft Cloud utilizes HTTPS protocol for sensitive data. When working in restricted networks, the following endpoints should be accessible from the mobile device for proper functioning:

- External endpoints
- LAN endpoints

External Endpoints

Endpoint	Description	Ports	Required
***.petrosoft.cloud**	Various Petrosoft services	80, 443, 20448, 20450	Always
***.cstoreoffice.com**	Various Petrosoft services	80, 443, 20448, 20450	Always
***.apt-petrosoftinc.com**	Loss Prevention Cameras	80, 443, 12501	If LPA features are used

LAN Endpoints

Endpoint	Description	Ports	Required
LAP Printers IPs	LAN Printer IP that is used to print from the mobile app	9100	If need to print on LAN printer
Direct Connect IP	Direct Connect local IP to allow Direct Connect setup and configuration	80, 443	If you need to set up Direct Connect from the mobile device

GRANTING PERMISSIONS TO CSTOREOFFICE® MOBILE APP FEATURES

To use the CStoreOffice® Mobile App features, you need to assign relevant permissions to the roles or users in CStoreOffice® depending on their business roles and scope of responsibility.

CStoreOffice® Mobile App Functionality Permissions

You can grant permissions to the forms and features in the following CStoreOffice® Mobile App modules:

- Location Summary
- Docs and Files
- Pricebook
- Inventory
- Loss Prevention
- QwickServe

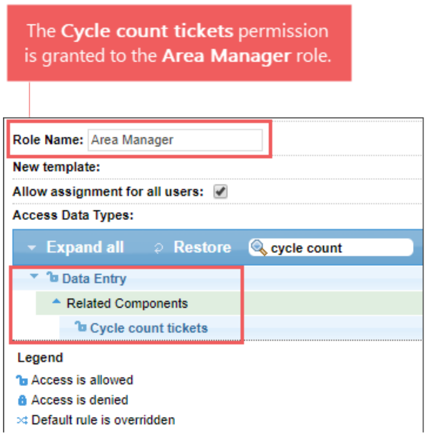
Checking Granted Permissions in CStoreOffice®

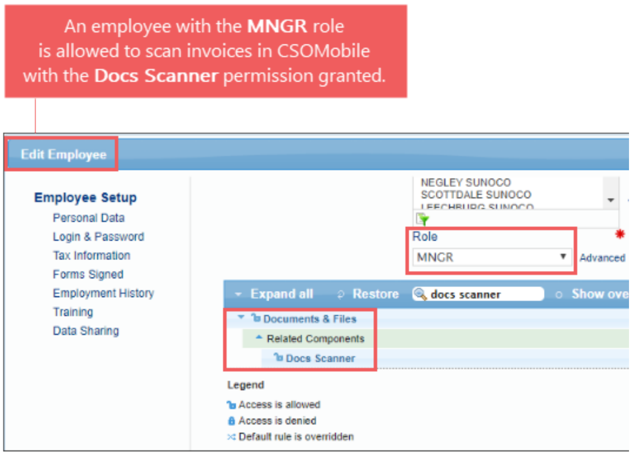
To make sure a permission is granted to the role or user:

1. Open either of the following user settings in CStoreOffice®:
   - User role: **Role Setup** form > **Access Data Types** list.
   - Employee form: **Employee Setup** form > **Login & Password** > **Advanced**.
2. In the search field, type the permission name.

   > To view the names of permissions for the module you need, select the relevant subsection in the CStoreOffice® Mobile App Functionality Permissions section.

3. Make sure the **Access is allowed** icon is displayed to the left of the permission name. If not - click it to grant the permission.





For more information about granting permissions in CStoreOffice®, see Roles Management Permissions.

Location Summary Permissions

The Location Summary module's permissions in CStoreOffice® Mobile App are grouped by the widgets included into the module:

- Store KPI Widget Permissions
- Fuel KPI Widget Permissions
- Profit Widget Permissions
- Shifts Widget Permissions
- Fuel Inventory Widget Permissions
- Location Info Widget Permissions

In the tables below, you can find the following information:

- **CStoreOffice® Mobile App Form**: The name of the form and its related functionality in CStoreOffice® Mobile App to which the related permission may be granted.
- **CStoreOffice® Corresponding Permission**
    - **Permission Name**: The name of permission in CStoreOffice® that can be granted to the role or user.
    - **Path to Permission**: Use this column's value to find the permission in the list of available permissions by opening relevant sections and subsections consecutively.

Store KPI Widget Permissions

CStoreOffice® Mobile App Form	CStoreOffice® Corresponding Permission	
	Permission Name	**Path to Permission**
Store KPI	Key Performance Indicators web part on home page	Dashboard > Related Components
Store KPI > Sales	Key Performance Indicators web part on home page	Dashboard > Related Components
Store KPI > Sales > Store Sales History	Store.Sales.Store Sales Detailed	Reports > Related Components
Store KPI > Sales > Store Sales History > Item Sales by Tags	Store.Sales.Item Sales by Tags report	Reports > Related Components
Store KPI > GPM	Key Performance Indicators web part on home page	Dashboard > Related Components
Store KPI > GPM > GPM Progress	Projection Report	Reports > Related Components
Store KPI > Profit	Projection Report	Reports > Related Components
Store KPI > Profit > Store Profit by Category	Store.Merchandise.GPM.Store GPM Report	Reports > Related Components
Store KPI > Inventory	Store.Inventory.Shortages.Consolidated Store Inventory Progress report	Reports > Related Components
Store KPI > Inventory > Inventory Level by Category	Store.Inventory.Volume and State.Category Inventory Levels Report	Reports > Related Components
Store KPI > In. Over/(Short)	Store.Inventory.Shortages.Inventory Adjustment History report	Reports > Related Components
Store KPI > In. Over/(Short) > Inventory Adjustment History		

Fuel KPI Widget Permissions

CStoreOffice® Mobile App Form	CStoreOffice® Corresponding Permission	
	Permission Name	**Path to Permission**
Fuel KPI	Fuel columns at Key Performance Indicators on dashboard	Fuel > Related Components
Fuel KPI > Sales	Fuel columns at Key Performance Indicators on dashboard	Fuel > Related Components
Fuel KPI > Sales > Fuel Sales History	Project Report Graphics	Reports > Related Components
Fuel KPI > Price	Fuel Prices Change History (station level)	Reports > Related Components
Fuel KPI > Price > Price Report	Competitors gas prices	Reports > Related Components
Fuel KPI > Price > Price Report > Price History Report (graphical and numeric data views)	Fuel Prices Change History (station level)	Reports > Related Components

Fuel KPI > Pool Margin	Fuel Sales Detailed	Reports > Related Components
Fuel KPI > Pool Margin > Pool Margin Progress	Fuel Sales Detailed	Reports > Related Components
Fuel KPI > Profit	Display Fuel in the Store Projection report	Fuel > Related Components
Fuel KPI > Profit > Fuel Profit Progress	Fuel Sales Detailed	Reports > Related Components

Profit Widget Permissions

CStoreOffice® Mobile App Form	CStoreOffice® Corresponding Permission	
	Permission Name	**Path to Permission**
Profit > Store	Projection Report	Reports > Related Components
Profit > Store > Store Profit by Category	Store.Merchandise.GPM.Store GPM report	Reports > Related Components
Profit > Fuel	Display fuel in the Store Projection report	Fuel > Related Components
Profit > Fuel > Fuel Profit Progress	Fuel Sales Detailed	Reports > Related Components
Profit > VIP	Display fuel in the Store Projection report	Fuel > Related Components
Profit > VIP > VIP Report		
Profit > Allowance		
Profit > Allowance > VIP Report		
Profit > Total Profit	Projection Report	Reports > Related Components

Shifts Widget Permissions

CStoreOffice® Mobile App Form	CStoreOffice® Corresponding Permission	
	Permission Name	**Path to Permission**
Shifts	Shift Report	Reports > Related Components
Shifts > Shift Report Details		

Fuel Inventory Widget Permissions

CStoreOffice® Mobile App Form	CStoreOffice® Corresponding Permission	
	Permission Name	**Path to Permission**
Fuel Inventory	Fuel inventory form	Fuel > Related Components
Fuel Inventory > Fuel Inventory Report		

Location Info Widget Permissions

No permissions required. The Location Info widget is displayed for all users.

> To learn more about the Location Summary module in CStoreOffice® Mobile App, see Viewing the Location Summary.

Pricebook Permissions

In the table below, you can find the following information:

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- **CStoreOffice® Corresponding Permission**
  - **Permission Name**: The name of permission in CStoreOffice® that can be granted to the role or user.
  - **Path to Permission**: Use this column's value to find the permission in the list of available permissions by opening relevant sections and subsections consecutively.

CStoreOffice® Mobile App Form	CStoreOffice® Corresponding Permission	
	Permission Name	**Path to Permission**
Pricebook > Items Lookup	Price Book manager	Price Book > Related Components
Pricebook > Items Lookup > Item Card	Item Setup: Station level	Price Book > Related Components
Pricebook > Items Lookup > Item Card > Edit Item		
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Category	Allow users to rewrite the item's Category	Price Book
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Department	Allow users to rewrite the item's Department	Price Book
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Retail	Allow users to change retail price	Price Book
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Parameters	Allow users to edit items	Price Book
Pricebook > Items Lookup > Create New Item	Allow users to set up items	Price Book
Pricebook > Items Lookup > Adding items to a cycle count ticket	Cycle count tickets	Data Entry
Pricebook > Shelf Tags	Shelf Tags	To be defined

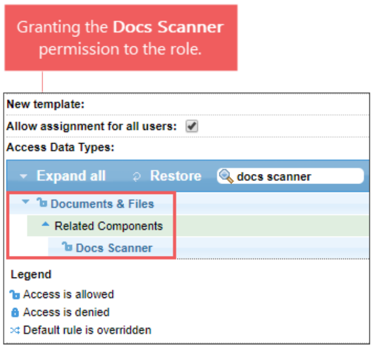
To learn more about the Pricebook module in CStoreOffice® Mobile App, see Working with Price Book Items.

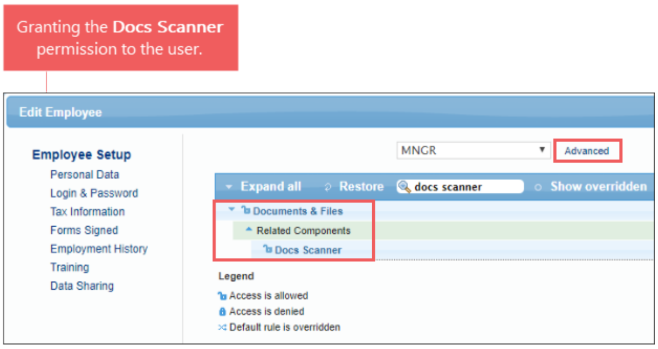
Docs and Files Permissions

To allow the user to access the Docs and Files functionality in CStoreOffice® Mobile App, you need to grant the **Docs Scanner** permission to the user in CStoreOffice®.

To make sure the Docs Scanner permission is granted, check either of the following user settings in CStoreOffice®:

- User role: **Role Setup** form > **Access Data Types** list.
- Employee form: **Employee Setup** form > **Login & Password** > **Advanced**.





For more information about granting permissions in CStoreOffice®, see Roles Management Permissions.

The Docs and Files permission grants an access to the following Docs and Files features in CStoreOffice® Mobile App:

- Create new invoice. The following invoice types are supported:
  - Merchandise
  - Fuel
  - Expense
  - Lottery
- New invoice form
  - Adding new comment
  - Adding an image from the gallery
  - Adding an image from the camera
- Documents calendar
  - Documents list by date
- Edit invoice form

- Editing comment
- Updating an image from the gallery
- Updating an image from the camera

To learn more about the Docs and Files module in CStoreOffice® Mobile App, see Scanning Invoices.

Inventory Permissions

In the table below, you can find the following information:

- **CStoreOffice® Mobile App Form**: The name of the form and its related functionality in CStoreOffice® Mobile App to which the related permission may be granted.
- **CStoreOffice® Corresponding Permission**
  - **Permission Name**: The name of permission in CStoreOffice® that can be granted to the role or user.
  - **Path to Permission**: Use this column's value to find the permission in the list of available permissions by opening relevant sections and subsections consecutively.

CStoreOffice® Mobile App Form	**CStoreOffice® Corresponding Permission**	
	Permission Name	**Path to Permission**
Inventory > Counts Inventory > Counts > Items Lookup	Cycle count tickets	Data Entry > Related Components
Inventory > Counts > Items Lookup > Edit Item	Item Setup: Station level	Price Book > Related Components
Inventory > Counts > Cycle Count Ticket Items	Cycle count tickets	Data Entry > Related Components
Inventory > Counts > Cycle Count Ticket Items > Item Form	Item Setup: Station level	Price Book > Related Components
Inventory > Counts > Upload Ticket	Cycle count tickets	Data Entry > Related Components

To learn more about the Inventory functionality in CStoreOffice® Mobile App, see Performing Itemized Inventory.

Loss Prevention Permissions

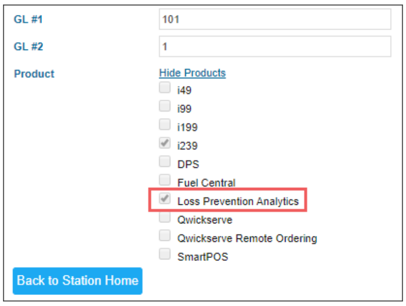
To allow the user to access the Loss Prevention features in CStoreOffice® Mobile App, the following conditions should be met:

- Loss Prevention Analytics product should be enabled for your Petrosoft account.
- The Video Journal permission should be granted to your user in CStoreOffice®.

Checking if Loss Prevention Analytics is Enabled

To check if the Loss Prevention Analytics module is enabled for your account in CStoreOffice®:

1. Sign in to CStoreOffice®.
2. Open the **General Station Options** form. For details, see Setting Up Locations.
3. In the **General Station Options** form:
   a. Set the **Advanced Mode** toggle to the **On** position.
   b. Go to the **Product** list and click **Show Products**.
   c. Make sure the **Loss Prevention Analytics** product is selected.

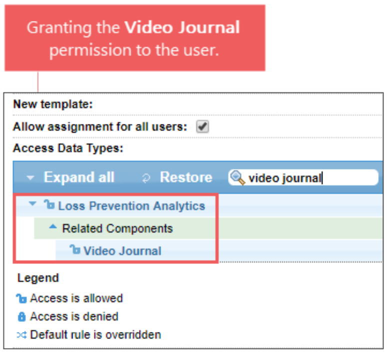


If you need to add the Loss Prevention Analytics product to your station, contact a Petrosoft representative.

Checking if Video Journal Permission is Granted

To make sure the Video Journal permission is granted, check either of the following user settings in CStoreOffice®:

- User role: **Role Setup** form > **Access Data Types** list.
- Employee form: **Employee Setup** form > **Login & Password** > **Advanced**.



For more information about granting permissions in CStoreOffice®, see Roles Management Permissions.

To learn more about the Loss Prevention module in CStoreOffice® Mobile App, see Using Loss Prevention Features.

QwickServe Permissions

To allow the user to access the QwickServe features in CStoreOffice® Mobile App, the following conditions should be met:

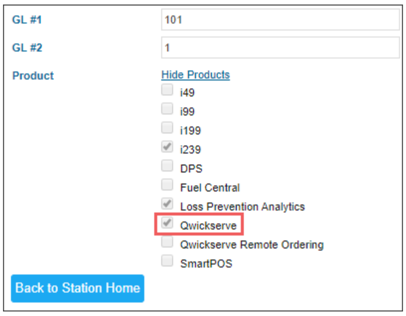
- QwickServe module should be enabled for your account in CStoreOffice®.
- Relevant permissions of the QwickServe module should be granted to your user in CStoreOffice®.

Checking if QwickServe is Enabled

To check if the QwickServe module is enabled for your account in CStoreOffice®:

1. Sign in to CStoreOffice®.
2. Open the **General Station Options** form. For details, see Setting Up Locations.
3. In the **General Station Options** form:
   a. Set the **Advanced Mode** toggle to the **On** position.
   b. Go to the **Product** list and click **Show Products**.

c. Make sure the **QwickServe** product is selected.



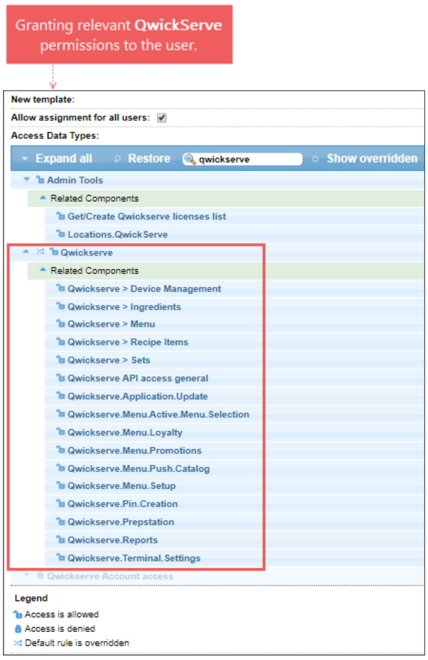
If you need to add the QwickServe product to your station, contact a Petrosoft representative.

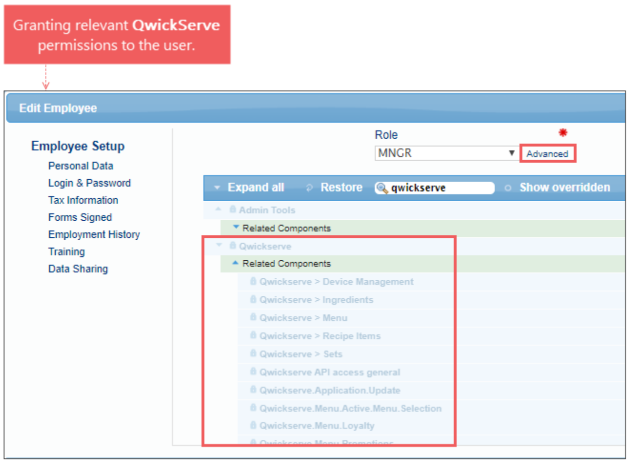
To learn more about the QwickServe module in CStoreOffice® Mobile App, see Viewing QwickServe Devices and Orders.

Checking if Relevant QwickServe Permissions are Granted

To make sure relevant QwickServe permissions are granted, check either of the following user settings in CStoreOffice®:

- User role: **Role Setup** form > **Access Data Types** list.
- Employee form: **Employee Setup** form > **Login & Password** > **Advanced**.





For more information about granting permissions in CStoreOffice®, see Roles Management Permissions.

To learn more about the QwickServe module in CStoreOffice® Mobile App, Viewing QwickServe Devices and Orders.

VIEWING THE LOCATION SUMMARY

When you log on to CStoreOffice® Mobile App, you can see the summary merchandise and fuel information for the location.

- If you log in to the application for the first time, the summary information for the first location in the locations list is displayed.
- If you have already used CStoreOffice® Mobile App, the summary information for the location with which you have recently worked is displayed.

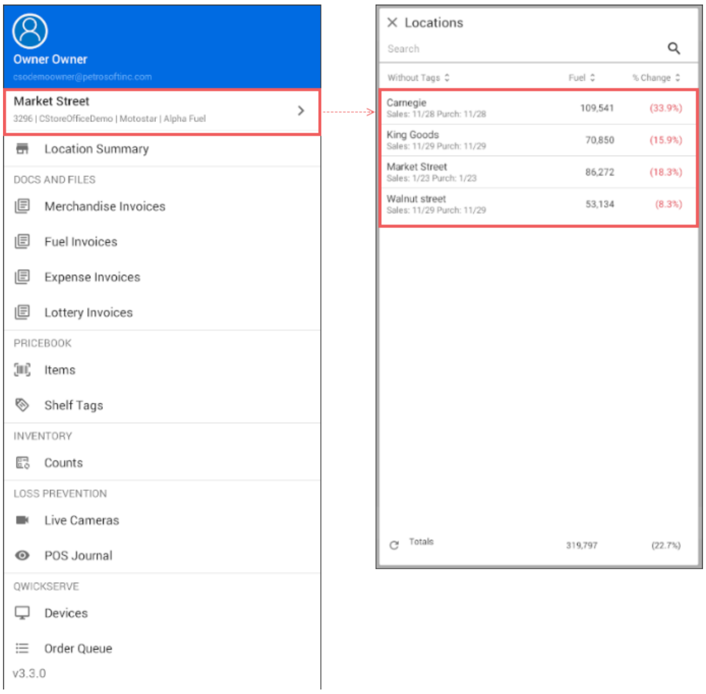
Using the Summary view in CStoreOffice® Mobile App, you can:

- Switch between locations
- Review the merchandise and fuel summary
- Update the summary information for the location

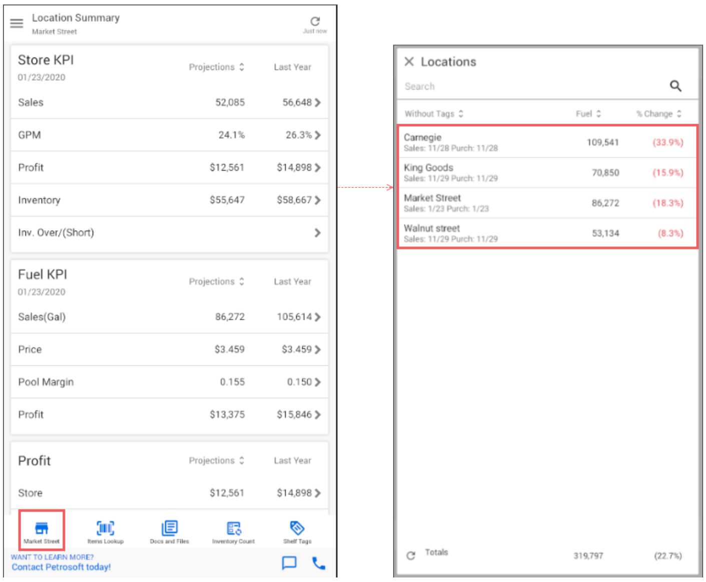
Switching Between Locations

To switch to another location, do either of the following:

- At the top left corner of the Summary view, tap the menu button, then tap the current location and from the list, select the location.



- At the bottom of the Summary view, tap the location name and from the list, select the location.



Reviewing the Merchandise and Fuel Summary

The Summary view of CStoreOffice® Mobile App presents the dashboard aggregating the major back-office merchandise and fuel data for the location. The dashboard allows you to get access to the most commonly used reports that will help you to easily track and forecast the retail location performance.

You can see the following widgets in the dashboard.

- Store KPI
- Fuel KPI

- Profit
- Shifts
- Fuel Inventory
- Location Info

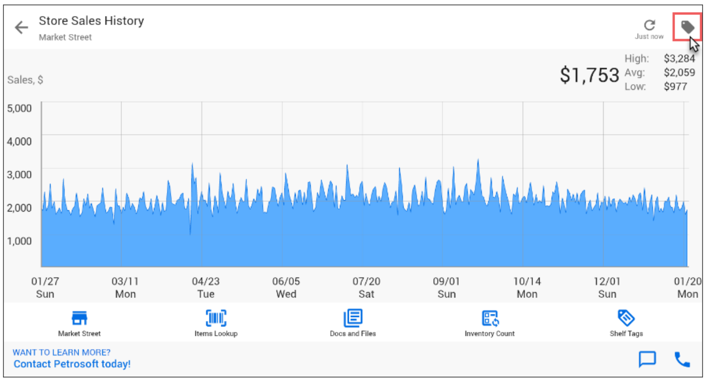
> All widgets and their forms are permission-based. For details, see Granting Permissions to CStoreOffice® Mobile App Functionality.

Store KPI

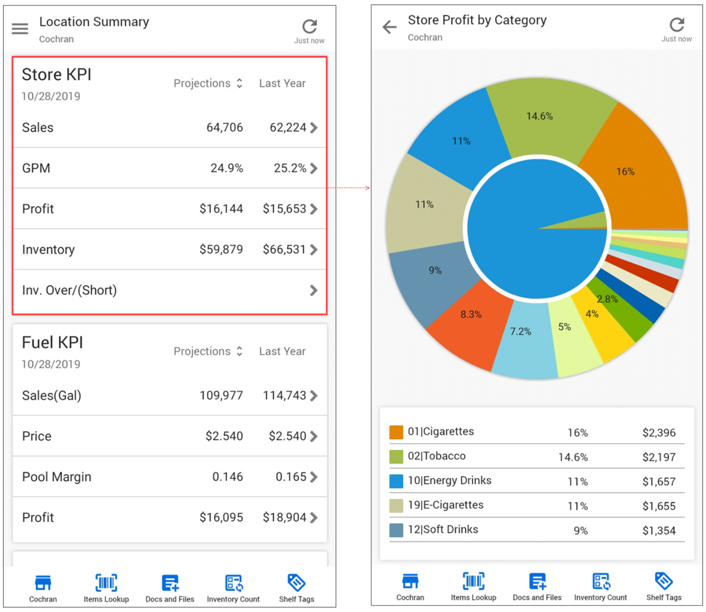
> To get the list of permissions from the Store KPI widget, see Store KPI Widget Permissions.

The Store KPI widget presents information about merchandise KPI for the location:

- **Sales**: The total sales amount, projected and reported for the last year. From the **Sales** section, you can open and view the following reports:
  - **Store Sales History** report: Tap the **Sales** section.
  - **Item Sales by Tags** report: Tap the **Sales** section and then, in the **Store Sales History** report, tap the tag icon.



- **GPM**: The GPM rate, projected and reported for the last year. Tap the **GPM** section, to open and view the **GPM Progress** report.
- **Profit**: The merchandise profit amount, projected and reported for the last year. Tap the **Profit** section, to open and view the **Store Profit by Category** report.
- **Inventory**: The inventory amount, projected and reported for the last year. Tap the Inventory section, to open and view the **Inventory Level by Category** report.
- **Inv. Over/(Short)**: Tap the **Inv. Over/(Short)** section, to view the **Inventory Adjustment History** report that displays the history of inventory adjustments made for the location.



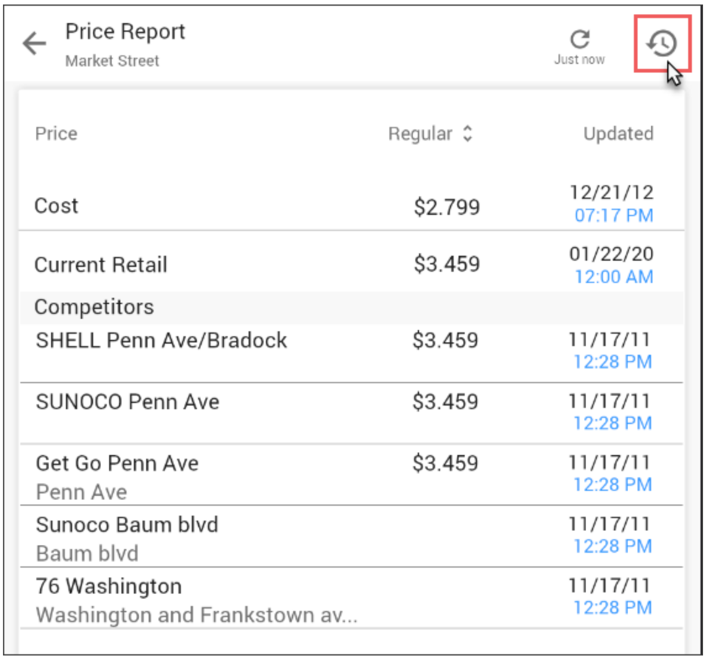
Fuel KPI

To get the list of permissions from the Fuel KPI widget, see Fuel KPI Widget Permissions.

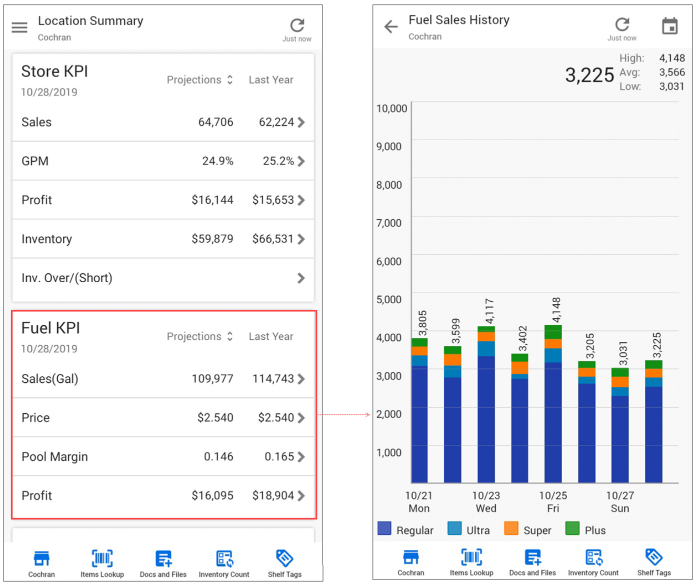
The Fuel KPI widget presents information about fuel KPI for the location:

- **Sales (Gal)**: The amount of fuel sold (in gallons), projected and reported the last year. Tap this line to open the **Fuel Sales History** report.
- **Price**: The fuel price, projected and reported for the last year. From the **Price** section, you can open and view the following reports:
  - **Price Report**: Tap the **Price** section, to open the **Price** report with information about competitor fuel prices.

- **Price History** report: Tap the **Price** section and then in the **Price Report**, tap the history icon.



- **Pool Margin**: The pool margin, projected and reported for the last year. The pool margin is the estimate of total profit per gallon based upon the gasoline sales price versus cost of gasoline per gallon. Tap this line to open the **Pool Margin Progress** report.
- **Profit**: The fuel profit amount, projected and reported for the last year. Tap this line in the widget to open the **Fuel Profit Progress** report.

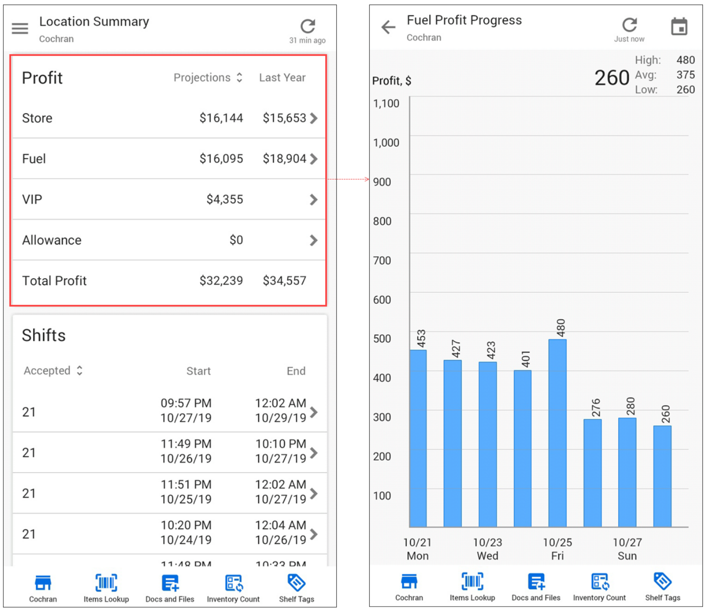


Profit

> To get the list of permissions from the Profit widget, see Profit Widget Permissions.

The Profit widget displays information about merchandise and fuel profit:

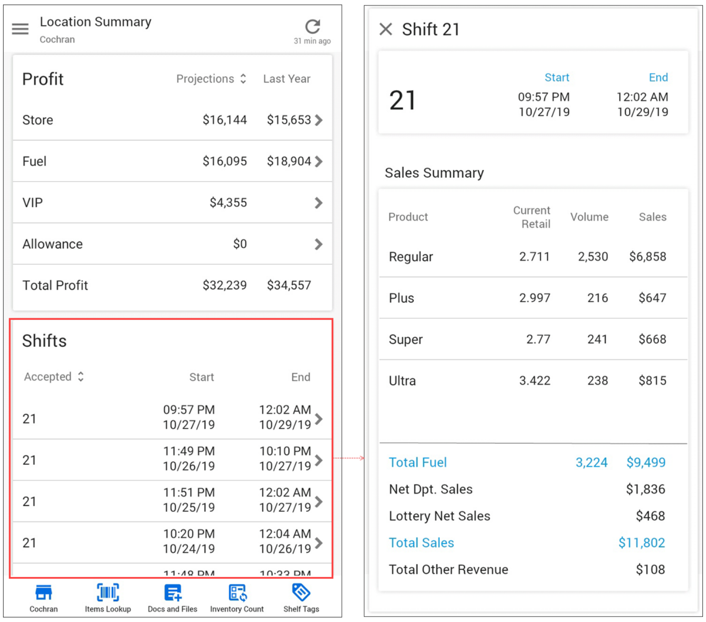
- **Store**: The merchandise profit, projected and reported for the last year. Tap this line to open the **Store Profit by Category** report.
- **Fuel**: The fuel profit, projected and reported for the last year. Tap this line to open the **Fuel Profit Progress** report.
- **VIP**: Purchases amount by VIP (Volume Incentive Programs). Tap this line to open the **VIP** report.
- **Allowance**: Purchases amount by allowance programs. Tap this line to open the **Fuel Allowance** report.
- **Total Profit**: The total profit for the location, projected and reported for the last year.



Shifts

To get the list of permissions from the Shifts widget, see Shifts Widget Permissions.

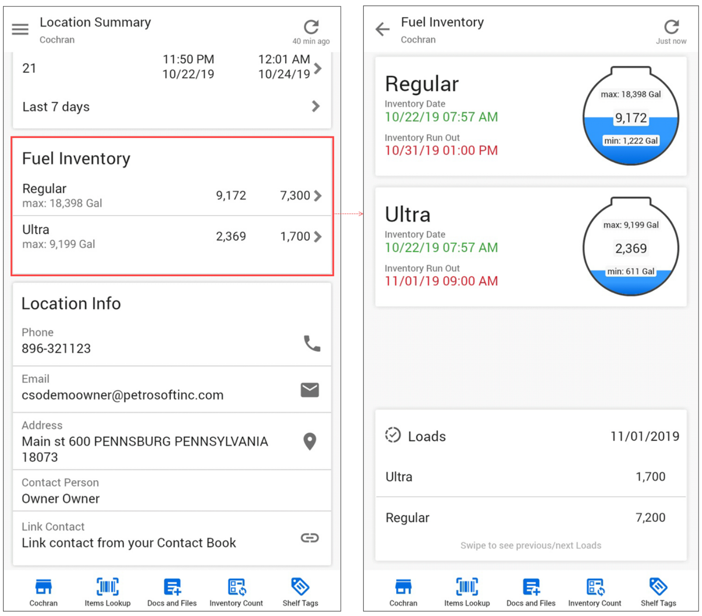
The Shifts widget displays information about recently accepted shifts. Tap the necessary line to see shift details.



Fuel Inventory

To get the list of permissions from the Fuel Inventory widget, see Fuel Inventory Widget Permissions.

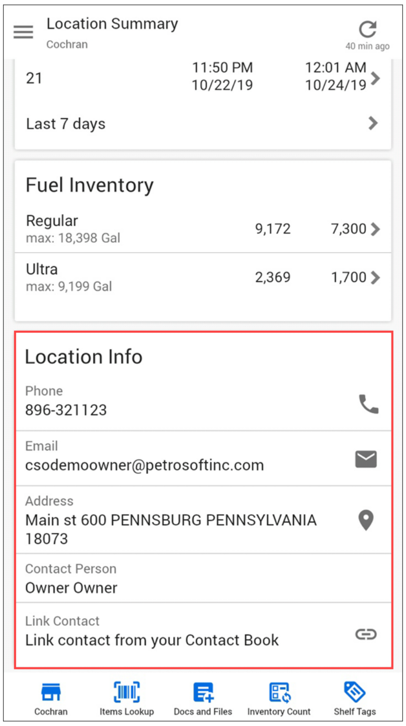
The Fuel Inventory widget displays inventory data for all fuel types. Tap the necessary line to see inventory details for a specific fuel type.



Location Info

No permissions required to display the Location Info widget.

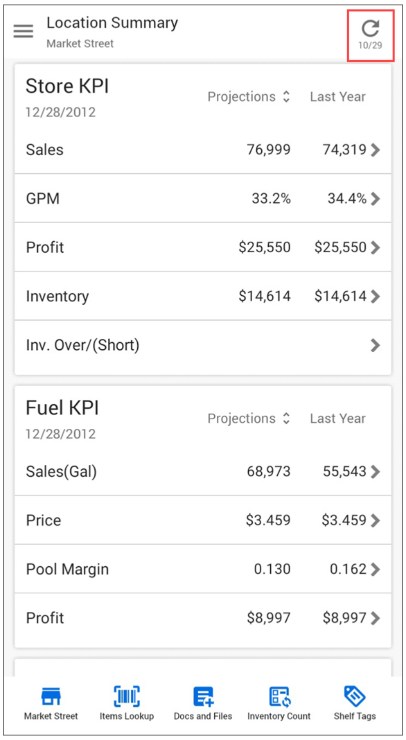
The Location Info widget displays information about the location set up in CStoreOffice®.



Updating the Summary Information

The summary information for the location is updated automatically.

- To see when data was last updated, at the top right corner of the Summary view, check the date below the sync icon.
- To update the summary information manually, tap the sync icon.



WORKING WITH PRICE BOOK ITEMS

CStoreOffice® Mobile App allows you to view and work with items added to the account Price Book in CStoreOffice®. You can perform the following operations with items:

- View and edit item data
- Add items to a cycle count ticket
- Add the item barcode to a shelf tags sheet
- Create shelf tags

All pricebook forms and related functionality are permission-based. For details, see Granting Permissions to CStoreOffice® Mobile App Functionality.

Viewing and Editing Items

You can view information about a specific item available in the Price Book and edit the item data, if necessary.

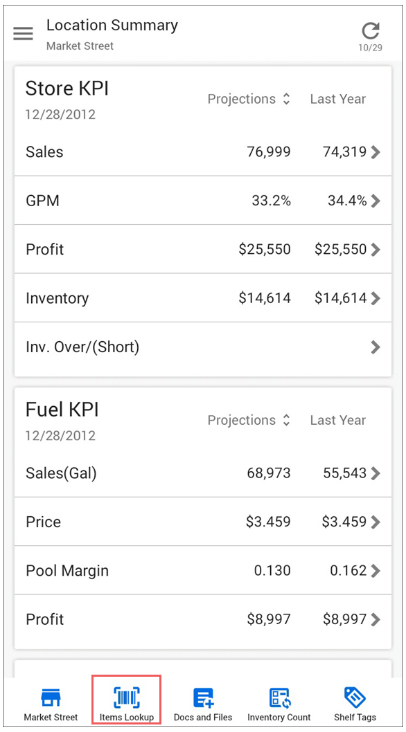
To be able to edit item data, you need to have relevant permissions granted to your user. If you do not have this permission, once you attempt to edit the item data, CStoreOffice® Mobile App displays a warning. To request a permission, in the warning window, tap **Request permissions** and select an application over which you want to send the request.

For more information about CStoreOffice® Mobile App pricebook permissions, see Pricebook Permissions.

Permissions are granted in CStoreOffice®. For details, Roles Management Permissions.

To view information about a specific item and edit it, you first need to find the item you need. You can do it in two ways:

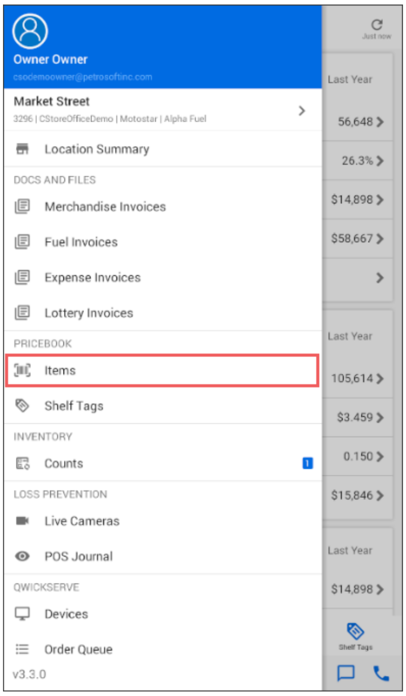
- **Scan the item barcode**. Do the following:
  a. At the bottom of the Summary view in CStoreOffice® Mobile App, tap **Items Lookup**.



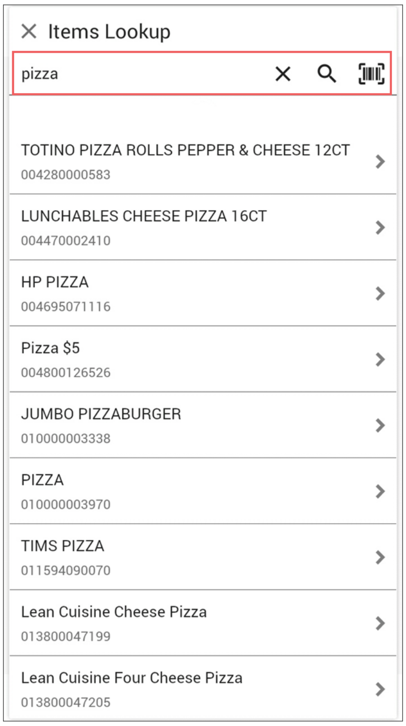
  b. Point the device camera at the item barcode. CStoreOffice® Mobile App will automatically find the item in the Price Book by the scanned barcode and display the item card with the item information.

Currently, only UPC-A item codes can be scanned via CStoreOffice® Mobile App. Make sure your item has the UPC-A item code. It should consists of 12 digits.

- **Find the item in the Price Book**. Do the following:
  a. At the top left corner of the Summary view, tap the menu button and then in the **Pricebook** section, tap **Items**.



b. In the search field at the top of the view, type the item name or a part of it and tap the search icon to the right. You can also search for items by UPC.

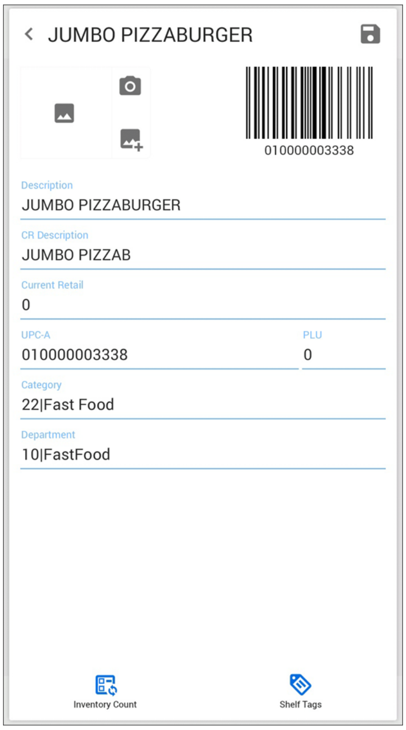


c. In the list of search results, tap the necessary item to open the item card.

You can now view and edit the following item data:

- Image assigned to the item
- Item description

- CR description
- Current retail
- UPC
- PLU
- Category
- CR department



Adding Items to a Cycle Count Ticket

If you want to perform itemized inventory, you can add an item to a cycle count ticket directly from the item card.

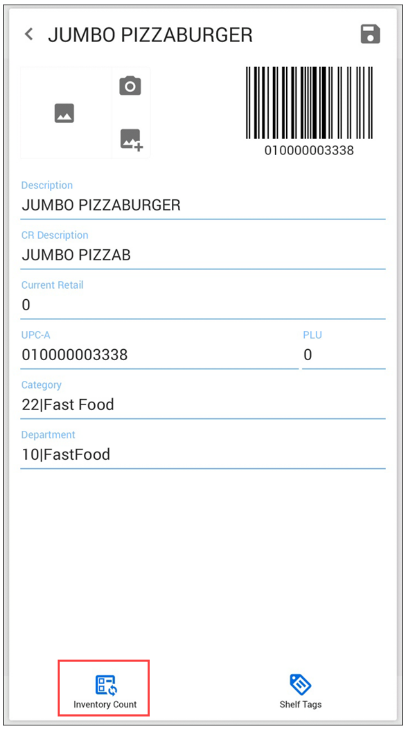
To be able to add an item to a cycle count ticket, you need to have relevant permissions granted to your user.

For more information about CStoreOffice® Mobile App pricebook permissions, see Pricebook Permissions.

Permissions are granted in CStoreOffice®. For details, Roles Management Permissions.

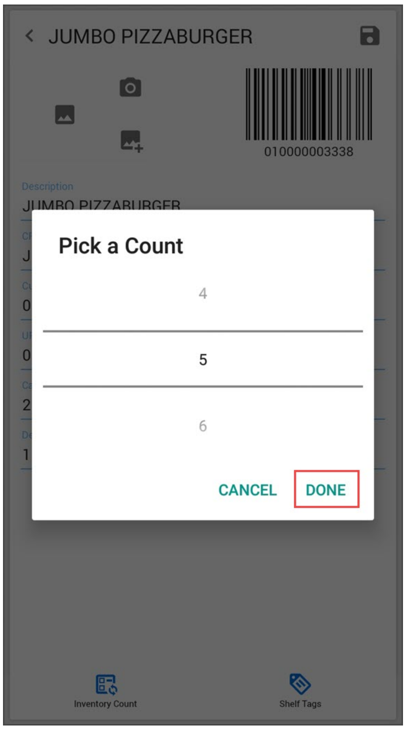
Do the following:

1. At the bottom of the Summary view, tap the location name and from the list, select the necessary location.
2. Find the necessary item by scanning the item barcode or finding the item in the Price Book. For details, see Viewing and Editing Items.
3. At the bottom of the item card view, tap **Inventory Count**.



4. In the displayed window, scroll up or down to define the number of items counted during the inventory.

5. Tap **Done**.



Result: A cycle count ticket is created, and the item is added to it. You can add more items to the ticket later. For details, see Performing Itemized Inventory.

If at least one item is added to a cycle count ticket, in the Summary view, CStoreOffice® Mobile App displays the number of added items over the **Inventory Count** button.

Adding Items to a Shelf Tags Sheet

If you need to print item barcodes, you can add the item barcode to a shelf tags sheet directly from the item card.

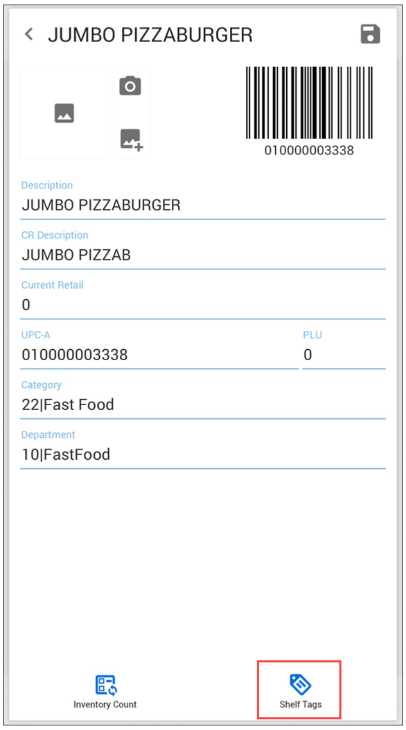
To be able to add the item barcode to a shelf tags sheet, you need to have relevant permissions granted to your user.

For more information about CStoreOffice® Mobile App pricebook permissions, see Pricebook Permissions.

Permissions are granted in CStoreOffice®. For details, Roles Management Permissions.

Do the following:

1. At the bottom of the Summary view, tap the location name and from the list, select the necessary location.
2. Find the necessary item by scanning the item barcode or finding the item in the Price Book. For details, see Viewing and Editing Items.
3. At the bottom of the item card view, tap **Shelf Tag**.



You can now proceed to setting up the shelf tags sheet. For details, see Creating Shelf Tags.

If at least one item is added to a shelf tags sheet, in the Summary view, CStoreOffice® Mobile App displays the number of added items over the **Shelf Tags** button.

Creating Shelf Tags

You can create shelf tags sheets with barcodes and retail prices for items in CStoreOffice® Mobile App on your mobile device. The created sheet can then be shared or sent by email as a PDF file to be printed later.

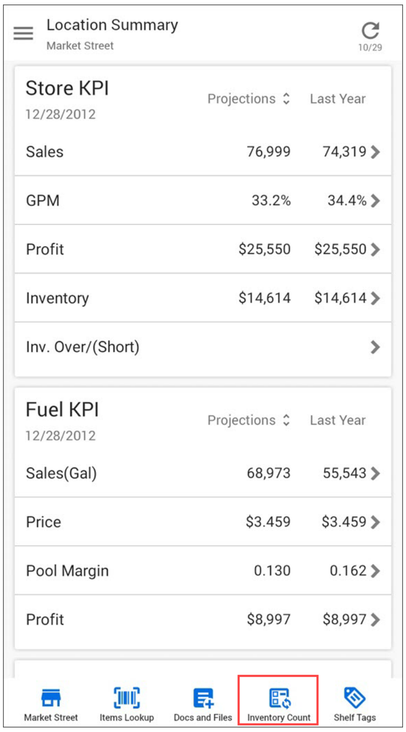
To be able to create shelf tags sheets, you need to have relevant permissions granted to your user.

For more information about CStoreOffice® Mobile App pricebook permissions, see Pricebook Permissions.

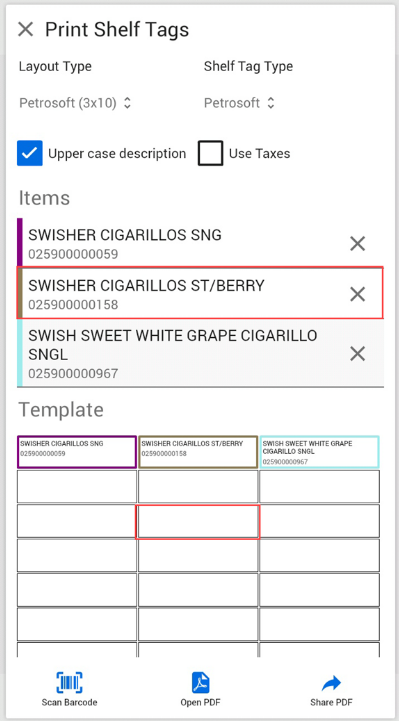
Permissions are granted in CStoreOffice®. For details, Roles Management Permissions.

To create a shelf tags sheet:

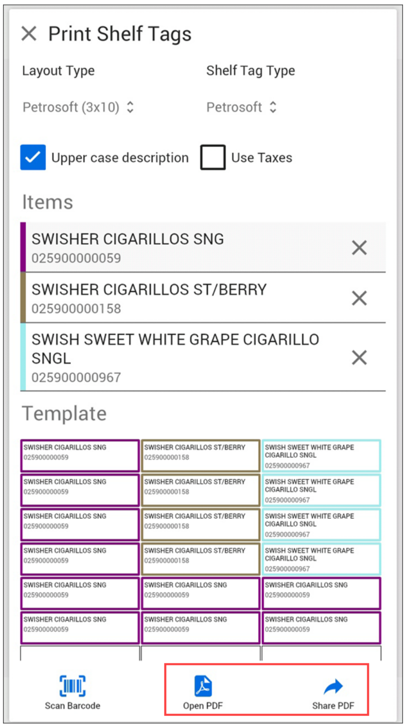
1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to create shelf tags.
2. At the bottom of the Summary view, tap **Shelf Tags**.



3. Add an item to the shelf tags sheet. You can do it in the following ways:
   - **Scan the item barcode**: At the bottom of the view, tap **Scan Barcode** and point the device camera at the item barcode. CStoreOffice® Mobile App will automatically find the item in the Price Book by the scanned barcode and add the item to the sheet.
   - **Add the item from the item card**: You can add the item to a self tags sheet directly from the item card. For details, see Adding Items to a Shelf Tags Sheet.
4. Populate the sheet with item tags. To do this, in the **Items** list, tap the necessary item and then in the **Template** section, tap one or more cells. The tag for the item will be placed to the selected cell(s).



5. At the top of the view, configure the sheet settings:
   - **Layout Type**: Select the sheet layout type — Petrosoft, Circle or EBY Brown Format.
   - **Shelf Tag Type**: Select the type of shelf tags — Petrosoft or Standard.
   - **Upper case description**: Enable this option to print item descriptions in the upper case.
   - **Use Taxes**: Enable this option to print the retail price with taxes.
6. At the bottom of the view, tap **Open PDF** to preview the created sheet or **Share PDF** to send the created sheet by email, messenger and so on.



SCANNING INVOICES USING CSTOREOFFICE® MOBILE APP

With CStoreOffice® Mobile App installed on a mobile device, you can take pictures of paper invoices and upload them to the CStoreOffice® data center. Petrosoft operators will then turn these documents into electronic invoices, and the invoice data will become available in CStoreOffice®.

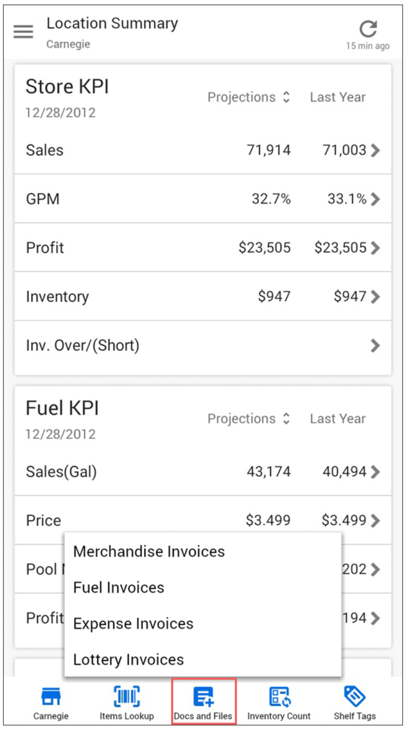
This option can be thought of as a 'mobile version' of Docs Scanner. For more details about this tool, see Docs Scanner.

> To be able to scan invoices, you need to have relevant permissions granted to your user. For details, see Docs and Files Permissions.

To scan an invoice with CStoreOffice® Mobile App:

1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to add the invoice.
2. At the bottom of the Summary view, tap **Docs and Files**.

3. In the **Docs and Files** menu, tap the necessary invoice type.



4. Tap the calendar icon and select the date for which the invoice is added.
5. At the top right corner of the view, tap the plus icon to add the invoice.

6. In the **Invoice** form, fill the following invoice data:

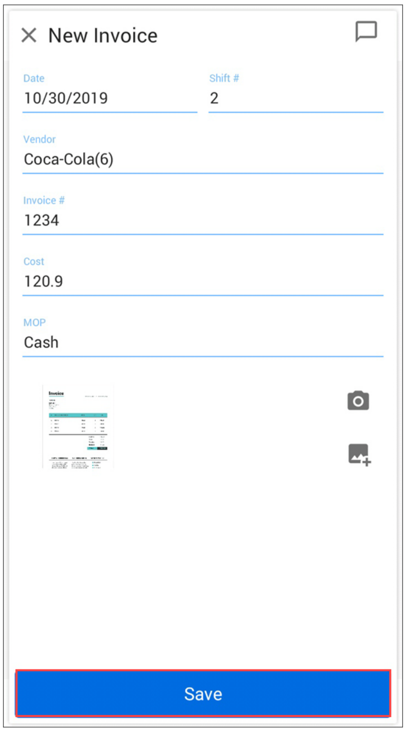
- **Shift number**: Type the shift number for the invoice.
- **Vendor**: Select the vendor for which the invoice is added.
- **Invoice #**: Type the invoice number.
- **Cost**: Type the invoice cost.
- **MOP**: Select the method of payment for the invoice.

7. Add the invoice image. You can do it in two ways:

- To add a photo, tap the photo icon and take the invoice photo with the device camera.
- To add a saved image, tap the image icon and browse to the invoice image on the device.

Please note that the number of images which can be uploaded and added to the invoice in CStoreOffice® Mobile App is limited to 1.

8. At the bottom of the view, tap **Save**.



Result: The invoice is sent to the Petrosoft data center for further processing by operators.

You can monitor the sending status in the **Docs and Files** menu at the bottom of the view. At the top right of the **Docs and Files** menu, you can view a digit (colored red) that indicates the number of images to be uploaded. When the red digit disappears, it indicates that all images are uploaded.

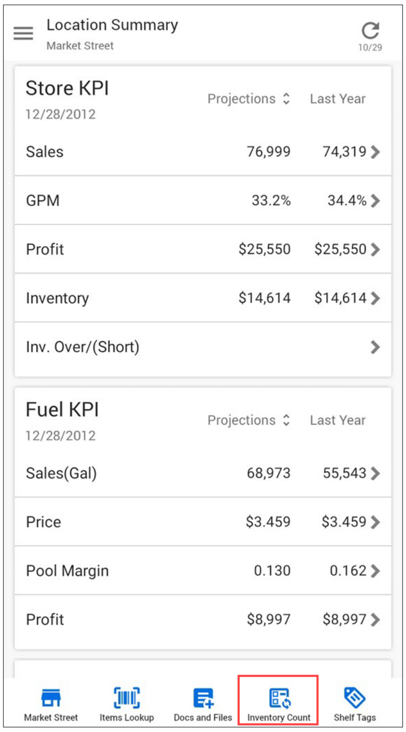
PERFORMING ITEMIZED INVENTORY

You can use CStoreOffice® Mobile App to perform itemized inventory with your mobile device. In particular, you can create a cycle count ticket and add to it all items that need to be counted, either by scanning item barcodes or manually. Once the items are counted and the cycle count ticket is ready, you can upload it to CStoreOffice®, and the store manager can then proceed with the ticket.

> To be able to perform an itemized inventory, you need to have relevant permissions granted to your user. For details, see Inventory Permissions.

To perform itemized inventory:

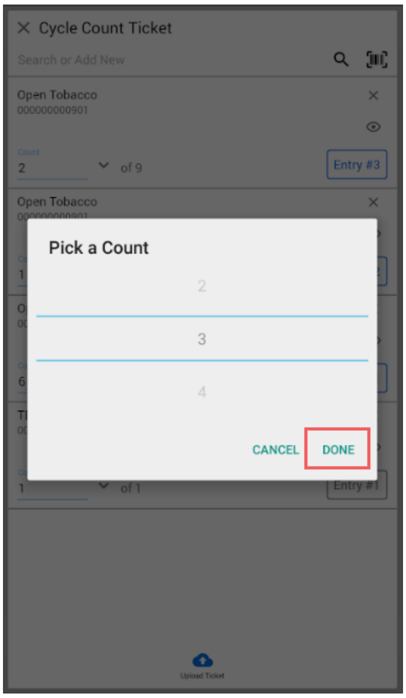
1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to perform itemized inventory.
2. At the bottom of the Summary view, tap **Inventory Count**.



3. Add an item to the cycle count ticket. You can do it in the following ways:

- **Scan the item barcode**: To the right of the search field, tap the barcode icon and point the device camera at the item barcode. CStoreOffice® Mobile App will automatically find the item in the Price Book by the scanned barcode and add the item to the cycle count ticket.
- **Find the item in the Price Book**: In the search field, enter the item name or a part of it and tap the search icon to the right. You can also search for items by UPC. In the results list, tap the item you want to add.
- **Add the item from the item card**: You can add an item to the cycle count ticket directly from the item card. For details, see Adding Items to a Cycle Count Ticket.

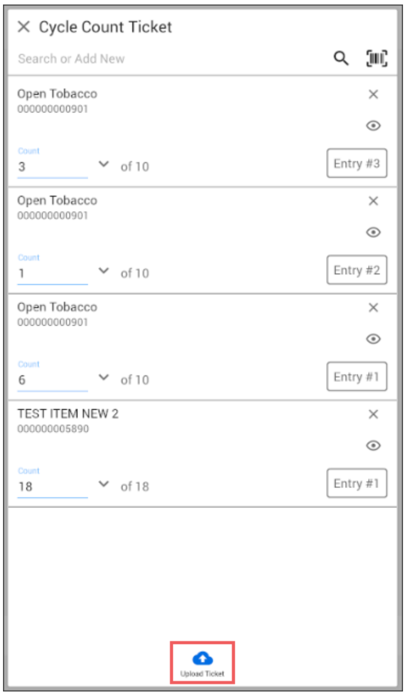
4. In the **Count** field, specify the number of counted items. You can type the number directly or tap the arrow icon to the right and scroll up or down in the **Pick a Count** window.



5. Repeat steps 3-4 for all items you want to add to the cycle count ticket.

You can open the item card with item details from the Cycle Count Ticket view. To do this, to the right of the item, tap the eye icon.

6. At the bottom of the view, tap **Upload Ticket**.



Result: The ticket is uploaded to CStoreOffice® and becomes available in the **Itemized Inventory** form. For details, see Itemized Inventory.

USING LOSS PREVENTION FEATURES

With CStoreOffice® Mobile App, you can use the following Loss Prevention features:

- View videos from cameras installed at your location and also check if all cameras are functioning properly. For details, see Viewing Retail Cameras.
- Review cash register transactions and watch store camera records for these transactions using a mobile device. For details, see Viewing the POS Journal.

The Loss Prevention functionality is available in CStoreOffice® Mobile App under the following conditions:

- If the Loss Prevention Analytics product is enabled for your Petrosoft account.
- If your user has relevant permissions.

For details, see Loss Prevention Permissions.

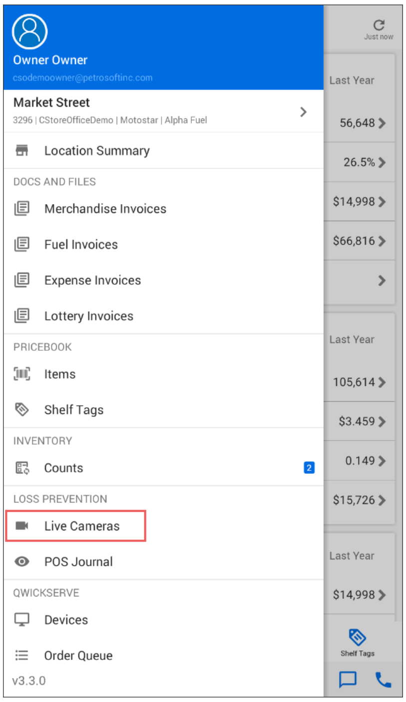
Viewing Retail Cameras

With CStoreOffice® Mobile App, you can view videos from cameras installed at your location. You can also check if all cameras are functioning properly.

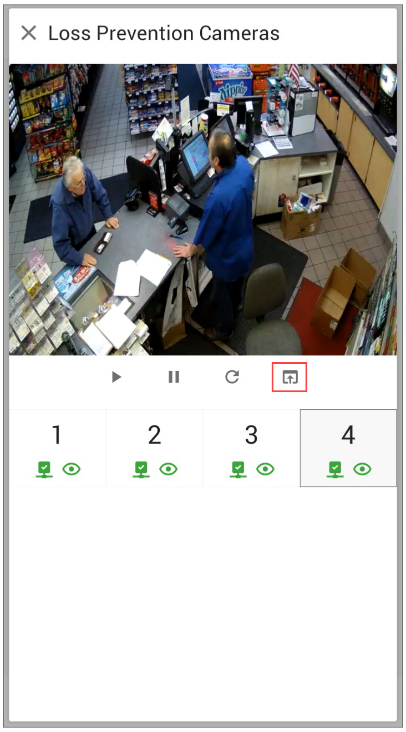
To be able to view videos from cameras installed at your location, you need to have relevant permissions granted to your user. For details, see Loss Prevention Permissions.

To view cameras at the store:

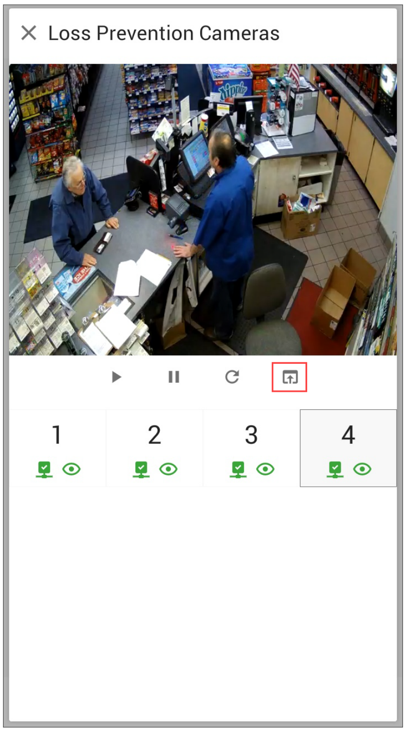
1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to view cameras.
2. At the top left corner of the Summary view, tap the menu button and then in the **Loss Prevention** section, tap **Live Cameras**.



3. Below the video stream, select the necessary camera and use controls to watch the video.



To watch the video in the full screen mode, below the video stream, tap the full screen icon.



If a camera is unavailable or the video stream cannot be loaded, CStoreOffice® Mobile App displays red connection and view icons under the camera.

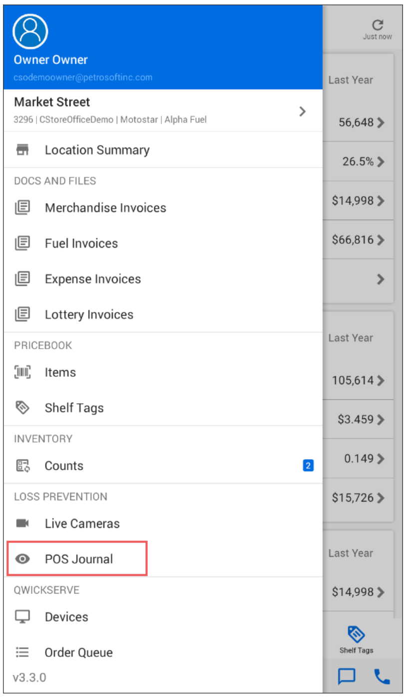
Viewing the POS Journal

With CStoreOffice® Mobile App, you can review cash register transactions and watch store camera records for these transactions using a mobile device.

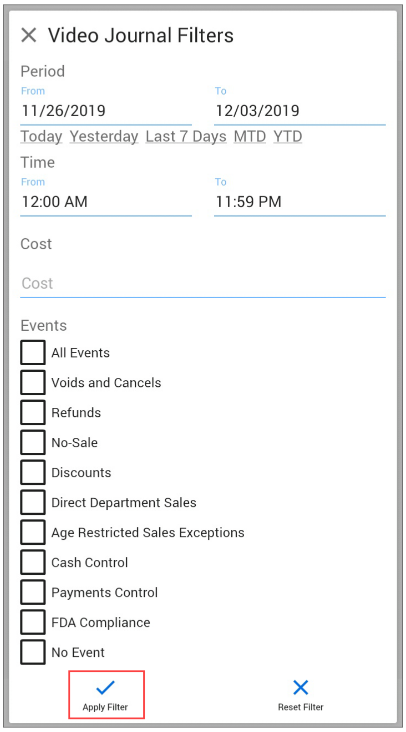
To be able to review cash register transactions, you need to have relevant permissions granted to your user. For details, see Loss Prevention Permissions.

To view the POS journal:

1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to view the POS journal.
2. At the top left corner of the Summary view, tap the menu button and then in the **Loss Prevention** section, tap **POS Journal**.

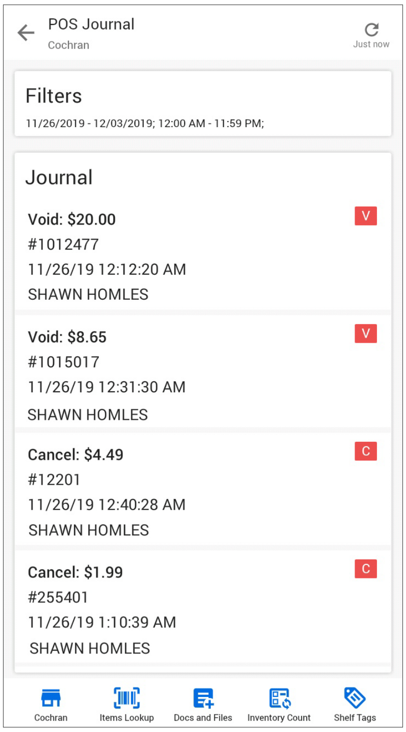


3. At the top of the view, tap **Filters** and set up the filter for the list of transactions you want to view:
   - **Period**: In the **From** and **To** fields, enter the start and end dates of the period for which you want to view transactions or tap a link of a predefined period below.
   - **Time**: Specify the time interval for which you want to view transactions.
   - **Cost**: Enter an approximate cost for transactions.
   - **Events**: Select the check boxes next to events you want to display in the list of transactions.
4. At the bottom of the Video Journal Filters view, tap **Apply Filter**. To discard the filter, tap **Reject Filter**.



5. In the POS Journal view, tap the transaction you want to check.

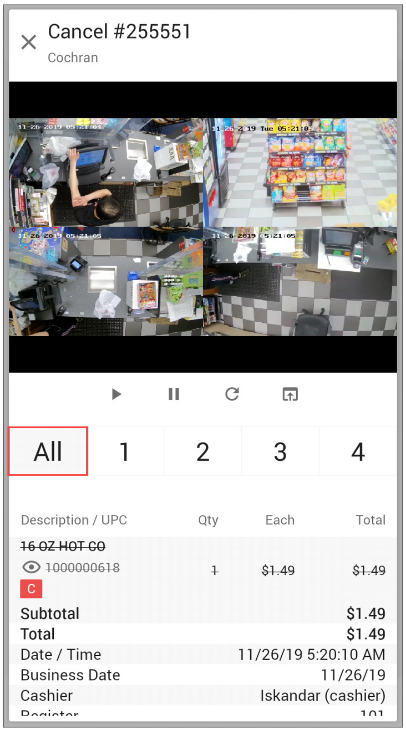
> The letter code to the right of the transaction defines the transaction type: 'V' for void transactions, 'C' for cancel transactions and so on.



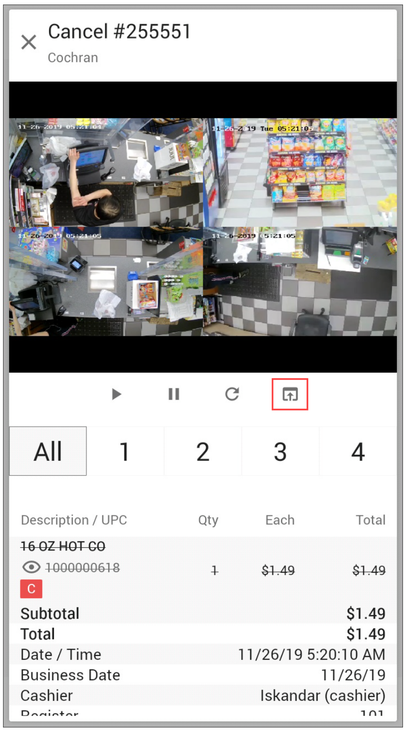
6. Review the transaction details. You can check the following data:

- Below the video, use the controls to switch between cameras and play video records from these cameras.

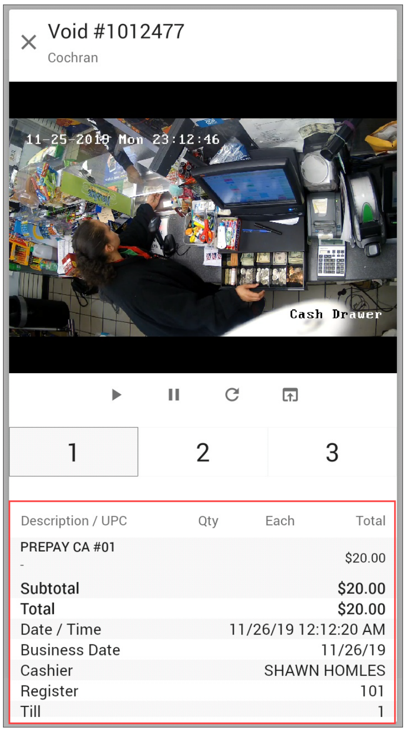
  To watch video records from all cameras at once in the dashboard, tap **All**.



  To watch the video record in the full screen mode, at the bottom of the video section, tap the full screen icon.



- At the bottom of the transaction view, check the transaction details. You can see the description of the item(s) sold, and the transaction statistics: date and time, cashier's name and so on.



To close the transaction details and get back to the transactions list, at the top left of the transaction view, tap the close button.

VIEWING QWICKSERVE DEVICES AND ORDERS

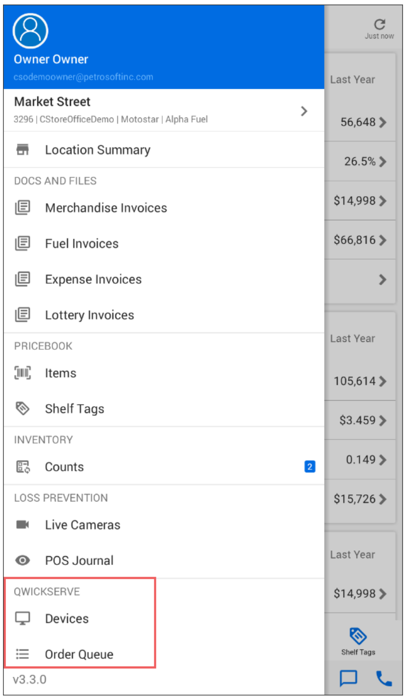
You can view the list of QwickServe devices set up for your account and check the queue of orders coming from these devices.

> This functionality is available only if the QwickServe module is enabled for your Petrosoft account. For details, see QwickServe Permissions.

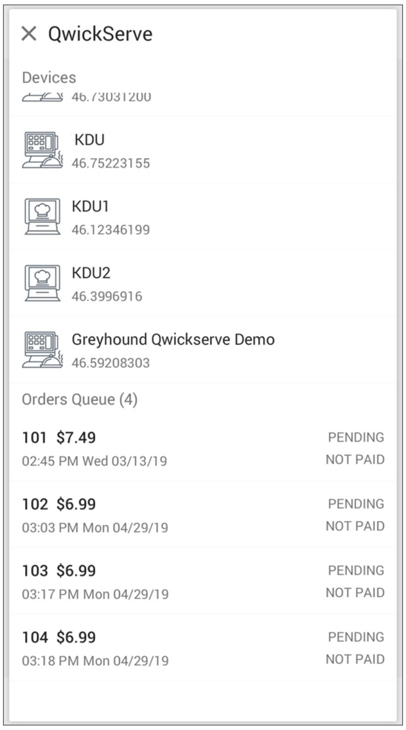
To check QwickServe devices and the order queue:

1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to check QwickServe devices.
2. At the top left corner of the Summary view, tap the menu button and in the **QwickServe** section,

tap **Devices** or **Order Queue**.



You can now review the list of devices and orders.



FAQS: CSTOREOFFICE® MOBILE APP

CANNOT ADD MULTIPLE IMAGES TO THE INVOICE

The number of images which can be added to the invoice in CStoreOffice® Mobile App is limited to 1. Therefore, it is strongly recommended to add only one image to the invoice.

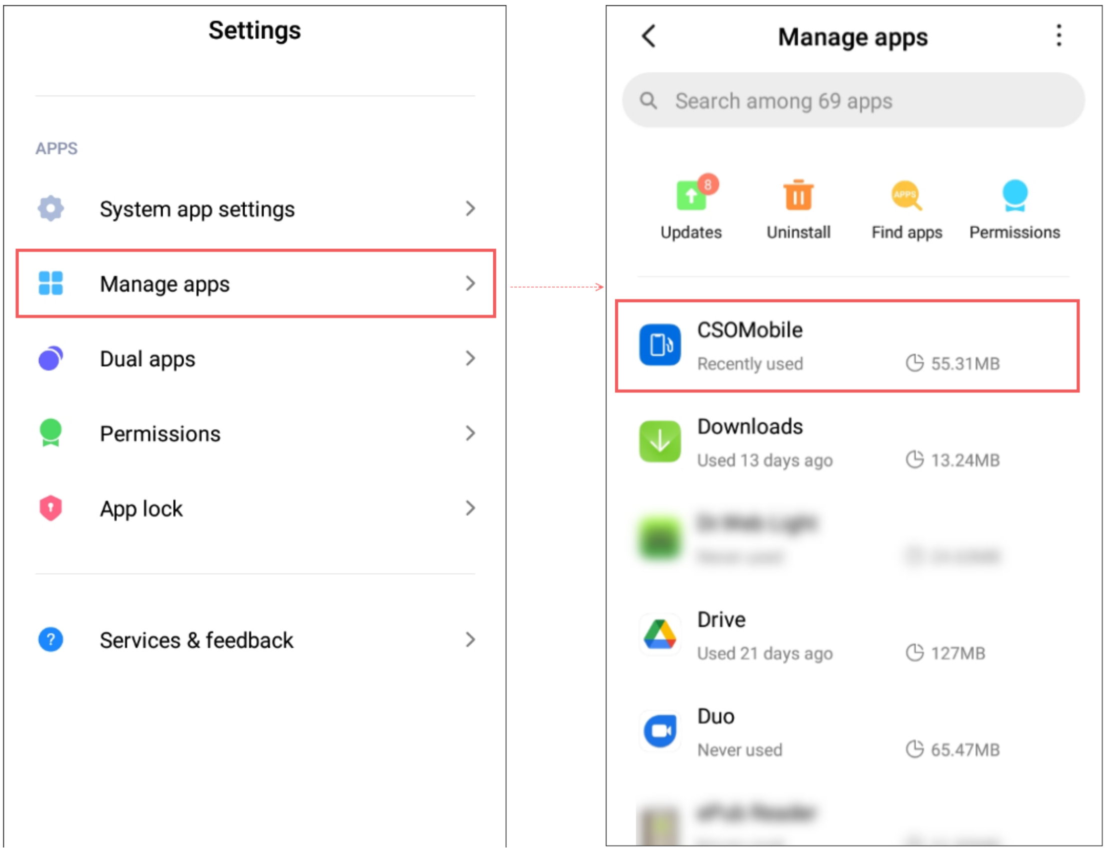
If you are still trying to upload several images at once, only the first image will be added or you may experience issues with the CStoreOffice® Mobile App.

For more information on how to add an invoice using the CStoreOffice® Mobile App, see Scanning Invoices Using CStoreOffice® Mobile App.

CANNOT USE CAMERA FROM CSTOREOFFICE® MOBILE APP

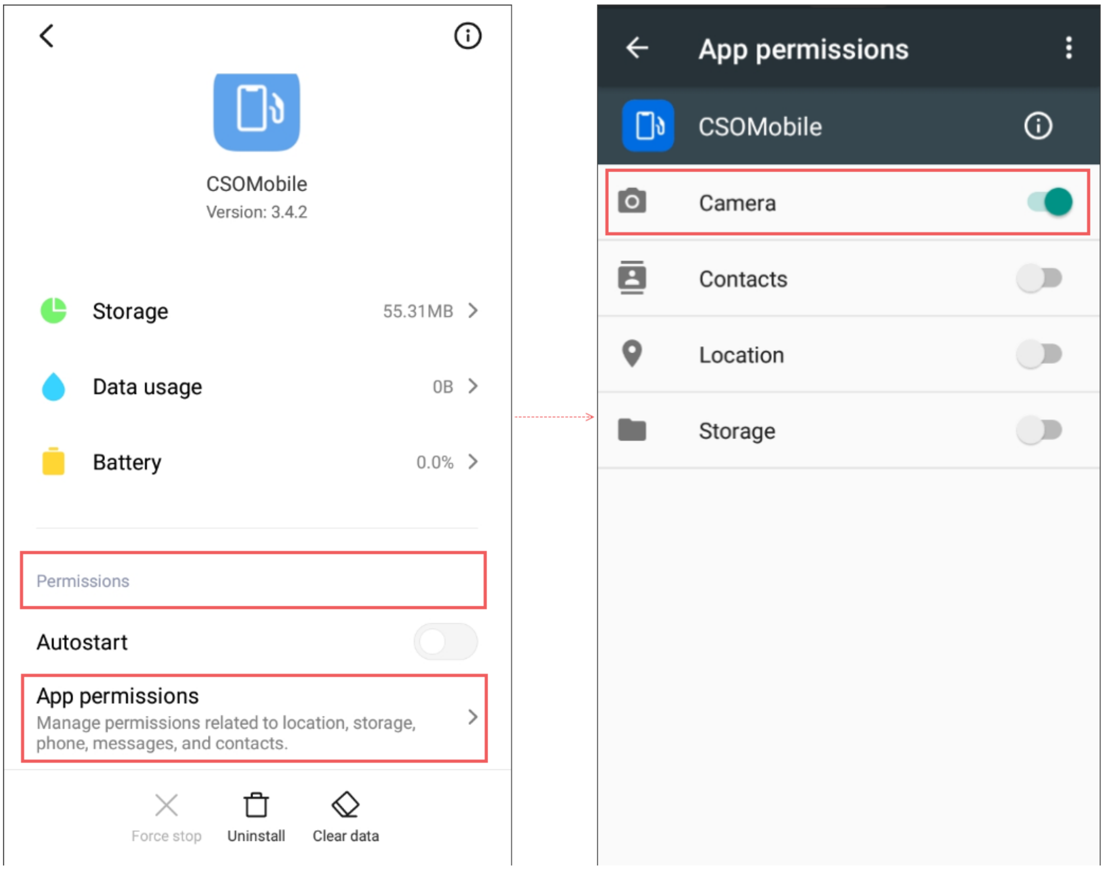
In this case, check that the corresponding permission is enabled for the CStoreOffice® Mobile App app in your device settings:

1. From your device, go to **Settings** > **Apps** > **Manage apps**.
2. In the **Manage apps** list, tap **CStoreOffice® Mobile App**.



3. In the CStoreOffice® Mobile App settings screen, go to **Permissions** > **App permissions**.

4. In the **App permissions** screen, make sure the **Camera** toggle is set to the **On** position. If not, set it to the **On** position.



Result: After the **Camera** permission is enabled for the CStoreOffice® Mobile App app on your device, you should be able to use camera from CStoreOffice® Mobile App.

> The names of the screens, settings and steps navigating you to the CStoreOffice® Mobile App camera permission may vary depending on your device model.

WHY IS MY ITEM NOT SCANNED?

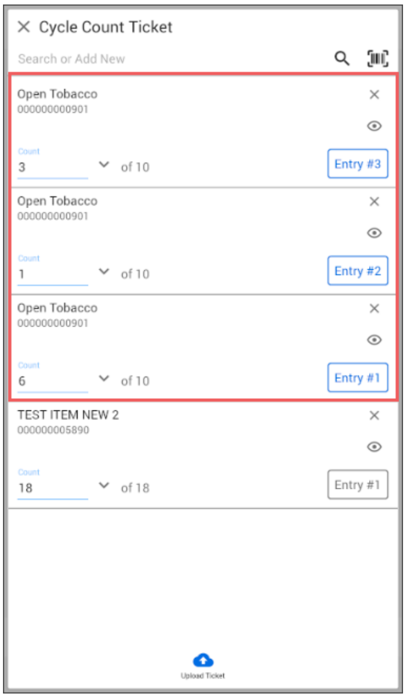
Currently, only UPC-A item codes can be scanned via CStoreOffice® Mobile App. Make sure your item has the UPC-A item code. It should consist of 12 digits.

WHAT DOES "ENTRY #" MEAN IN THE CYCLE COUNT TICKET?

The **Entry #** label is displayed to the right of each item added to the cycle count ticket. It indicates the order in which the same items are added to the ticket as single line items.

Each time the same item is added to the ticket, it is displayed in a separate line with the **Entry #** value which is increased by one.

For example in the image below, the **Open Tobacco** item is added to the ticket three times as this item is displayed in three single lines.


Cycle Count Ticket
Search or Add New
Open Tobacco
000000000901
Count
3
of 10
Entry #3
Open Tobacco
000000000901
Count
1
of 10
Entry #2
Open Tobacco
000000000901
Count
6
of 10
Entry #1
TEST ITEM NEW 2
000000005890
Count
18
of 18
Entry #1
Upload Ticket