New West technologies

Mobile Retail Platform

Mobile Suite Pro v5.5.x

Manual

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WELCOME

Thank you for purchasing New West Technologies Mobile Manager v5.5.x. In this document, we will describe the available Modules and Features this application has to offer. Mobile Manager provides you the capability to move your most time-consuming tasks onto a mobile platform. Inventory controls, receipt of purchase orders and transfers, item management – it's all possible and it's all portable with Mobile Manager. Achieving real-time database access via wireless networking, you have the freedom to roam the world and be right where the work takes place – on the sales floor.

Mobile Cashier provides the capability to perform sales in any location. Roaming registers, line-busting tactics, and a personalized sales experience are all possible. With a magnetic card reader you can authorize credit cards and complete transactions without all the bulky hardware normally associated with credit card sales.

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REQUIREMENTS

It is assumed the following prerequisites have been met before installing and running the application:

HARDWARE

- **Touch screen mobile based PDA running windows mobile with a screen resolution of 240x320 or 640x480**
- **A windows mobile device cradle or USB sync-cable for the windows mobile device device** *(For installation)*
- **2 gigabyte Secure Digital card** *(Optional; For mobile offline database)*
- **Wireless card in windows mobile device , pre-configured** *(Optional; For real time data transfer)*
- **Barcode scanner attached or configured to windows mobile device** *(Optional; For barcode scanning)*
- **Magnetic Stripe Reader attached or configured to Windows mobile device** *(Optional; For credit card transactions)*

SOFTWARE

- **Windows XP, Vista or Windows 7 (32 or 64 bit) Operating system**
- **Microsoft Retail Management System (RMS) Store Operations**
- **Microsoft SQL Server 2005, 2008, 2012 (including Express edition)**
- **Microsoft ActiveSync 4.5(Windows XP and older) or Windows Mobile Device Center(Vista and newer)**
- **Microsoft .NET Framework v2.0 installed on the PC**
- **Microsoft .NET Compact Framework v2.0-SP2 installed on the windows mobile device**

OTHER

- **A wireless network or access point to your network or cellular service, providing connectivity between your database server and the Windows mobile device .** *(Optional; For real time data transfer and credit card authorization)*
- **Mobile Cashier requires your RMS Vital Merchant or Mercury account information are correctly configured in RMS prior to the software installation.**
- **Assure your PDA is set to the current date. This can be done when creating a synchronized partnership from the device to the PC.**

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INSTALLATION

The below steps will walk you through a successful installation. Before completing the following steps, please ensure your system requirements have been met.

Note: The applications listed below must be installed prior to the installation of Mobile Manager.

DEVICE SYNCHRONIZATION

You will first need to install a device synchronization application which will allow us to transfer files from your PC to your windows mobile device. Windows XP users (Click here), Windows Vista/7 users (Click here) to download/install the device synchronization application.

MICROSOFT .NET FRAMEWORK 2.0

Mobile Manager includes a mobile cashier manager application which requires installation of the Microsoft .NET framework 2.0. (Click here) to download/install Microsoft .NET framework 2.0.

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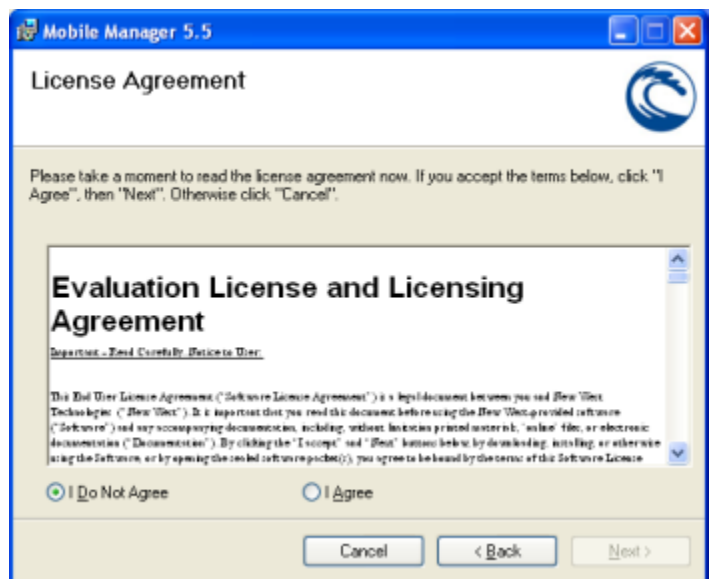www.newestech.com
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- Verify the handheld is turned on, cradled to the desktop PC, Active sync or mobile device manager is in a 'connected' status.
- Double click the Mobile Manager 5.5.msi application to start the installation

    The Welcome screen should appear
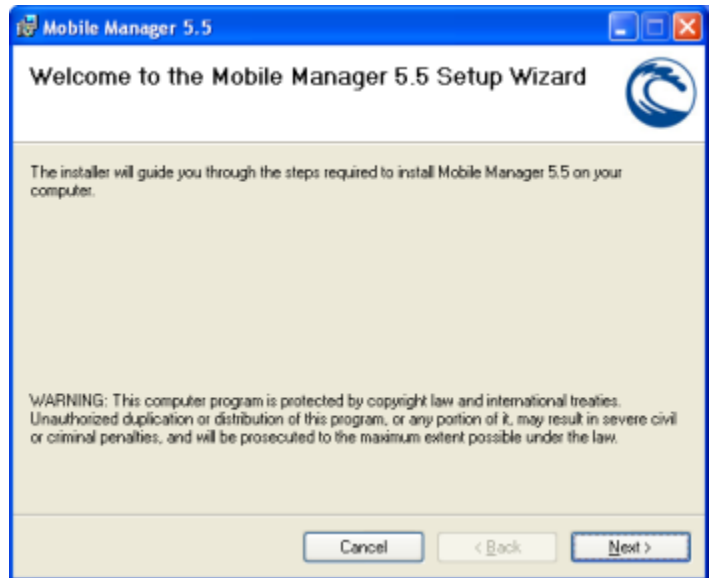
- Click Next
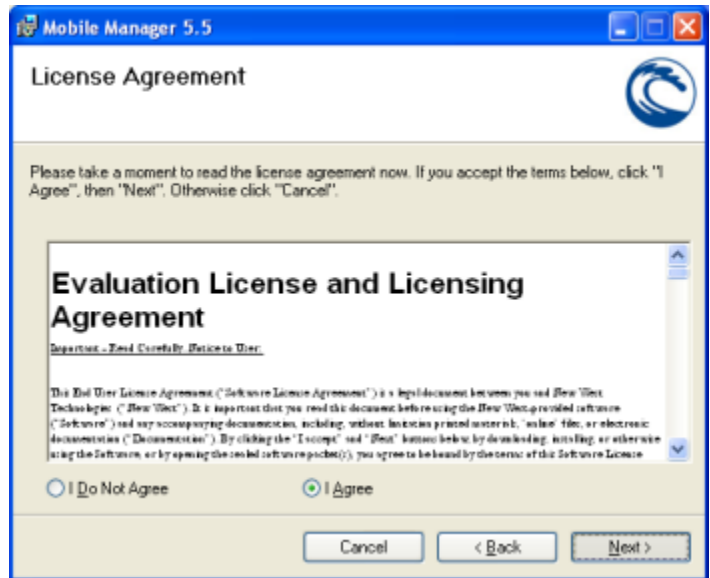   a. If you click Cancel the installation will be canceled

    The License Agreement screen should appear

- Read the License Agreement and click I Agree

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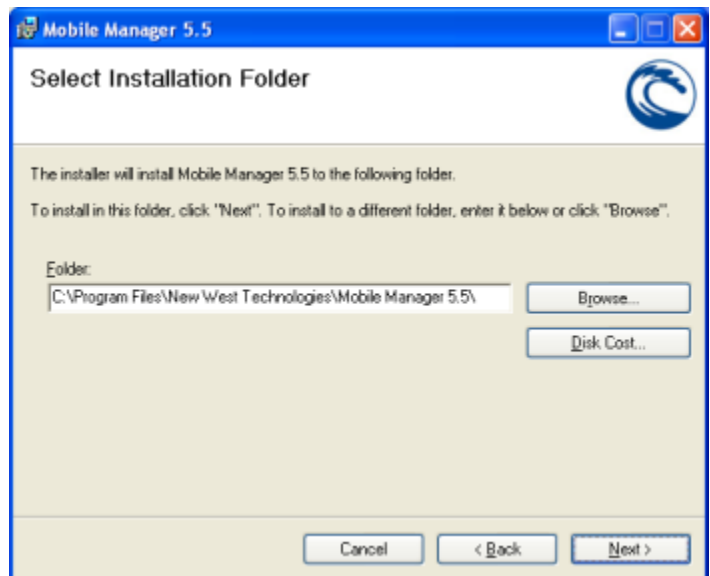Fax: 503-235-4416

The Next button should activate.

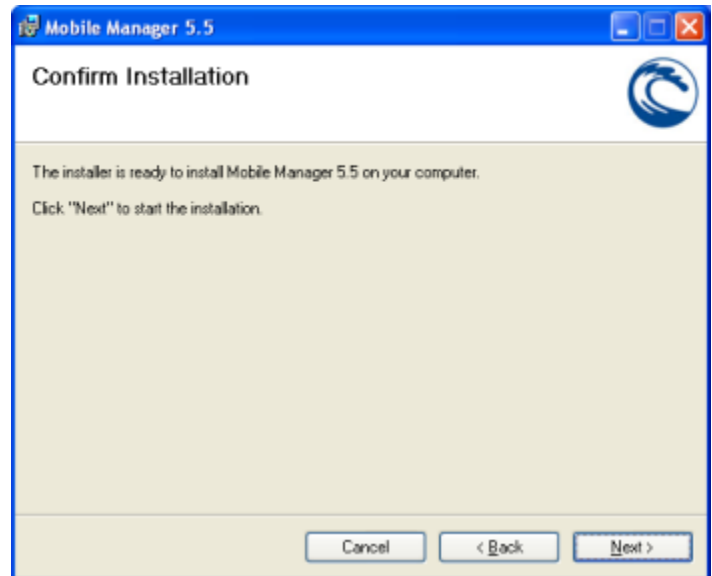- Click Next

The Select Installation Folder screen should show

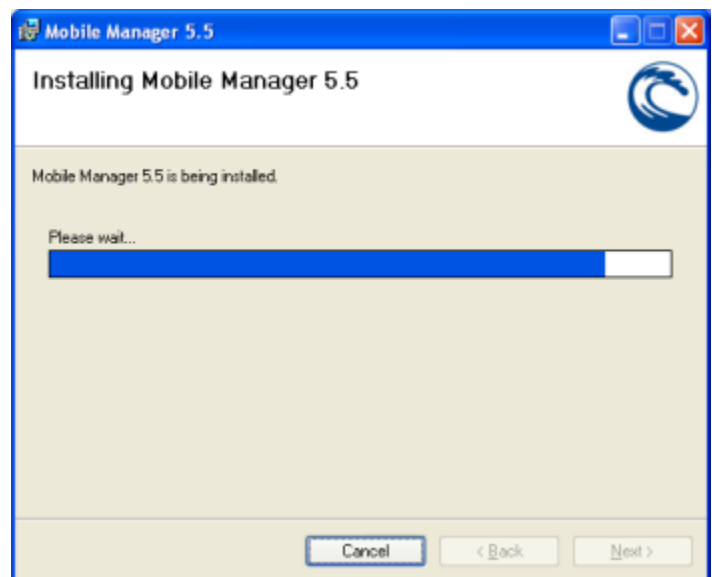*NOTE: It is not recommended to change the installation folder.*

- Click Next

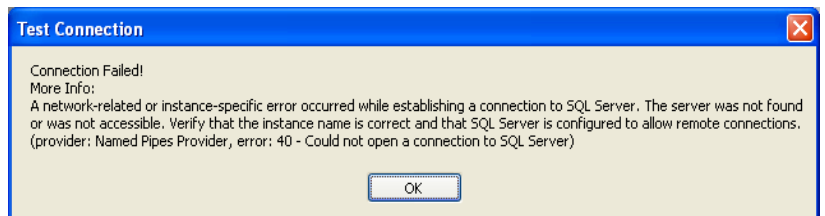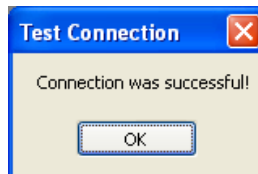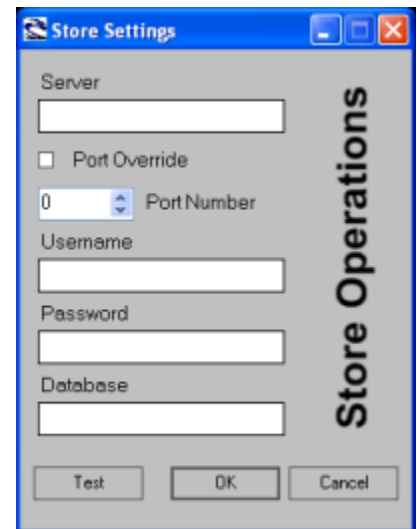The Confirm Installation screen should show

- Click Next

The Installing Mobile Manager 5.5 screen should show the progress of the installation.

The Store Settings window should pop up.

- o Server
    - ▪ The SQL server address
        - • Example: 192.168.0.100
        - • Example: (local)
        - • Example: 192.168.0.11/R2
- o Port Override
    - ▪ Check this if your SQL Server is setup to use a different port then the default port
- o Port Number
    - ▪ If Port Override is checked, enter the port number here
- o Username
    - ▪ The username used to log into the SQL Server
- o Password
    - ▪ The password for the username used to log into the SQL Server
- o Database
    - ▪ The name of the database
- o Test Button
    - ▪ Push the Test button to confirm the database connection settings are correct

    - ▪ If the connection is successful you will receive this message:

    - ▪ If the connection is unsuccessful you may receive this message, or a similar one:
- o Ok Button
    - ▪ This will save the store connection settings
- o Cancel Button
    - ▪ Closes the Store Settings window without making any changes.

Test Connection

Connection was successful!

OK

Test Connection

Connection Failed!
More Info:
A network-related or instance-specific error occurred while establishing a connection to SQL Server. The server was not found or was not accessible. Verify that the instance name is correct and that SQL Server is configured to allow remote connections. (provider: Named Pipes Provider, error: 40 - Could not open a connection to SQL Server)
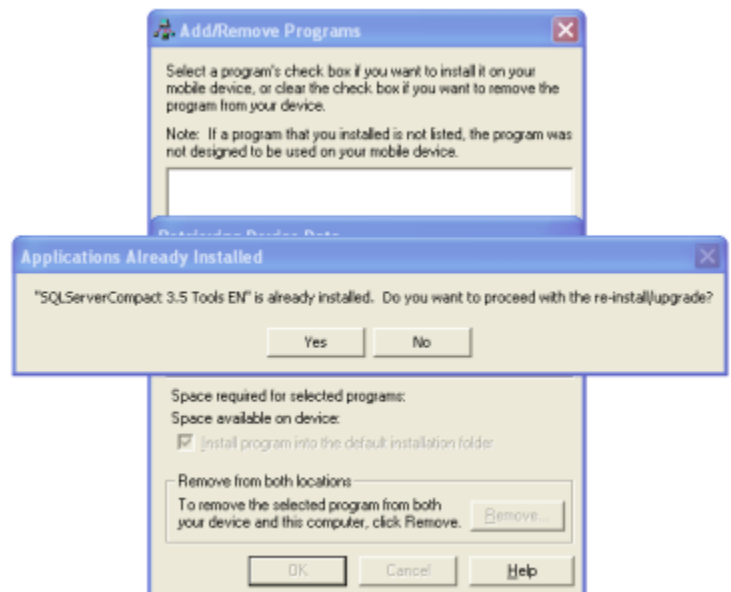
OK

- Enter your Store Connection Settings
- Click the Test Button
    - o If connection successful, click OK button
    - o If connection is unsuccessful, verify the store settings and click the Test button again.
        - ▪ If the connection still fails, consult the troubleshooting section at the end of this document.
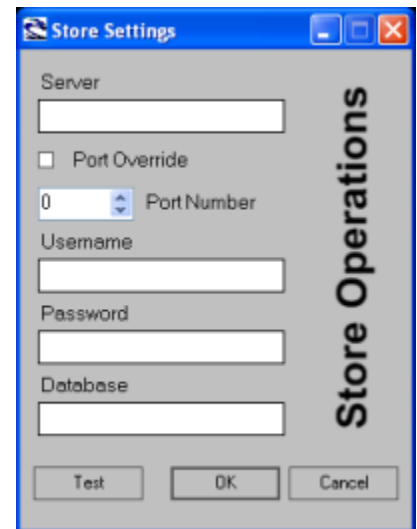
The Windows Mobile Device Add Remove Programs window should pop up.

If the prerequistes are already installed, you may click No to the re-install option.

Clicking Yes will reinstall the required components.

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A message should prompt you to check the mobile device to see if there are any addition installation steps.

Application Downloading Complete

Please check your mobile device screen to see if additional steps are necessary to complete this installation.

OK
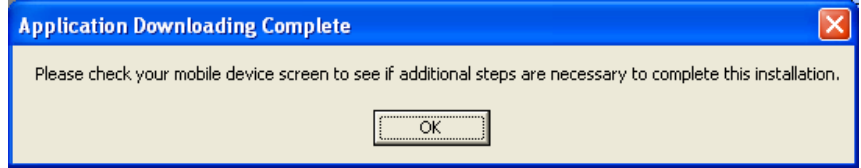
- **Click OK**

Prepare a device for auto-installation screen should show.

Windows Mobile 2003 devices may uninstall 3rd party applications from the device upon a hard reset. The hard reset feature places an automatic installer located in the device system files preventing loss of the Mobile Manager application upon a hard reset or power loss to the device.
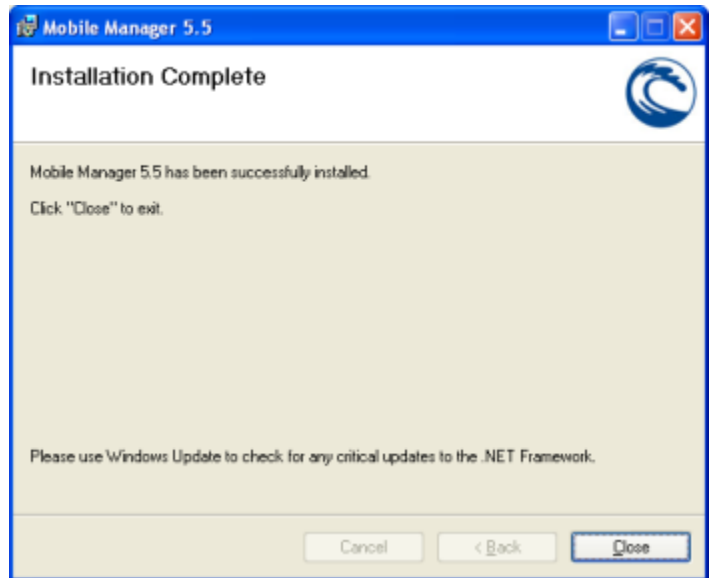
Prepare a device for auto-installation

Windows Mobile 2003 devices may lose installed programs if the battery ever drains completely. Certain devices may be prepared to reinstall Mobile Manager if this occurs. Please select the manufacturer of the device (or "Storage Card" to use a removable storage card for auto-installation) to prepare it to automatically reinstall. If you do not know the manufacturer of the device or do not wish to prepare it for auto-installation, please select "Unknown or unlisted."

OK

Note: This feature is only available for windows mobile 2003 devices listed in the drop down field.

- Choose the appropriate device from the dropdown box, or Unknown or unlisted and click OK.

Prepare a device for auto-installation

Windows Mobile 2003 devices may lose installed programs if the battery ever drains completely. Certain devices may be prepared to reinstall Mobile Manager if this occurs. Please select the manufacturer of the device (or "Storage Card" to use a removable storage card for auto-installation) to prepare it to automatically reinstall. If you do not know the manufacturer of the device or do not wish to prepare it for auto-installation, please select "Unknown or unlisted."

OK

Unknown or unlisted
Symbol
Intermec
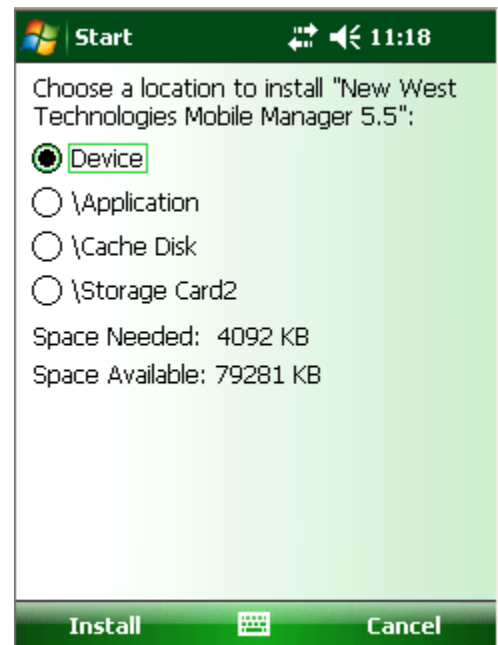Storage Card

Installation complete screen should show

- Click Close

- Check the mobile device to see if any addition steps are required.

  NOTE: You may be prompted to confirm the installation of the Mobile Manager 5.5 or other components required by the application.

- Always choose DEVICE for the installation location
  NOTE: The software will not work correctly if installed to anything other than Device

- Click Install

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Installation complete screen should show.

- **Click OK to close the installation screen**

NOTE: If other components were installed at the same time as Mobile Manager 5.5 (Example: SQL Server Compact 3.5 Core) you may have to click Install and OK several times to complete the installation(s). You may also need to reboot your handheld device after some of the components have been installed.

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CASHIER MANAGER

The mobile cashier manger application is installed to your PC during the Mobile Manager installation. By default, each cashier has access to all licensed modules and features. The mobile cashier manager allows you to place some restrictions on which modules and/or features of Mobile Manager each cashier can access.

NOTE: By default, Cashier Manager will populate Mobile Manager with the current RMS cashier's User ID and name, but will not require a password.

Configuration

There is no configuration of this application required.

Application Use

Run Mobile Cashier Manager

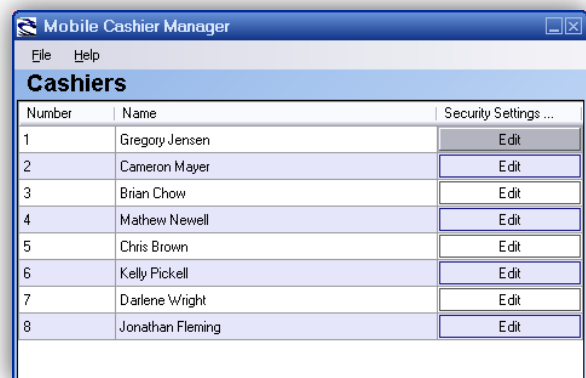From your PC, click the start button and follow the path shown below to open the mobile cashier manager application.

→ All Programs
→ New West Technologies
→ Mobile Manager
→ Mobile Cashier Manager

Cashiers Screen

When presented with the mobile cashier manager interface, select the **Edit** button for the cashier you would like to edit.

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Cashiers Security

On the cashier security screen, you can limit the access that a cashier has to various areas of functionality. If you would like to limit which modules or features a cashier can access, you can place restrictions on the cashier's access. In the example displayed, you do <u>not</u> want the selected cashier to have the ability to change the price of an item in mobile sales. Therefore, you select **Sales** from the module dropdown list, and then select **Change Price** from the policy list, leaving the allow column checkbox unchecked. You can then create additional policies as needed.

You may also set a password for each cashier; note the password field in the lower left-hand corner of the Cashier Security Screen.

When finished, Press **OK** to save settings and exit cashier security screen.

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MOBILE MANAGER

LOGIN SCREEN

- Launch Mobile Manager
  - o Tap Windows Mobile Start Button
  - o Tap Programs
  - o Tap Mobile Manager

  NOTE: After launching Mobile manager the first time, it will have
  a shortcut under the Windows Mobile Start Menu

- **Login Screen**
  - o **User Id**
    - ▪ The User ID used to log into Mobile Manager
    - ▪ Configurable in the Cashier Manager
  - o **Password**
    - ▪ The password associated with the User ID
  - o **OK Button**
    - ▪ Tapping this attempts to log into Mobile Manager
  - o **Cancel Button**
    - ▪ Closes Mobile Manager
  - o **Settings**
    - ▪ Opens the Setting configuration page
  - o **Sync**
    - ▪ Opens menu for syncing the device
  - o **Log**
    - ▪ Allows you to view or delete the log file
  - o **Help**
    - ▪ Allows you to view the product details and active the product

- **Settings**
  - **Server**
    - Enter the server address that holds the database
    - Example: 192.168.0.10
    - Example: (local)
    - Example: 192.168.0.10/R2
  - **Database**
    - Enter the name of the database
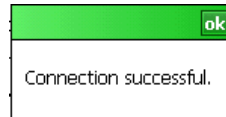 - **Username**
    - Enter the username associated with the SQL server
  - **Password**
    - Enter the password for the username
  - **Test Connection Button**
    - Tests the connection to the database
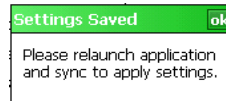   - If the test passes you should see a message:
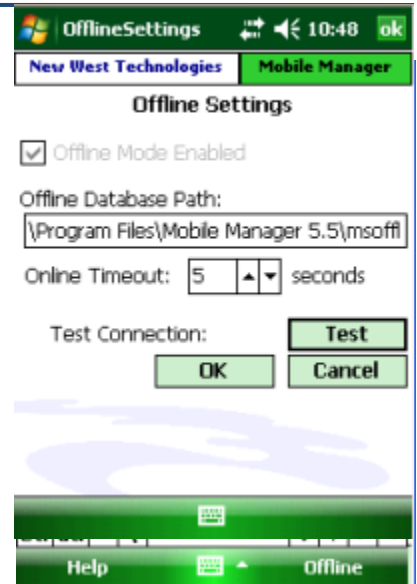   - If the test failed you may see a message similar to this:
  - **OK Button**
    - Saves the connection settings
    - If a change is detected the program will prompt to to close and relaunch with the new settings
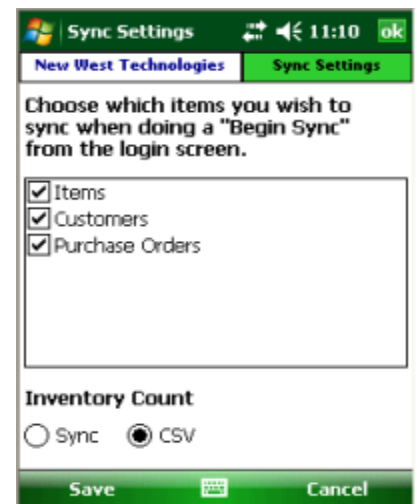 - **Cancel**
    - No changes are saved, closes settings screen

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- o **Offline**
  - ▪ Allows you to change the offline database settings
    - • Offline Mode Enabled
      - o If checked, offline mode will be enabled
    - • Offline Database Path:
      - o Allows you to specify the exact path to the offline database.
      - o *NOTE: It is recommended to store the offline database on a storage card*
    - • Online Timeout
      - o Specify the amount of seconds to wait before prompting to go into offline mode
  - ▪ See above for Test, Ok and Cancel Button definiations
- • **Sync**
  - o **The Sync Menu allows you to sync Sales Only or everything**

  - o **Settings**
    - ▪ Allows you to specify which items to be synced.
      - • Items
        - o Syncs all items
      - • Customers
        - o Syncs all customers
      - • Purhcase Orders
        - o Syncs all Purchase Orders and Transfers
      - • Inventory Count
        - o Specify format for Inventory Counts.
        - o *NOTE: It is recommended to use CSV format*
        - o *If you choose SYNC a CLOSED inventory count will be added to RMS after an offline inventory count has been completed. This is not editable.*

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- o **Begin Sync**
  - ▪ This will sync all options set in the Settings menu
- o **Sales Only**
  - ▪ This will sync offline sales only

- • **Log**
  - o Allows you to view or delete the log file
    - ▪ The log file may contain error messages or details of the sync process

- • **Help**
  - o **Product Info**
    - ▪ Displays details about the product, and contact information for New West Technologies

Activate

- ▪ **Allows you to Activate the modules you have purchased.**
- ▪ **Enter your license Key**
- ▪ **Press Unlock**
  - • The software will store the key in a text file named **ucode.txt** on the root of the device.
  - *Note: Mobile Manager requires access to the internet to unlock your Mobile Manager modules. If you do not have access to the internet, please refer to the options menu outlined in* <u>Validate your software</u> *section, or contact New West Technologies 1-800-466-7839.*

  - *Mobile Manager requires activation once every 365 days*

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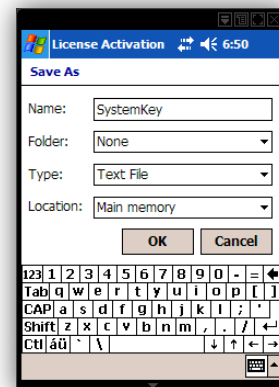
Options

Create System File

Name – Leave the file name set to its default name or rename file.

Folder – Select the folder you wish to save the file on your mobile base device.

Type – Select the file type.

Location – Select the location you wish to save the file on your mobile base device.

Email your SystemKey information to support@newestech.com. Please include company name information and the activation key used to ensure quickest response.

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VALIDATE YOUR SOFTWARE

Mobile Manager will validate the software every 365 days. If cashier will be using the device in an offline environment, they can simply reset the validation counter on the device to ensure access to Mobile Manager for 365 days.

Note: Validation of software requires an active connection to the internet via wireless connection or while connected to your PC network using the device synchronization application installed during installation of Mobile Manager.
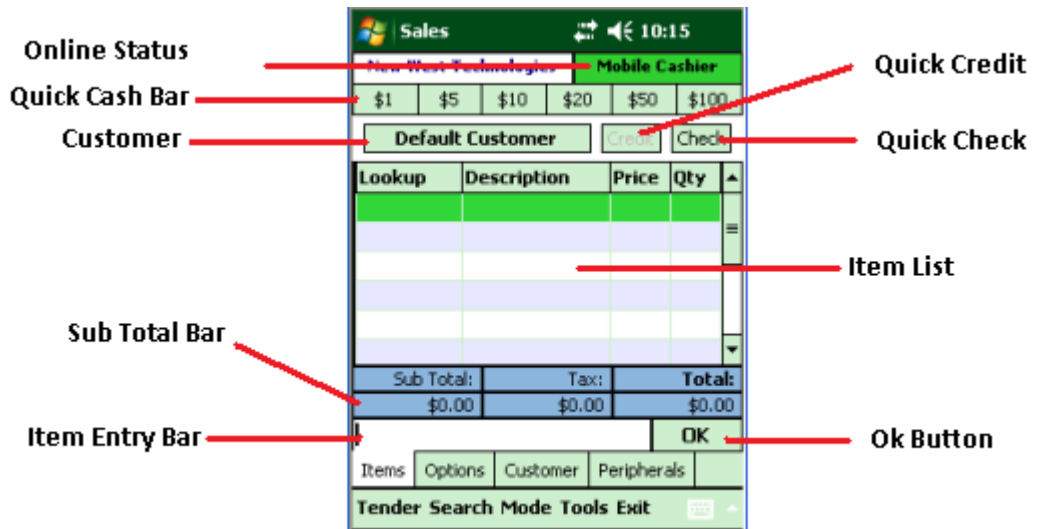
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SALES – ONLINE

- From the main menu, use the down arrow and choose Sales from the drop down menu

- The Sales screen should show

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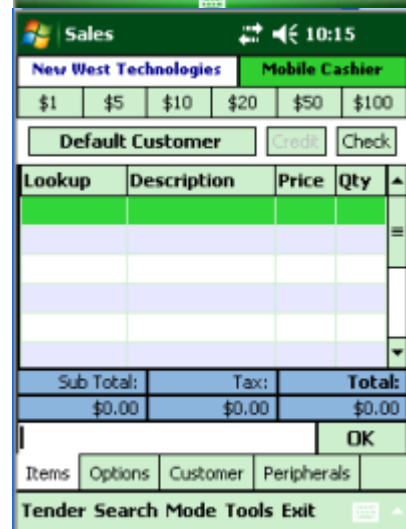
- **Sales Overview**

  - **Online Status**
    - This field will change color depending on the current state of connection.
      - **Green**
        - Able to access the Credit Card Processor and the Database
      - **Yellow**
        - Able to access the Credit Card Processor, but not able to access the Database
      - **Red**
        - Unable to access the Credit Card Processer, unable to access the Database
  - **Quick Cash Bar**
    - Pressing any of the dollar amounts reduces the total due by that amount.
    - If the tendered amount is greater than the total due, it will calculate the change due.
    - If the tendered amount is less than the total due, the total due amount will be reduce by the amount tendered.
      - Example: Total = $9.99
      - Tap $1
      - Total = $8.99
      - Tap $5
      - Total = $3.99
      - Tap $10
      - Change = $6.01
  - **Quick Credit**
    - Activates the Card reader so you can swipe the card instantly
  - **Quick Check**
    - Allows you to process a check instantly
  - **Customer**
    - Default Customer
      - If a customer has been set as the Default Customer, tap this button to load the default customer
    - Customer Name
      - If you search and select a customer from the Search or Customer tab, the name of the customer will appear here.

- o **Item List**
  - ▪ Items added to the sale will show here. The Item Look Up Code, Description, Price and Quantity will be displayed.
  - ▪ If you tap on one of the column headers, the items in the sale will be sorted by that field. (alphanumeric sorting).
  - ▪ If you tap and hold an Item the Options menu for that item will pop up allowing you to edit the item or delete the item from the sale.
- o **Total Bar**
  - ▪ Sub Total
    - • Shows the cumulative total of the items in the sale
  - ▪ Tax
    - • Shows the cumulative total of the taxes in the sale
    - • Shows Exempt if Tax Exempt status is present
  - ▪ Total
    - • Shows the cumulative total of the sale
- o **Item Entry Bar**
  - ▪ Scan or manually enter Item Look Up code
- o **OK Button**
  - ▪ If you manually entered an Item Look Up Code, Tap OK to add it to the sale

- **Options Tab**
  - The Options Tab allows you to select a register, Perform a Blind Close on a Batch, Perform a No Sale Transaction and Reprint a from a sale.
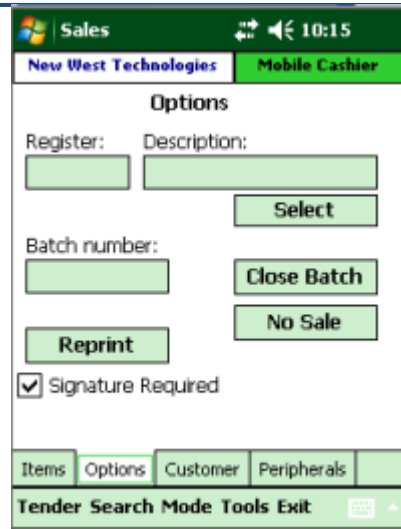
  - Tap the select button to select a register
   *NOTE: The register and Description are blank when you first install and launch the product.*
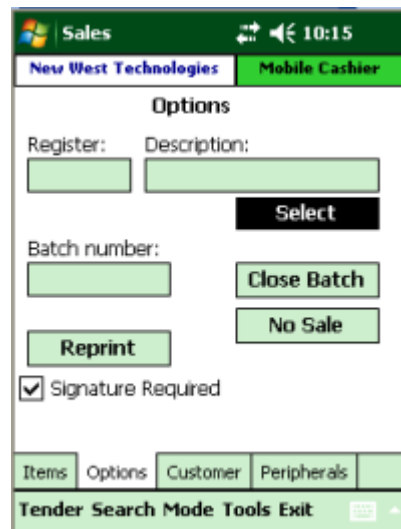
  - The Select Register screen will show.
 - Highlight the Desired Register and Tap the OK button

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- Now the Register and Description fields are filled out.

- If you Tap the Close Batch button, you should receive this message:

  Batch successfully closed
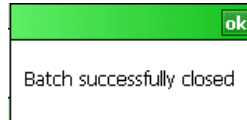
- Tap the No Sale button to perform a no sale transaction and this message should appear:

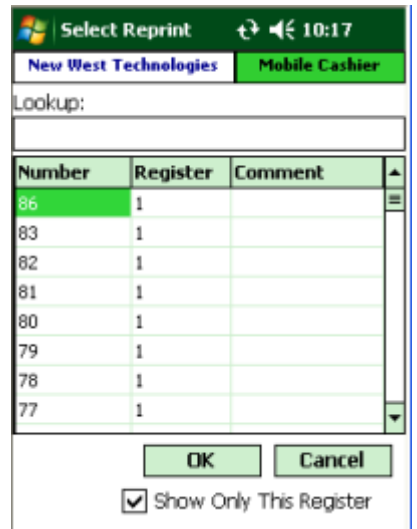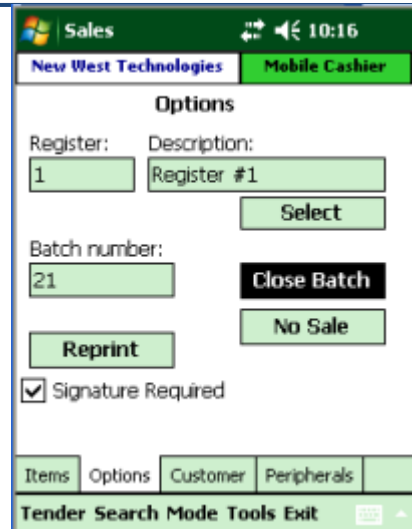 No Sale Completed   ok
  No sale transaction complete.
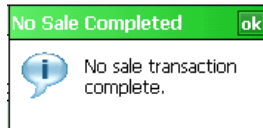
- Tap the Reprint button, a list of transactions and registers will show.

- If Show Only This Register is checked, only sales performed on the register set in the Options screen will show.

    NOTE: If all registers are chosen and there are a lot of transactions it will take longer to load

- Tap the transaction you wish to reprint a receipt for and tap OK

- A message will show "Printing Receipt"

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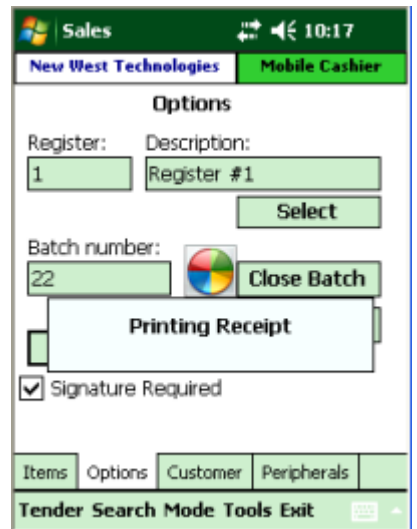
- **Customer Tab**
  - o **You can select existing customers, create new customers or clear customers from sales.**

    - ▪ Tap the Select Customer Button

    - ▪ The Customer Search screen will show
      - Use the down arrow next to Search Fields to change what field is searched.
      - Enter a term in the Search Terms Box and Tap Search

      - Results will return in the bottom half of the screen

      - Tap and Highlight the desired entry and Tap OK
      - Tap Make Default to set the highlight customer as the Default Customer

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- The Customer Tab will now show the selected customer
- The Customer Button on the Items Tab will show the customer's first and last name

- If you tap the Clear Customer button, the customer will be removed from the sale and the Customer Tab will be blank

- Tap New Customer to create a new customer
  - The account number will be automatically generated.
  - Fill out the fields and set the price level
  - Tap Save to save and set the new customer for the transaction
  - Tap Cancel to not save and return to the Customer Tab

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- **Peripherals Tab**
  - o Setup the Card Reader and Printer, set the number of receipts to Print
    - ▪ Card Readers
      - Tap the arrow to bring up the menu of Card Readers
        - *NOTE: The card readers should be paired with the device before attempting to use it. See Common Printer Pairing section for help.*

        - o Symbol
        - o Woosim
        - o Bixolon
        - o Zebra
        - o AllInOne (Pidion Devices)
    - ▪ Bluetooth Serial Port
      - If the Card Reader uses Bluetooth a Serial Port or Com Port number will have been assigned or choosen during the pairing process. Use the up/down arrows to set the Serial Port number.
    - ▪ Re-Start MSR
      - Used to restart the Card Reader drive in case the mobile device and the card reader have lost connection.
    - ▪ Print Receipt
      - Set the number of receipts to print out after each transaction
    - ▪ Setup Printer
      - This allows you to set the printer driver, port, paper width and height.
        - *NOTE: The printer should be paired with the device before attempting to use it. See Common Printing Pairing section for help.*

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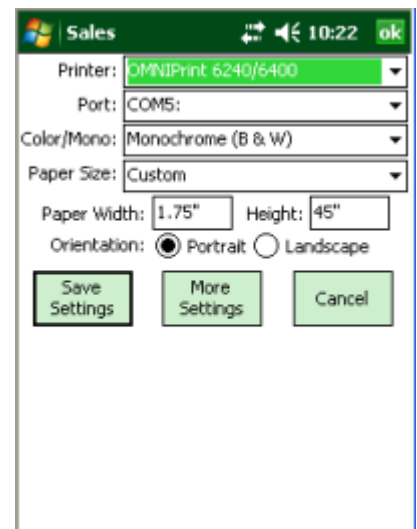
- **Search**
  - o **Allows you to search for items or customers**
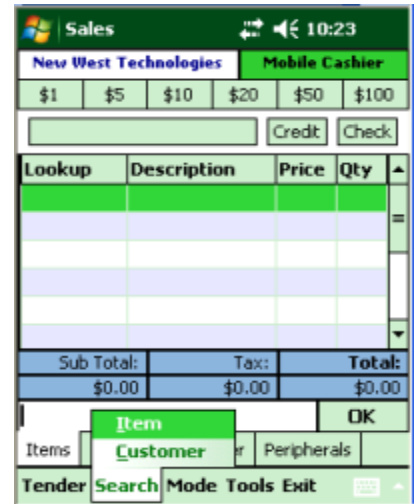
  - ▪ Item
    - • Search Terms
      - o Enter the term
        NOTE: If left blank the search may take several minutes to complete. It is not recommended to perform a blank search

    - • Search Button
      - o Tap this to search
    - • Search Fields
      - o Allows you to specify what fields to search by
        - ▪ Item Lookup Code
        - ▪ Description
        - ▪ Inactive Items
        - ▪ Supplier
    - • Results
      - o The results will return in the bottom half of the screen
  - ▪ Item Manager
    - • Tap Item Manager to launch Item Manager (this allows you to create or edit items).
  - ▪ Customer
    - • This is the same search screen described above in the Customer Tab.
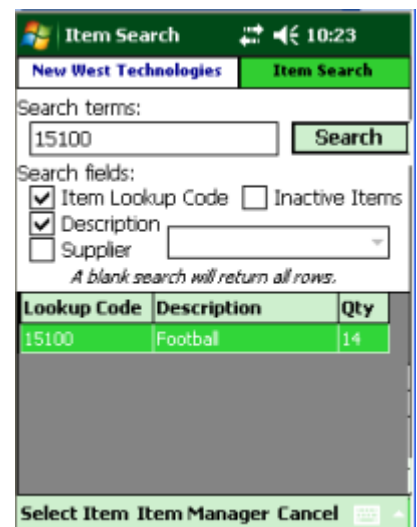
- **Mode**
  - o **Allows you to turn on or off three modes: Quickscan, Tax Exempt, Return Mode**
  - o **If a check mark is present, the mode is enabled**
    - ▪ Quickscan
      - Allows you to scan an item and automatically add 1 quantity
    - ▪ Tax Exempt
      - Allows you to set transaction as tax exempt, so taxes are not charged

    - ▪ Return Mode
      - All items will be considered to have a negative 1 quantity.
      - You will receive a warning message, and an option to cancel, when entering this mode

      - After entering return mode, the sub total bar along the bottom will be red.

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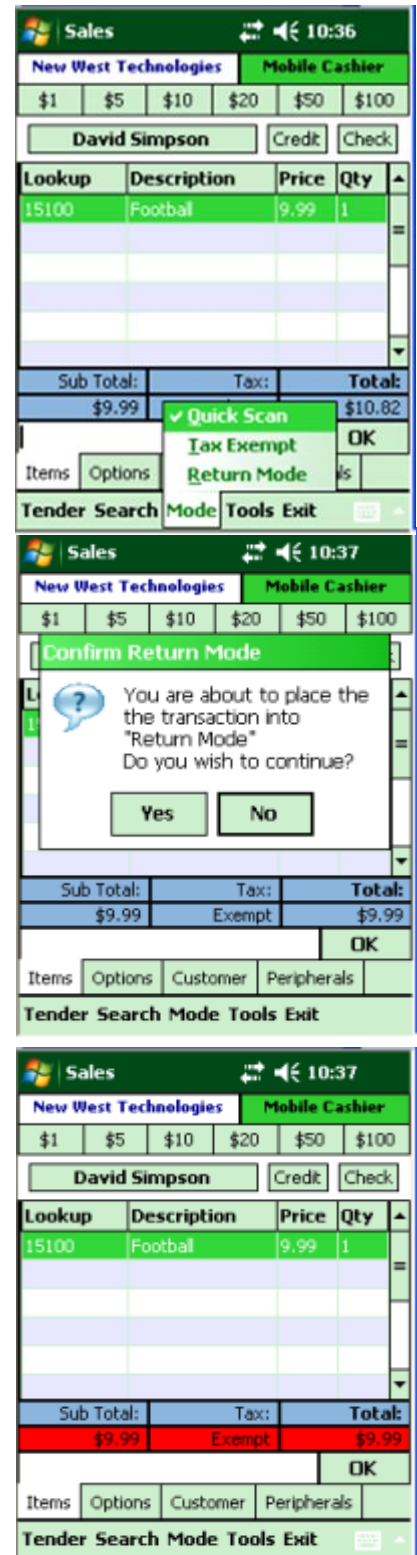
- **Tools**
  - o **Allows you to access the Maintenance options or place the transaction On Hold.**
    - ▪ Maintenance
      - • Close Batch
        - o Allows you to perform a Blind Close
    - ▪ Place On Hold
      - • Places the transaction on hold
        - o If Print receipt is not zero, it will print a ticket with the transaction number in a barcode to be easily retrieved at an RMS POS register.
        NOTE: Mobile Sales is unable to recall On Hold Transactions.

- **Tender Button**
  - o **Allows you to specify tender types and amounts**
    - ▪ Cash & check are in the first drop down menu
    - ▪ Credit options are in the second drop down menu
    - ▪ You can specify an Amount or use the Exact Change button
    - ▪ Tap OK to load the tender type processing screen; if you use credit card it will bring up the credit card processing screen.

    - ▪ **Credit Card Authorization Screen**
      - • Entering this screen should activate the Card reader if it is setup and configured.

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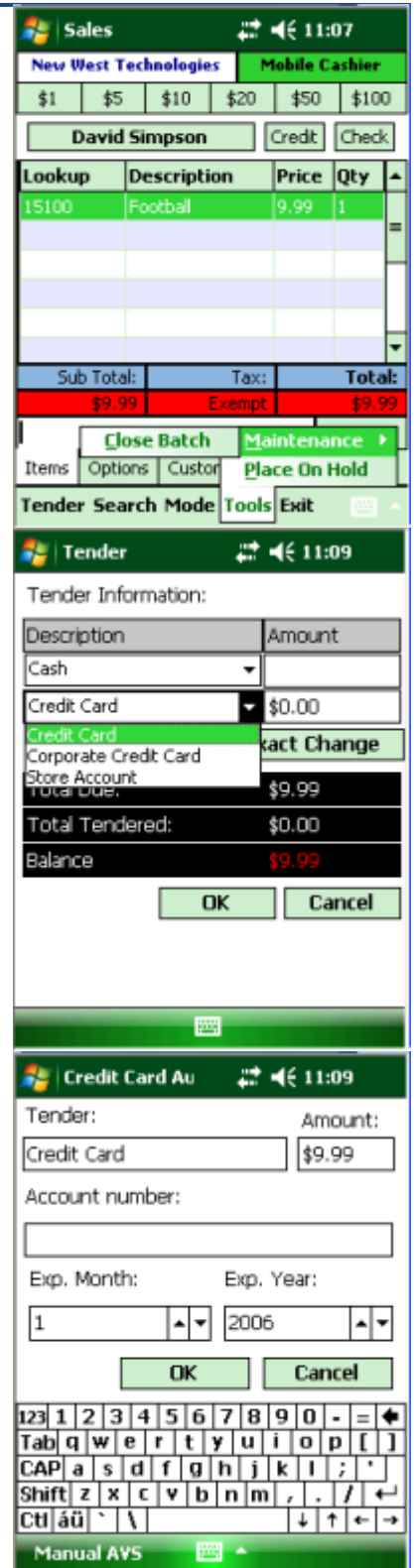
- Swipe the card
  - Should see the Authorizing message
  - The Auth Status should be Pending
  - The MSR Status should be green
    - **NOTE: May have to minimize the soft keyboard to see these fields**

- If the card is approved, a signature screen will appear (if configured to capture signatures)
- The customer can sign and Tap OK
- Clear button clears the signature from the screen

- If set to print receipts, a receipt will print out and the Sales screen/Items tab will reappear.

SALES – OFFLINE

- **When the program cannot make a connection the database, it will switch to offline mode.**

  NOTE: Sales configuration must be setup and program must be synced before going offline. See section: going offline for first time

- **From the login screen, if the database connection has failed, it will display a warning.**
  - Cancel button – Tap this to enter Offline Mode
  - Retry button – Tap this to retry to connect to the database
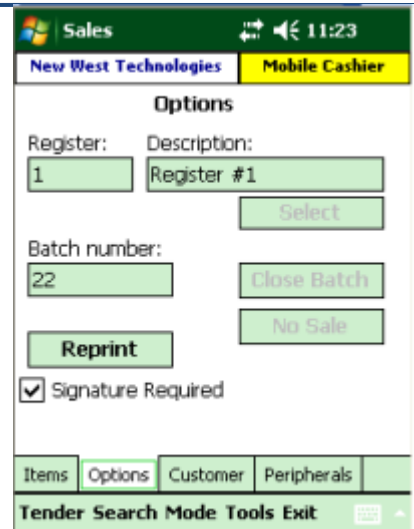
- **Main Menu**
  - Notice the Mobile Manager window is RED to indicate offline status (Only sales has a Yellow mode, all other modules are red).
  - Choose Sales from the Drop Down Menu
  - Tap OK

- **Yellow Offline Mode**
  - Notice the Mobile Cashier window is YELLOW.
  - This means that the program could connect to the credit card processor, but not the database. (Credit card tenders can be authorized live, but the transaction information is stored in the offline database until a Sync is performed.)
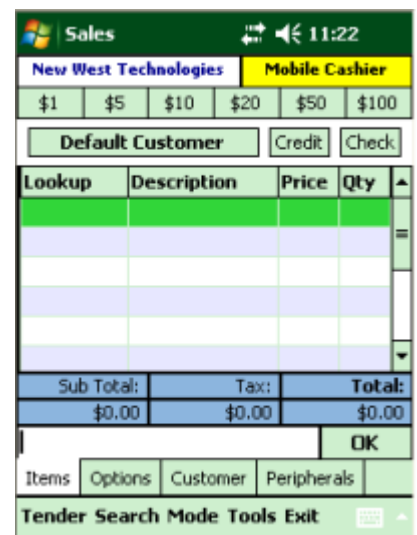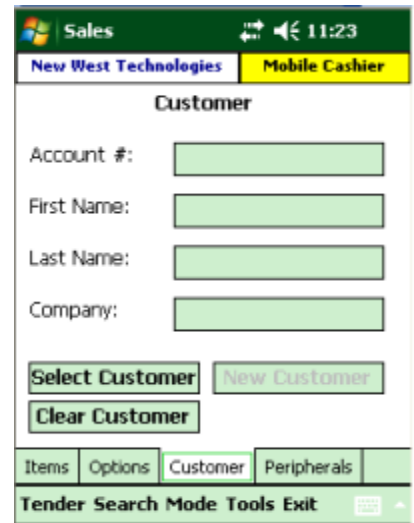
o Options Tab
  ▪ Notice you cannot change the register, close the batch or perform a No Sale transaction in Offline mode.

o Customer Tab
  ▪ Notice you cannot create a NEW customer
  ▪ You can still search for customers in the offline database

o Search – Items
  ▪ Notice you cannot launch Item Manager in Offline mode
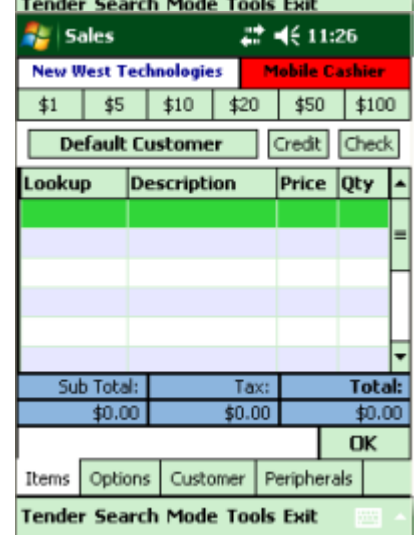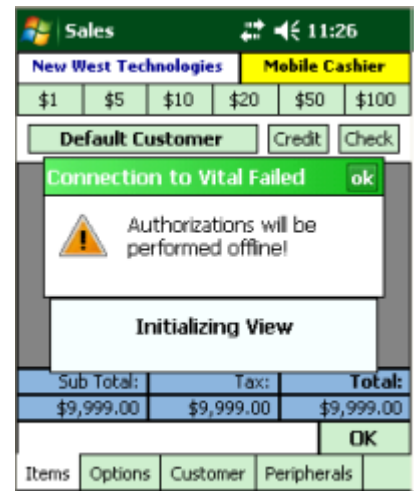 ▪ You can still search for items in the offline database

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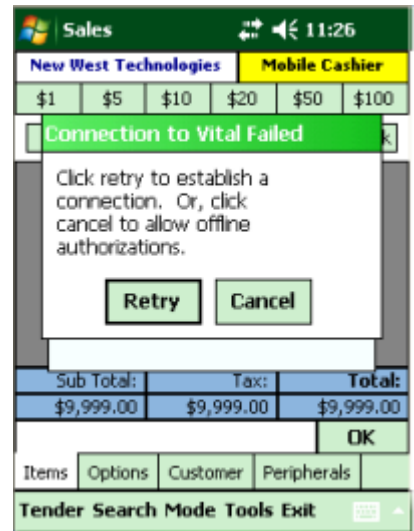
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- **Red Offline Mode**

  NOTE: Sales configuration must be setup and program must be synced before going offline. See going offline for the first time section.

  o Unable to connect to the database, and unable to connect to the credit card processor.
  o When entering sales from the main menu, and no connection to the processor is detected, you will receive a message:
    - Tap cancel to process credit card transactions offline, or retry to try and establish a connection.

  o If you tap Cancel you will get a message:
  o Tap OK

  o Notice the Mobile Cashier Window is RED.
  o Like YELLOW mode, you cannot change registers, close batches or perform No Sale Transactions.
  o You cannot create new Customers, or use the Item Manager

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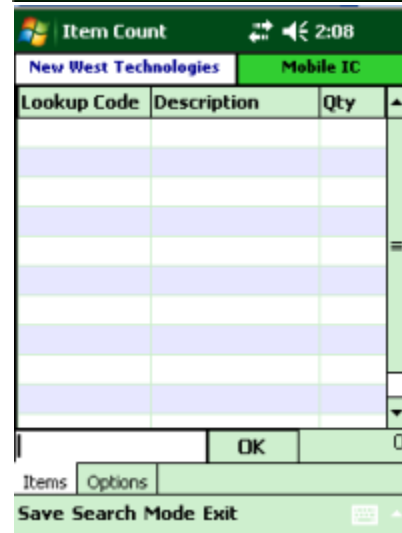Fax: 503-235-4416

INVENTORY COUNT – ONLINE

- **Choose Inventory Count from the drop down list**

  o You have two options, create a new count, or recall an existing count.

  o Create New Inventory Count
    ▪ Items Tab
      - This is where you scan items
      - The LookupCode, Description and Quantity amounts are displayed
      - The application will combine lines of the same items and increase the quantity instead of having multiple lines of the same items
      - You can Tap and Hold on an entry to Edit or Delete it

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- Options
    - Add to on-hand quantity
        - This sets the option to add the amount counted to the already existing on hand quantity
        - This option is mutually exclusive to **Leave Count open**; If this is checked, you cannot check Leave Count Open

    - Leave Count Open
        - This leaves the count open so that you may recall the inventory count in RMS Manager and process it.
        - This option is mutually exclusive to **Add to on-hand quantity**; If this is checked, you cannot check Add to on-hand quantity
    - Quick Scan mode Quantity
        - You can set the Quick Scan option to automatically enter a quantity of 1, or the Multiple Package Quantity (MPQ) set in the item properties, Supplier information.

- Search will open the Item Search screen, see Sales Module from above for more information.
- Mode
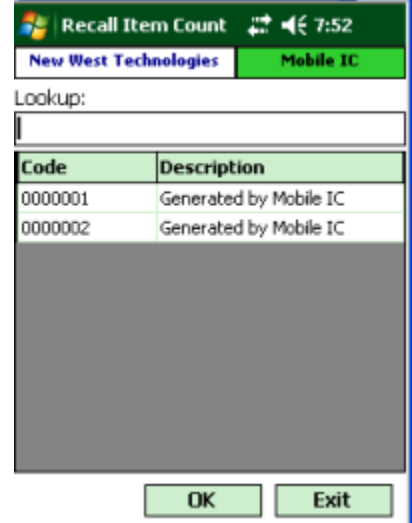   - Will allow you to enable or disable QuickScan
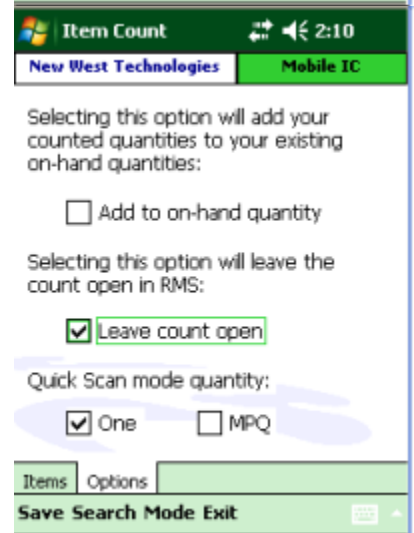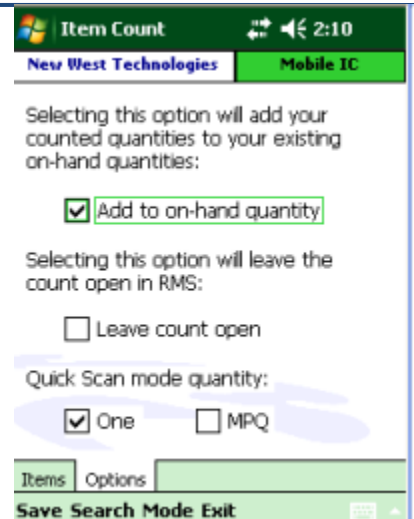
- Cumulative item count
  - In the lower right hand corner, next to the OK button, the cumulative number of items in the count can be viewed.
- Save
  - Allows you to save and exit the inventory count.
- Exit
  - Allows you to exit the inventory count without saving.
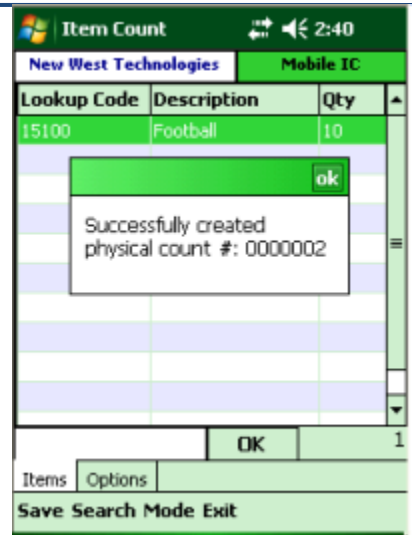
o Recall Existing Count
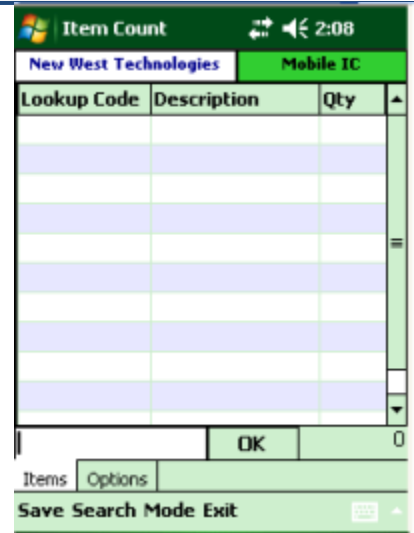 - Allows you to open a previously created or saved inventory count.
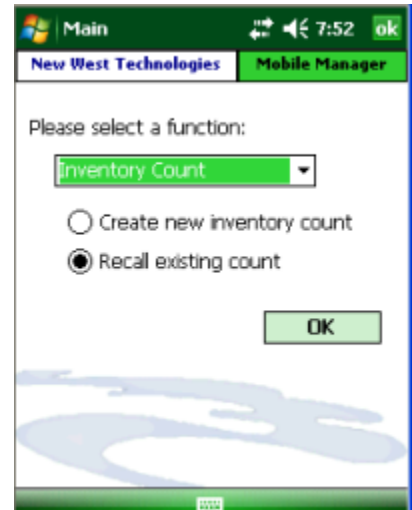
- You can search for the count number/code or if it is already visible, tap the required count and tap ok to load it.

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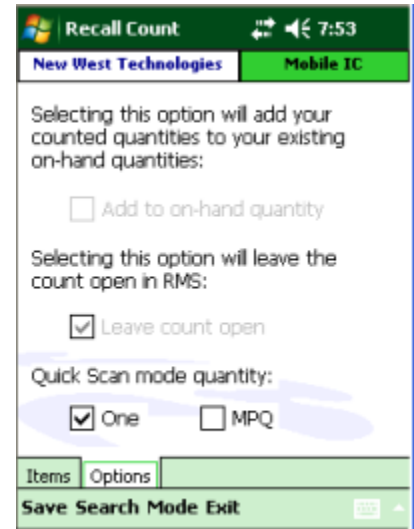Fax: 503-235-4416

- Item(s) entered previously are not accessible when recalling an inventory count.

- Options Tab
  - Notice you cannot change the Add to on-hand quantity or Leave count open options. Whichever option was set when the count was created will stay selected.

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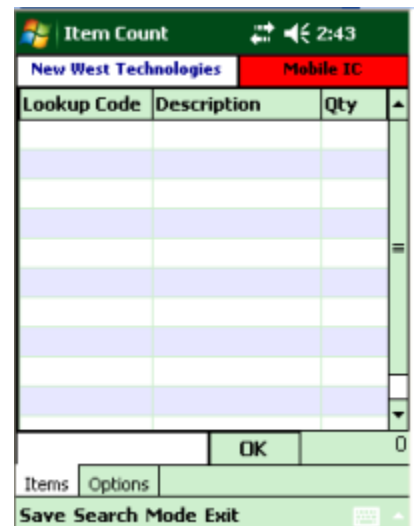Fax: 503-235-4416

INVENTORY COUNT – OFFLINE

- **You can only create new inventory counts in offline mode**
    - o Offline mode is indicated by the RED window around Mobile Manager

    Note: Before using the inventory count module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Inventory Count Module. It is recommended to keep item counts under 1000 items as your windows mobile device may run short of memory. Save your current count and reboot your windows mobile device by performing a soft reset before each use
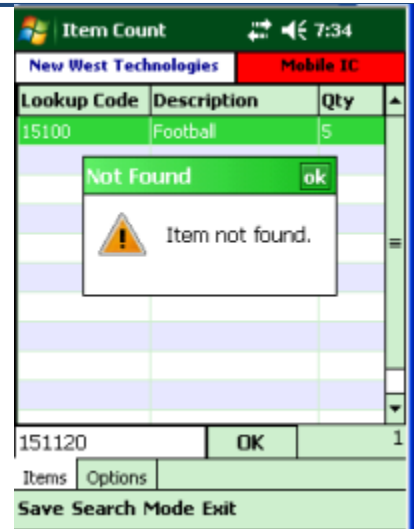
- **You can add items, just like in online mode.**
    - o The RED window around Mobile IC reminds you that you are in offline mode.
    - o Search works the same as online mode
    - o Mode allows you to toggle QuickScan on or off

- **The options tab is limited in offline mode.**
    - o It defaults to leaving the count closed
    - o You cannot change this setting in offline mode
    - o **If you chose SYNC in the settings menu, a CLOSED inventory count will be added to RMS after an offline inventory count has been completed. This is not editable.**
        - *NOTE: It is recommended to use CSV files for offline inventory count. See Login screen section for help setting this option.*

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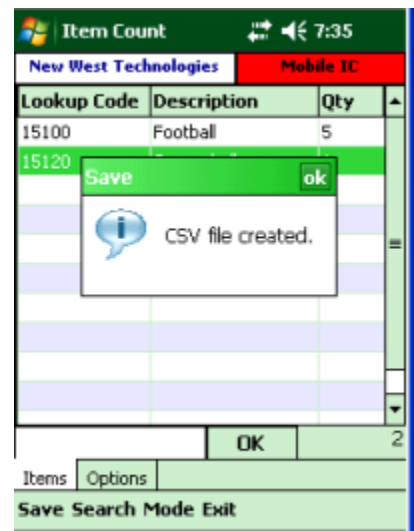Fax: 503-235-4416

- **You cannot create new items in offline mode. Item Manager is unavailable.**

- **If CSV is set in the Settings menu, from the login screen, when you save the count a CSV file will be created**.

  NOTE: it is recommended to perform offline inventory counts as CSV files, not synced.

  Note: Please see CSV File section for information on how to retrieve the CSV file

- **If Sync is set in the Settings menu, from the login screen, when you save the count it will add it to the offline batch.**

  NOTE: This method creates a CLOSED inventory count which will appear in RMS after you go online and sync the program.

- **This inventory count is NOT editable.**
- **It will over write the previous item quantity with what is in the offline count.**

  NOTE: it is recommended to perform offline inventory counts as CSV files, not synced.
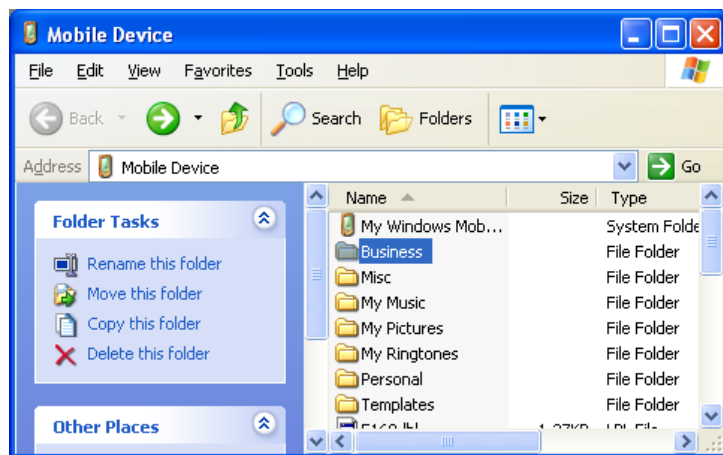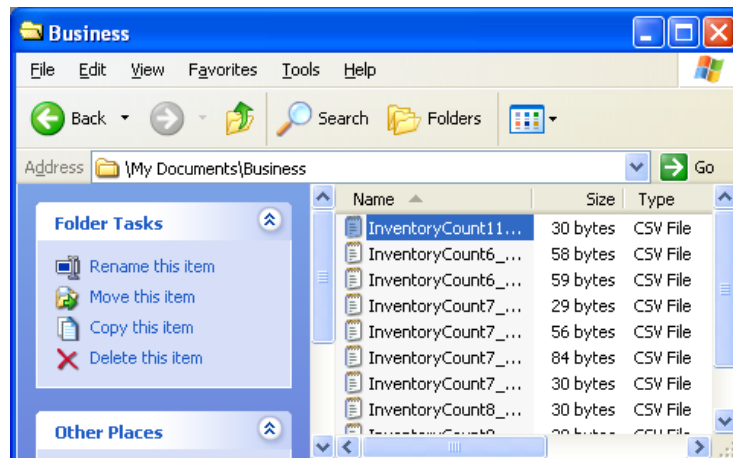
CSV FILE RETRIEVAL

Windows XP

- **Connect the device to a PC with a cradle or USB connection (Depending on the device).**
- **Open Microsoft Active Sync**
- **Verify Active Sync shows the device as connection**
- **Click Explore**
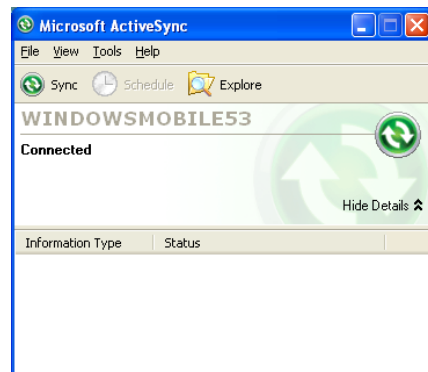
- **Double Click the Business Folder**

- **Drag and drop the desired Inventory Count file onto the Desktop**
- **You can now import the file into RMS Store Manager**

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Windows Vista/7

- **Connect the device to the PC with a cradle or USB cable (Depending on the device).**
- **Open Microsoft Mobile Device Center**
- **Verify the Device is showing as Connected**
- **Mouse over File Management**
- **Click Browse the contents of your device**

- **Double click the "\" or Root drive of your device**
  NOTE: Drive name may differ depending on device

- **Double click My Documents**

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- **Double click Business**

- **Drag and drop the desired Inventory Count file onto the desktop**
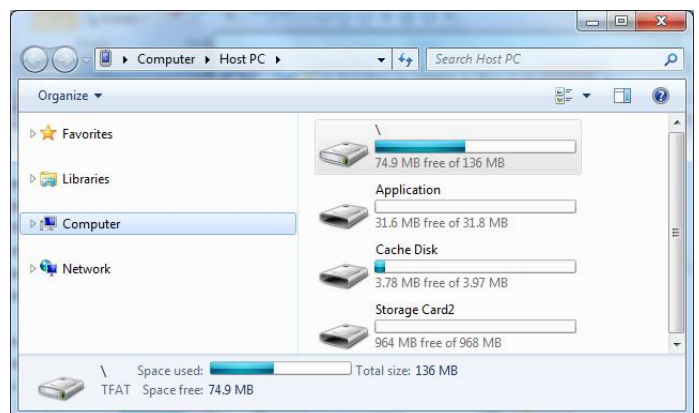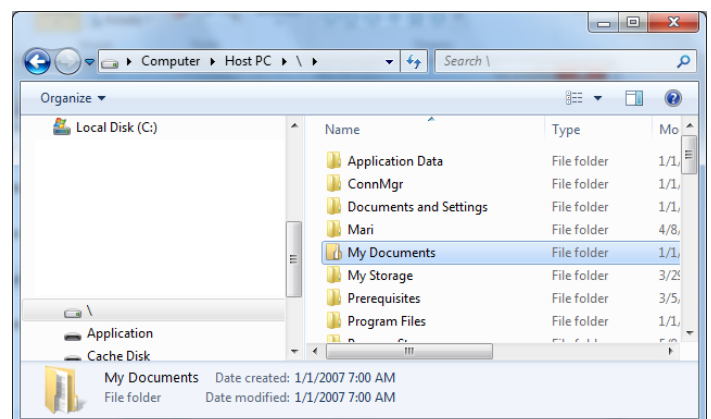- **You can now import the file into RMS Store Manager**

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PURCHASE ORDER – ONLINE

- **Choose Purchase Order from the drop down menu**

    o Create A New Purchase Order

        ▪ Items
            - This is where you scan items
            - The LookupCode, Description and Quantity amounts are displayed
            - The application will combine lines of the same items and increase the quantity instead of having multiple lines of the same items
            - You can Tap and Hold on an entry to Edit or Delete it

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- Options
  - Place Purchase Order
    - o This marks the Purchase Order as Placed
  - Receive All
    - o This option will add the quantities to the on hand quantities, mark the Purchase Order complete and close the Purchase Order
    - o If this option is checked, the Landed Cost Tab will be visible
  - QuickScan Mode Quantity
    - o You can set the Quick Scan option to automatically enter a quantity of 1, or the Multiple Package Quantity (MPQ) set in the item properties, Supplier information.
  - Use One Supplier
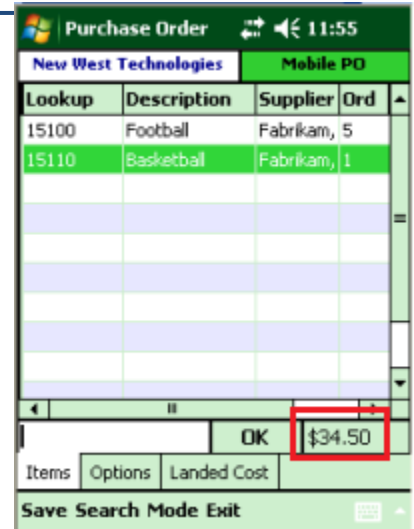   - o Allows you to set One Supplier for this Purchase Order

      NOTE: This option must be selected prior to adding items to the Purchase Order

  - Landed Cost
    - o Use landed cost when receiving
      - ▪ Allows use of the Landed Cost option in RMS
    - o Cost distribution method
      - ▪ Allows you to choose which method of distributing the landed cost: Quantity, Value, Manual
    - o Other Cost
      - ▪ Allows you to enter an Other Cost amount
    - o Shipping Cost
      - ▪ Allows you to enter a Shipping Cost amount

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- ▪ Cumulative Cost Total
  - In the lower right hand corner, next to the OK button, the cumulative cost can be viewed.
- ▪ Search
  - Open the Item Search
- ▪ Mode
  - Allows you to toggle QuickScan mode on or off
- ▪ Save
  - Allows you to save and exit the Purchase Order
- ▪ Exit
  - Allows you to exit without saving
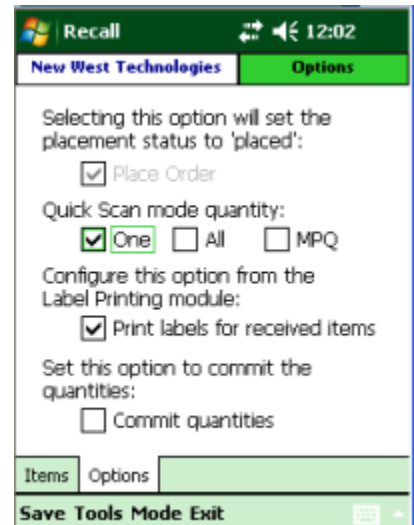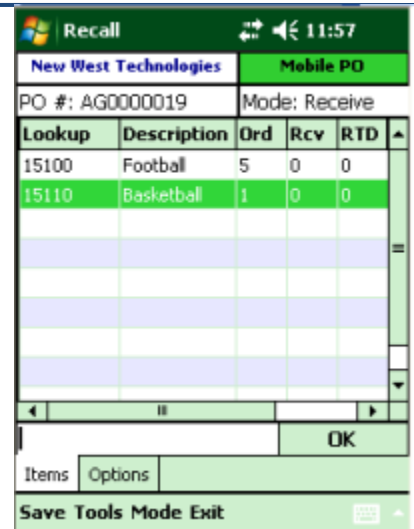
○ Recall A Purchse Order

- ▪ Choose or search for a PO Number

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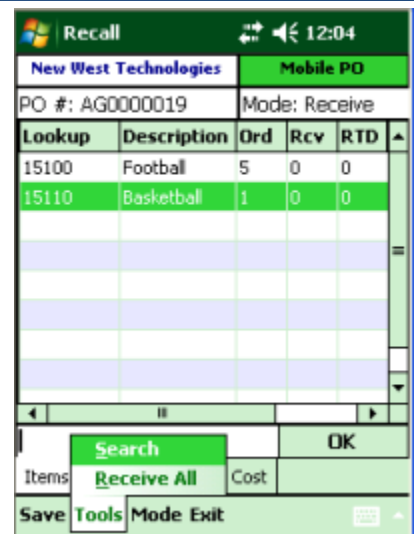Sales@newestech.com
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- Items
  - This items tab is set to Receive Mode on default. This means you cannot add items to the PO unless you change modes, but if you scan an item it will add it to the Rcv (Receive) quantity.
  - You can also Tap and HOLD to edit the item information.

- Options
  - Place Order
    - This Option is unable in Receive Mode
  - QuickScan Mode Quantity
    - You can set the Quick Scan option to automatically enter a quantity of 1, the Multiple Package Quantity (MPQ) set in the item properties, Supplier information, or ALL which sets the received quantity to the ordered quantity in the PO.
  - Print labels for received items
    - If the Labels have been configured previously and a printer is paired you can print out a label for each item quantity received.
  - Commit quantities
    - This will commit the quantities to the inventory when the PO is closed.
    - With Commit quantites checked, the Landed Cost tab becomes available
- Landed Cost
  - Works the same as in create a PO above.

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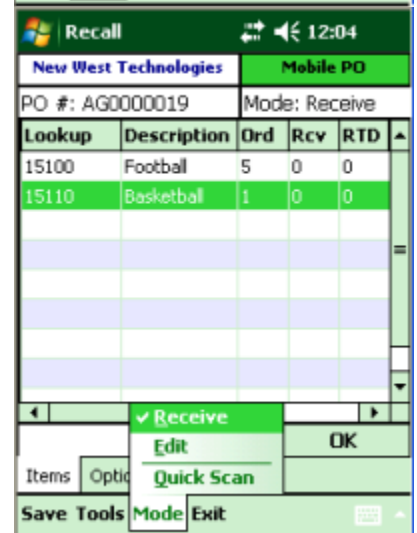Fax: 503-235-4416

- Tools
  - Search
    - Opens Item Search
  - Receive All
    - Sets the Received Quantity equal to the Ordered Quantity for each item in the PO

- Mode
  - Receive
    - Sets the PO to Receive mode
    - In receive mode, you cannot add new items to the PO.
  - Edit
    - Sets the PO to Edit mode, so more items may be added to the PO or previous items maybe edited or deleted
  - QuickScan
    - Enabled or disabled Quick Scan
- Save
  - Allows you to save, close or leave the PO open, and exit the PO
- Exit
  - Allows you to exit without saving or closing the PO

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PURCHASE ORDER – OFFLINE

- **There are only a few differences between online and offline mode for purchase orders.**
    - o Create New Purchase Order
        - You cannot access Item Manager, so you can only add items to the Purchase Order that already exist.
    - o Recall Purchase Order
        - You cannot print labels for items as they are received, you may goto Label Manager and print labels.
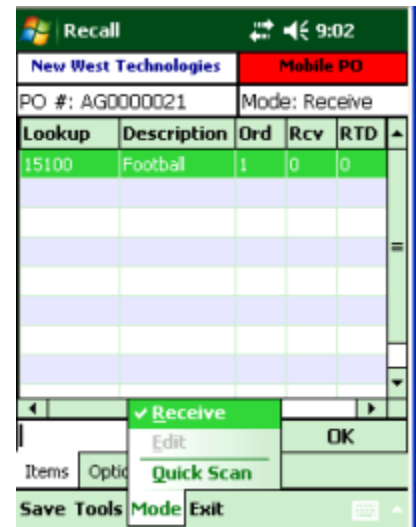
- You cannot switch to EDIT mode, you can only receive the purchase order in offline mode.

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ITEM MANAGER

Allows creation and modification of items

The Item manager starts with the Item search screen as described in the Sales section
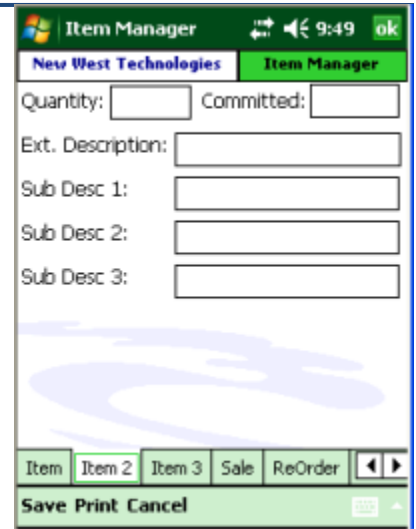
Note: For detailed information on these options, please reference your RMS manual.

- **Add**
  - Item
    - Price
    - Cost
    - Item Code (Item Lookup Code)
    - Description
    - Department
    - Category

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- o Item 2
    - Quantity
    - Committed
    - Extended Description
    - Sub Description 1
    - Sub Description 2
    - Sub Description 3

- o Item 3
    - Alias
        - New
            - o Allows the creation of new aliases
        - Drop Down
            - o Allows you to see all the aliases for an item
    - Supplier
    - BarCode
    - Bin Location
    - Unit of Measure

- o Sale
    - Allows you to put the item on sale, with sale price, start and end dates

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- o ReOrder
  - Allows you to set the reorder point and restock level

- o Pricing
  - Allows you to set different price levels and taxable options

- o Options
  - Allows you to set the different options

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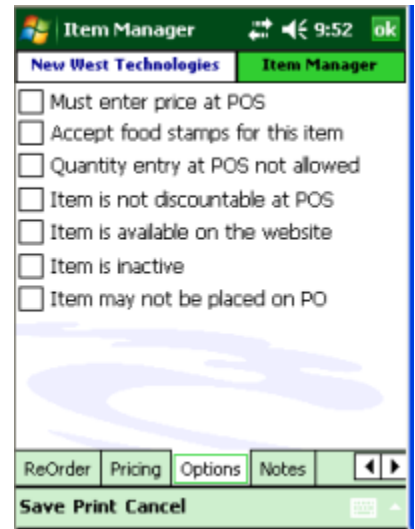
o Notes
  • Allows you to enter notes for the item

▪ Modify
  o Allows you to change the item details for existing items
  o Search for an item
  o Tap the item to highlight it
  o Tap Modify
  o The Item details window will show, like above. Pick the tab with the option you wish to change and make the change. Tap Save to save the changes

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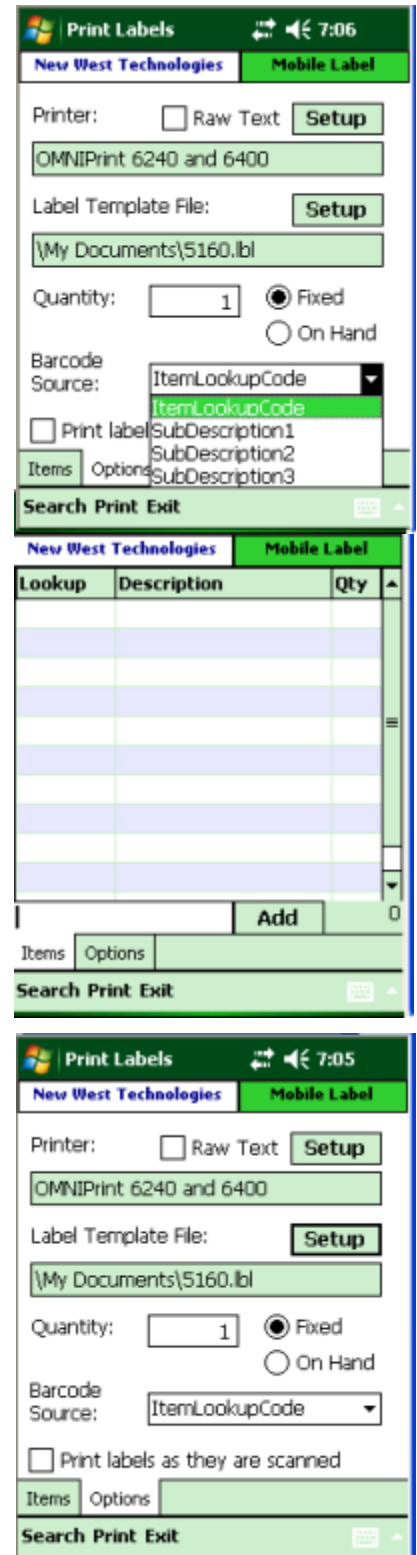
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LABEL PRINTING

This allows you to print labels from the mobile device.

NOTE: You must have a label file on the device to print labels from. You may use RMS Manager Label Designer to create a label file for use with this module. See your RMS Manual for more information.

The printer can be configured from the Label Printing module, see Sales module for more information on the steps to setup the printer, or Common Printer Pairing Section for more details about printer drivers and setup.

- **Items**
    - o Allows you to scan or enter items to print labels for
    - o Shows the Item Look Up Code, Description and Quantity On Hand

- **Options**
    - o Printer
        - Raw Text – Some printers require this
        - Setup – Allows you to enter the Printer setup and configuarion screen
    - o Label Template File
        - Setup – Allows you to choose the label file to print
    - o Quantity
        - Fixed
            - If you choose fixed you can enter a number into the text box next to it to print a set number of labels
        - On Hand
            - Will print out the number of labels equal to the on hand quantity for the items
    - o Barcode Source
        - Allows you to set the barcode source
    - o Print labels as they are scanned
        - If enabled as you scan items into the Items tab labels will start to print
- Search
    - o Allows you to search for an item to print labels for
- Print
    - o If Print labels as they are scanned is NOT checked, tap this to print out the labels after youhave entered the desired Items
- Exit
    - o Exits Label Manager

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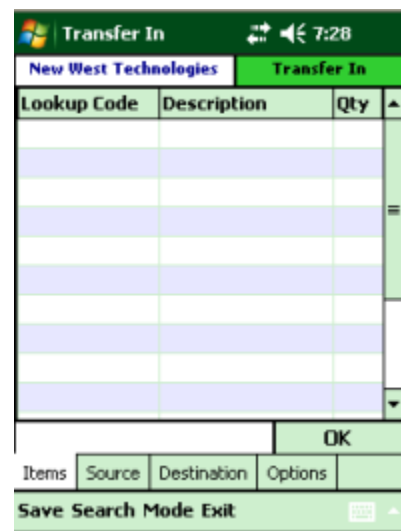Fax: 503-235-4416

TRANSFERS - ONLINE

Allows you to transfer inventory from one store to another

- **Create a new transfer in/out**

  - Items
    - Similar to Purchase Order Items tab

o   Source
  ▪ Allows you to choose the Source for the transfer
        NOTE: If a Transfer OUT – source will automatically fill with the store information

  ▪ Select Store button allow you to search and select a store

  ▪ Clear Store button clears the source location from the fields

o   Destination
  ▪ Allows you to choose the Destination for the transfer
        NOTE: If a Transfer IN – source will automatically fill with the store information

  ▪ Select Store Button allows you to search and select a store
  ▪ Clear Store Button allows you to clear the store information from the fields
  ▪ Select Supplier allows you to search and select a supplier
  ▪ Clear Supplier allows you to clear the supplier from the transfer

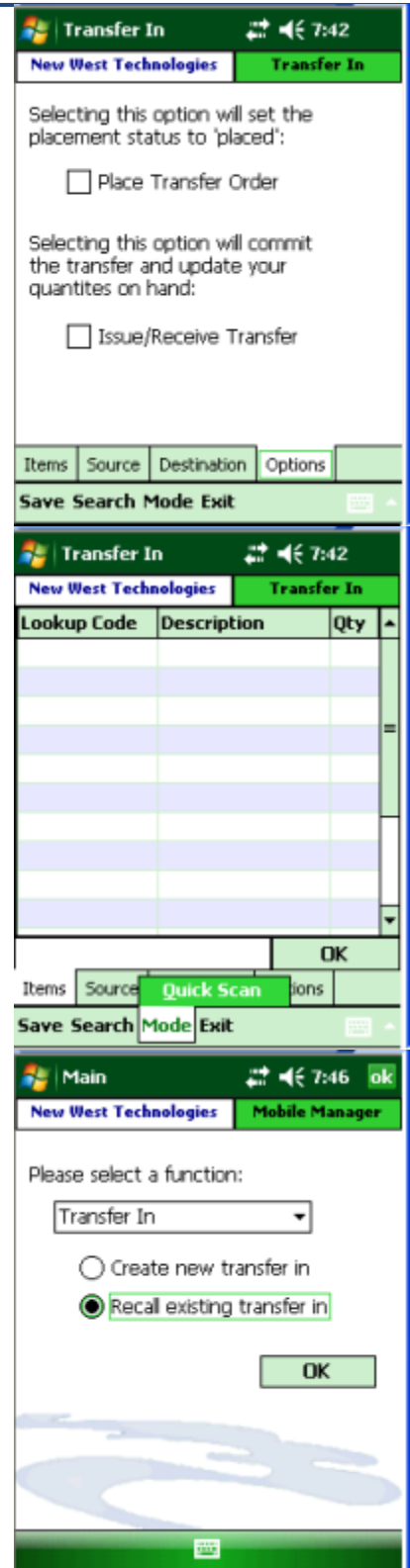**Mobility Solutions**
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- o Options
  - ▪ Place Transfer Order
    - • Marks the transfer as placed
  - ▪ Issue/Receive Tansfer
    - • Commits quantities and allows transfer to be closed after saving

- o Search
  - ▪ Allows you to search for items
- o Mode
  - ▪ Enable to Disable Quick Scan
- o Save
  - ▪ Saves the transfer and exits
- o Exit
  - ▪ Exits the transfer without saving

- ▪ **Recall existing transfer in/out**
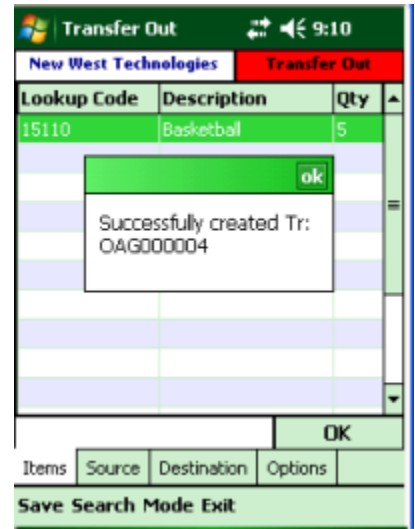 - o Works just like recalling a Purchase Order – Online, refer to the Purchase Order section of the manual for more information

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TRANSFERS – OFFLINE

Transfers work the same in offline mode as they do in online mode.

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WORK ORDER & QUOTE

Allows you to create and recall work orders, online only.
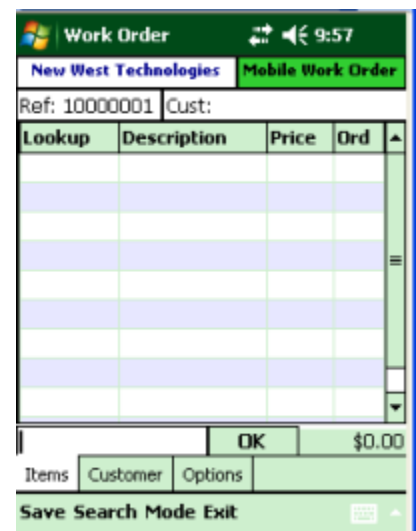
Quotes work the same as work orders, but in RMS Store Operations you can convert a Quote into a Work Order, you cannot convert a Quote into a Work Order in Mobile Manager.

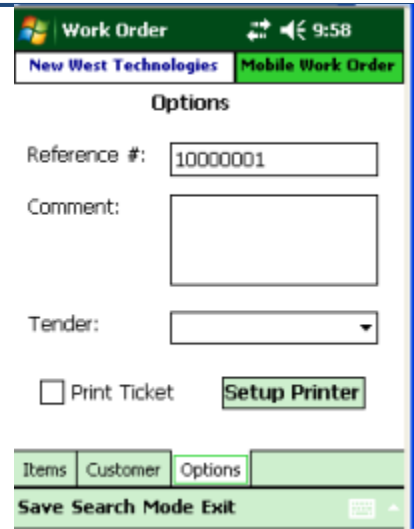*NOTE: You cannot tender or accept a deposit, only add items and customers.*

- **Create new work order**

  - o Items
    - Add items to the work order – Item Look Up Code, Description, Price and Ordered Quantity show
  - o Customer
    - Search and add/create customers – see Sales module for more details

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- o Options
    - ▪ Reference #
        - • A field to place a reference or invoice number
    - ▪ Comment
        - • Add comments to the work order
    - ▪ Tender
        - • Preferred tender type
            - *NOTE: This does not tender the WORK ORDER, or accept a deposit.*
    - ▪ Print Ticket
        - • Allows a tickets to be printed with a bar code for easier recalling in RMS Store Opertations
    - ▪ Setup Printer
        - • Opens the printer setup and configuration screen. See Printer Setup section of the manual for more information
- o Search
    - ▪ Search for items
- o Mode
    - ▪ Enable or Disable Quick Scan
- o Save
    - ▪ Save the Work Order and Exit
- o Exit
    - ▪ Exit without saving

- ▪ **Recall work order**
    - o Edit, add, delete items or customers from Work Order
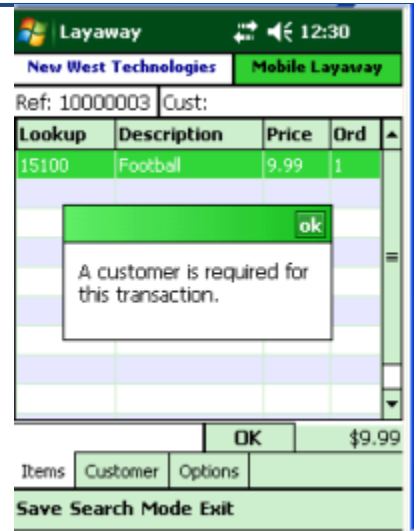
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LAYAWAY

Layaway works the same as Work Order and Quotes, except it requires a customer to be assigned before saving.

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SYNC

Allows you to sync items into the offline database for offline use; and to add offline transactions, purchase orders, transfers and inventory counts into the live database.

NOTE: Syncing Mobile Manager is different than syncing the device with Microsoft Active Sync or Mobile Device Center.

- **From the login screen, tap Sync and Begin Sync.**
  - o If you only did offline sales, you can choose Sales Only to sync.
  - o The Sync Settings should have been previously setup.

- **A box will pop up showing the Uploading progress.**

- **If you have offline sales, you will see each sale processed and synced into the live database.**
  - o Any Red Mode offline credit card transactions will be authorized at this point. In the example to the right you can see one transaction being authorized and one previous transaction that has already been authorized.

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- **After processing the sales transaction, a message will pop up letting you know how many transactions were synced successfully, and how many failed, or could not connect.**
- **You can also choose to view the log at this point.**
  - o If you wish to view the log later, you can use the log button on the login screen.
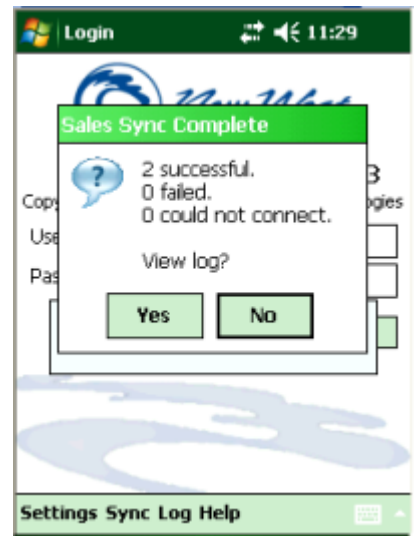
- **After the sales have processed, all other modules will start processing.**
  - o The message box will update to show which items are syncing to the database.

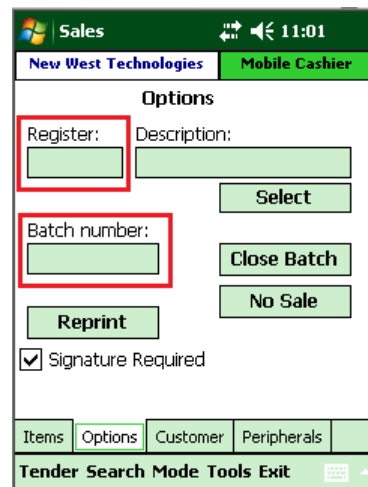- **When the sync has finished, a message will appear letting you know how long it took.**
  - *NOTE: If you have a large database it may take hours to sync all the items.*

GOING OFFLINE FOR THE FIRST TIME

Verify the register and batch has been set in the Sales Module in Online mode before you go offline for the first time.

- **Login to Mobile Suite**
- **Choose Sales**
- **Click the Options Tab**
- **Verify the Register and Black number are not blank.**
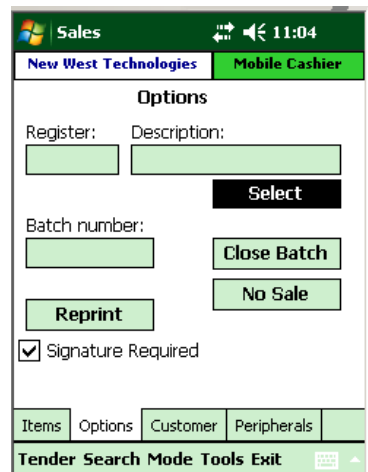
If the Register and batch number are blank follow these steps to select the register and batch number:

- **Login to Mobile Suite**
- **Choose Sales from the Main Menu**
- **Tap the Options Tab**
- **Tap the Select Button**

- **Select a Register**
- **Tap OK**

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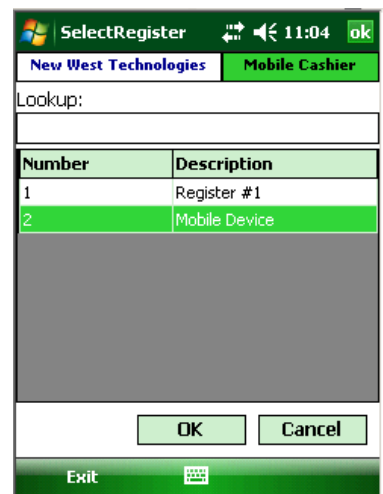
- **The Options screen should show a Register and Batch Number now.**
- **Sync the database**
  - o **Tap Exit**
  - o **Tap Ok**
  - o **Tap Sync>Begin Sync**
- **Once the Sync has completed you can remove the device from the cradle, or turn off the wifi connection to go into Offline mode.**

It is recommended to setup the printer and card reader in online mode before going offline. Please see the section (COMMON PRINTER PAIRING AND SETUP) for pairing and setup instructions.

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COMMON PRINTER PAIRING AND SETUP

An example of Bluetooth pairing of a mobile hand held device and MSR/Printer combination. Your devices may difference slightly from the screen shots, but you should be able to follow this guide and pair a device and set it up in Mobile Suite for use.

- ▪ **Verify Bluetooth is enabled**
    - o Tap the Start Menu Icon
    - o Tap Settings
    - o Tap Connections Tab
    - o Tap Bluetooth

    - o Verify Turn on Bluetooth is Checked

    - o Tap Devices Tab
    - o Tap Add new Device
        - ▪ The hand held deivce will search for available devices, make sure the MSR/Printer is turned on and in discovery mode if applicable.

o Tap the name of the deivce it found, in this case WOOSIM
o Tap Next

o Enter the passcode for the device. In this case the passcode is 1234.
o Tap Next

o Tap the Serial Port check box if it is not checked.
  ▪ This allows two way communication from the hand held to the MSR/Printer
o Tap Finish

o The device is now listed in the Devices Tab
o Tap the COM Ports tab

o Tap New Outgoing Port

o Tap the device name
o Tap Next

o   Choose an available COM port from the drop down list.

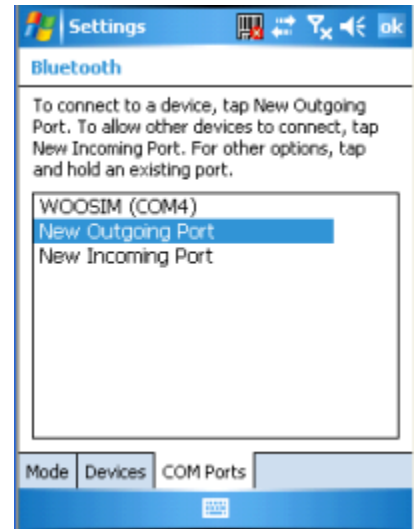*NOTE: Secure connection may or may not need to be checked. It depends on the device.*

o   Tap Finish

o   Now the Woosim has a com port in the COM Ports tab.
o   The device can now be setup in Mobile Suite – See the Sales section for more information.
o   The printer driver for the WOOSIM is OMNIPrint 6240/6400

- **You can follow the above steps for the Zebra EM220 as well.**
  o   Use passocde 0000.
  o   Use printer driver Seiko DPU-5445, DPU-3445

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CLOSE BATCH

Blind-close the batch and open a new batch by selecting the Close Batch button from the Options tab in the Sales module.

Note: Please refer to RMS documentation for more information on Blind Close.

PRINT (X) REPORT

Perform X or Z Reports from Store Operations Manager:

1. Select **Journal** from the menu bar
2. Select **Update Batch Info** from the drop down list
3. You can select your desired filter criteria or simply press **OK** to continue with default
4. Note the status of your Mobile Register (number ##?)
5. If *Open,* you will need close the batch before you can process any reports against the batch in question (Refer to close batch above)
6. Double Click the batch number in question
7. Choose from any one of the selections

Note: You will need to have an active connection to your online database when completing the above steps.
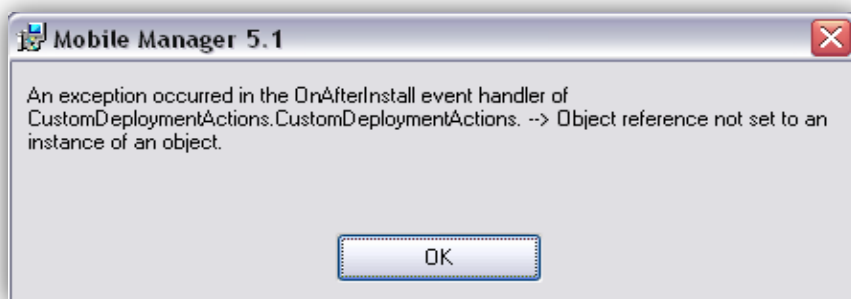
TROUBLE SHOOTING

Installation Error

The error messages below indicate the machine which you are installing on does not meet system requirements.
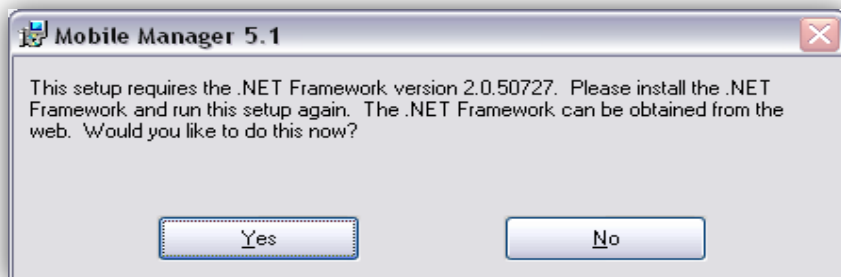
↑ Commonly seen when .NET Framework 2.0 is not installed. Please reference Microsoft .NET Framework 2.0 during installation.

↑ Commonly seen when Device Sychronization application is not installed. Please reference Device Synchronization during installation.

↑ Commonly seen when Microsoft RMS is not installed. Please reference software requirements.

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License Activation Error	
Cannot Activate License	You will need to verify your Mobile Device has a successful connection to the Internet. This can be done using Internet Explorer found in the Start menu of your mobile device. We recommend searching for google.com and using the Google search engine to search for something you would <u>not</u> have typically accessed from the mobile device. This is due to the fact that the visited webpage can sometimes be cached on the mobile device, appearing as though you have accessed the web page when you have actually simply opened the cached directory from the mobile device. Adjusting the Network Settings is often required when setting up your wireless connection between the mobile device and the wireless router. We recommend setting the network settings to either My ISP or My Work Network. Select Start > Settings > Connection(tab) > Connection(icon) > Advanced(tab) > Select Networks When using My Work Network settings, you may need to verify and set your internet proxy settings in accordance with your wireless set-up. Select **Edit** and **Proxy Settings** from the mobile wireless network settings screen.

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Database Connection Error

Cannot Connect to online database. "Connection failed. Please verify your network connectivity and that port 1433 is not blocked by any firewalls.SqlEception".	Please complete the following while the mobile device is synchronized through the device synchronization application. *Note: Test the database connection from your windows mobile device after completing each step listed below to determine cause of connection error.* 1. Verify SQL server is running on port 1433. • If running on 1433 continue to step 2 • Else from the server field of Mobile Manager, add the port used to the server name (example: 192.168.1.1:1327) 2. Verify Database configuration settings • Verify Server Name is not set to (local) • Verify Server IP address has not changed (If using server IP address for server name) • Verify there are not 2 PC's with same name (If using PC name for server name) • Verify Database Password is correct (Case sensitive) 3. Confirm **Microsoft SQL Client 2.0** is installed on the PDA: (Start > Settings > System(tab) > Remove Programs) • If Microsoft SQL Client 2.0 is missing, please confirm you have installed the Microsoft .NET Compact Framework v2.0 SP2. Next rerun the Mobile Manager Installer. (please refer to *Requirements*) 4. Test Firewall • From server or PC hosting the database • Select **Start** • Select **Run** • Type **cmd** and press **enter** • Type Telnet 127.0.0.1 [SQL port] (example: Telnet 127.0.0.1 1327) Correct punctuation is critical.

	If connection fails, you will be prompted with an error message. This indicates connection to the database is blocked by firewall or SQL server is not configured to port 1433. *Note: You will need to setup an SQL exception for port 1433(or the SQL port number determined in step 1) in the firewall on the server or PC hosting the database.*
Cannot Connect to offline Database	Verify the Mobile offline database **msoffline.sdf** was installed to the default directory *\Program Files\New West Technologies\Mobile Manager 5.4* on your windows mobile device. If you chose to install the offline database to a directory other then the default directory, then you will need to search for the offline database on the windows mobile device and reconfigure the offline database location (Please reference Mobile Manager > Settings > Offline Configuration). *Note: If offline database cannot be found, please reinstall Mobile Manager to recreate offline database.*

Login Error

Invalid Login	Please reference Mobile Manager Login

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