



Mobile Retail Platform

Mobile Suite Pro v5.4.8

Manual



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WELCOME

Thank you for purchasing New West Technologies Mobile Manager v5.4. 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.

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
- A windows mobile device cradle or USB sync-cable for the windows mobile 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 (32bit) Operating system
- Microsoft Retail Management System (RMS) Store Operations
- Microsoft SQL Server 2005 or 2008 (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 celular 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.

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. ([Click here](#)) to download/install device synchronization application which best fits your windows operating system.

MICROSOFT .NET FRAMEWORK 2.0

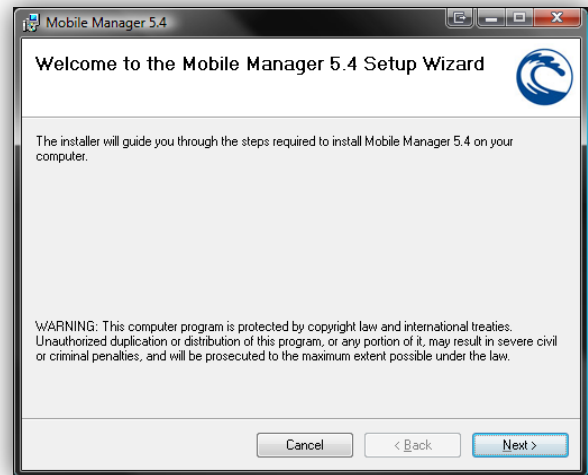
Mobile Manager includes a mobile cashier manager application which requires installation of the Microsoft .NET framework 2.0. ([Click here](#)) to download/install Microsoft .NET framework 2.0.

MOBILE MANAGER

Step #-1

You will first need to initialize the installation process by running the Mobile Manager v5.4.msi installation file.

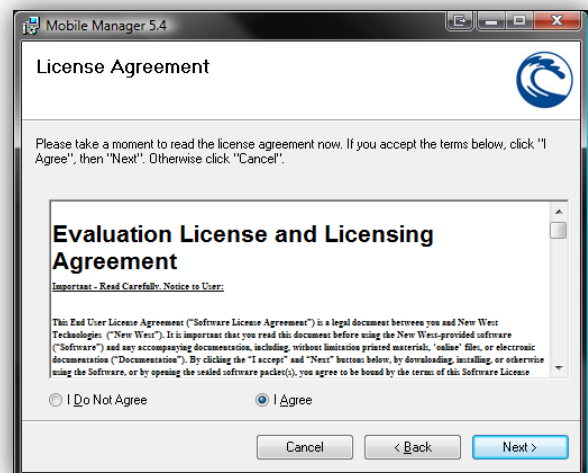
Select **Next** to continue installation.



Step #-2

Please review and accept our [licensing agreement](#) before installing.

Select **Next** to continue installation.

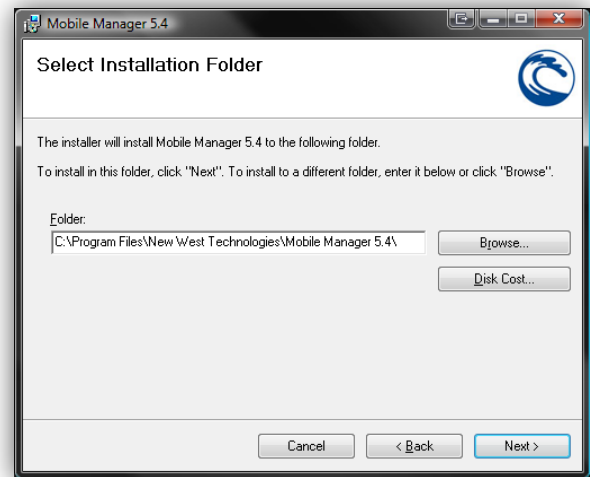


Step #-3

Here we have provided the option to designate where you would like to install the application files.

Select **Next** to continue installation.

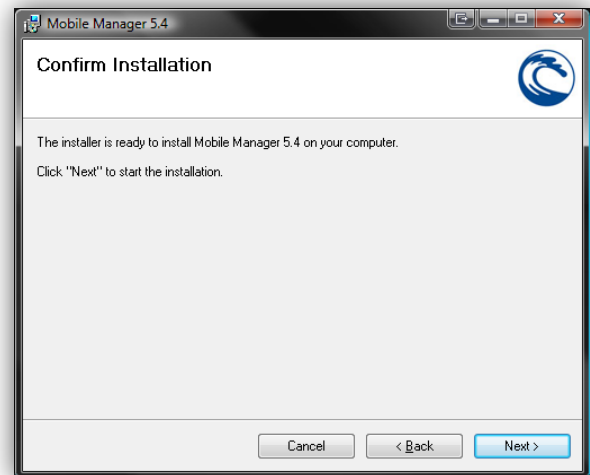
Note: The installer will also install the mobile cashier manager application. We recommend running the installer on your back office PC (if available).



Step #-4

We are now ready to install Mobile Manager to your windows mobile device.

Select **Next** to continue installation.



Step #-5

In this step you will establish a connection to your database.

Server – Name or IP address of PC hosting your database.

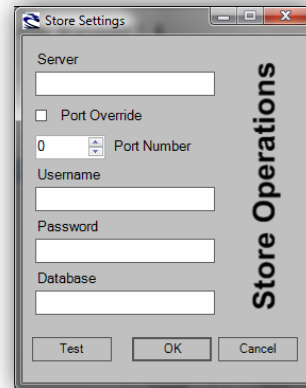
Port Override – Only required if SQL server has been configured to a port other than default port 1433.

Port Number – Required only if port override is selected.

Username – The Database login ID

Password – The Database login password

Database – The Database name



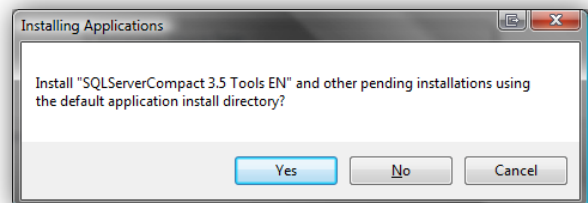
Note: Enter all required information and **Test** connection before saving settings. When complete select **OK**.

Step #-6

This step allows you to install to the default directory or select the directory you wish to install Mobile Manager to your windows mobile device.

Select **Yes** to install to the default directory.

Select **No** to install to the directory of your choice.



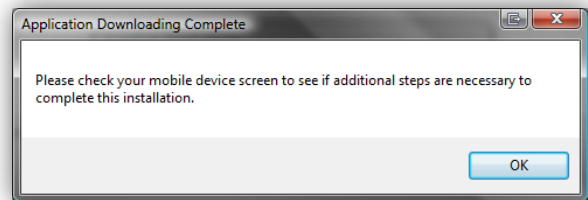
Note: Installing to a directory other than the default directory may impact performance of Mobile Manager. This is not recommended.

Step #-7

A message will appear reminding you to verify device has completed installation.

Select **OK** to continue installation.

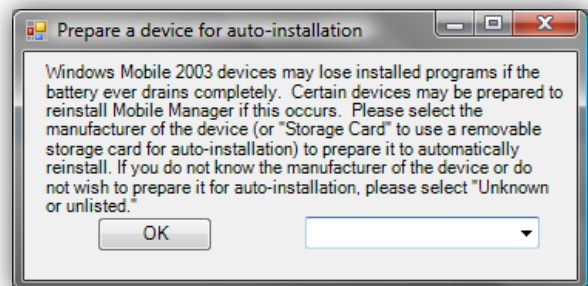
Note: When repairing installers you may be prompted to complete additional steps from the windows mobile device.



Step #-8

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.

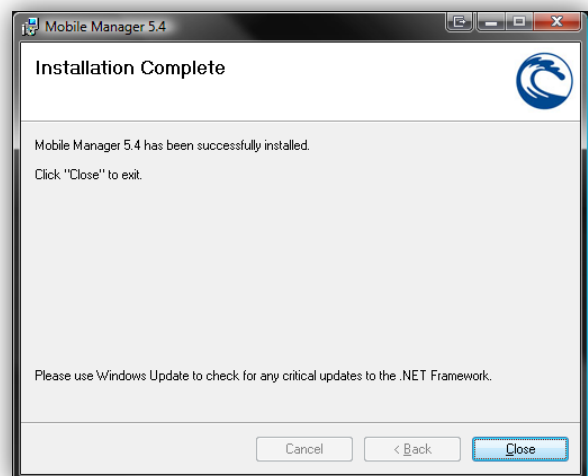
Note: This feature is only available for windows mobile 2003 devices listed in the dropdown field.



Step #-9

Installation of Mobile Manager is complete.

Select **Close** to exit installation.



MOBILE LICENSE

Mobile Manager is licensed per windows mobile device. Your unlock key will determine which modules may be accessed from your windows mobile device.

TRIAL LICENSE

Mobile Manager offers the ability to test this application with a built in 7 day trial license. The trial license will allow you limited access to all modules.

Trial License Limitations

- Valid for 7 days
- Process up to 5 items
- Item Manager Module is not included

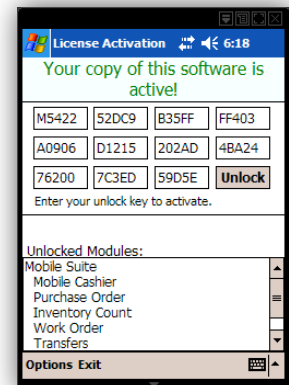
ACTIVATE

From the Mobile Manager login screen, select **Help > Activate** > enter your license key.

Select **Unlock** to active Mobile Manager.

The software will auto enter the unlock key when saving the unlock key to a text file named **ucode.txt** and placing it in the root directory of the mobile device (ActiveSync > Explorer > My Windows Mobile Based 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 Appendix I (Menu/Feature Options) or contact New West Technologies 1-800-466-7839.



VALIDATION

Please reference Options in Appendix I (Menu/Feature Options).

APPLICATIONS INCLUDED

MOBILE 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.

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.



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 not 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.



Module	Policy	Allow
Sales	Change Price	<input type="checkbox"/>
*		<input type="checkbox"/>

Password:

OK Cancel

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MOBILE MANAGER

Outlined below are the available modules included in this application.

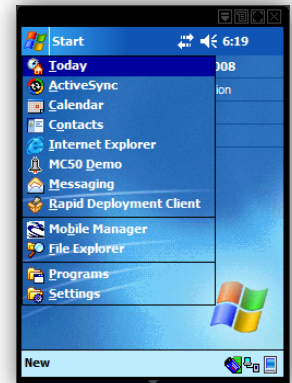
Modules	Online	Offline
Sales	✓	✓
Inventory Count	✓	✓
Purchase Orders	✓	✓
Item Manager	✓	
Label Printing	✓	
Transfer In	✓	✓
Transfer Out	✓	✓
Work Order	✓	
Layaway	✓	
Quote	✓	

Start Mobile Manager

From your windows mobile device you can run this application from the following directory:

- Start
- Programs
- Mobile Manager

After first initialization, your windows mobile device will then place a shortcut in your start menu directory.



Login

Note: Mobile Manager must be configured before use. Please refer to [Settings](#) for information to properly configure Mobile Manager.

Note: Your Mobile Password is not enabled by default. You can assign a password to your User ID using mobile cashier manager.

Enter your Microsoft RMS cashier **User ID**. This is the same User ID used when logging into Store Operations POS. Use the **Password** that was assigned to your User ID in mobile cashier manager.

Note: The user ID and Password are Case-Sensitive. If connection is unsuccessful, please reference Appendix IIII (Troubleshooting Guide).



Settings

Online Configuration

Mobile Suite Pro. requires a successful connection to your database. Please complete the configuration outlined in this section.

Note: Cashiers can easily determine if Mobile Manager is running in "online mode" when the field located in the top right corner is displayed in Green.

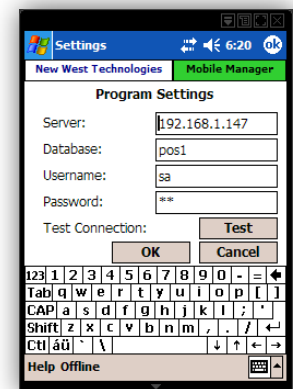
Configure Database Settings

From the login screen select **Settings** which will take you to the program settings screen. Test your database connection by selecting the **Test** button from the program settings screen.

When configuring Mobile Suite Pro. with new database settings, the software will exit completely. After configuring your new database settings, it is recommended to sync offline database to update the offline database with new configuration settings.

If you need assistance, online help is available by pressing the **Help** button in the lower left-hand corner of the screen.

Note: If your connection is unsuccessful, please reference Appendix IIII (Troubleshooting Guide).



Online Features

Please refer to each module to determine its available features included in Mobile Manager.

Offline Configuration

When operating in offline mode, Mobile Manager will be using a database that is hosted on the windows mobile device. By default, the offline database path will be set to \Program Files\New West Technologies\Mobile Manager v5.4\msoffline.sdf. We recommend storing this file on a secure digital (SD) storage card. Offline mode will not work if you have not completed configuration as described in this section.

Note: *It is necessary to sync your store database with the offline database installed on your Pocket PC. Please refer to Sync for information on how to synchronize your offline database.*

Cashiers can easily determine if Mobile Manager is running in “offline mode” when the field located in the top right corner is displayed in **Red**.

Configure Database Settings

From the login screen select **Settings** which will take you to program settings screen. From the program settings screen select **Offline** which will take you to offline settings screen. Test your database connection by selecting the **Test** button from the offline settings screen.

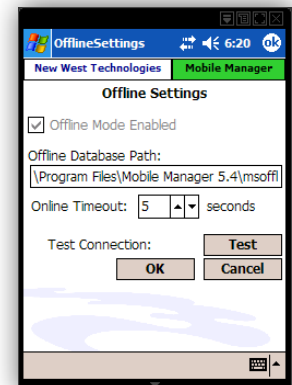
If you choose to store your offline database to another directory on your windows mobile device, you will need to update the path which Mobile Manager will search for this file.

You may also select the time allotted for Mobile Manager to search for database connection before switching to offline database.

Note: *If your connection is unsuccessful, please reference Appendix IIII (Troubleshooting Guide).*

Offline Features

Some modules may have limitations which cannot be performed in offline mode. While reviewing each module, note the * asterisk at the beginning of each feature. When asterisk is present, this indicated the feature is not available in offline mode.



Sync

Sales Only

Allows a cashier to synchronize offline sales.

Note: Credit Card transactions cannot be authorized until the connection to the RMS database and the internet is restored.



Begin Sync

Mobile Manager will be using a database that is hosted on the windows mobile device. When running Mobile Manager in offline mode you will need to synchronize the offline database with your RMS database. It is recommended to perform a full sync before and after each use.

Note: It is required to configure each module before syncing your offline database. Mobile Manager requires a successful connection to your live database and offline database before syncing.

Settings

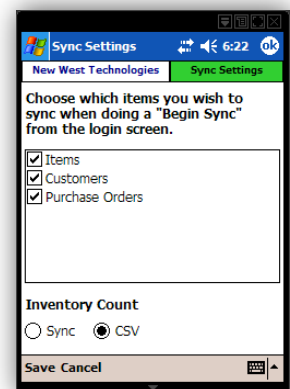
Allows cashier to select which features (Items, Customers and Purchase Orders) they would like to synchronize when performing a Begin Sync.

Cashiers also have the ability to configure offline Inventory Counts to save to Sync(offline database) or to a CSV file:

Sync – Each sync file created will create separate IC worksheets.

CSV – Is the recommended method as CSV's can be transferred from the mobile device and then imported and merged into one Inventory Count worksheet.

Note: Saving to a CSV file is required when using multiple devices with an offline inventory count.



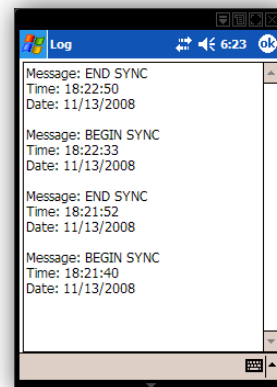
Log

View

Allows cashier to view log file of offline transactions.

Note: *If the log file is too large to open, It may be necessary to copy the log file to your PC.*

The log file **MobileSuiteSync.log** can be found in the `\Program Files\New West Technologies\Mobile Manager 5.4\Serialize\Sale` directory of your mobile device.



Delete

Allows cashier to delete log file of offline transactions.

Help

Product Info

Includes information on your Mobile Manager application.



Activate

Please reference Mobile License.

Modules

Sales

Mobile Sales allows cashiers to process customer cash, check and credit card transactions through your wireless handheld device. Including full mobile functionality for complete customer check-out experience from ringing up the sale, signature capture, and card authorization through receipt printing. Performing Credit Card transactions is as easy as scanning your items and swiping the credit card (available for supported symbol devices with attachable MSR). The perfect solution for queue acceleration or tent sales!

This version also allows cashiers to complete sales in offline mode with real time online card authorization. This feature requires a successful wireless connection. Cashiers can determine which mode is currently in use by the color indicator located on the top right side of the module screen.

Green	Indicates a successful connection to database and merchant account.
Yellow	Indicates a successful connection to merchant account providing real time credit card authorizations while saving all sale transactions to the offline database.
Red	Indicates no connection to database or merchant account while saving all sale transactions to the offline database. All card authorizations will be processed when performing a sales sync. Please reference Mobile Manager Login Sync.

Mobile Sales uses its own batch and register number. Batches may be viewed from Store Operations Manager where you can enter the opening/closing amounts and print reports (also viewable from all standard reporting systems). Mobile Sales should not share a register or batch with another register or Mobile Cashier unit. Mobile Sales will check for all open batches when entering the sales module for the current configured register. If for any reason, a duplicate batch gets created in the database cashier will be prompted with the select batch feature allowing user to manually close batches or simply select the batch you wish to use. Please reference Appendix I (Menu/Feature Options > Select Batch).

When performing a sale using a selected customer, cashier will first need to select the customer from the customer selection tab. By selecting this feature, the customer will receive all customer discounts configured within Store Operations Manager.

Returns may also be performed from your windows mobile device. Cashier will first need to configure the sales module to return mode, all items scanned thereafter configuration will then be processed as a return. Or you may manually edit the item to a negative quantity.

Note: *Cashier will need to configure the application to their specific needs before use. This is done when completing the configuration settings outlined in the Mobile Sales Module. It is recommended to sync the offline database after altering settings within the sales module.*

Mobile Sales does not currently support recalling Work Orders, Layaways or Quotes from your windows mobile device.

Items

Cash – Selecting the quick cash buttons will perform a “quick cash” transaction. The transaction will not process until the full amount has been received.

Default Customer – Allows cashier to process transaction using default customer settings. Refer to Customer in mobile sales module.

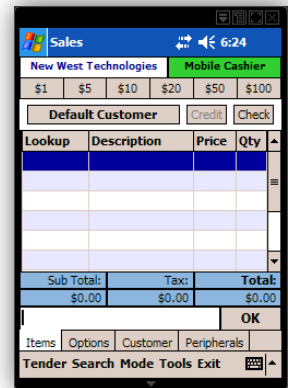
Credit – This feature will open the Credit Card Authorization screen allowing cashier to swipe credit card and complete transaction

***Note:** This feature is available for use with selected printers only.*

Check – Allows cashier to quickly tender transaction using checks.

Items list – Also referred to as “Transaction Screen”, displays the items which have been entered into your sales transaction, listing the following for each item entered:

- **Lookup** = Item Lookup code
- **Description** = Item Description
- **Price** = Item Price
- **Qty** = Quantity



Options

Register – Displays the register number

Description – Displays the register name

Select – Access the register selection screen to configure register used

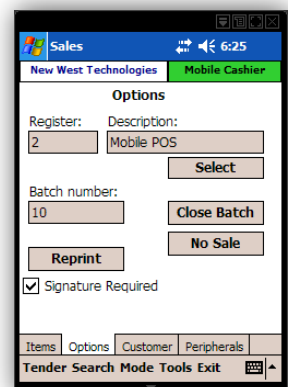
Batch Number – Displays currently open batch

Close Batch – Please reference Appendix III (Close Batch)

Reprint – Allows cashier to reprint sales receipt

No Sale – Performs a no sale transaction

Signature Required – Checking this box configures sales to prompt for signature when processing credit cards



***Note:** Mobile Sales should not share a register or batch with another register or Mobile Cashier device.*

Customer

Account # – Indicates the selected customers account number

First Name – Indicates the selected customers first name

Last Name – Indicates the selected customers last name

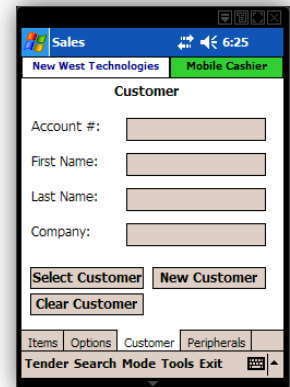
Company – Indicates the selected customers Company

Select Customer – Access the Select Customer screen

New Customer – Access the New Customer screen

Clear Customer – Clears the customer from the transaction

Note: A customer is required before adding items to the transaction screen to receive all customer discounts configured within Store Operations Manager or tendering to a store account.



Peripherals

Select Card Reader – Also referred to as “Magnetic Stripe Readers (MSR)”. Mobile Sales supports the following MSR’s:

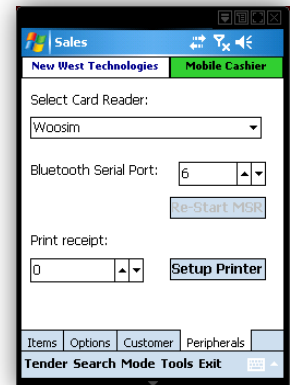
- Symbol
- Woosim
- Bixolon
- Zebra

Bluetooth Serial Port – Allow cashiers to choose which serial port to use for their Bluetooth connection

Re-Start MSR – Manually Initialize the MSR (for Symbol only)

Print receipt – Sets the number of receipts printed per transaction

Setup Printer – Please reference Appendix II (Printer Setup).



Menu Options

Please reference Appendix I (Menu/Feature Options).

Inventory Count

Don't lose another sale to an inventory count again! Eliminate costly labor by using the latest barcode technology to scan your product offerings, reducing the tedium of a manual hand count. Mobile Inventory Count is so simple to use, your staff will be up and counting in no time.

Mobile Inventory Count allows users to do a physical inventory count without returning to the desktop computer for data entry also allowing users to recall an inventory count that has been created in RMS. You can then recall the count from one or more windows mobile devices concurrently to perform the physical count. To learn more about creating counts in RMS, please consult your RMS Users Guide.

If inventory for the same item has been entered by multiple windows mobile devices, the quantities will be summed to produce the total count for the item.

When completed with the entire inventory count, from the inventory screen save the physical inventory count to the RMS database. Commit quantities to update your database immediately or recall at a later time to be completed.

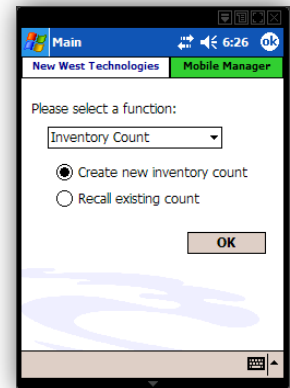
User will first need to create the IC Worksheet when performing an offline IC (this is done per user's preference using the RMS IC wizard). Mobile Inventory Count will create CSV files. Offline CSV files are stored in the business folder in your windows mobile device. Due to memory limitations, you will need to maintain this folder to free up used storage space.

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.*

Create New Inventory Count

Create a new inventory count by selecting **Create new inventory count** when entering the Mobile Inventory Count module.

Press **OK** to continue to Inventory Screen.

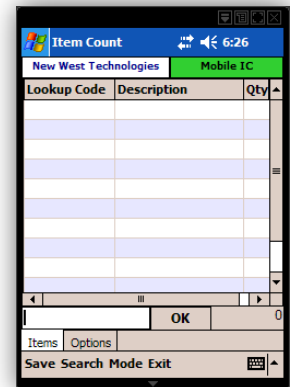


Items

Displays the items which have been entered into your physical inventory count, listing the following for each item entered:

- **Lookup code** = Item Lookup code
- **Description** = Item Description
- **Qty** = Quantity

Cashiers may also monitor the amount of Items scanned (Item count located just right of the OK button).



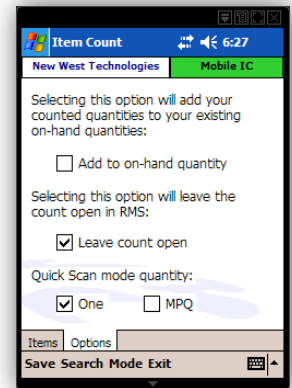
Options

***Add to on-hand quantity** – This feature adds items to the existing quantities instead of replacing the existing quantity. When this option is enabled, Mobile Manager does not create a physical count sheet, but immediately adjusts inventory quantities.

***Leave count open** – If checked, this feature tells Mobile Inventory Count not to automatically close and commit the physical inventory count when saving. This option is checked by default, when unselecting this option cashier will be prompted with a message box that allows cashier to select **yes** to apply count now or **no** to leave count open.

Note: When performing offline inventory with multiple devices, it is required to save offline inventory count as a CSV file. Please refer to mobile manager sync settings.

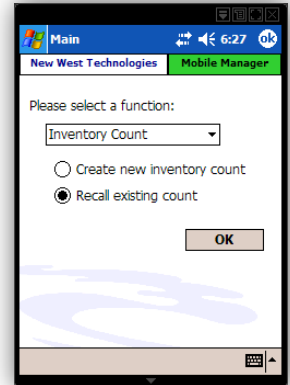
Quick Scan mode quantity – Please reference Quick Scan in Appendix I (Menu/Feature Options).



*Recall Existing Count

Recall an existing inventory count by selecting **Recall existing count** when entering the Mobile Inventory Count module.

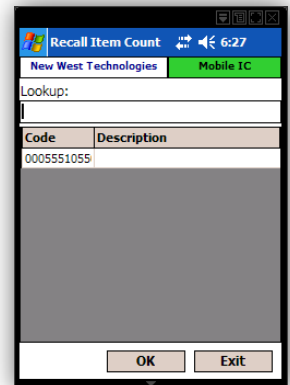
Press **OK** to continue to Inventory Screen.



Select Open Inventory Count

Allows cashier to select from a list of available open inventory counts. Highlight the inventory count you wish to process. This can be done by scrolling to and selecting the desired inventory count or type the inventory count number in the lookup field.

Press **OK** to continue to Inventory Count screen.

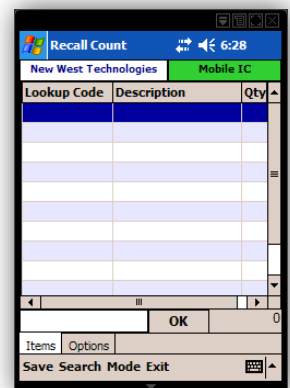


Items

Displays the items which have been entered into your physical inventory count, listing the following for each item entered:

- **Lookup code** = Item Lookup code
- **Description** = Item Description
- **Qty** = Quantity

Cashiers may also monitor the amount of Items scanned (Item count located just right of the OK button).

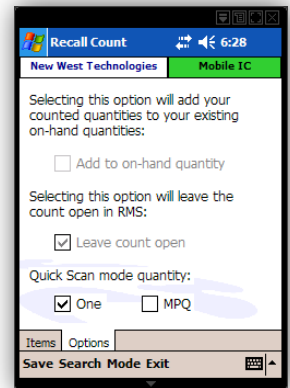


Note: When recalling a count, the previous items scanned will not be displayed as the PDA is limited in RAM/Storage space.

Options

***Leave count open** – If checked, this feature tells Mobile Inventory Count not to automatically close and commit the physical inventory count when saving. This option is checked by default, when unselecting this option you will be prompted with a message box that allows you to select **yes** to apply count now or **no** to leave count open.

Note: Leave count open must be checked when performing inventory count using multiple devices. When performing offline inventory with multiple mobile devices, it is required to save offline inventory count as a CSV file. Please refer to mobile manager sync settings.



Quick Scan mode quantity – Please reference Quick Scan in Appendix I (Menu/Feature Options).

Menu Options

Please reference Appendix I (Menu/Feature Options).



Purchase Orders

Mobile Purchase Order will decrease lead time on order shipping by reducing monotonous paperwork, enabling shipping labor to focus more on packaging and less on forms. Increase the accuracy of your inventory by eliminating redundant paperwork entry. By combining the ease of bar code scanning and wireless technology, purchase order management has never been easier. In addition, the ability to print store item labels while receiving a purchase order allows your business to get stock on the sales floor and sold quickly, increasing your profitability.

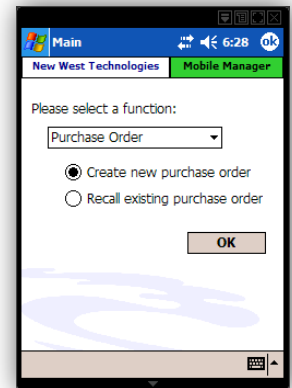
Mobile Purchase Order allows users to both create and receive purchase orders with the handheld. Since many of the products that you receive from suppliers will have a barcode to scan, Mobile Purchase Order can greatly reduce the instance of human error in data entry, while at the same time reducing the amount of labor required to bring new stock into inventory.

Note: Before using the purchase order module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Purchase Order 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.

Create New Purchase Order

Create a new purchase order by selecting **Create new purchase order** when entering the Mobile Purchase Order module.

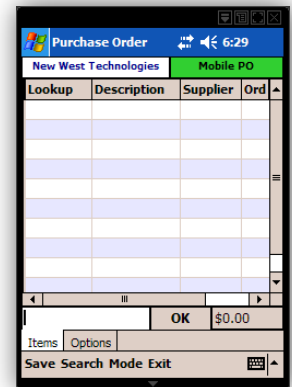
Press **OK** to continue to Purchase Order Screen.



Items

Displays the items which have been entered into your Purchase Order, listing the following for each item entered:

- **Lookup** = Item Lookup code
- **Description** = Item Description
- **Supplier** = Supplier
- **Ord** = Order Quantity
- **Code** = Reorder No.



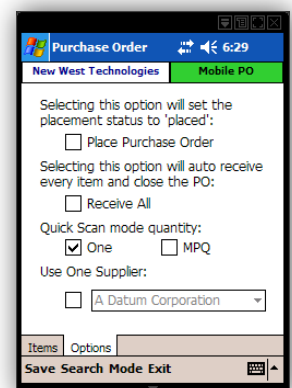
Options

Place Purchase Order – Allows cashier to automatically mark the purchase order as “Placed” in RMS.

Receive All – Allows cashier to auto-receive all items, commit the quantities, and close the purchase order in RMS.

Quick Scan Mode Quantity – Please reference Quick Scan in Appendix I (Menu/Feature Options).

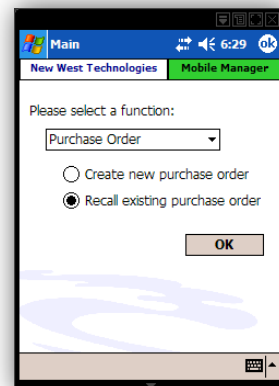
Use One Supplier - This feature forces a single supplier for the entire purchase order.



Recall Existing Purchase Order

Recall an existing purchase order by selecting **Recall existing purchase order** when entering the Mobile Purchase Order module.

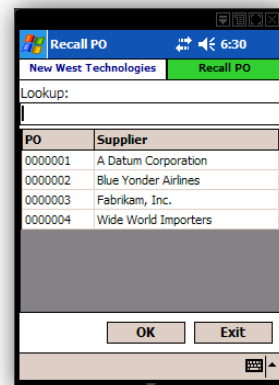
Press **OK** to continue to Purchase Orders Screen.



Select Open Purchase Order

Allows cashier to select from a list of available open purchase orders. Highlight the purchase order you wish to process. This can be done by scrolling to and selecting the desired purchase order or type the purchase order number in the lookup field.

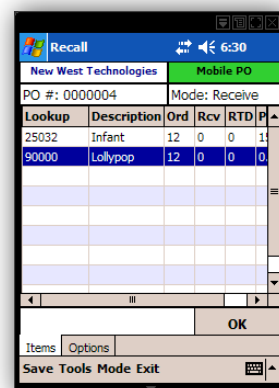
Press **OK** to continue to Purchase Order screen.



Items

Displays the items which have been entered into your Purchase Order, listing the following for each item entered:

- **Lookup** = Item Lookup Code
- **Description** = Item Description
- **Ord** = Order Quantity
- **Rcv** = Received Quantity
- **RTD** = Received To Date Quantity
- **Price** = Item Price
- **Cost** = Item Cost



Options

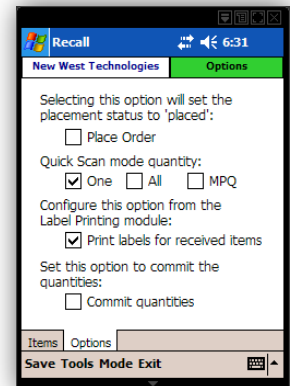
Place Order – Allows cashier to automatically mark the purchase order as “Placed” in RMS.

Quick Scan Mode Quantity – Please reference Appendix I (Menu/Feature Options).

Print Labels For Received Items – This function allows users to print labels when adding to the received quantity.

Note: *Printer and label settings must be configured before using this feature. Please reference Appendix II (Printer Setup).*

Commit Quantities – Allows cashiers to commit the quantities, and close the purchase order in RMS.



Menu Options

Please reference Appendix I (Menu/Feature Options).



Item Manager

Mobile Item Manager is an extension of the Microsoft RMS database. Especially convenient for outdoor locations or warehouses, mobility makes it possible to take the work to your products. Scan your new inventory and easily add it to your database. When used in conjunction with Mobile Inventory Count, you can add new product into the database while counting on-hand quantities. It's the easy and convenient way to manage your stock levels while improving accuracy.

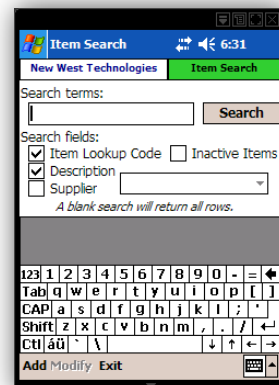
Mobile Item Manager brings the latest technology to your handheld. With Item Manager, you can edit or view several item properties including: item pricing, sales schedules and descriptions, all from your mobile device.

When first opened, Item Manager displays the item search screen. Choose an item to Modify or Add a new item. Item Manager may also be opened from other supported modules by scanning in a lookup code that does not exist or selecting the Item Manager menu button from the search feature.

Item Manager also supports the ability to view item details while offline. Please note you may not alter the item information, you may only view item details.

Item Search

Please reference Search in Appendix I (Menu/Feature Options).



Item

Enter or modify the following information:

- Price
- Cost
- Item Code
- Description
- Department
- Category

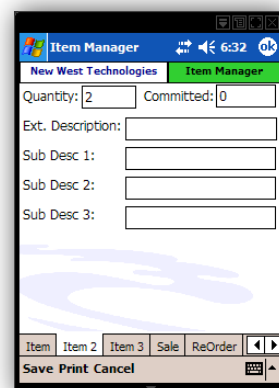


Note: For detailed information on these options, please reference your RMS manual.

Item 2

Enter or modify the following information:

- Quantity
- Committed
- Ext. Description
- Sub Desc 1
- Sub Desc 2
- Sub Desc 3



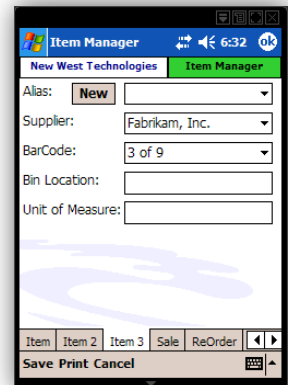
Note: For detailed information on these options, please reference your RMS manual.

Item 3

Enter or modify the following information:

- Alias
- Supplier
- Barcode
- Bin Location
- Unit of Measure

Note: For detailed information on these options, please reference your RMS manual.

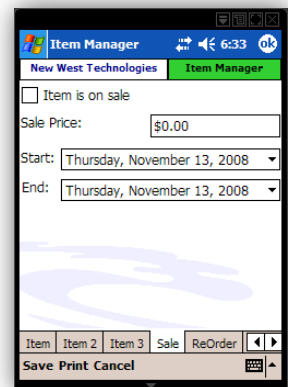


Sale

Enter or modify the following information:

- Item is on sale
- Sale Price
- Start
- End

Note: For detailed information on these options, please reference your RMS manual.

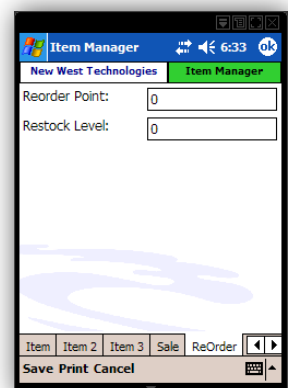


ReOrder

Enter or modify the following information:

- Reorder Point
- Restock Level

Note: For detailed information on these options, please reference your RMS manual.

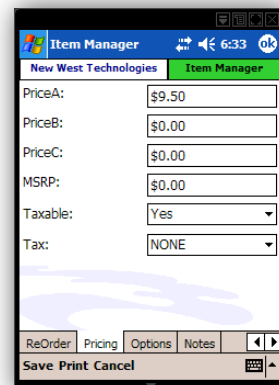


Pricing

Enter or modify the following information:

- PriceA
- PriceB
- PriceC
- MSRP
- Taxable
- Tax

Note: For detailed information on these options, please reference your RMS manual.

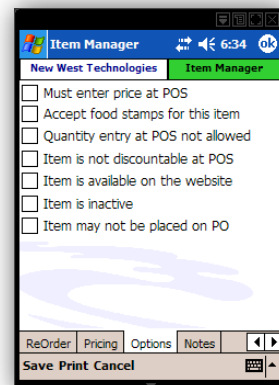


Options

Enter or modify the following information:

- Must enter price at POS
- Accept food stamps for this item
- Quantity entry at POS not allowed
- Item is not discountable at POS
- Item is available on the website
- Item is inactive
- Item may not be placed on PO

Note: For detailed information on these options, please reference your RMS manual.

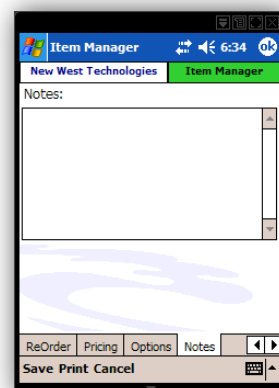


Notes

Enter or modify the following information:

- Notes

Note: For detailed information on these options, please reference your RMS manual.



Menu Options

Please reference Appendix I (Menu Options).

Label Printing

Utilize wireless handheld technology to broadcast print jobs or RMS labels to any printer, wireless or cabled, on the network. Eliminate the need for a traditional register or repetitive trips to the printer to collect store labels. Experience the complete convenience of mobility.

With Mobile Label Printing, you have the option of printing labels as they are scanned or in batch mode. Print functionality is integrated throughout Mobile Manager, enabling label printing for received items or as needed for price changes.

In batch mode, the main transaction screen lists the items in the current batch and the quantity of labels to be printed for each item. If the print labels as scanned box is checked on the options tab, then scanning an item will result in labels being printed according to the configuration.

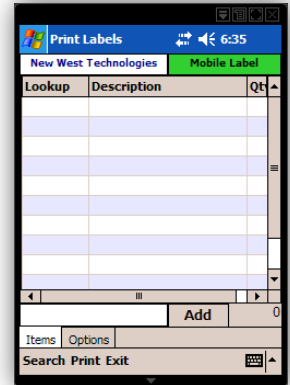
Note: *Before using the label printing module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Label Printing Module. It is recommended to keep item counts under 1000 items as your windows mobile device may run short of memory. Save your current count and reboot your windows mobile device by performing a soft reset before each use.*

Items

Displays the items which have been entered into your Items list, listing the following for each item entered:

- **Lookup code** = Item Lookup code
- **Description** = Item Description
- **Qty** = Quantity

Cashiers may also monitor the amount of Items scanned (Item count located just right of the Add button).



Options

Printer – Displays the current configured printer driver.

Raw Text – This feature is typically used for unsupported desktop printers allowing all information to be sent in raw text mode and uses the native printer language.

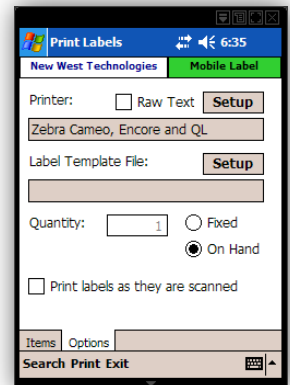
Setup – Please reference Print in Appendix I (Menu/Feature Options).

Label Template File – Displays the current configured label file.

Setup – Please reference Appendix II (Printer Setup).

Quantity – Print the **Fixed** quantity for each item or select **On Hand** to print current on hand quantity

Print labels as they are scanned – Automatically prints labels as they are scanned



Menu Options

Please reference Appendix I (Menu/Feature Options).

Transfers

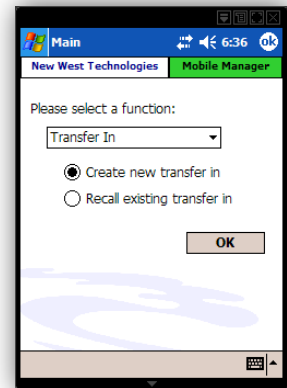
Mobile Transfers allows cashiers to create, issue or receive transfers with the handheld. Since many of the products that you receive from suppliers will have a barcode to scan, Mobile Transfers can greatly reduce the instance of human error in data entry, while at the same time reducing the amount of labor required to bring new stock into inventory.

Note: Before using the transfer module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Transfers 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.

Create New Transfer

Create a new transfer by selecting **Create new transfer** when entering the Mobile Transfer module.

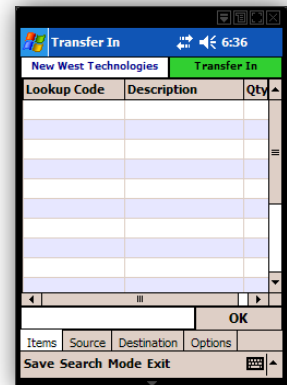
Press **OK** to continue to Transfer Screen.



Items

Displays the items which have been entered into your Items list, listing the following for each item entered:

- **Lookup code** = Item Lookup code
- **Description** = Item Description
- **Qty** = Quantity

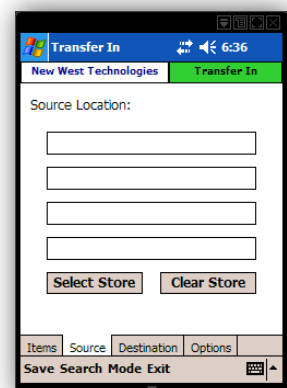


Source

Source location – Displays the location cashier has selected items to be sent from.

Select Store – Select the location for items to be sent from.

Clear Store – Clear the current source location.



Destination

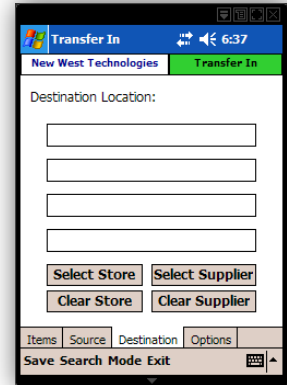
Destination location – Displays the location cashier has selected for items to be received.

Select Store – Select the location for items to be received.

Clear Store – Clear the current destination location.

Select Supplier – Select the supplier for items to be received.

Clear Supplier – Clear the current destination location.

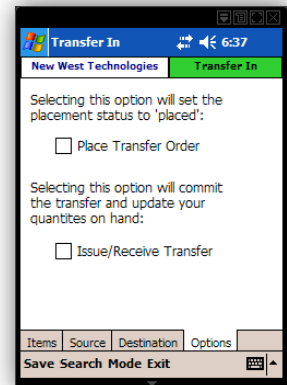


Options

Place Transfer Order – Allows cashier to automatically mark the purchase order as “Placed” in RMS.

Issue/Receive Transfer – This option will allow cashiers to commit the transfer and update quantities in RMS.

Note: selecting issue/receive will close the transfer from RMS. Transfers may not be edited after they are closed.



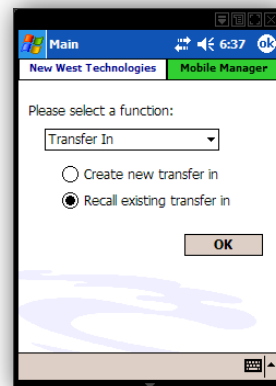
Menu Options

Please reference Appendix I (Menu/Feature Options).

Recall Existing Transfer

Recall an existing transfer by selecting **Recall existing transfer** when entering the Mobile Transfer module.

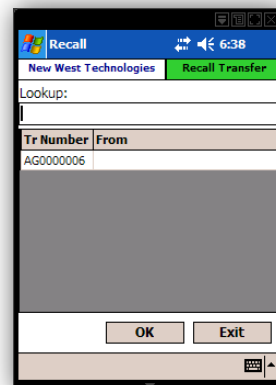
Press **OK** to continue to Transfer Screen.



Select Open Transfer

Allows cashier to select from a list of available open transfers. Highlight the transfer you wish to process. This can be done by scrolling to and selecting the desired transfer or type the transfer number in the lookup field.

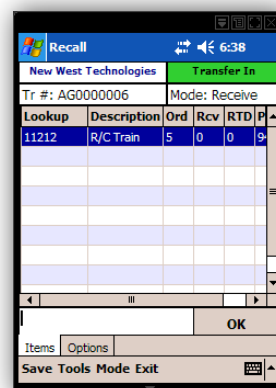
Press **OK** to continue to Transfer screen.



Items (Transfer In)

Displays the items which have been entered into your Items list, listing the following for each item entered:

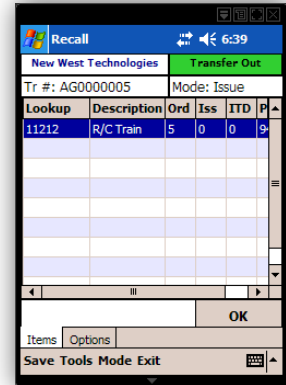
- **Lookup** = Item Lookup Code
- **Description** = Item Description
- **Ord** = Order Quantity
- **Rcv** = Received Quantity
- **RTD** = Received To Date Quantity
- **Price** = Item Price
- **Cost** = Item Cost



Items (Transfer Out)

Displays the items which have been entered into your Items list, listing the following for each item entered:

- **Lookup** = Item Lookup Code
- **Description** = Item Description
- **Ord** = Order Quantity
- **Iss** = Issued Quantity
- **ITD** = Issued To Date Quantity
- **Price** = Item Price
- **Cost** = Item Cost



Lookup	Description	Ord	Iss	ITD	P
11212	R/C Train	5	0	0	9

Options

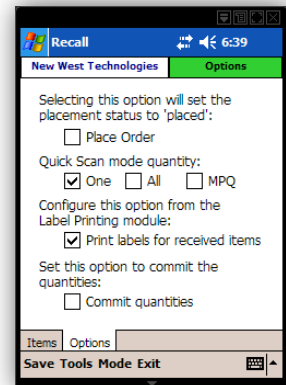
Place Order – Allows cashier to automatically mark the purchase order as “Placed” in RMS.

Quick Scan mode quantity – Please reference Quick Scan in Appendix I (Menu/Feature Options).

Print Labels from received items – Allows Cashier to automatically print labels as items are received.

Commit quantities - Commit the quantities and close the Transfer in RMS.

Note: selecting *Commit quantities* will close the transfer from RMS. Transfers may not be edited after they are closed.



Selecting this option will set the placement status to 'placed':

☐ Place Order

Quick Scan mode quantity:

☒ One ☐ All ☐ MPQ

Configure this option from the Label Printing module:

☒ Print labels for received items

Set this option to commit the quantities:

☐ Commit quantities

Menu Options

Please reference Appendix I (Menu Options).

Work Order

Mobile Work Order easily creates customer work orders while on the sales floor. This saves the employee and customer time, avoiding travel to the point of sale system for order entry. Mobile Work Order always uses a 0% deposit on work orders.

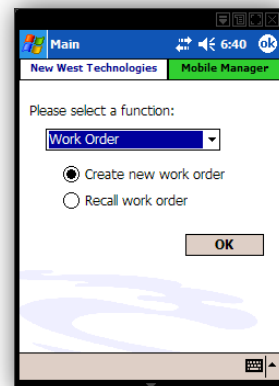
Mobile Work order can also allow you to offer the convenience of gift registry to your customers. Using Mobile Work Order, your customer can create a Work Order as they browse your store. Those wishing to purchase a gift from the registry can be given a paper copy of the work order to help them make their selections. When items are purchased, they are picked-up from the work order and converted into a sale. Items that are not sold remain on the WO to be picked up in the future.

Note: *Before using the Work Order module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Work Order 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.*

Create New Work Order

Create a new work order by selecting **Create new work order** when entering the mobile work order module.

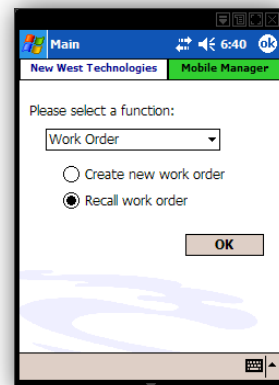
Press **OK** to continue to work order screen.



Recall Work Order

Recall a work order by selecting **Recall work order** when entering the mobile work order module.

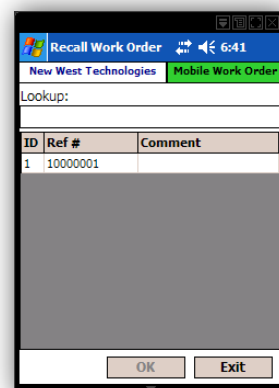
Press **OK** to continue to work order screen.



Select Open Work Order

Allows cashier to select from list of available open work orders. Highlight the work order you wish to process. This can be done by scrolling to and selecting the desired work order, type the work order number printed on receipt or by scanning the barcode.

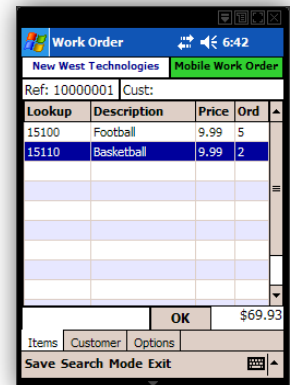
Press **OK** to continue to work order screen.



Items

Displays the items which have been entered into your work order, listing the following for each item entered:

- **Lookup** = Item Lookup Code
- **Description** = Item Description
- **Price** = Price
- **Ord** = Order Quantity



Lookup	Description	Price	Ord
15100	Football	9.99	5
15110	Basketball	9.99	2

OK \$69.93

Items Customer Options Save Search Mode Exit

Customer

Account # – Indicates the selected customers account number

First Name – Indicates the selected customers first name

Last Name – Indicates the selected customers last name

Company – Indicates the selected customers Company

Select Customer – Access the Select Customer screen

Clear Customer – Clears the customer from the transaction

New Customer – Access the New Customer screen

Note: A customer is required before adding items to the items screen to receive all customer discounts configured within Store Operations Manager or tendering to a store account.



Customer

Account #:

First Name:

Last Name:

Company:

Select Customer New Customer

Clear Customer

Items Customer Options Save Search Mode Exit

Options

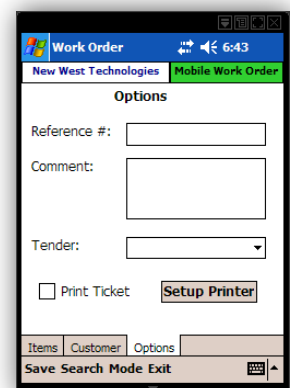
Reference # – Displays the reference number

Comment – Allows cashier to enter additional comments

Tender – Select the tender type which will be used to process the sale

Print Ticket – Automatically prints ticket upon save

Setup Printer – Please reference Appendix II (Printer Setup)



Options

Reference #:

Comment:

Tender:

☐ Print Ticket Setup Printer

Items Customer Options Save Search Mode Exit



Menu Options

Please reference Appendix I (Menu/Feature Options).

Layaway

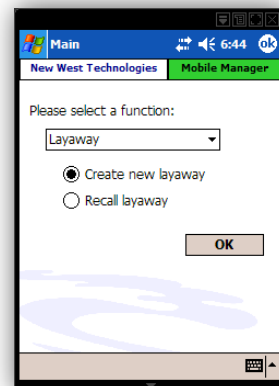
Mobile Layaway allows cashiers to place items on layaway while on the sales floor. This saves the employee and customer time, avoiding travel to the point of sale system for order entry. Customer information is required when creating your Mobile Layaway purchase order and always starts with a 0% deposit.

Note: Before using the Layaway module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Layaway 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.

Create New Layaway

Create a new layaway by selecting **Create new layaway** when entering the mobile layaway module.

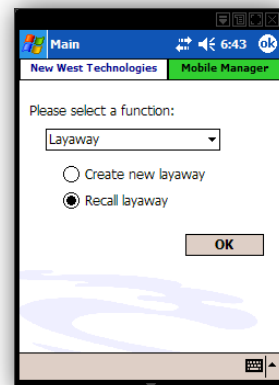
Press **OK** to continue to work order screen.



Recall Layaway

Recall a layaway by selecting **Recall layaway** when entering the mobile layaway module.

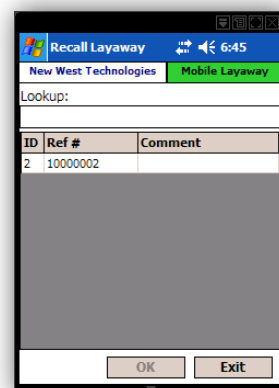
Press **OK** to continue to layaway screen.



Select Open Layaway

Allows cashier to select from list of available open layaway. Highlight the layaway you wish to process. This can be done by scrolling to and selecting the desired layaway, type the layaway number printed on receipt or by scanning the barcode.

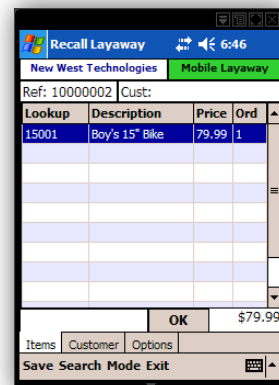
Press **OK** to continue to work order screen.



Items

Displays the items which have been entered into your layaway, listing the following for each item entered:

- **Lookup** = Item Lookup Code
- **Description** = Item Description
- **Price** = Price
- **Ord** = Order Quantity



Lookup	Description	Price	Ord
15001	Boy's 15" Bike	79.99	1

OK \$79.99

Items Customer Options Save Search Mode Exit

Customer

Account # – Indicates the selected customers account number

First Name – Indicates the selected customers first name

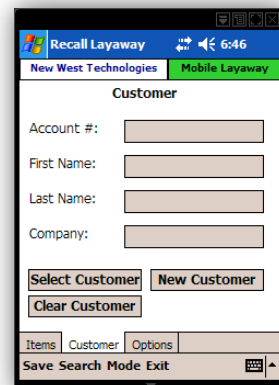
Last Name – Indicates the selected customers last name

Company – Indicates the selected customers Company

Select Customer – Access the Select Customer screen

Clear Customer – Clears the customer from the transaction

New Customer – Access the New Customer screen



Customer

Account #:

First Name:

Last Name:

Company:

Select Customer New Customer

Clear Customer

Items Customer Options Save Search Mode Exit

Options

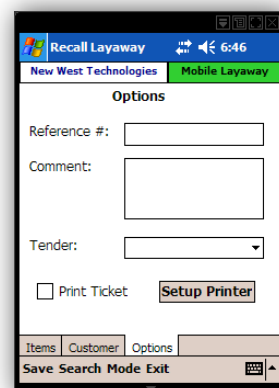
Reference # – Displays the reference number

Comment – Allows cashier to enter additional comments

Tender – Select the tender type which will be used to process the sale

Print Ticket – Automatically prints ticket upon save

Setup Printer – Please reference Appendix II (Printer Setup)



Options

Reference #:

Comment:

Tender:

☐ Print Ticket Setup Printer

Items Customer Options Save Search Mode Exit



Menu Options

Please reference Appendix I (Menu/Feature Options).

Quote

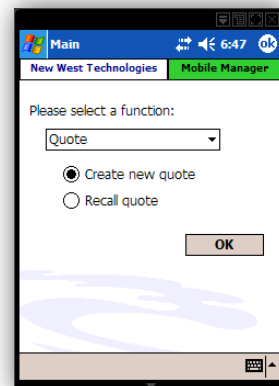
Mobile Quote allows cashiers to create a quote while on the sales floor. This saves the employee and customer time, avoiding travel to the point of sale system for order entry.

Note: Before using the Quote module, cashiers will need to configure the application to their specific needs. This is done when completing the configuration settings outlined in the Mobile Quote 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.

Create New Quote

Create a new quote by selecting **Create new quote** when entering the mobile quote module.

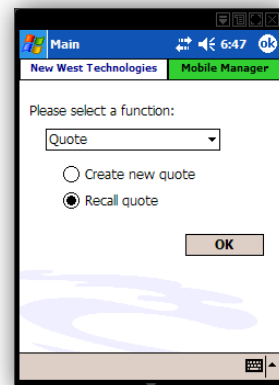
Press **OK** to continue to quote screen.



Recall Quote

Recall a quote by selecting **Recall quote** when entering the mobile quote module.

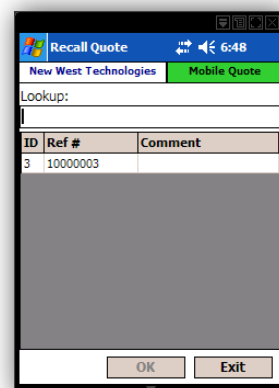
Press **OK** to continue to quote screen.



Select Open Quote

Allows cashier to select from a list of available open quotes. Highlight the quote you wish to process. This can be done by scrolling to and selecting the desired quote, type the quote number printed on receipt or by scanning the barcode.

Press **OK** to continue to quote screen.





Displays the items which have been entered into your quote, listing the following for each item entered:

- **Lookup** = Item Lookup Code
- **Description** = Item Description
- **Price** = Price
- **Ord** = Order Quantity

Account # – Indicates the selected customers account number

First Name – Indicates the selected customers first name

Last Name – Indicates the selected customers last name

Company – Indicates the selected customers Company

Select Customer – Access the Select Customer screen

Clear Customer – Clears the customer from the transaction

New Customer – Access the New Customer screen

Note: Selecting the customer is required before adding items to the items screen to receive all customer discounts configured within Store Operations Manager or tendering to a store account.

Recall Quote

New West Technologies Mobile Quote

Customer

Account #:

First Name:

Last Name:

Company:

Select Customer New Customer Clear Customer

Items Customer Options

Save Search Mode Exit

Print

Reference # – Displays the reference number
Comment – Allows cashier to enter additional comments
Tender – Select the tender type which will be used to process the sale
Print Ticket – Automatically prints ticket upon save
Setup Printer – Please reference Appendix II (Printer Setup)

Recall Quote

New West Technologies Mobile Quote

Options

Reference #:

Comment:

Tender:

☐ Print Ticket **Setup Printer**

Items Customer Options Save Search Mode Exit



Menu Options

Please reference Appendix I (Menu/Feature Options).

APPENDIX I

MENU/FEATURE OPTIONS

Exit

Allows cashier to exit the module.

Mode

Allows cashier to select from the available mode functions.

Note: *Not all features are available for each module.*

Edit

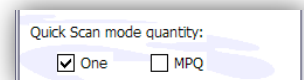
Allows cashier to edit the item list when recalling from a supported module.

Issue

Allows cashier to issue items when recalling from a supported module.

Quick Scan

Allows cashier to use the quick scan option configured in options tab from a supported module.



One – Sets quick scan mode to add a quantity of one when entering items.

MPQ(Master Pack Quantity) – Sets quick scan mode to add the MPQ quantity when entering items.

Note: *The quick scan feature defaults to quantity of one for each item scanned if configuration option is not available or if the MPQ is not set.*

Receive

Allows cashier to receive items when recalling from a supported module.

Return

Allows cashier to perform a return on all items entered after selecting the return function.

Tax Exempt

Allows cashier to set tax exempt permissions from supported modules.

Options

Create System File

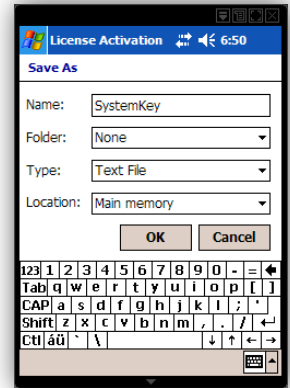
Name – Leave the file name set to its default name or rename file.

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 softwaresupport@newestech.com. Please include company name information and the activation key used to ensure quickest response.



Validate Your Software

Mobile Manager will validate the software every 7 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 7 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.

Print

Cashier must first configure the mobile device with a supported printer. Please reference Appendix II (Printer Setup).

Save

Allows Cashier to save their current count.

Search

Prompts cashier with a selection window to search for items or customers.

Note: The search function defaults to item search if selection window is not available.

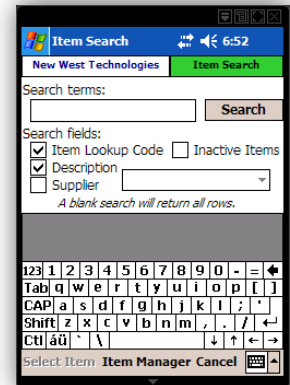
Item

Search terms – Enter/Scan the Item lookup code or enter partial information based on configuration of search fields to filter the list of items displayed.

Search – Accesses database to perform search.

Search fields – Allows the cashier to set the fields specified when performing a search.

When searching for an item, the item search screen will display the available items which match your search criteria.



Select Item

Adds the item to the item list.

Item Manager

Refer to Item Manager in mobile manager modules

Cancel

Allows cashier to cancel and exit this feature.

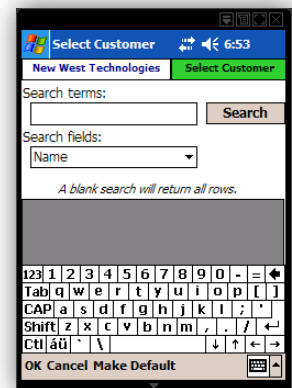
Customer

Search terms – Enter your search criteria based on configuration of search fields to filter the list of items displayed.

Search – Accesses database to perform search.

Search fields – Allows the cashier to set the fields specified when performing a search.

When searching for a customer, the customer search screen will display the available customers which match your search criteria.



OK

Adds the customer to the customer list.

Cancel

Allows cashier to cancel and exit this feature.

Make Default

Allows cashier to set default customer.

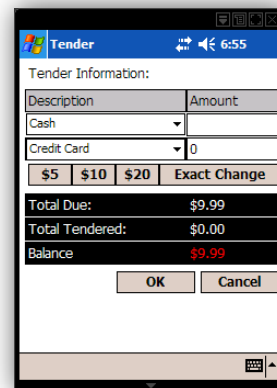
Tender

Displays the tender entry screen where Cash, Check, Credit Card, Store Account tender types, etc. are listed in a drop down box. When performing a credit card transaction the tender type used will default to the first defined credit card tender type in RMS. If you have more than one credit card tender type, you may use the drop down box (denoted by a down arrow in the description) to select which credit card tender type you would like to use for the transaction.

Selecting one of the Quick Cash buttons will perform a “quick cash” transaction. The transaction will not process until the full amount has been received.

If tendering with exact change, select the tender description type, select the amount box, then **Exact change**.

Press **OK** to complete or **Cancel** to return to transaction screen.



The screenshot shows the 'Tender' screen with the following fields and options:

- Tender Information:**
 - Description: Cash (dropdown)
 - Amount: 0 (input field)
- Buttons: \$5, \$10, \$20, Exact Change
- Total Due:** \$9.99
- Total Tendered:** \$0.00
- Balance:** \$9.99
- Buttons: OK, Cancel

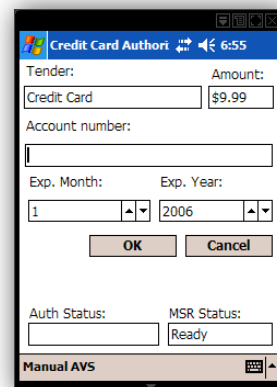
Credit Card Authorization

The Credit Card Authorization screen allows you to swipe or manually enter a credit card. The Auth Status box shows the present status of the authorization. While awaiting authorization, it displays “Pending”, but the box will change color and return a message based on the results of the authorization.

- If the transaction is authorized, it will turn green and display the authorization code.
- If transaction is not successfully authorized, It will turn red and display an error message.

The MSR Status box will display the status of the magnetic stripe reader.

Press **OK** to complete or **Cancel** to return to transaction screen.



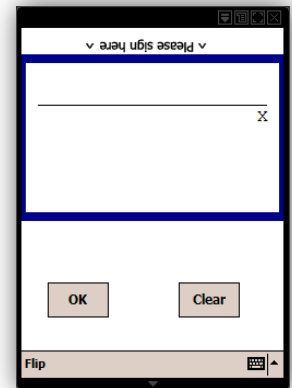
The screenshot shows the 'Credit Card Authorization' screen with the following fields and options:

- Tender:** Credit Card (dropdown)
- Amount:** \$9.99 (input field)
- Account number:** (input field)
- Exp. Month:** 1 (dropdown)
- Exp. Year:** 2006 (dropdown)
- Buttons: OK, Cancel
- Auth Status:** (input field)
- MSR Status:** Ready (input field)
- Manual AVS (checkbox)

Capture Signature

Mobile Sales has the ability to capture a digital signature and print this on the receipt when processing credit card transactions. This feature also has a **flip** option that flips the orientation of the screen. Press **OK** to complete or **Clear** to redo signature.

***Note:** This feature can be enabled or disabled with the Signature Required checkbox found on the options tab.*



Tools

Allows cashier to select from the available tool features.

Issue All

Allows cashier to issue all items from supported modules.

Place On Hold

Allows cashier to place order on hold from supported modules.

Receive All

Allows cashier to receive all items from supported modules.

Maintenance

Allows cashier to close batch without opening a new batch.

Search

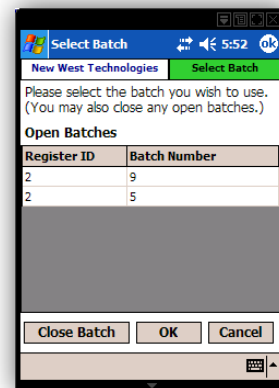
Please reference search in Appendix I (Menu/Feature Options).

Select Batch

Allows cashier to close or select the batch you wish to use.

Select the batch you wish to close and select **Close Batch** to blind close the batch or select your batch and **OK** to continue to the sales screen using the selected batch.

Cancel to exit sales module.



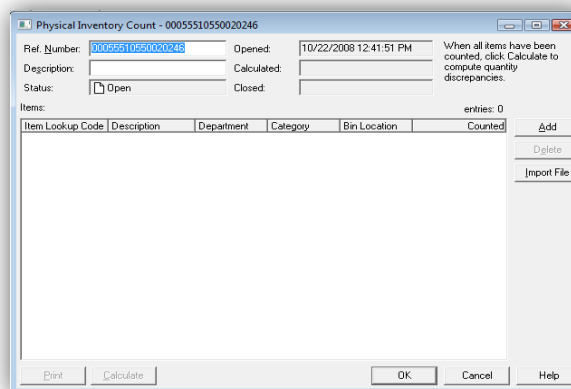
IMPORT CSV FILES

Transfer CSV Files

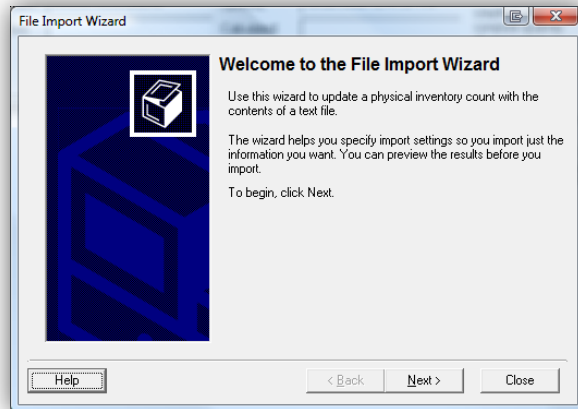
The Offline IC CSV files can be located on your PDA in the Business folder. While your device is synchronized with the PC via Microsoft ActiveSync (for Windows XP and below) or Microsoft Windows Mobile Device Center (for Vista and above), browse to the following directory on the mobile device: \My Documents\Business. Cut and paste all .csv files to a local folder on your PC. After all files have been transferred, you may import them into RMS.

Import Files

From the properties of your RMS Physical Inventory Count, Select **Import File** to start the File Import Wizard.



Select **Next** to begin.



File to Import:

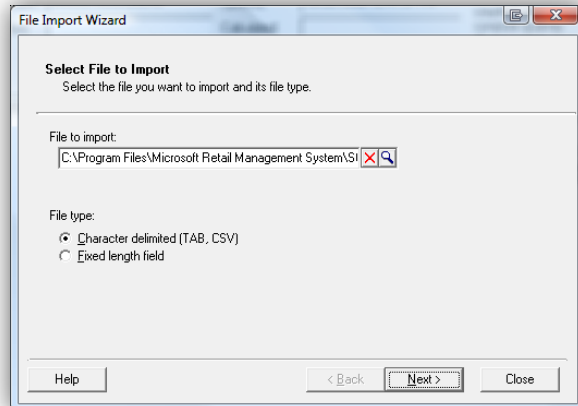
Browse to the selected file to import (The Mobile CSV files)

Note: Each file must be imported one at a time

File type:

Select Character delimited (TAB, CSV)

Select **Next** to continue



Field delimiter – Set to Comma (,)

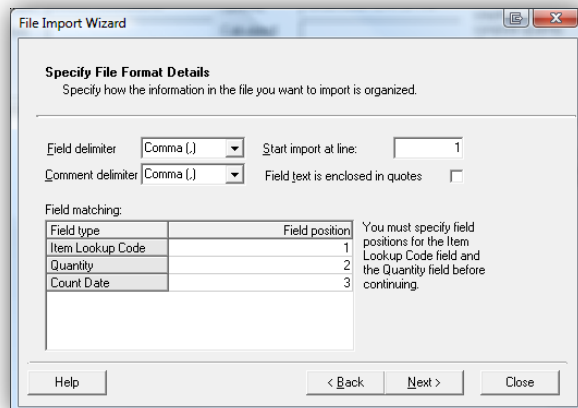
Comment delimiter – Set to Comma (,)

Start import at line – Set to 1

Field matching – Set field position

- Item Lookup Code = 1
- Quantity = 2
- Count Date = 3

Select **Next** to continue



Items:

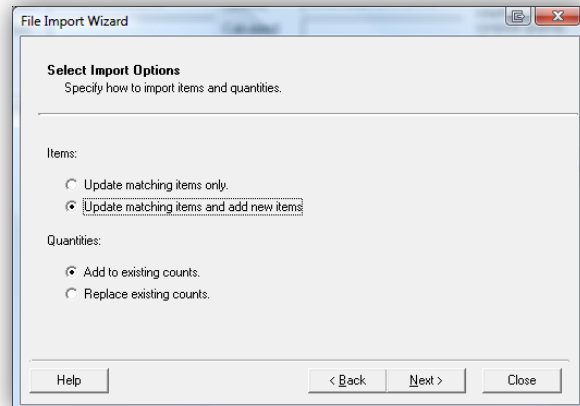
Check **Update matching items and add new items**

Quantities:

Check **Add to existing counts**

Select **Next** to continue

Select **Import** to finish



Select Import Options
Specify how to import items and quantities.

Items:

☐ Update matching items only.

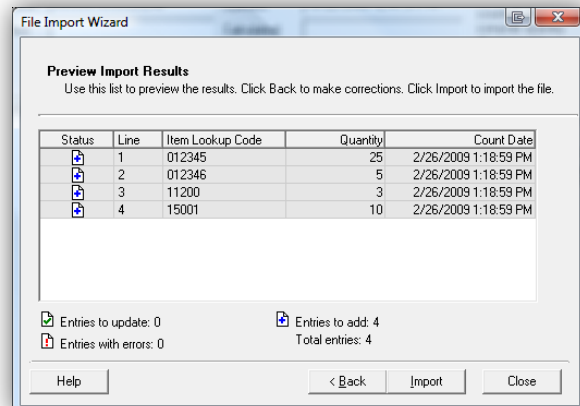
☒ Update matching items and add new items

Quantities:

☒ Add to existing counts.

☐ Replace existing counts.

Help < Back Next > Close



Preview Import Results
Use this list to preview the results. Click Back to make corrections. Click Import to import the file.

Status	Line	Item Lookup Code	Quantity	Count Date
	1	012345	25	2/26/2009 1:18:59 PM
	2	012346	5	2/26/2009 1:18:59 PM
	3	11200	3	2/26/2009 1:18:59 PM
	4	15001	10	2/26/2009 1:18:59 PM

Entries to update: 0
 Entries to add: 4
 Entries with errors: 0
 Total entries: 4

Help < Back Import Close

APPENDIX II

PRINTER SETUP

Printer Configuration

Printer – Select the supported printer driver.

Port – Select the port type which will be used to connect to printer.

Color/Mono – Select the supported printer color option.

Paper Size – Select the supported printer paper size.

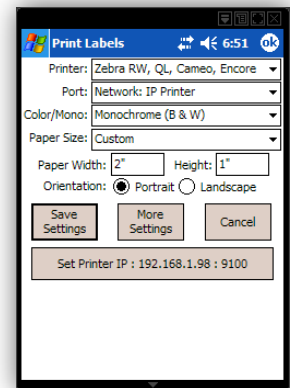
Paper Width and Height – Paper width and height can be modified when “custom” paper size is selected.

Orientation – Select the orientation.

Save Settings – Save printer configuration settings.

More Settings – Recommended for advanced users only.

Cancel – Allows cashier to cancel and exit this feature.



Additional Configuration

Receipt font and timing settings can be configured in the **settings.xml** file located from ActiveSync > Explore > My Windows Mobile Based-Device > Program Files > Mobile Manager. You will need to copy the file to your PC for editing.

- ReceiptFontSize (defaults to original size “6”)
- PauseSecondsBetweenReceipts (defaults to “0”)

Supported Printers

Able Systems Ap1300

Axiom A631

Brother MPrint

Canon BubbleJet compatible printers (360 dpi)

Canon BubbleJet 300 dpi

Citizen 203DPI printers

Citizen CMP-10

Citizen PD-22

Citizen PD-04

Citizen PN60i

Epson ESC/P 2 compatible printers

Epson Stylus compatible printers

Epson TM-P60

HP PCL compatible - includes DeskJet and LaserJet

Pentax PocketJet 3 and PocketJet 200

Pentax PocketJet 3 Plus and PocketJet II

Seiko DPU-3445

Seiko DPU-L465

Generic Epson compatible 180DPI 24-pin printers (LQ/ESC)

Generic Epson compatible 360DPI 24-pin printers (LQ/ESC)

Generic Epson compatible 203DPI 24-pin printers (LQ/ESC)

Exttech 2" Thermal

Exttech 3" Thermal

Exttech 4" Thermal

Intermec PB/PW/68/78 Thermal

O'Neil MicroFlash

Zebra Cameo, Encore and QL

CUSTOM s'print

Fujitsu FTP-628WSL110

IPC PP-50

OMNIPrint 6240 and 6400

SiPix A6 printer

DymoCoStar label printers

Seiko LabelWriter printers

Any printer that accepts ASCII Labels

Label Configuration

Folder – Select the folder which contains the label template files.

Cancel – Allows cashier to cancel and exit this feature.

Type – Select the label type.

Name – Displays the name of the available label file.

Folder – Displays the folder name of the available label file.

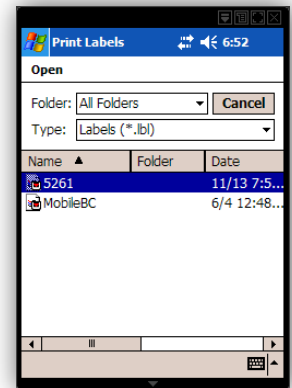
Date – Displays the date of the available label file.

Size – Displays the size of the available label file.

Type – Displays the type of the available label file.

Location – Displays the location of the available label file.

Note: Label files must be transferred to the mobile device using the device synchronization application.



APPENDIX III

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.

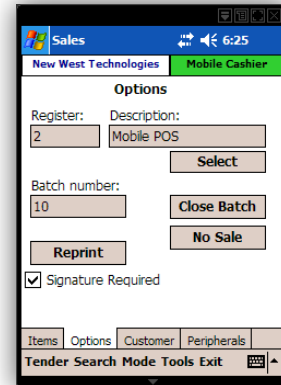
Please reference Appendix I (Menu/Feature Options) for additional batch maintenance.

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.

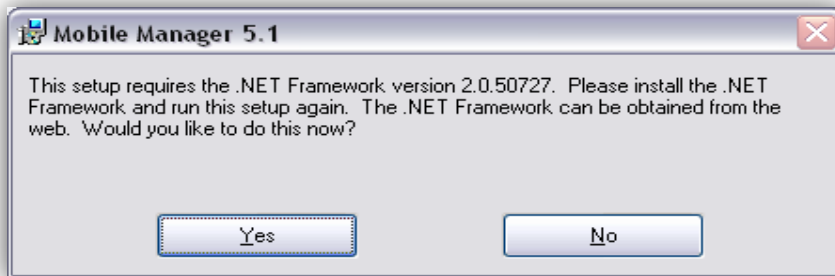


APPENDIX III

TROUBLE SHOOTING

Installation Error

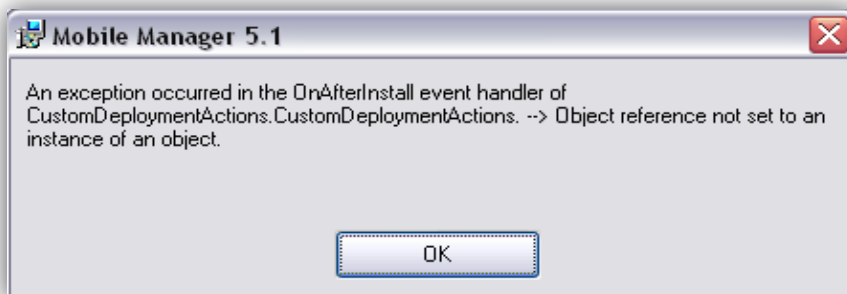
The error messages below indicate the machine which you are installing on does not meet system requirements.



↑ Commonly seen when .NET Framework 2.0 is not installed. Please reference Microsoft .NET Framework 2.0 during installation.



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



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

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 not 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.

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.

	<p>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.</p> <p>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.</p>
Cannot Connect to offline Database	<p>Verify the Mobile offline database msoffline.sdf was installed to the default directory <code>\Program Files\New West Technologies\Mobile Manager 5.4</code> on your windows mobile device.</p> <p>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).</p> <p>Note: If offline database cannot be found, please reinstall Mobile Manager to recreate offline database.</p>

Login Error

Invalid Login	Please reference Mobile Manager Login
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SUPPORT INFORMATION

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