Quick Start Guide

Microinvest Warehouse Pro Mobile

2010

I. Application Installation

The *Microinvest* **Warehouse Pro Mobile** is the point of sale application for mobile devices that works in tandem with the main *Microinvest* **Warehouse Pro** application. If you purchased a single terminal license (1st License) for the mobile application, it will come with the main back office application. If you downloaded the applications individually, you need to install BOTH the *Microinvest* **Warehouse Pro** main module and the *Microinvest* **Warehouse Pro Mobile** module to use its point of sale (POS) functions.

Installing Microinvest Warehouse Pro Mobile application from Internet

1. Go to **http://www.microinvest.net/en**
2. From **Product information** select *Microinvest* **Warehouse Pro Mobile**
3. Press **Download**.
4. Select the folder in which you want to save the installation file and press **Save**.
5. Wait until the file is saved on your computer.

Installation Steps of *Microinvest* Warehouse Pro Mobile

Please first make sure that you have the appropriate Pocket PC sync software installed on your computer:

> **Microsoft ActiveSync (**for **Windows XP)**
>
> Or
>
> **Windows Mobile Device Center (**for **Windows Vista or Windows 7)**

Now you can proceed with the installation of *Microinvest* **Warehouse Pro Mobile** following the steps below:

1. Connect the device using the cable and wait until the Synchronization wizard shows up on your screen.


Microsoft ActiveSync (Windows XP)

Windows Mobile Device Center (Windows Vista or Windows 7)

2. Press the button **Cancel** (for Microsoft ActiveSync) or **Connect without setting up your device** (for Windows Mobile Device Center)

3. Hide the **ActiveSync / Windows Mobile Device Center** window by pressing the close button.

4. Start **Microinvest Warehouse Pro Mobile** installation from your computer (use the file you downloaded from the internet).

5. Select your language of choice from the drop-down list and press **OK.**

6. Read carefully the License Agreement and press the **Accept** button for confirmation.

7. Select the operating system of the mobile device from the drop-down list and press **INSTALL**.

   Note: To check the OS version of the mobile device, go to: **Start** button → **Settings** → **System** → **About**.

8. Choose the type of the installation and press the **Install** button.

   ➢ Choose **Complete** – in case this is the first installation on this mobile device.
   ➢ Choose **Basic** – in case of updating with a newer version of the program.
   ➢ Choose **Extended** – if you want to install the program together with a sample database for working in demo mode.
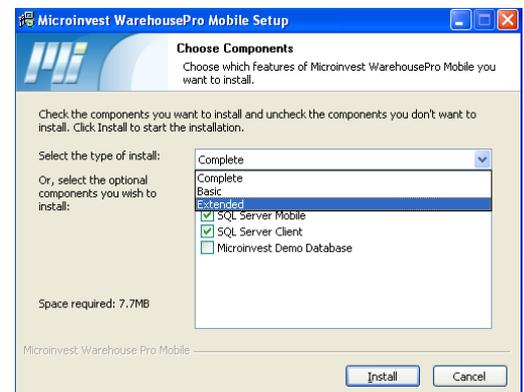

9. Please, wait until all files are transferred to your mobile device. Please, look at the mobile device screen and **DO NOT** HURRY TO PRESS **OK** on your computer**.**

10. On the screen of the mobile device press **Yes** and wait until **WarahouseProMobile.cab** is installed successfully. →
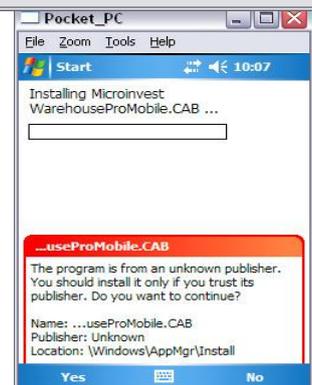
11. Then press **OK** on the screen of your computer.

12. If you have chosen **Basic** type of installation, **go to step 27.** If your device's operating system is Windows Mobile 6 (or later), **continue with step 16.**

13. Please, wait until all files are transferred to your mobile device. Please, look at mobile device screen and **DO NOT** HURRY TO PRESS **OK** on your computer**.**

14. Wait until **Microsoft.NET CF.2.0.cab** is installed on the mobile device.
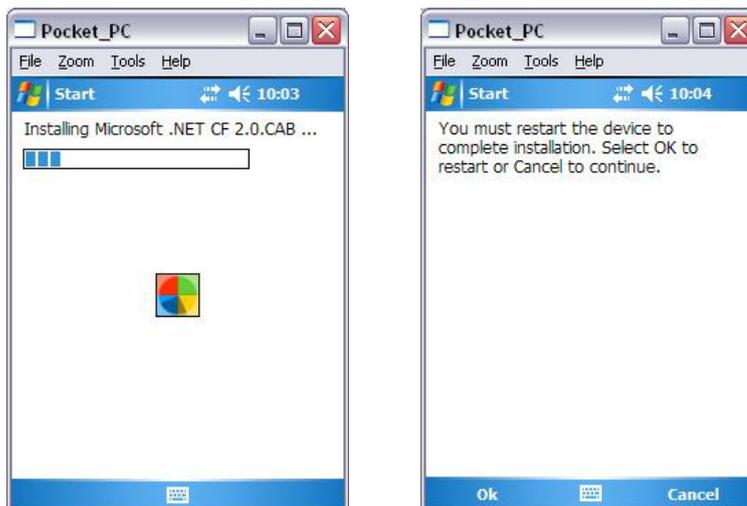
15. Press **OK** and wait until the mobile device restarts.

   ➢ Once the mobile device is restarted, **wait until it connects back to ActiveSync**

   ➢ Proceed with installation

16. Now press **OK** on your computer.

17. Please, wait until the files are transferred to the mobile device. Do not press **OK,** until the process is complete on the mobile device.

18. Wait until the **SQL Server Compact 3.5 Core** is installed on the mobile device.

19. Press **OK** on the mobile device screen.

20. Press **OK** on the computer screen.

21. Please, wait until the files are transferred to the computer. Do not press **OK,** until the process is complete on the mobile device.

22. Wait until **Microsoft SQL Client 2.0** is installed on the mobile device.

23. Press **OK** on the mobile device screen

24. Press **OK** on the computer screen. If you have chosen **Complete** installation type, go to **Step 27**.

25. Please, wait until the files are transferred to the computer. Do not press **OK,** until the process is complete on the mobile device.

26. Wait until **DemoDatabase** is installed on the mobile device.

27. Press **OK** on the mobile device screen and **Close** on the computer screen.

End of installation process!

II. Starting Microinvest Warehouse Pro Mobile for the first time

Microinvest **Warehouse Pro Mobile** works in tandem with the main *Microinvest* **Warehouse Pro** application and provides front office functionality on a mobile device to the user on the move. All back office functions such as setting up items, users, locations, etc are configured in the main *Microinvest* **Warehouse Pro** application to which *Microinvest* **Warehouse Pro Mobile** connects and syncs. Please follow the instructions below to set up your mobile device to work with your main application.

1. Start the program on your mobile device from **Start** button → **Programs** → **Warehouse Pro Mobile**.

2. You need to set a device password (this is the password used for access to system settings). A notification message will be displayed: **"A password for accessing the settings has not been set! Please, set a password in order to start using the system!"**. Press **OK**.

3. Enter password or leave the fields blank. Then press **OK**.
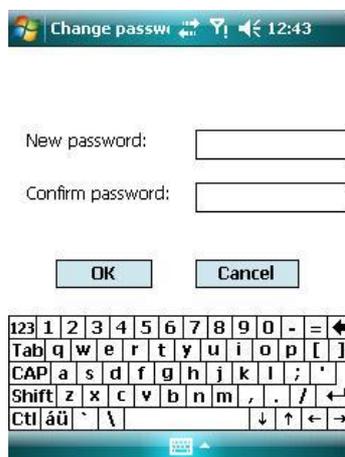
4. A notification message will be displayed: **"The program settings have not been set! Please specify them in order to start the system!"**. Press **OK**.

5. Enter the device settings password (the one you entered in step 3) and press **OK**.

6. By default the system is set to work in online mode. For now, leave it like this.

|	
Server:	enter the **Name** or **IP address** of the computer, on which SQL server is installed.
Username:	enter the user name for access to the SQL server
Password:	enter the password for access to the SQL server
Database:	enter the name of **WarehousePro** database, you will work with.

7. Use the button **Test Connection** in order to test the connection with the server and database availability.

8. Press **OК**.

9. A notification message will appear: **"The object's settings have not been specified. Please, do this now!"**. Press **OК**.

10. Enter the password to access the settings. Press **OК**

11. **Microinvest Warehouse Pro Mobile** works with one warehouse (location) at a time. Select the location from the dropdown menu and press **OК**
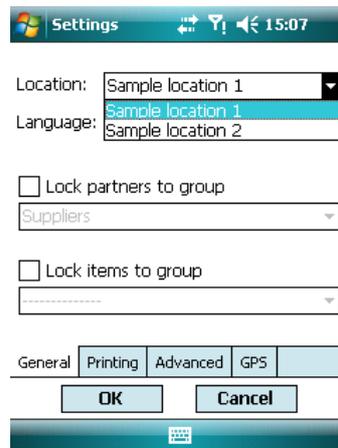
12. Select username and enter the password of the user to access the program.
    Press **OК.**
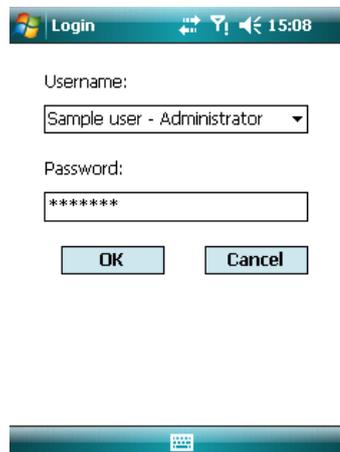
13. A notification message will be displayed: **"This copy is not licensed! Please obtain a valid license number to use the full functionality!"**. Press **OK**.

14. Now, you are ready to work in online demo mode.

Work in offline mode

1. Go to **Settings → Database**

2. Enter password. Press **OK**

3. By default the system is set to work in **Online mode**. Uncheck the box.
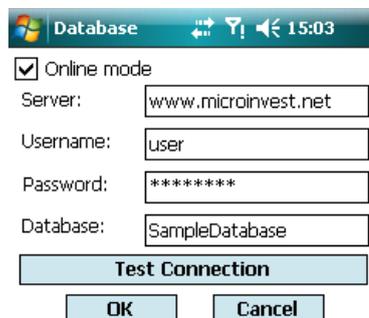
4. A notification will appear:**"Do you want to start synchronization?"**.
   Press **Yes**.
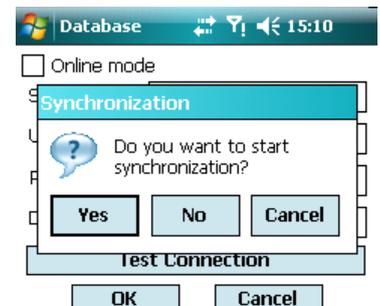
5. Wait until the synchronization is complete. Press **OK**.

6. You will get back to the Database settings window. Press **OK** to close it.

7. Login to the application with the corresponding user and password. Press **OK**.

8. Now, you can unplug the cable from the mobile device and start using *Microinvest* **Warehouse Pro Mobile** in offline mode.

Note: Offline mode requires no actual connection to the SQL server which allows you to take the device with you and work with the application at any place. The mobile device stores all of its operational data locally and later, when you get back to office you can use menu **File → Synchronize** to synchronize your data with the Microinvest Warehouse Pro database.

Registering Microinvest Warehouse Pro Mobile

The very first time that you launch your software, it will be in Demo mode. If the demo expires you will get a product registration window prompting you to enter your license key.

If you have already bought a license from our web site, please, use the license key from the confirmation e-mail you received from our team. To register Microinvest **Warehouse Pro Mobile**, go to **Help → Register**. Enter the license key and press **OK.**

Microinvest®
software company since 1984
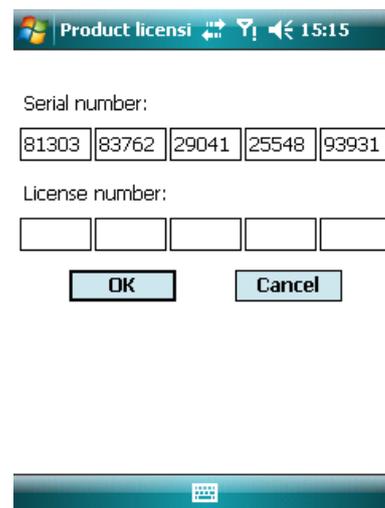
III. Work with Microinvest Warehouse Pro Mobile

To start the application go to menu **Start**->**Programs**. After the first start of the program, in the **Start** menu will shows up *Microinvest* **Warehouse Pro Mobile icon**. Click on it.

The main screen of the program will open. Select the operation that you want to do.

- **Sale** – this is the module for making sales to certain partners/clients.
- **Order** – this is the module for ordering goods/items to certain partners/clients.
- **Inventory** - module for making warehouse inventory.
- **Purchase** – module for delivery and enrolment items in the warehouse.
- **Refund** – module for item/good returns from clients.
- **Payment** -   function for payment of not paid documents and tracking clients' obligations.
- **Credit note –** module for adjusting already done operation.
- **Debit note -** module for adjusting already done operation.

How to make a sale?

Click on **Sale** button. The main window will open. Here are written the items, the partners/clients and the total sum for each operation.

1. It is necessarily to select the partner for the operation you want to do. Press the button, and then select from the list with all partners the one you want. Press **OK.**

2. Now select the items which you are selling. Press the button   or   .   The list will show up. The application allows searching by certain criteria.
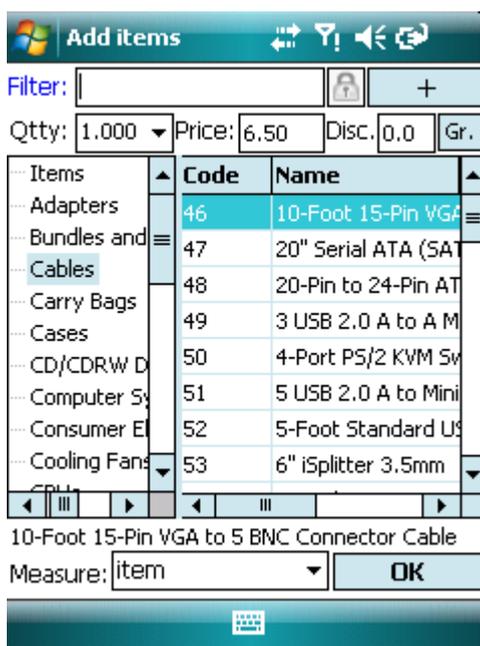
3. After that enter the quantity you are selling, the price and the discount (if applicable) in the respective fields **Qtty**, **Price**, **Disc**.

Additional information:

1. In the **Add items** window you can apply a discount to a particular items included in the operation. But in the main **Sale** window the discount is applied to all items in the document.

2. For your convenience on the bottom of the items selection window, you can check whether you have added the item. Every new item is marked with red. It is not necessary to close the items selection window until you are selecting.
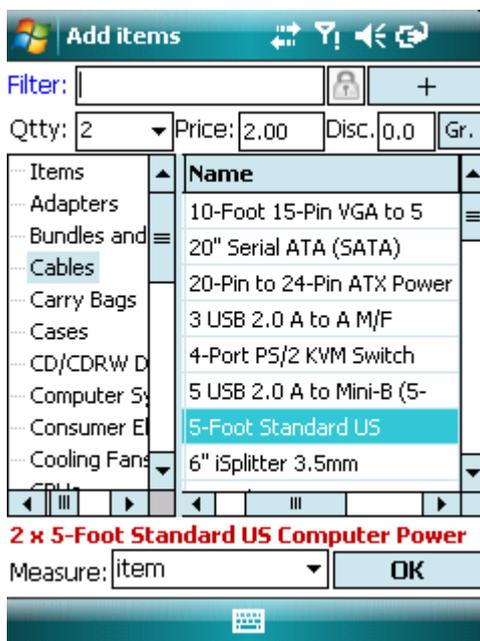
3. Quantity might be entered in the **Add items** window or after that is the main **Sale** window, just click on the quantity of the particular item.

To finish the operation, press **OK**. A notification will open "Do you want to save the operation?". Press **YES** to confirm, and **NO** to reject to go back to the document**.**

Note: After confirming the operation, corrections are available only in the back office application *Microinvest* Warehouse Pro after synchronization.

After completion of the sale goes to the payment window. Select the terms of payment. And press **OK** to save the information.
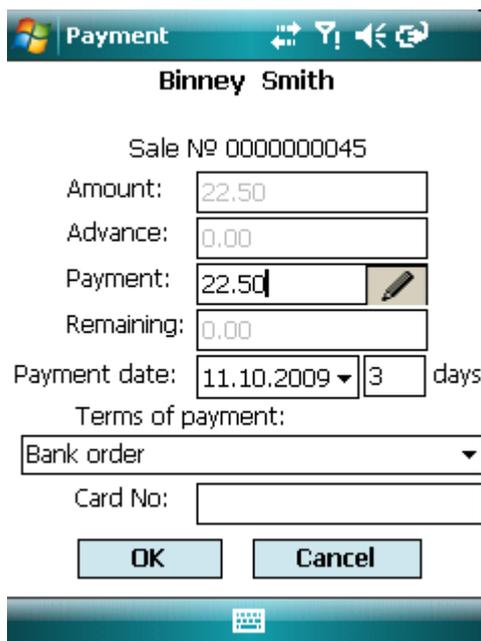
A notification window will open with the following message "The operation has been saved successfully. Press **OK** to confirm**.**
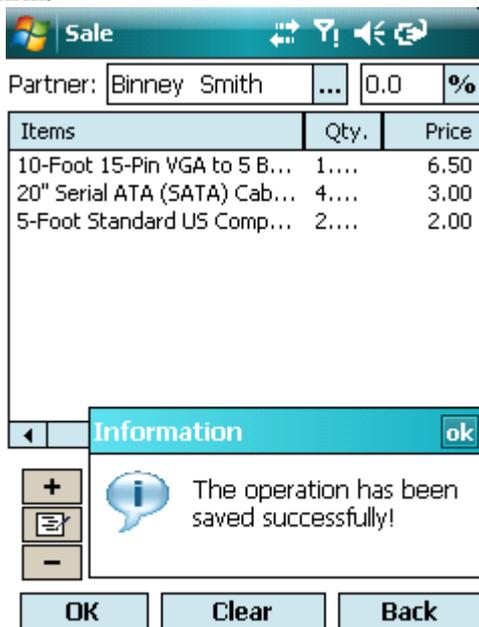
On the next step will appear the Printing window. Select the document that you want to print and press **OK.**

If the printing function is enabled, the document will print. If not, go to **Settings**, **Printing**, select "**Always ask**" and the printer type.
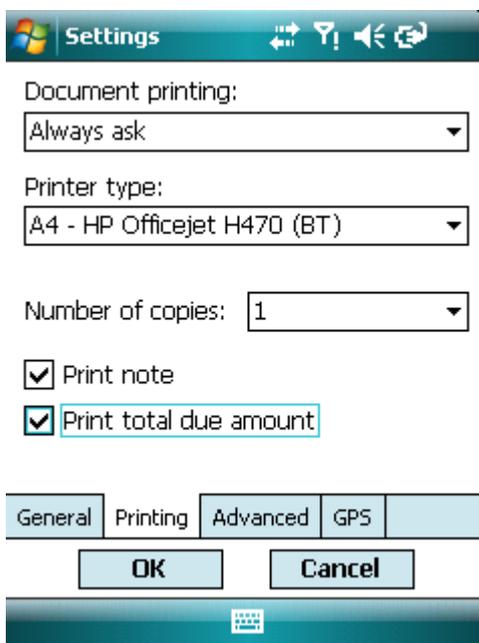
Please note that all transactions created via the *Microinvest* **Warehouse Pro Mobile** module will are available to managers using the main *Microinvest* **Warehouse Pro** module where the more robust reporting is available.

This Quick Start guide covered the initial steps to install and get started using the mobile application of *Microinvest* Warehouse Pro. For further information and additional tutorials, please visit our web site where we have "**Support**" section with **FAQ**. Feel free to send us an email with a

specific question and we will be glad to assist you. Thank you for choosing *Microinvest* Warehouse Pro!

To obtain a license online or find more information, please visit our web site:

http://www.microinvest.net/en