

DoInventory™ Quick Start Documentation

Introduction:

DoInventory™ allows easy management of your home or business inventory or assets collection from any Windows Mobile handheld or phone and Windows PC. This document provides information on the handheld software, as the PC software has its own complete help file system. You may want to print this document for easier reference.

Installation:

To install the software, download the setup file (usually DoInventoryWM_Setup.exe) to your PC. Then, double click the .exe setup file to start the PC installer. The installer will install the PC software first. When the software is first run after installing, the handheld software will be installed.

Registration:

The software is initially installed as a trial version. After purchasing, a 5-digit registration code is provided. This 5-digit code is entered in the blank area on the startup screen on the handheld or on the PC software from the Help / Register menu. Once the registration code is entered on either the handheld or PC, the registration code will be transferred to the other version when synced. The registration code unlocks the full version features. No additional installation is required.

Getting Started:

The following screens and descriptions explain many of the features in DoInventory™. The software was designed to be easy and intuitive, so it will be easy to get started. This documentation will help explain some of the advanced features.

To start the software on the handheld, go to the Start menu. If DoInventory is not there, go to Programs. Tap or select the DoInventory icon to launch the program. Note that this document may specify a tap, which only applies to touch screen devices. Smartphone users can navigate and select with the hardware buttons.

The screenshots below were taken from a Palm OS device, but they will be almost identical on your Windows Mobile device.

DolInventory List Screen:



Upon startup, the list of records is displayed. From this screen, the user may scroll through the list with the onscreen scrollbar or the hardware scroll buttons. Tap a letter in the Quick Nav Bar to go to the first record starting with that letter. Also, the Quick Find Area can be used to jump to a certain record by entering the first few letters in the record title. Simply tap any record in the list to view the record's details.

The buttons at the bottom of this screen will create a new blank record, filter (search) for certain records, or switch to scan mode allowing barcode scanner use.

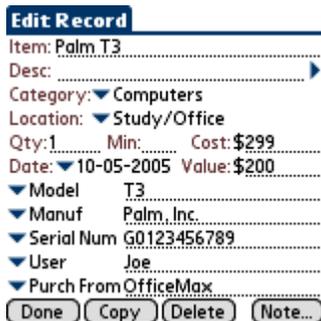
Record Details Screens:



The View screen is displayed after selecting any record in the list. It displays the detailed view of any record in a single text box. Empty fields are not displayed for a more compact view.

Tap Edit to edit any details for that record. On the Edit screen, simply enter the text for each field. You can easily move to the next field while entering data using the Enter key or graffiti stroke (/).

The Expanded Input button to the right of the description field can be used to display multiple lines for easier viewing and editing of the corresponding text.



The category and location can be changed by tapping the down arrow next to the category or location fields.

The five custom field names can be changed by tapping the down arrow to the left of any of the custom fields. The list of custom field labels can be edited and customized. This allows individual records to be setup precisely for a particular item.

Finally, the buttons at the bottom of the screen will save the record, duplicate the record, delete the record, or add a note to the record.

Editing Categories, Locations, and Custom Field Names:



The master list of categories, locations, or custom field names can be edited to include the names preferred by each user.

To edit the master lists, choose the Edit List... item in the appropriate drop down list, or choose the desired option from the File menu.

The screen displayed will list all items in that master list. Icon buttons on this screen will add a new item, delete the selected item, or edit the selected item.

When an item is edited, the Add button changes to Update, and the Edit icon changes to a Clear icon. If you no longer wish to edit the item, tap the Clear icon to get out of edit mode.

Barcode Scanner Support:

Scan Mode

Options:
Qty: +1 -1 No change
Mode: Scan View Edit
 Add as new record if not found
Barcode Field: ▼ Item

Status: Ready to Scan

Barcode:

Scan:
Item:
Qty:

Many types of barcode scanners are supported, including the Janam XP20/XP30, Symbol SPT15xx, 17xx, 18xx, MC50/70 and CSM150 (springboard), the Socket SDIO In-Hand scanner (for Palm OS or Pocket PC), and any barcode scanner supported by SerialMagic™ Professional for Palm OS from Serialio.com which include LaserChamp and Socket CHS7 scanners.

To use a barcode scanner, tap the Scan button from the main list screen. On the Scan screen, options can be selected to increment/decrement inventory counts, view or edit the record matching the scanned barcode, or add a new record if no record exists with that barcode. Specify which field the barcode is in so that DoInventory can lookup the scanned barcode properly.

If a match is found, the Item name and Quantity fields (after +1 or -1 if chosen) are displayed. Further changes to the quantity can be made with the buttons to the right of the quantity value.

To edit or view all information for a record after a match is found, tap the Edit or View buttons at the bottom of the screen.

Pocket PC Scanners

For using the Socket SDIO In-Hand scanner, the SocketScan software will need to be installed to the Pocket PC. Once installed, specify a button to trigger the scan by going to Start... Settings... Buttons... and assigning 'SocketScan' to the desired button. In DoInventory, press (and release) the selected trigger button to initiate the scan.

For the Symbol MC50/MC70 Scanners use the Symbol DataWedge software and in the prefix/suffix options for barcode scanning, check the boxes for Send Data & Send ENTER key after suffix, clear others.

Setting or Changing the Preferences:

Preferences - Page 1

Default Sort: ▼ Item

Enabled Sorts:

<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> Custom 1
<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/> Custom 2
<input checked="" type="checkbox"/> Date	<input checked="" type="checkbox"/> Custom 3
	<input checked="" type="checkbox"/> Custom 4
	<input checked="" type="checkbox"/> Custom 5

Backup Databases on Hotsync
 Confirm Delete Operations
 Confirm Record Copy

Done Password More...

The Preferences screens allow many options to be set by the user. Select the Preferences item from the Edit menu to access the preferences screens.

Preferences - Page 1

The default sort can be specified. This is the sort used when the program is started on the handheld or PC.

Sorts can be enabled (checked) or disabled (unchecked). Only enable the sorts that you want in order to save RAM and improve program speed.

Preferences - Page 2

Default Currency Symbol: \$...

Default Custom Field Labels:

Field 1: ▼
Field 2: ▼
Field 3: ▼
Field 4: ▼

Done More...

Additional options allow the backup of databases on a hotsync to be enabled or disabled (Palm OS handhelds only). The confirmation messages when deleting or copy a record can also be enabled or disabled.

Preferences - Page 2

The default currency symbol can be specified. Enter the desired currency symbol into the text area.

Default custom field labels can be specified. These default labels will be automatically used for the custom fields anytime a new record is created on the handheld or PC.

Change Password

New Password: |
Retype Password: |

7 8 9
4 5 6
1 2 3
0 abc Bksp

OK Hide Input Cancel

The date format and separator can be specified on this screen as well.

Password

Tap the Password button on either preference screen to set or change the program password. This password will be required on the handheld and PC when starting the software.

Filtering (Searching) Records:

Filter Records

Item Text:
Desc Text:
Category: ▼
Location: ▼
Custom 1:
Custom 2:
Custom 3:
Custom 4:
Custom 5:

Do Filter Cancel Clear Criteria

Records can be filtered (searched) by first tapping the Filter button on the main list screen. This will display the Filter screen.

Enter the desired search criteria, and tap the Do Filter button to filter on the criteria. A list of records matching the filter will be displayed.

When a filtered list of records is displayed, the Filter button on the main list screen will change to an All button. Tap the All button to clear the filter and view all records.

Menu Options:

A menu system is available to perform additional functions on the handheld. To view the menu system, tap the Menu bar at the bottom of the screen.

File Menu:

The File menu offers the following options:

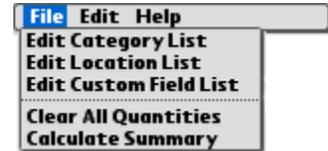
Edit Category List – selecting this option will display the screen to allow the user to edit the master list of categories.

Edit Location List – selecting this option will display the screen to allow the user to edit the master list of locations.

Edit Custom Field List – selecting this option will display the screen to allow the user to edit the master list of custom field names.

Clear All Quantities – clears quantity values for all records. This is useful before doing an inventory count.

Calculate Summary – calculates a summary of the inventory database, including a total item count, total cost, and total value for all records.



Edit Menu:

The Edit menu offers the following options:

Preferences – selecting this option will display the preferences screen to allow program settings and a password to be changed.

Export Record to Memo/Note – while viewing any record, select this option to export the record as text to a new note.

Cut/Copy/Paste – standard functions.



Help Menu:

The Help menu offers the following options:

Help – selecting this option will display the help file available on the handheld.

About – selecting this option will display the About screen, including the version number.

Register – selecting this option will display the Registration screen for entering the registration code.

Close – selecting this option will shutdown the application on the Pocket PC, rather than hide it.



DoInventory Desktop:

The Plus version includes PC desktop software to manage information from the PC. The PC software includes all of the features on the handheld software, plus other features specific to the desktop software. Features available only on the desktop software include printing selected records, printing all records, attaching graphics or pictures to records, importing records from delimited text files (CSV, etc.), exporting records to a CSV file, and more. Consult the help file on the PC desktop software for further information on the desktop features.

DoInventory Plus - PC Companion (Evaluation Version)

File Edit Help

Sort By: Item

Item: Palm T3

Desc: [empty]

Category: Computers Edit List... Date: 10/05/2005

Location: Study/Office Edit List...

Cost: \$299 Total: \$299.00 Quantity: 1

Value: \$200 Total: \$200.00 Min Level: [empty]

Custom Fields: Edit List...

Field 1: Model T3

Field 2: Manuf Palm, Inc.

Field 3: Serial Num G0123456789

Field 4: User Joe

Field 5: Purch From OfficeMax

Note: [empty]

New List All Search Copy Delete Save Cancel Details Picture

Records Listed: 9 (Cost: \$299.00, Value: \$200.00) EDIT MODE CAPS NUM INS 9:58 AM 10/31/2005

Conclusion:

If you are just evaluating or have already purchased DoInventory™ – Thanks!

If you have questions about the software, or cannot find an answer to a problem at our site, please email our support staff. We will work hard to resolve your issue and answer your questions.

