Mobile Inventory Manager
User Guide

Triple E Technologies, LLC

Version 022516.02

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Introduction

The **Mobile Inventory Manager** (**MIM**) inventory management software runs on a Windows mobile handheld scanner and gives you the power to manage your store's inventory wirelessly and in real-time. The MIM syncs with your Site Controller and DataManager to give you the capability to instantly update your inventory while on the floor. Portability and ease of use make the MIM an essential asset for keeping your inventory updated. With the touch of a button, you can add and edit inventory items, change prices, and more, all without being confined to your desk. The following are a few of the MIM's features:
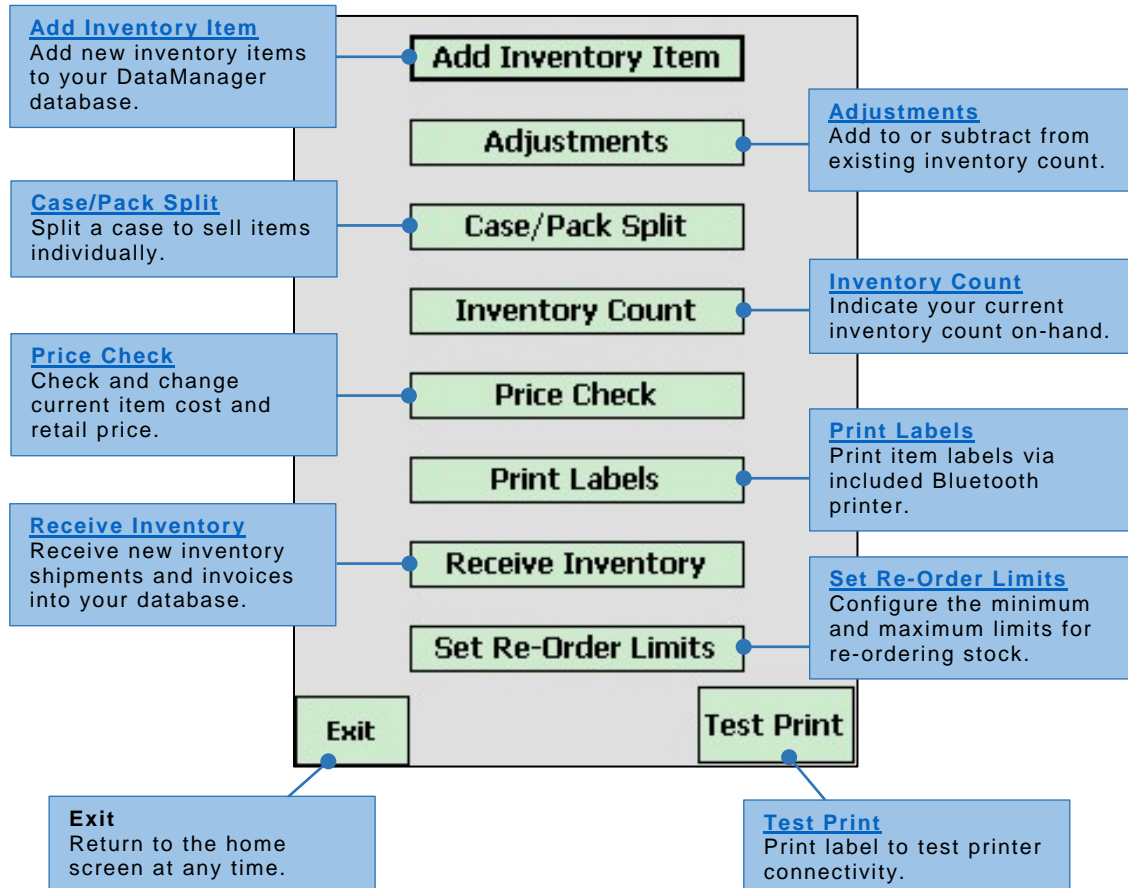
- ✓ Add new inventory items instantaneously
- ✓ Quickly print labels from included Bluetooth printer
- ✓ Maintain and adjust inventory prices
- ✓ Perform inventory adjustments and counts
- ✓ Receive inventory
- ✓ Print custom scannable labels for products with no UPC
- ✓ Split cases into individual products
- ✓ Set up and manage re-order limits

MIM at a Glance

Main Menu

You can access all of the MIM's features from the main menu.

Add Inventory Item
Add new inventory items to your DataManager database.

Case/Pack Split
Split a case to sell items individually.

Price Check
Check and change current item cost and retail price.

Receive Inventory
Receive new inventory shipments and invoices into your database.

Adjustments
Add to or subtract from existing inventory count.

Inventory Count
Indicate your current inventory count on-hand.

Print Labels
Print item labels via included Bluetooth printer.

Set Re-Order Limits
Configure the minimum and maximum limits for re-ordering stock.

Add Inventory Item

Adjustments

Case/Pack Split

Inventory Count

Price Check

Print Labels

Receive Inventory

Set Re-Order Limits

Exit

Test Print

Exit
Return to the home screen at any time.

Test Print
Print label to test printer connectivity.

Hardware Shortcut Keys

The MIM software is loaded onto an Intermec Windows Mobile handheld scanner. Listed below are the Intermec's essential buttons and their functions, as well as commonly used shortcut keys.

Button Functions

Scan Button	Press and hold down to use scanning feature.
Sleep Mode	Put the MIM in sleep mode. Press again to wake MIM from sleep mode.
Backspace	Delete a character when typing.
Tab	Navigate between different fields.
Arrow Up/Down	Scroll through values in dropdown menus.
Enter/Space	Accept a selection or insert a space.
Orange Modifier	Enable orange functions labeled above keys.
Green Modifier	Enable green functions labeled above keys.

Button Shortcuts

Use Uppercase Letter	Press + + , then press the letter you want to capitalize.
Enable Caps Lock	Press + B. Press again to disable caps lock.
Access Start Menu	Press + 1. Press ESC to close start menu.
Close Current Window	Press + 3.
Use Orange Characters/Functions	Press (orange LED turns on), then press a key with orange character or function printed above it.
Use Green Characters/Functions	Press (green LED turns on), then press a key with green character or function printed above it.
Unlock Orange/Green Modifier	Press or once. The LED turns off.

Setting up the MIM

Connecting to your Wireless Access Point (CK3 Model)

Before you can start syncing your inventory changes to DataManager, you will need to connect your MIM to your wireless access point. The following steps apply to the Intermec CK3 model.

To connect to your wireless access point:

1. From the Windows home screen, navigate to **Start** > **Settings** > **Connections** tab > **Wireless Manager** icon > **Status** > **Wireless** > **Advanced** > **Scan** tab**.**

2. Select **Scan**. List of visible SSIDs displays.

3. Write down the details for your desired SSID.

4. Navigate to **Start** > **Settings** > **System** tab > **Wireless Network** icon.

5. Touch **Edit Selected Profile**, then edit the selected profile to match your desired SSID and security settings.

6. Uncheck the **Enable Power Management** checkbox.

7. Navigate to **Start** > **Settings** > **Connections** tab > **Wireless Manager** icon > **Status** > **Wireless**.

8. Wait for the MIM to run the automatic diagnostic tests:

   - Wireless Enabled

   - MAC Address

   - Associated

   - IP Address

   - Connection Validated

9. Verify all diagnostic tests have passed. If one or more tests fail, validate the wireless SSID, password, and security type, then try again.

Connecting to your Wireless Access Point (CK3X Model)

On Intermec CK3X models, you can connect to your wireless access point by either using the default Funk Security or by switching to Microsoft Security.

Funk Security allows you to configure a default wireless profile that the Intermec will always use to connect to a wireless network. With Funk Security configured properly, you will never be alerted to connect to any other wireless access points (WAPs) in range.

Funk Security (Recommended)

To configure Funk Security:

1. Touch , then navigate to **Settings** > **System** > **Intermec Settings**.

2. From the **Intermec Settings** folder, touch **Communications** > **802.11 Radio**. Verify the radio is enabled.

3. Set the **Security Choice** to **Funk Security**. The device will reboot.

4. Navigate to **Settings** > **System** > **Intermec Systems** > **Communications**, then touch the **Funk Security** icon.

5. Touch **Profile 1**, then set the **Network Type** to **Infrastructure**.

6. Enter a description for the wireless access point in the **Profile Label**.

7. Disable **Power Mode**.

8. Set the **SSID** to match your wireless access point.

9. Set the **Associate** and **Encryption** to match your wireless access point security settings.

10. Enter the appropriate **Pre-Shared Key** or **Transmit Key** depending on your wireless access point's security settings.

11. Return to the **Start** menu, then touch the **ISpyWifi** icon.

12. From the **ISpy** tab, verify that you have an IP address.

13. Touch the **Scan** tab, then verify that your SSID matches an SSID in the list.

14. Touch the **Supp** tab, then configure the current wireless profile or attempt to reconnect to the wireless access point.

15. Touch the **Ping** tab to ping other devices on the network, if desired.

Microsoft Security

Microsoft Security is an alternate method of wireless connectivity. It is easier to set up initially, but as long as it is enabled, you will be notified whenever a new WAP appears in range and will be prompted to connect.

To configure Microsoft Security:

1. Touch , then navigate to **Settings** > **System** > **Intermec Settings**.

2. From the **Intermec Settings** folder, touch **Communications** > **802.11 Radio**. Verify the radio is enabled.

3. Set the **Security Choice** to **Microsoft Security**. The device will reboot and will detect wireless networks in range upon successfully restarting.

4. Select the desired wireless network and enter your wireless network access key when prompted.

5. If desired, navigate to the **Start** menu and touch the **ISpyWifi** icon the check the current wireless access status.

Disabling Auto-Complete

By default, your windows mobile scanner enables the auto-complete feature. Disabling this feature is suggested prior to use to increase usability and prevent accidental term assignments.

To disable auto-complete:

1. Navigate to **Start** > **Settings** > **Input** icon > **Word Completion** tab.

2. Uncheck the **Suggest words when entering text** and **Enable Auto Correct** checkboxes.

Installing Microsoft ActiveSync

Installing Microsoft ActiveSync is required to sync data between the MIM and Windows PCs running Windows XP SP2 or earlier. If you are running Windows 7 or later, your synchronization settings will be managed through the Windows Mobile Device Center, so you will not need to download ActiveSync.

To install Microsoft ActiveSync:

1. Download Microsoft ActiveSync.
2. Run the installer on your home office PC. Uncheck all boxes when prompted to sync files during the install process.
3. Click **Next**, then finish the installation.

Installing MIM Software

You can install the MIM software once either ActiveSync or Windows Mobile is running on your computer.

To install MIM software:

1. Download the MIMSetup.CAB file on your home office PC.
2. Transfer the MIMSetup.CAB file to the MIM using ActiveSync or Windows Mobile explorer.
3. On the MIM, navigate to the MIMSetup.CAB file and launch it.
4. When prompted, choose to install to the **Flash File Store**.

Starting the MIM Software

To start the MIM software:

1. Power on the MIM device.
2. On the home screen, touch **Start**, then touch **Mobile Inventory Manager**.
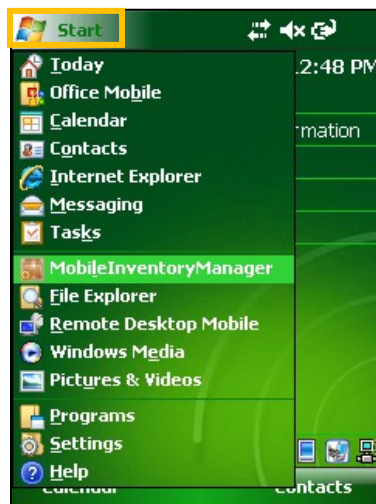
Configuring the MIM Software

You can access the MIM database connection settings from the application loading screen. You will have approximately 3-5 seconds to select this option before the application fully loads. From the configuration screen, you can change the following:

- Server
- Database
- User ID
- Password
- Bluetooth printer support
- Printer COM Port

To access the configuration settings:

1. Launch the MIM software.
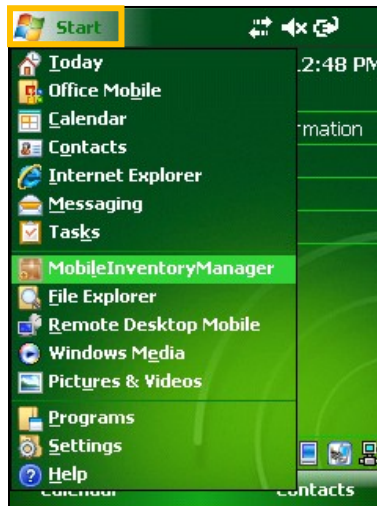
2. While the loading screen is displayed, touch **Config**.

3. Make changes as applicable, then touch **Apply Changes**.

Setting up the Printer

Connecting to the Printer (CK3)

The MIM includes an optional Bluetooth printer that can be used to print labels as you add and update inventory items. You will need to follow the steps below to connect the MIM to the printer before you can begin printing labels. Before starting this process, ensure that the printer is within a 15 foot range and is powered on.

1. From the MIM home screen, navigate to **Start** > **Settings** > **Connections** tab > **Wireless Manager** icon.
2. In the **Wireless Manager** menu, touch **Enable**, then check **Bluetooth**.
3. Navigate to **Start** > **Settings** > **System** tab > **Wireless Printing** icon.
4. Touch **Search**, then select the printer and touch **Set**.
5. Touch the **Enable** checkbox to enable the printer.
6. Touch **Print Test Page**. Page will not print, but LCD display will display if connected.
7. Ensure the printer's LCD display shows the letters **IPL**.

Connecting to the Printer (CK3X)

When using the CK3X model, you configure the Bluetooth printer settings via the Intermec Settings menu. Before starting this process, ensure that the printer is within a 10 foot range of the Intermec and is powered on.

To configure the printer:

1. Touch , then navigate to **Settings** > **Bluetooth**.
2. Touch **Add New Device**. The device will begin searching for available Bluetooth devices.
3. Select the **PB22-23821335010** printer device.
4. Touch **Next** until the device attempts to pair with the printer. If necessary, enter a passcode.
5. Touch **COM Ports** at the top of the screen.
6. Configure a **New Outgoing Port**. Select the PB22 printer, then tap **Next** and choose **COM8** from the dropdown menu.
7. Touch **Finish**.
8. Return to the **Settings** menu, then select **System**.
9. From the **System** menu, touch **Wireless Printing**.
10. Touch **Search**, then select and set the **PB22 printer** when it is found.
11. Check the **Enable Printer** checkbox, then touch **Print Test Page** to verify functionality.

Configuring the Printer (CK3)

You can optimize the printer's functionality by setting the following configurations. Disabling sleep mode is recommended to prevent connection interruptions when performing MIM functions, and setting up the media type is recommended to best display information on your labels.

IPL 12.0.0

To disable sleep mode:

1. Press **Settings** .

2. Press **Power** **four** times, until **Power** option displays.

3. Press **I** for **OK**.

4. Press **Power** until **Sleep Timer** displays.

5. Press **I** for **OK**.

6. Press **Power** until **Always On** displays.

7. Press **I** for **OK**.

8. Press **Power** until **Standby Timer** displays.

9. Press **I** for OK.

10. Press **Power** until **Disabled** displays.

11. Press **I** for **OK**.

12. Press **Settings** to return to home menu.

To set up media type:

1. Press **Settings** .

2. Press **Power** until **Media** displays.

3. Press **I** for **OK**.

4. Press **I** for **OK** when **Media Type** displays.

5. Press **Power** until **Gap** displays.

6. Press **I** for **OK**.

7. Press **Power** until **LBL Rest Point** displays.

8. Press **I** for **OK**.

9. Press **Power** until **-10** displays.

10. Press **I** for **OK**.

11. Press **Settings** to return to home menu.
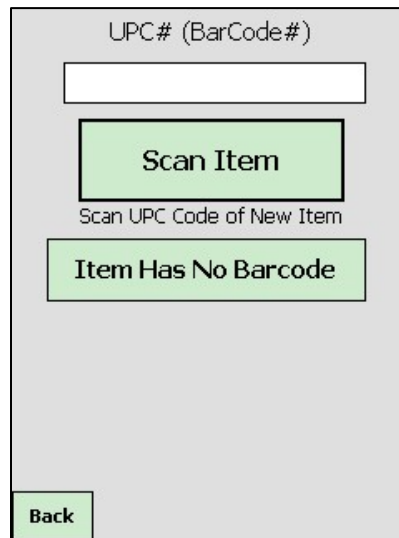
Daily MIM Functions

Add Inventory Items
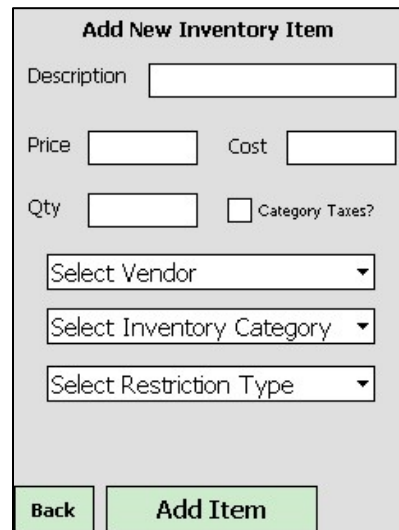
You can add inventory items to your database by either scanning them or by creating custom UPCs for items without them. An inventory category and restriction type are required to add a new inventory item. You can also add optional information, such as item price, cost, quantity, and vendor.

To add inventory items (scanning):

1. Touch **Add Inventory Item**. **Scan Item** screen displays.

2. Press and hold the scan button, or touch **Scan Item**, then scan the item. **Add New Inventory Item** screen displays.

3. Type the following:

   Description | Unique name or brief narrative identifying entry.

Price	Item retail price per specified unit of measure (case or unit).
Cost	Item vendor price, per specified unit of measure.
Qty	Item quantity in stock, per specified unit of measure.

4. Touch the **Select Vendor**, **Inventory Category**, and **Restriction Type** dropdown menus and select the appropriate values.

5. If desired, check the **Category Tax** checkbox to apply tax values from the selected inventory category.

6. Touch **Add Item**.

To add an item (custom barcode):

1. Touch **Add Inventory Item**. **Scan Item** screen displays.

2. Touch **Item Has No Barcode. Add New Inventory Item** screen displays.

3. Type the following:

Description	Unique name or brief narrative identifying entry.
Price	Item retail price per specified unit of measure (case or unit).
Cost	Item vendor price, per specified unit of measure.
Qty	Item quantity in stock, per specified unit of measure.

4. Touch the **Select Vendor**, **Inventory Category**, and **Restriction Type** dropdown menus and select the appropriate values.

5. If desired, check the **Category Tax** checkbox to apply tax values from the selected inventory category.

6. Touch **Barcode**, then type a custom UPC using the following guidelines:

- Must begin with an alphabetical character (A – Z)

- Must be at least six characters

7. Touch **Add Item**.

Adding Items to the Database
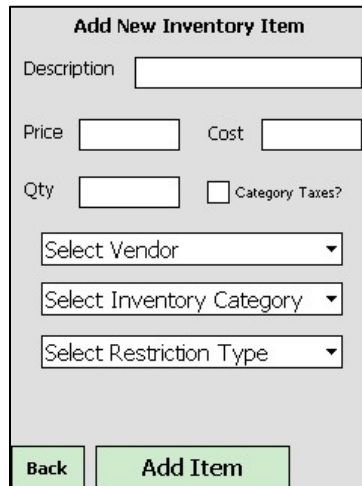
You can add items to your inventory while performing other MIM functions without using the Add Inventory Item option. After you add an item to your inventory, you will return to the previous screen, allowing you to quickly return to your previous tasks.

To add an item to the database:

1. Scan an item from any of the main menu option submenus, excluding Add Inventory Item.

2. Touch **Add Item to Database**. **Add New Inventory Item** screen displays.
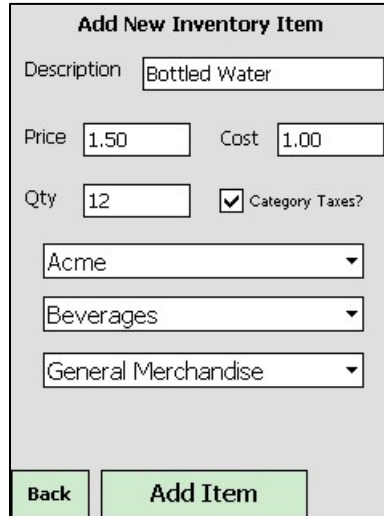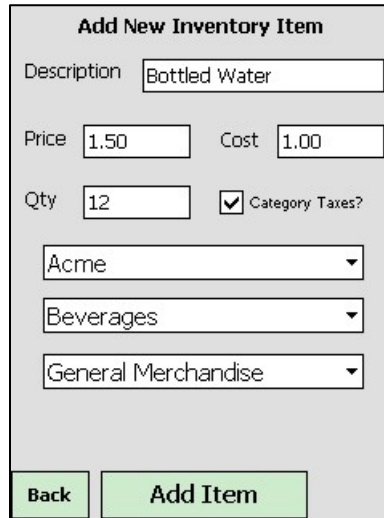

3. Type the following:

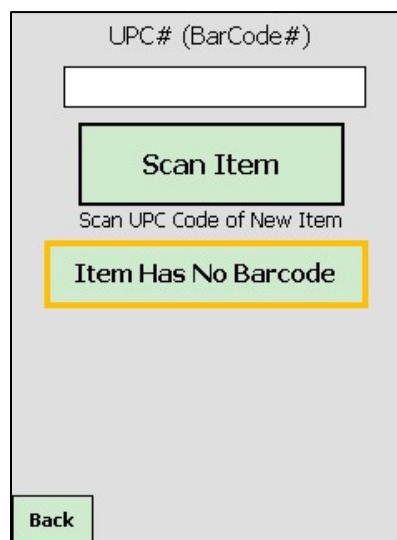|	
Description	Unique name or brief narrative identifying entry.
Price	Item retail price per specified unit of measure (case or unit).
Cost	Item vendor price, per specified unit of measure.
Qty	Item quantity in stock, per specified unit of measure.

4. Touch the **Select Vendor**, **Inventory Category**, and **Restriction Type** dropdown menus and select the appropriate values.

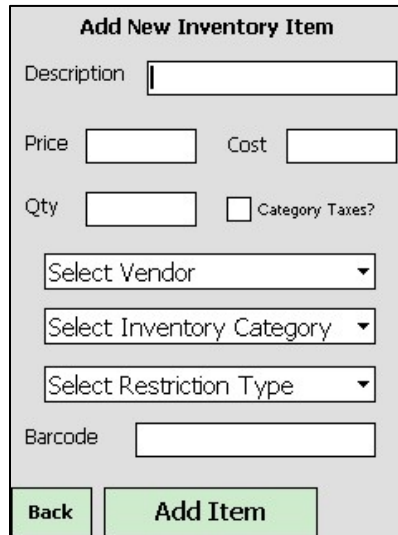5. If desired, check the **Category Tax** checkbox to apply tax values from the selected inventory category.

Add New Inventory Item

Description | Bottled Water

Price | 1.50 | Cost | 1.00

Qty | 12 | ☑ Category Taxes?

Acme ▼

Beverages ▼

General Merchandise ▼

Back | Add Item
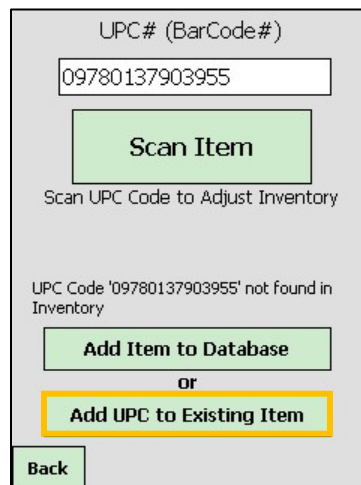
6. Touch **Add Item**.

Associating New UPCs with Existing Items

If you scan an item that doesn't exist in the database, you can associate that item's UPC with an existing inventory item. After you associate a UPC with an existing item, scanning either of the UPCs will display the item's information.

To add UPC to existing item:

1. Scan an item from any of the main menu option submenus, excluding Add Inventory Item.

UPC# (BarCode#)

09780137903955

Scan Item

Scan UPC Code to Adjust Inventory

UPC Code '09780137903955' not found in Inventory

Add Item to Database

or

Add UPC to Existing Item

Back

2. Touch **Add UPC to Existing Item. Scan Item** screen redisplays.
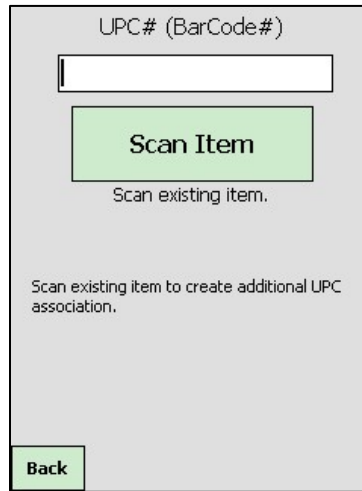
3. Press and hold the scan button, or touch **Scan Item**, then scan the existing item.

Inventory Adjustments

You can add to and subtract from your inventory count by using the **Inventory Adjustments** function. When adjusting inventory, you do not need to include a plus or minus sign in the quantity field; selecting an adjustment type will determine whether the entered quantity will be added to or subtracted from the existing count. Inventory Adjustment reasons are connected to the **Add To** and **Subtract From** adjustment reason codes you create in DataManager.
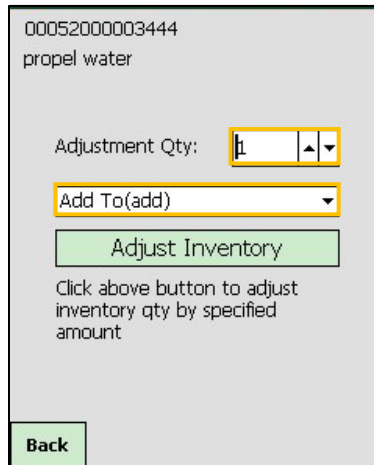
If you want to indicate your current inventory count on hand rather than adding to or subtracting from it, see the **Inventory Count** section.

To make inventory adjustments:
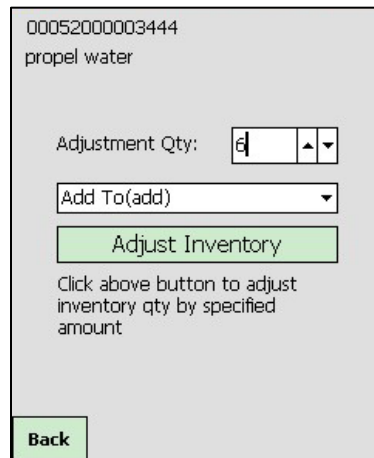
1. Touch **Adjustments**. **Scan Item** screen displays.
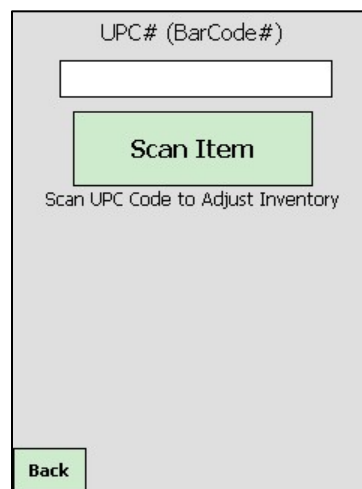
2. Press and hold the scan button, or touch **Scan Item**, then scan the item.

3. Touch **Adjustment Qty** and type an amount, or touch the up and down arrows to adjust the amount.

4. Touch the dropdown menu to select the adjustment type.

5. Touch **Adjust Inventory**.

Case/Pack Split

The **Case/Pack Split** function splits a case or carton of items into individual, sellable items. In order to properly use this function, you will need to label the individual inventory items as received in cases in DataManager. When you perform a Case/Pack Split, your inventory will decrease by one case and increase by the number of items in the case.

To use case/pack split:

1. Touch **Case/Pack Split**. **Scan Item** screen displays.
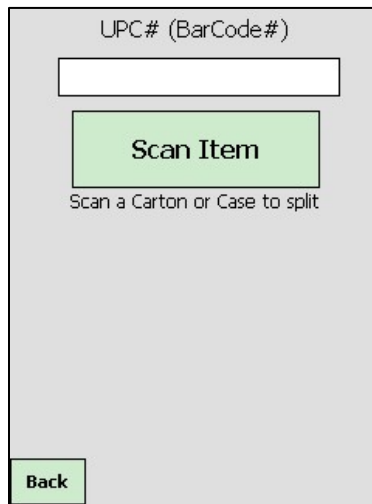
2. Press and hold the scan button, or touch **Scan Item**, then scan the carton or case. **Scan Item** screen redisplays.
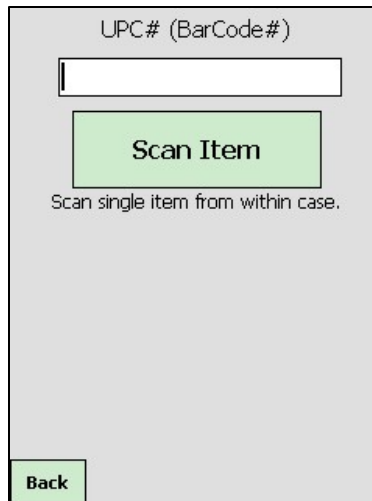
3. Press and hold the scan button, or touch **Scan Item**, then scan the individual item.

Inventory Count

The **Inventory Count** function allows you to indicate your current inventory count on hand. This function differs from the Inventory Adjustment because it overwrites the current count and changes it to the value entered, instead of adding to or subtracting from it.

To perform an inventory count:

1. Touch **Inventory Count**. **Scan Item** screen displays.

UPC# (BarCode#)

Scan Item

Scan UPC Code to Perform Count

Back

2.   Press and hold the scan button, or touch **Scan Item**, then scan the item.

3.   Touch **Enter Count** and type an amount, or touch the up and down arrows to adjust the amount.

00052000003444
propel water

Enter Count: 30

Accept Count

Back

4.   Touch **Accept Count**. Verification screen displays.

00052000003444
propel water

Entered Count: 30
Onhand Count: 24
Difference: 6

Inventory Count

Adjust Inventory

Click above button to set
inventory count.

Change Entered Count

Back
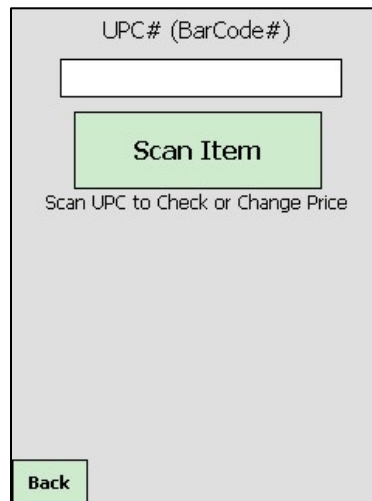
5. Touch **Adjust Inventory** to make the changes, or touch **Change Enter Count** to edit the entered count.

Price Check
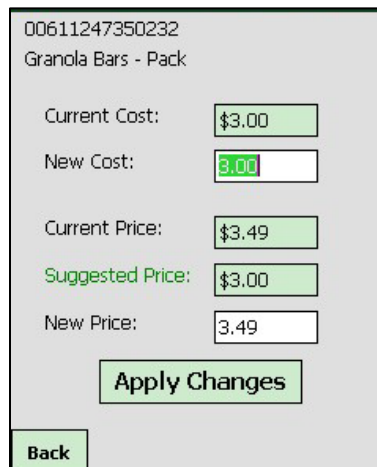
You can check and change the prices for your inventory items by using the **Price Check** function. When you scan an item, the MIM will display relevant cost and price values, and it will also create a suggested price based on the item category's gross profit margin target in DataManager.

To perform a price check:

1. Touch **Price Check**. **Scan Item** screen displays.

2. Press and hold the scan button, or touch **Scan Item**, then scan the item. **Price Check** screen displays.

3. If changing cost, touch **New Cost** and enter the new cost.

4. If changing retail price, touch **New Price** and enter the new price.

00611247350232
Granola Bars - Pack

Current Cost: $3.00

New Cost: 3.50

Current Price: $3.49

Suggested Price: $3.00

New Price: 4.00

Apply Changes

Back

5. Touch **Apply Changes**.

Print Labels

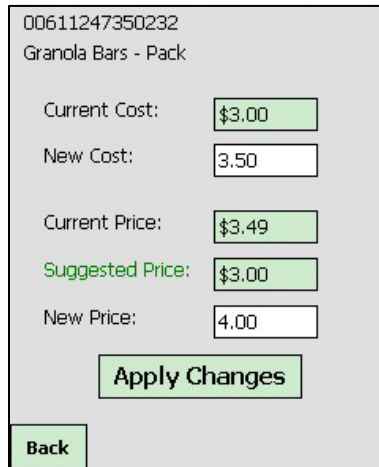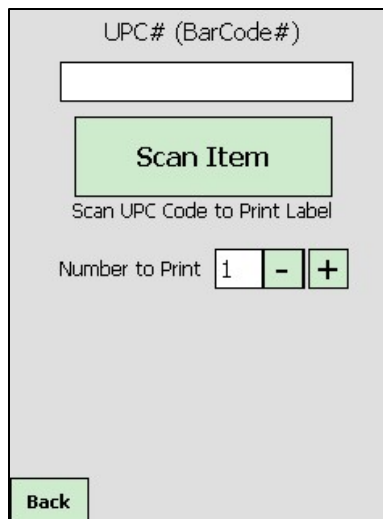The MIM includes a wireless Intermec Bluetooth printer, allowing you to print labels instantly for inventory items on the floor. Scanning an item with the **Print Label** function prints a label with the item's description, price, and UPC code.

Verify the printer is powered on and located within 15 feet of the MIM to ensure labels print successfully. Additionally, ensure the MIM has been successfully paired with the printer prior to use. See Connecting to the Printer for more information.

To print labels:

1. Touch **Print Labels**. **Scan Item** screen displays.

UPC# (BarCode#)

Scan Item

Scan UPC Code to Print Label

Number to Print 1   - +

Back

2. Touch the minus and plus buttons - + to change the **Number to Print**.
3. Press and hold the scan button, or touch **Scan Item**, then scan the item.

Receive Inventory

The **Receive Inventory** function allows you to receive inventory from a new shipment. When receiving inventory, you can include an invoice number to help distinguish between shipments.

After receiving inventory, you need to mark the shipment as received in DataManager to complete the receiving process.

To receive inventory:

1. Touch **Receive Inventory**. **Receive New Inventory** prompt displays.

2. Touch **Yes**. **Scan Item** screen displays.
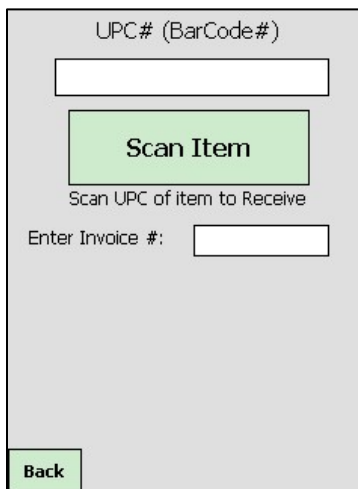
3. If desired, type the invoice number in the **Enter Invoice #** field.

4. Press and hold the scan button, or touch **Scan Item**, then scan the item UPC. **Receive Inventory** screen displays.

5. Touch **Quantity**, then type the quantity received.

6. Touch **Ext. Amount**, then type the extended amount.

   -If received in cases, Ext. Amount = (Quantity x Quantity per case) x Vendor Price

   *-If **not** received in cases, Ext. Amount = Quantity x Vendor Price*

7. Touch **Receive**. **Scan Item** screen redisplays.

8. As applicable, repeat steps 4-7 for each additional item to be received.

9. When finished, touch **Back**. **Confirmation** prompt displays.

10. Touch **Yes** to finish receiving inventory, or touch **No** to continue receiving inventory.

11. In DataManager, mark the shipment as received.

Set Re-Order Limits

After scanning an item, you can set minimum and maximum re-order limits. The minimum limit indicates when you need to order new stock, and the maximum limit indicates the maximum item count that should be on hand at any given time.

In order to effectively use this feature, you should run the **Re-Order Limits** report in DataManager to review the recommended amount of stock to be ordered.

To set re-order limits:

1. Touch **Set Re-Order Limits**. **Scan Item** screen displays.
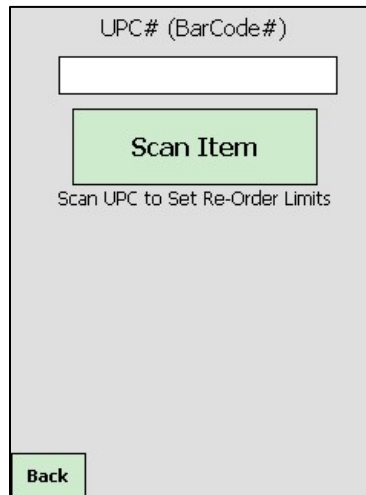
2. Press and hold the scan button, or touch **Scan Item**, then scan the item. **Set Re-Order Limits** screen displays.

```
00052000003444
propel water


On Hand Qty:        30

Minimum Qty:        0

Maximum Qty:        0


              Submit


Back
```

3. Touch **Minimum Qty** and enter the minimum inventory amount.

4. Touch **Maximum Qty** and enter the maximum inventory amount.

```
00052000003444
propel water


On Hand Qty:        30

Minimum Qty:        30

Maximum Qty:        50


              Submit


Back
```

5. Touch **Submit**.

Test Print

You can use the Test Print function to print a test label and ensure your printer is configured and connected properly.

To test print:

- Touch **Test Print**.

General Troubleshooting

Resetting a Frozen Device (Warm Boot)

1. Press and hold the **Power** button until the screen goes blank.
2. Press the **Power** button once to turn the device back on.

Resetting a Frozen Device (Cold Boot)

1. Remove the battery on the back of the device.
2. Press and hold the small black or silver round button in the battery compartment for about 3 seconds.
3. Reinsert the battery.
4. Wait for the device to reboot and reset.