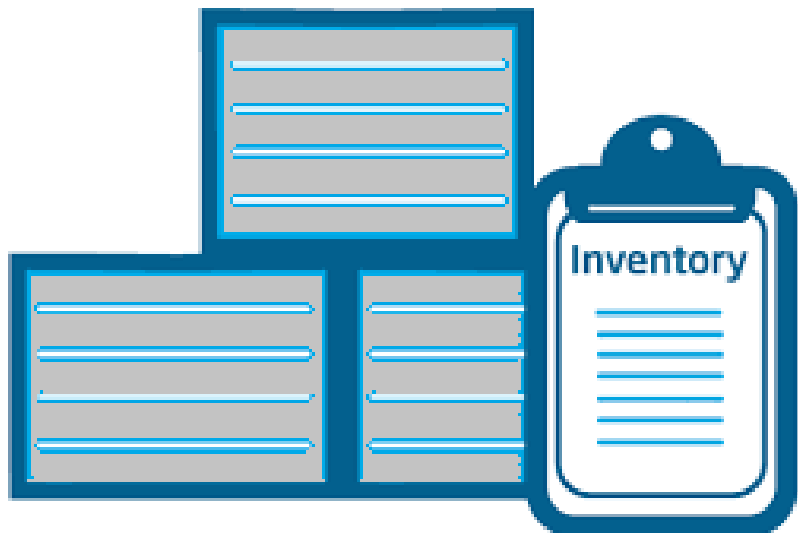


Inventrue

Inventory Count Module

MyPOS

Installation and User's Guide



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Inventrue - TRS Inventory Count Module

MyPOS

Installation Guide

Pre-requisites

- 1) The tablet or computer requires an internet connection
- 2) The tablet or computer must have a full Windows O/S (Windows 7 or higher)
- 3) The tablet or computer needs .NET Framework 4.5.1
- 4) The tablet or computer must share the same external IP address as your MyPOS installation

Before you begin....

To ensure a smooth installation setup, please read the four points below:

- 1) You will require your tablets or computers to be part of your store's network (wireless)
- 2) You will require your MyPOS Database connection credentials.
- 3) You will require a local and network folder to store your count files
- 4) Time Monday – Friday between 9am – 5pm Eastern time to call 1-877-877-4767 for your licenses once the software is installed on your device(s)

Installation

- 1) Download the application from the link below
- 2) Save the file on the local system
- 3) If a message is displayed that Windows has protected your PC, you must click the "More Info" option generally located on the left side of the screen, then select the option to continue.
- 4) Access folder where file has been saved
- 5) Right-click on executable, then select "Run as Administrator"

<http://tricityretail.com/clickonce/inventrue-mypos/>

Use all defaults for folders options and program will launch when installation is complete, with an icon on the desktop.

Configuration

MyPOS Database Connection information will be supplied by your MyPOS administrator at time of install.

Test Database Connection will test to ensure that the database connection information is correct.

Load from user.config will populate the database connection information from the tablet or computers MyPOS installation.

This feature requires MyPOS to be installed on the tablet or computer.

The screenshot shows a 'Database Setup' window with a teal header and a white background. It contains several input fields and buttons. The 'MyPOS Database Connection' section has fields for 'Server Name', 'Database Name', 'Username', 'Password' (masked with dots), and 'Time Out (in s)' set to 30. Below these are two buttons: 'Test Database Connection' and 'Load from user.config'. The 'Unique file identifier' field is set to '01', and a label below it says 'Filename is: myPOSCount01.txt'. The 'Maximum quantity allowed' field is set to '99999'. There are two checkboxes: 'Perform count online' (unchecked) and 'Include inactive products' (unchecked). Below these are two sections for backup directories. The first section, 'Backup / Store Count File to the following directory when online (remote):', has a text field with '\\\\SERVER\\Inventory Count' and a 'Browse' button. The second section, 'Backup / Store Count File to the following directory when offline (local):', has a text field with 'C:\\Inventory Count' and a 'Browse' button. At the bottom are 'OK' and 'Cancel' buttons.

Unique File Identifier must be different on each device as a way of identifying the count files that are uploaded for import to MyPOS. Each device should have its own unique identifier. The file that will be available for import into MyPOS Physical Count will be displayed, using the unique identifier

Maximum quantity allowed is set to 99999 to allow a five digit quantity, 999 for a three digit quantity etc. This feature is designed to significantly reduce the chance that a user will scan a barcode in the quantity field.

Perform count online option will require a persistent network connection.

Include Inactive products will include all MyPOS products when creating a new blank count.

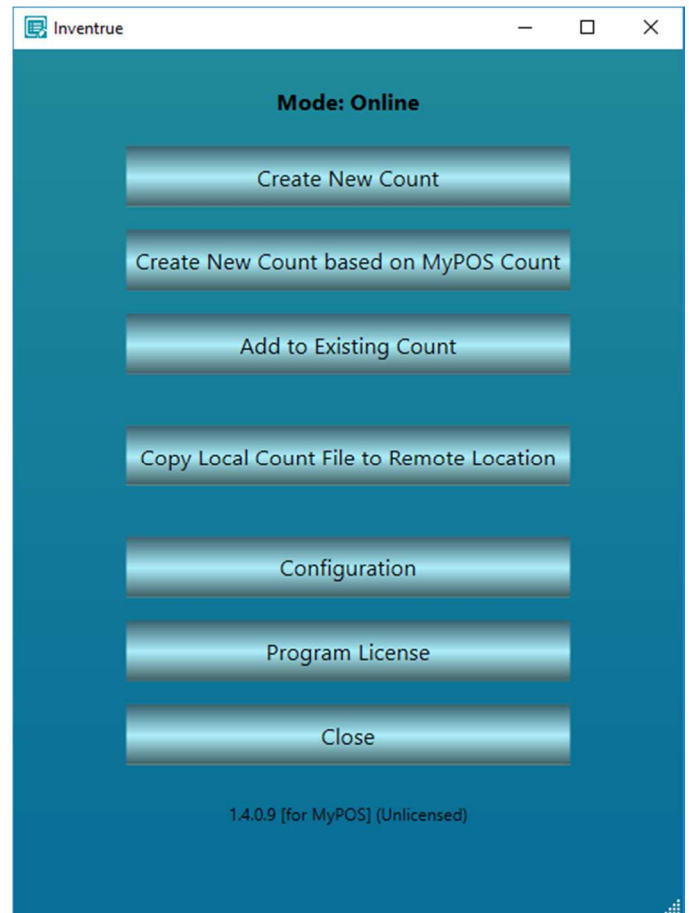
Backup / Store Count file directory when online (remote) will specify the location where the files should be uploaded for import into MyPOS. Normally, all devices would have the same directory on a shared folder on your network .

Backup / Store Count file directory when offline (local) will specify the location where the files should be stored on the local device.

Usage

Inventrue will allow you to sync product catalogs and count files from your mobile device and networked PCs. Catalogs are built when the user begins the count and at this point, the device must be on the network. Once the catalog is built, the user is safe to disconnect from the network then perform their physical counts. The count file will be stored locally until the user connects the device to the network and clicks the “Copy Local Count File to Remote Location”.

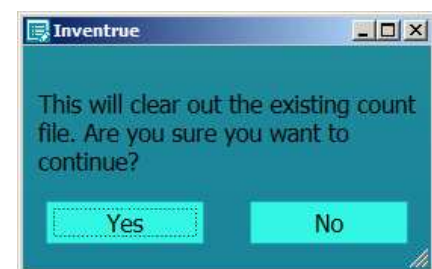
When you open the program you will see your mode (Online or Offline) posted at the top of the screen.



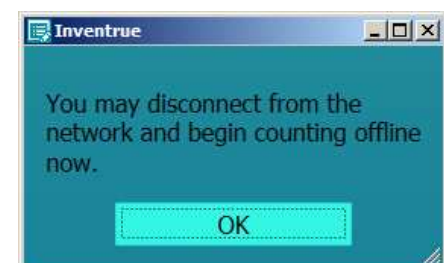
Create New Count

Click the Create New Blank Count button to enable a count on any or all products in your MyPOS database. When you click this button, the existing count file will be erased to make room for the new data.

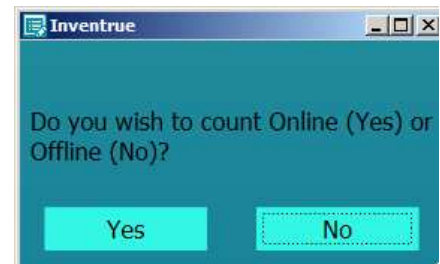
Click Yes, to start with a blank count file.



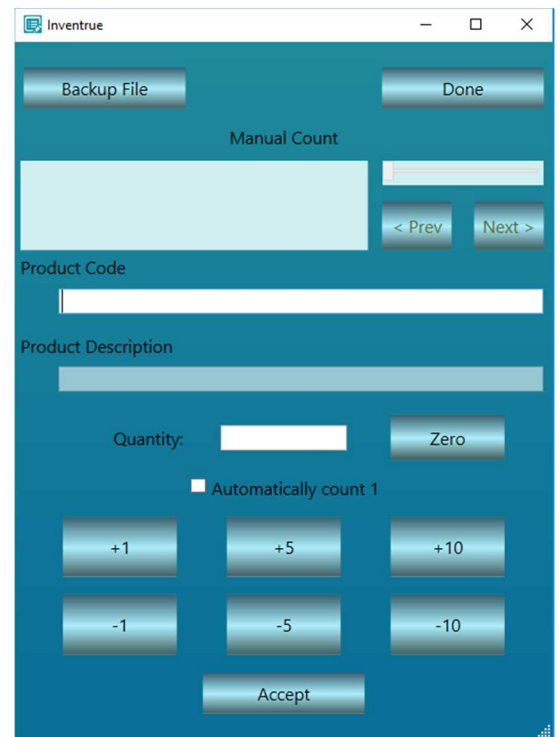
If counting offline, the display will now indicate that you can disconnect from the network to begin counting offline.



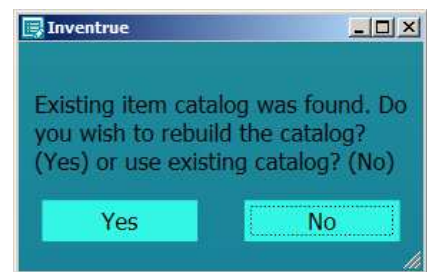
If the configuration option is set to count online, a prompt will request that you answer Yes to count online or No to count offline.



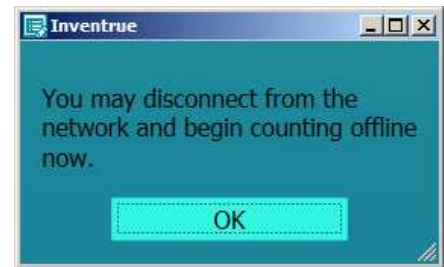
If answer is Yes, the count screen will be displayed and will indicate “Online” at the top of the display.



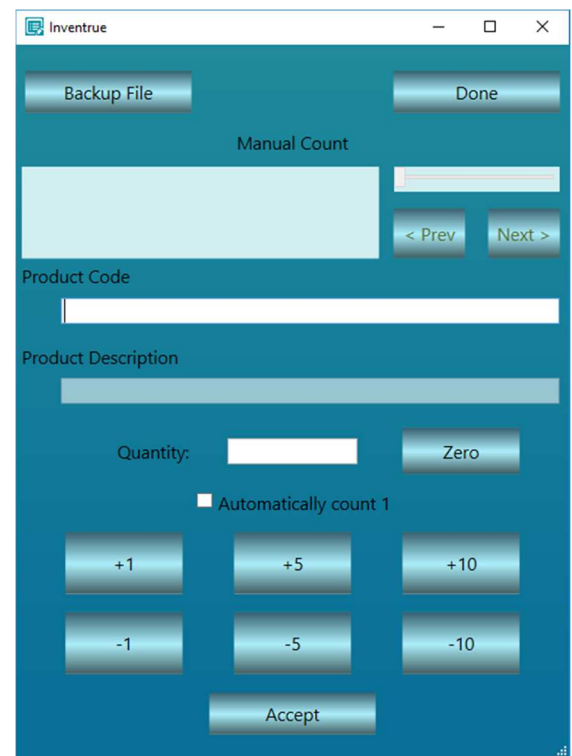
If the configuration option is NOT set to count online, you will be prompted to use the catalog. The default has been set to “No” so that you will not inadvertently over-write a file that you are already using. Choose “Yes” to build a new catalog. By default, Inactive products will not be included. If you would like to include inactive products, choose this option in configuration. In cases where you are performing a number of counts on the entire database, you may wish to keep the same catalog. If you’re not sure, choose “No”.



Once the catalog has been rebuilt or you have selected No to rebuild, a message will indicate that you can disconnect from the network to begin counting offline.



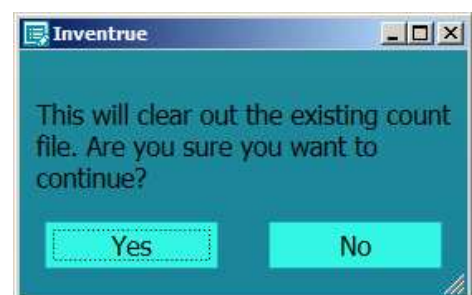
The count screen will be displayed and will indicate “Offline” at the top of the display.



Create New Count based on MyPOS Count

Click the Create New Count based on MyPOS Count button to create a count based on the products in an existing open, Physical Count in MyPOS. When you click this button, the existing count file will be erased to make room for the new data.

If you select “Create New Count base on MyPOS Count” you will be prompted to clear the existing count file.



Click Yes, to start with a new count file and you will be prompted with a list of all open physical inventory counts.

Once you choose a count and click OK a catalog with the products in the count will be created and you will be able to disconnect from the network, if counting offline, to perform your count.

The count screen will be displayed.

Only products in the count will be permitted to be scanned.



Add to Existing Count

If you have a count in progress and you are taking a break or perhaps connected to the network to back up your file, simply click “Add to Existing Count” to continue counting.

If the option to count online is set, you will be prompted to answer Yes to count online or No to count offline.

Copy Local Count File to Remote Location

This button is used when you want to transfer your count file from your device to the remote (network) location to either submit the file for import into MyPOS or to periodically back up your file.

Every time you click this button, your file will copy to the remote location and rename the previous version of the file with a YYYYMMDDHHMM extension.

Counting Inventory

Backup File sends a copy of the local count file to the network remote location.

Backup File Done

Manual Count

< Prev Next >

Product Code

Product Description

Quantity: Zero

☐ Automatically count 1

+1 +5 +10

-1 -5 -10

Accept

Done exits the count and returns to the menu.

The top window displays the last product counted. Use the **< Prev** and **Next >** buttons to scroll through previously counted products.

Product Code field is where the cursor must be to enter or scan products.

Product Description will be automatically filled in when a product is scanned and cannot be edited.

Quantity is where you will enter the counts for the product scanned / entered.

Zero will zero the count in the quantity field.

Automatically count 1 can be checked to automatically enter 1 in the count for each product scanned. If checked, upon scanning each product the program will save the product with a 1 count with having to enter the count and press **Accept**.

Pressing the **+1, +5, +10, -1, -5, -10** buttons will add or subtract these counts from the current product displayed. These buttons cannot be used if **Automatically count 1** is checked on.

Accept needs to be pressed after each product is scanned and the quantity has been entered if manually entering quantities with the **Automatically count 1** is unchecked.

Licensing

To use Inventue in a live environment, the software must be licensed.

Without a license, Inventrue may be used but as a demo only. Only 5 products scanned will be saved for import in MyPOS.

To Obtain a License

Press the **Program License** button on the main menu screen.

The lower left corner of the screen will inform you if the product is licensed or not.

A unique Auto-generated License ID will be displayed.

Provide this unique Auto-generated License ID to Tri-City Retail System to obtain a **License Code**.

Once you have obtained your license code from by Tri-City Retail System, enter the code in the **License Code** field then press the **Verify** button.

The image shows a screenshot of a software window titled "Program License". The window has a blue header bar with the title and standard window controls (minimize, maximize, close). The main area is white. It contains two text input fields. The first field is labeled "Auto-generated License ID" and contains the text "123456789012345678901234". The second field is labeled "License Code" and is currently empty. Below these fields are three buttons: "Unlicensed" (disabled, gray), "Verify" (active, blue), and "Close" (active, blue). The "Unlicensed" button is located at the bottom left, "Verify" is in the center, and "Close" is at the bottom right.

A message will be displayed indicating if the license is verified.

If your license is verified successfully, press the Close button.

Inventrue is licensed on this device only, not for any particular MyPOS store database.

Contact Tri-City Retail Systems for all licensing request.

Tri-City Retail Systems Inc.
550 Parkside Drive
Waterloo, Ontario, Canada
N2L 5V4
Phone: 877-877-4767
Email: support@tricityretail.com
Web: <http://www.tricityretail.com>