

# **DoInventory™ Quick Start Documentation**

## **Introduction:**

DoInventory™ allows easy management of your home or business inventory or assets collection from any Palm OS® handheld, Pocket PC or Windows Mobile handheld, and Windows PC. The Plus version includes PC desktop companion software with additional features. The Lite version runs only on Palm OS® handheld computers, and is intended primarily for Mac users. 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. The handheld screenshots are taken from a Palm OS® handheld, but they look almost identical on the Pocket PC.

## **Installation:**

To install the Plus version on a PC, download the setup file. If this file is in ZIP format, you will need to first unzip the file with an unzip utility. Then, double click the .exe setup file to start the PC installer. The installer will install both PC and handheld software components. Palm OS® users will need to hotsync once the installer is finished to install the handheld files to your handheld.

To install the Lite version, simply download the ZIP file to your PC. Then, unzip the file with an unzip utility such as Winzip ([www.winzip.com](http://www.winzip.com)). Once unzipped, install all \*.prc and \*.pdb files to your handheld using the Install Tool that was installed with your handheld desktop software.

## **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 menu. Once the registration code is entered the handheld, tap Register. For Palm OS®, on the next hotsync, the registration code will be transferred to the PC. The Plus version, if installed, will detect this code and unlock the full PC version. 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, tap the DoInventory™ icon. On Palm OS® handhelds, this icon may be in the Unfiled category. From the Home (icon) screen on your handheld, tap the drop down list in the upper right corner, then select Unfiled to list an uncategorized icons. A category can be assigned to the icon to make it easier to find. Consult your handheld manual for how to categorize icons. On Pocket PC handhelds, tap the Start menu icon in the upper left, then select Programs from the list displayed. The DoInventory icon will be available from that screen of icons.

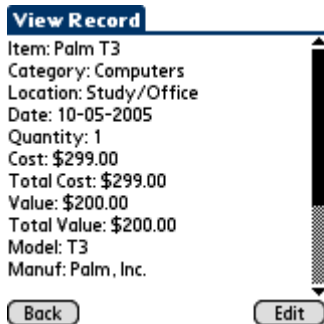
## Doinventory List Screen:



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.

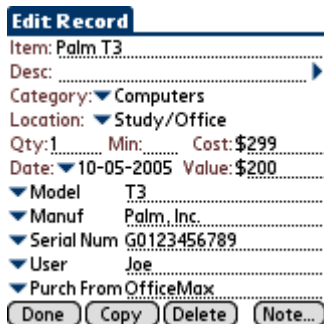
## Record Details Screens:



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: (+1) (-1) (+10) (-10)

Done Edit View

Many types of barcode scanners are supported, including the Symbol SPT15xx, 17xx, 18xx, 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.

### Palm Scanners

The Socket SDIO In-Hand scanner will need to be configured with the SocketScan utility. Make sure that the scanner is enabled, then in the Configuration portion of the utility, make sure that [CR] is specified as the Suffix. Finally, select a hardware Scan Trigger Button to be used. In DoInventory, press the selected trigger button to initiate the scan.

Scanners supported by Serial Magic™ Professional for Palm OS by Serialio.com: SerialMagic™ will need to be installed and started on the Palm OS handheld. Also, the Actions screen will need to be set to: <<DATA-IN>><<CR>>. Scanning using any supported scanner will cause the record viewer to be displayed with the matching record. The user may need to specify the correct Barcode field from the Scan screen in DoInventory, if the barcode is not in the item field.

The Symbol CSM-150 springboard scanner for Handspring handhelds will need to have the scan trigger button configured. Start the CSM Hello app on the handheld, then tap Select Triggers. Pick a hardware button to trigger the scanner. In DoInventory, press the selected trigger button to initiate the scan.

The Symbol SPT 15xx, 17xx, and 18xx scanners will not need any special configuration.

### 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.

## 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: ▼ .....

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.

Done More...

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 silkscreen icon (just below the Home silkscreen icon). Also, on most handhelds, the title bar for the application can be tapped while the application is running to display the menu system.

### 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 memo (Palm OS®) or note (Pocket PC).

**Beam Record** – (Palm OS® only) – while viewing any record, select this option to beam the current record to another DoInventory™ user. When the receiving user starts DoInventory™ on their handheld again, the new record will be imported.

**Cut/Copy/Paste** – standard functions.

**On Screen Keyboard** – (Palm OS® only) – displays the Palm OS on-screen keyboard



### Help Menu:

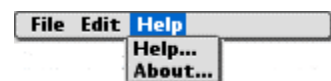
The Help menu offers the following options:

**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** – (Pocket PC only) - selecting this option will display the Registration screen for entering the registration code.

**Close** – (Pocket PC only) - 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.

The screenshot displays the 'DoInventory Plus - PC Companion (Evaluation Version)' window. On the left, a list of items is shown, with 'Palm T3' selected. The main area contains the following details:

- Item: Palm T3
- Desc: [Empty]
- Category: Computers
- Location: Study/Office
- 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]

At the bottom, the status bar indicates 'Records Listed: 9 (Cost: \$299.00, Value: \$200.00)' and 'EDIT MODE'. Other buttons include 'New', 'List All', 'Search', 'Copy', 'Delete', 'Save', 'Cancel', 'Details', and 'Picture'.

## 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.

