

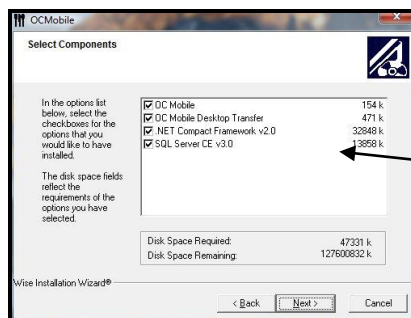
Guide to Using OCMobile

Installing OCMobile

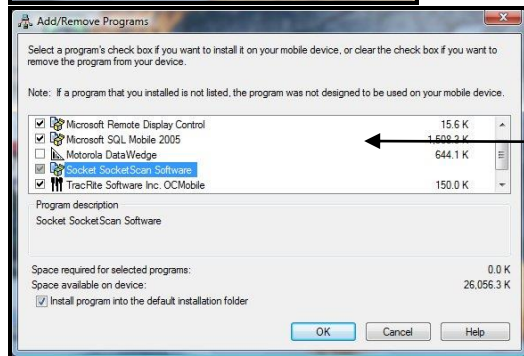
To download **OCMobile**, go to www.restaurantvision.com/installs.htm select *OCMobilesetup.exe*

Double click on the install. This should be done on the computer with Optimum Control installed.
Requires version 3.10.04.0133 or later.

Be sure that your Pocket PC is connected to the computer and ActiveSync or Windows Mobile Device Center is running.



Be sure all the components are checked. Certain Pocket PC's may have some of these items already installed.



Make sure these items are all selected:

- Microsoft.Net Compact Framework v2.0
- Microsoft remote Display control
- Microsoft SQL Mobile 2005
- Tracrite Software OCMobile
- ANYTHING NOT SELECTED WILL BE REMOVED FROM POCKET PC. So check everything
- Motorola Datawedge

Once complete look on the Pocket PC to see if any further steps are required.

Exporting the Inventory Worksheet to OCMobile

1. In Optimum Control, click on the **Inventory worksheet** window, and select the desired filters and sorting for the worksheet.
2. Click the **Export** button. Make sure that you have your pocket pc in cradle and hooked up to computer with **Activesync** running.



Note: If you have not activated your software an activation screen will appear asking for an activation code. Call Tracrite Software Inc. to receive your activation code.

Counting inventory with OCMobile

1. Tap **start**, choose **Programs**. Select **OCMobile**.



Inventory Counting

1. Tap on **Inventory** button. *The first load of a new count sheet the database will be created, this may take a couple of moments in which you will see the items being processed.*

Once the database has been created the **locations** window will open. This will be your main root window for moving from location to location.

Location	Count
Back Storage	0 / 14
Bar Storage	0 / 2
Cooks Line	0 / 5
Cooler	0 / 61
Freezer	0 / 11
Front Storage	0 / 1
Liquor Storage	0 / 18
Store room	0 / 38

Count shows how many items have been counted in that location

2. Tap on a **Location** and enter a count amount using the number buttons at the bottom of the screen.

Item Description	Case	UOM
Butter	4	lb.
Cheese-Feta	8	pail
Cheese-Monterey Jack	8	lb.
Cheese-Mozzarella	78	lb.
Cheese-White cheddar	1	lb.
Cream 35%	8	ea.
Eggs, large	7	dz.

Item Description	Case	UOM	Purch.	UOM
Butter	4	lb.	0.000	cs.
Cheese-Feta	8	pail	3	cs.
Cheese-Monterey Jack	8	lb.	0.000	cs.
Cheese-Mozzarella	78	lb.	0.000	cs.
Cheese-White cheddar	1	lb.	1	cs.
Cream 35%	8	ea.	0.000	cs.
Eggs, large	7	dz.	0.000	cs.

Click **Accept** to enter number and move to next row.

3. Select **Accept** and the number will be entered. Note: The **Accept** key works like an enter key on your computer keyboard. Tapping **Accept** will move you the next row

4. To count purchase units, use scroll bar at bottom of screen to move to the right and show those units.
5. Add your counts as necessary, once complete click the locations button to go back to main screen.

Tip – to **Add** to a counted amount (for example you counted **23** but want to add **13** to that count).

1. Highlight the counted amount.
2. Click the **+** and the amount to add.
3. Click **Accept** and the two numbers will be added together.

Searching for items

1. Tap into the **Search** box, the keyboard will appear.
2. Type a few letters for the item you are searching for and tap **Find**. Your list will filter down based on your search.
3. Once complete, tap **Clear** to bring back the full listing.



Scanning inventory with a barcode scanner.

Assign barcodes.

1. Select a **Location**
2. Scan the items barcode or UPC code
3. If the barcode is not found in the system, you will be asked if you wish to **assign the barcode**. Click **yes**.
4. Search for the item you wish to assign the barcode.
5. Click **Save**.

The barcodes will now be assigned and new barcode information will be uploaded to optimum control upon import to worksheet.

Counting inventory by scanning

1. Scan the item barcode,
2. Enter a count. *Note: to add a count each time you scan, select the "**Auto increment Counts**" on the main location screen.*
3. Scan next barcode
4. To move to another location tap the location key.

Uploading counts

1. Once you have completed counts, in the main locations screen select "**upload counts**"
2. Plug in Handheld PDA to the computer or cradle, make sure Active Sync or **Windows Mobile Desktop** is running and you are connected
3. In **Optimum Control** – Select inventory count sheet,
4. Click **Import** - Your counts will be uploaded. Most times a message will appear indicating that there are counts in the sheet already. To overwrite the counts click **Yes**. To add the counts to the existing counts click **No**.
5. New barcodes will also be detected upon save of worksheet. To save the new barcodes, click **Save** when prompted. The barcodes will be updated.
6. Once sheet is complete, click **Save Worksheet** and **Summarize** to finalize the inventory.

Ordering

Exporting Order guide to Optimum Control

1. In Optimum Control, click the **Orders** button.
2. Select the supplier and or group that you want to order with. As opposed to the inventory window that has you select locations, the order window exports by **groups**.
3. Once the listing has been selected, make sure the Pocket PC is connected to the computer and click **Export**.
4. You will be prompted as to whether PDA is connected and export window will appear.

Creating order in OC Mobile

1. Tap **start**, select **OC Mobile** and choose **Order**.
2. Select the **Group** that you wish to order and a listing of items in that group will appear.
3. Tap the item and enter the desired amount to order, note that the purchase units appear by default.
4. If you wish to order a **split case**, highlight the item and select "**Full**" button, this will switch the unit of measure for that item to the case unit.
5. To switch back, click the "**Split**" button and will change back to "**Full**"
6. Enter your order for each item and group. Once complete, exit to main **Groups** screen and tap **Upload Order**.

Order Groups	
Group	Count
Beverage	0 / 7
Bread	0 / 2
Dairy	0 / 5
Food	0 / 18
Meats	0 / 12
Other	0 / 8
Paper	0 / 8
Produce	0 / 3
Spice	0 / 6

Auto Increment Counts **Exit**

Upload Order

Order Sheet		
Beverage	Groups	
Search:	<input type="text"/>	<input type="button" value="Find"/> <input type="button" value="Clear"/>
Selected: Juice-Orange	<input type="button" value="Split"/>	
Item Description	Purch.	UOM
Coffee	4.000	cs.
Tea	9.000	cs.
Juice-Orange	2.000	pak.
Stir sticks	0.000	cs.
Straws 8 "	7.000	cs.
Sugar portion	8.000	cs.
Sugar twin portion	6.000	cs.

1	2	3	4	5	+	<	2.000
6	7	8	9	0	.	Clr	Accept

Importing your order to Optimum Control

1. Click the **Orders** button in Optimum Control.
2. Click **New**.
3. Make sure your Pocket pc is connected and click **Import** on the order window. Your order will appear.