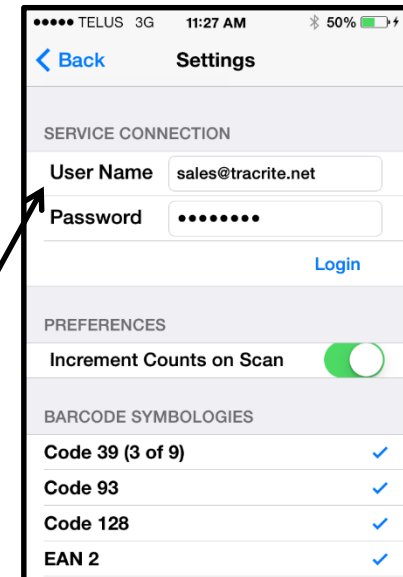# OCMobile – Inventory Getting Started Guide V5

Set Up

In Optimum Control:

- Click on the Settings Gears (top left corner)
- Click Preferences | OC Mobile – Inventory
- Put in the username and password that was provided | Save | Exit

On your Apple Device:

- Go to the App Store and search OCMobile
- Download OC Mobile – Inventory 2016 App
- Enter the App | Click Settings
- Put in the username and password that was provided to you | Login| Back
- Click Enter

This is the user name and password that we create for you. Not your OC credentials.

●●●●● TELUS 3G   11:27 AM   ⚊ 50% ▭⚡

❮ Back   **Settings**

SERVICE CONNECTION

User Name   sales@tracrite.net

Password   ●●●●●●●

Login

PREFERENCES

Increment Counts on Scan   🟢

BARCODE SYMBOLOGIES

Code 39 (3 of 9)   ✓

Code 93   ✓

Code 128   ✓

EAN 2   ✓
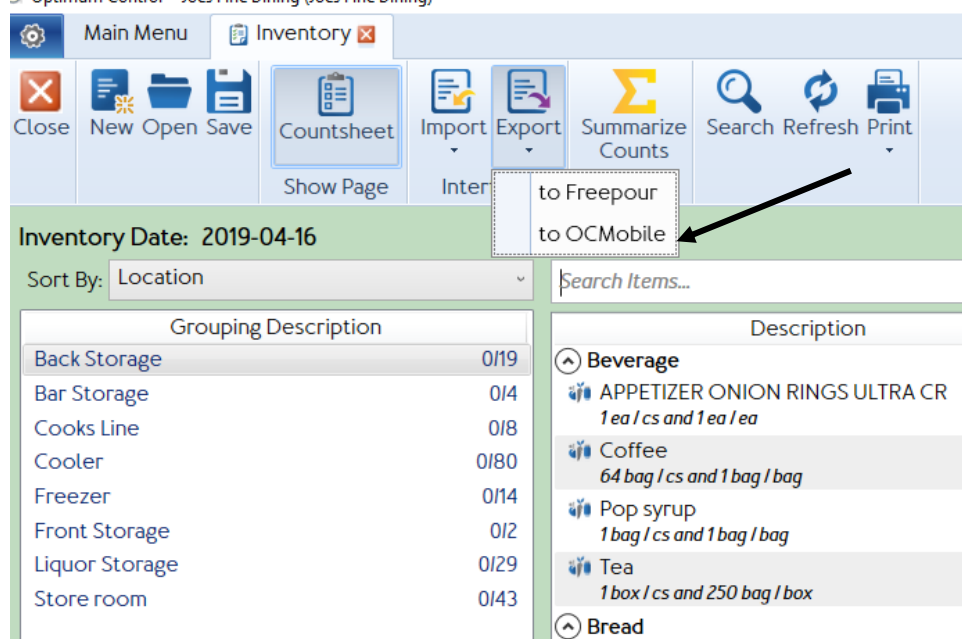
Exporting Inventory Count Sheets

In Optimum Control:

Click Count Inventory | New

Choose the date and the type of Inventory that you are counting | Finish

Click Export | To OC Mobile

Entering Counts

- Once the uploader has completed go into your OCMobile – Inventory App. tap Enter. Tap the date of the count sheet that you have exported with the items that you selected to be counted. Note: Depending on your device, load times may vary.

- Once it has loaded you see a screen with all of your items broken down into locations.

- Select the location that you'd like to enter counts for.

- Enter the count for each item and tap Next. The default count is **Count Unit,** to enter a count as Purchase Unit or Recipe Unit tap the ⓘ button. You will have the option to enter your amount as Purchase, Count or Recipe Unit. **Note:** The Purchase, Count and Recipe Units all appear in the main window on iPads.

- Once you have completed a location tap Done. Tap on Locations to go back to the menu.

- You can search for specific items on the locations screen or in specific locations.

Choose the inventory count sheet you want to use

Choose the location group you want to count

Enter in your count and click Next

Enter your additional counts here
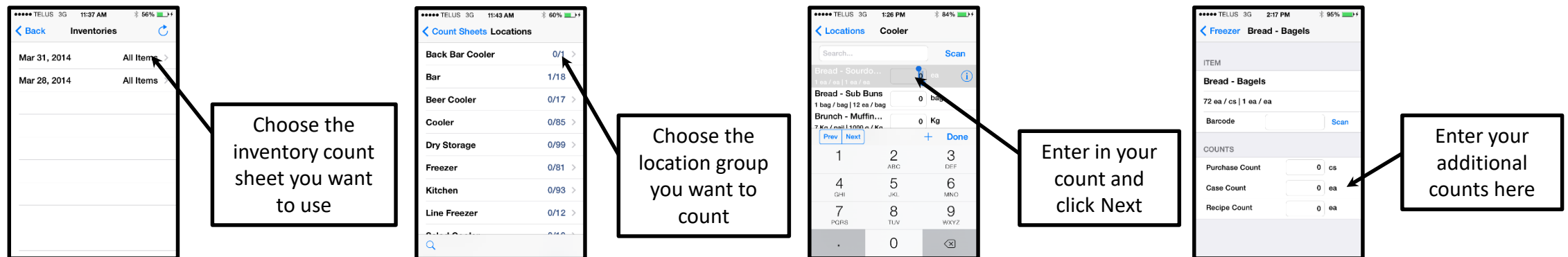
Scanning Bar Codes

Note: To scan bar codes you must activate the bar codes options. Go back to the Main Page, tap Settings. Check off all the bar codes that you wish to use. If you are unsure which bar codes you use you may check them all off.

- You will use your camera to scan barcodes of items that appear on the inventory count sheet.

- If you would like to assign a barcode to an item, locate your item in the App, tap the ⓘ button. You will see a field for barcode. Tap Scan, once the scanner reads the barcode it will automatically assign the barcode to that item.

- You can also scan a barcode and then associate it to an item.
  - Tap the scan button at the top of the Location Count window.
  - Scan your barcode. A message will appear that your barcode could not be found. Would you like to assign it now? Tap Yes.
  - Assign the barcode to an item in that location. Click Assign Barcode at the top. Then you can enter the count for that item.

Click Yes to assign your barcode to an item
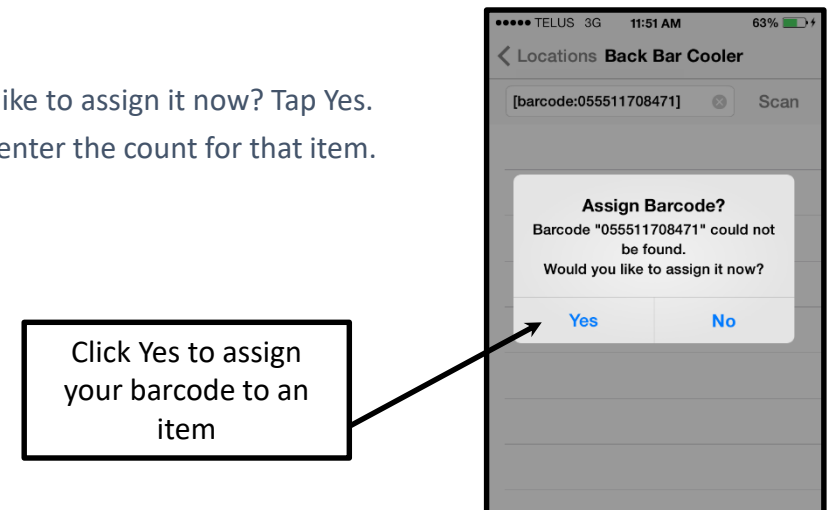
Importing Inventory Count Sheet

- In the App, tap the upload button on the countsheet window to upload your count sheet to the web.

- In OC, click Import, Click from OCMobile

- You will have the option to merge with your existing countsheet
  - YES - If you have manually entered any counts or if you have already uploaded counts from another device you will click YES to add the counts.
  - NO – This will overwrite anything that you currently have in your countsheet
  - Cancel the import

Warning!

⚠ Do you want to merge the existing countsheet?

Yes - Merge
No - Overwrite

[Yes] [No] [Cancel]
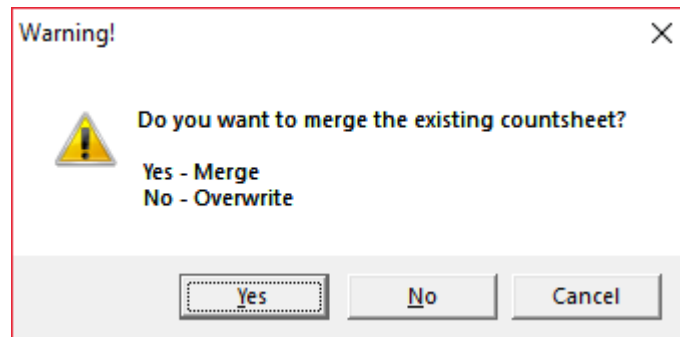
Important Note: If you delete your count sheet in Optimum Control after you have exported the Inventory to your Apple device you will not be able to import your counts back into Optimum Control