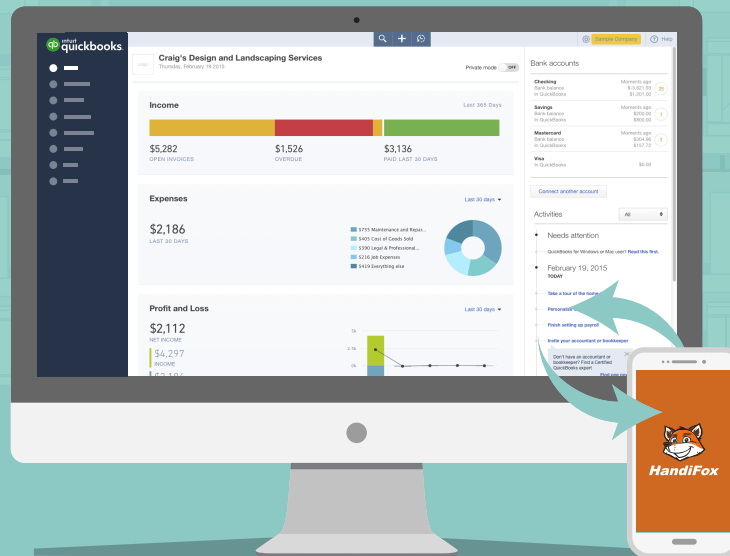


# HandiFox

Mobile Inventory Tracking & Sales Management Software

## Getting Started



Tecom Group, Inc.  
2016

**Hello!**

*Thank you for choosing  
HandiFox – an award-winning  
Inventory Tracking and  
Sales Management solution.*



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# 1 INTRODUCTION

This document is designed to give you an overview of HandiFox capabilities and some important basics useful to know when working with our software. It does not contain in-depth instructions on the usage of HandiFox and does not cover some of its less significant features.

HandiFox allows you to work with your QuickBooks company data on mobile devices, effectively extending QuickBooks functionality to your warehouse, receiving dock, sales and delivery staff in the field. It also has some unique features of its own. Below is a brief list of HandiFox features which will be further described in section 3.


- Create and process sales transactions and receive payments.
- Create and process purchase transactions.
- Count inventory on hand.
- Track inventory at multiple sites and move items between sites.
- Generate barcodes, print barcode labels and scan barcodes for quick product selection.
- Print customizable reports straight from the mobile device in 2" or Letter format

All entries made on the mobile device are uploaded to QuickBooks during on-demand synchronization. At the same time, all new information entered by employees in QuickBooks is downloaded to the device. This way all data is made available both in QuickBooks and HandiFox, irrespective of its origin.

# 2 BREAKDOWN

HandiFox system consists of two major components: the desktop software and the mobile application.

The desktop program is installed on one of your QuickBooks PCs. Its main purpose is handling data synchronization between QuickBooks and HandiFox mobile app. Besides that, its components provide the following functionality:

- HandiFox menu under File in QuickBooks gives you access to system-wide settings, mobile user management and some PC-only features like label printing.
- HandiFox tray icon (  ) displays system status, allows you to register the software, control synchronization services and start HandiFox Monitor.
- HandiFox Monitor lets you view synchronization log and submit log files to Tecom in case of issues. This is mainly a maintenance tool, but you may still need to use it sometimes.

HandiFox mobile app can be installed on Android smartphones and tablets, as well as certain models of industrial handhelds (ruggedized, with built-in barcode scanner). The mobile app is where the main business activities (e.g. taking sales orders or counting inventory) are performed.

# 3 FEATURES & USAGE

This section covers some procedures essential to the use of HandiFox, as well as the major business features.

## Mobile Users & Permissions

For security and tracking reasons, the mobile app requires authorization with a user name and password. When HandiFox is installed on the PC, mobile app users can be managed in QuickBooks under *File → HandiFox → Handheld User Manager*. This window lets you create new users, edit existing ones and delete user accounts that are not needed anymore.

User creation/editing window allows you to grant or deny permission for different operations in the mobile app. It is also possible to limit mobile user's ability to see company's customers and sales transactions by selecting a sales rep for them and enabling the appropriate option.

You will need to create at least one user account to start using HandiFox mobile app. Multiple users can log in on the same device sequentially, and one user account can be used on multiple devices, even simultaneously.

## Synchronization

By synchronizing, HandiFox keeps your company information up-to-date on your mobile devices and uploads transactions created in the mobile app back to QuickBooks. Below are some basics on the synchronization process that are useful to know when working with the software.

Synchronization happens only when a mobile device user initiates it. It does not require a constant internet/network connection.

HandiFox synchronization is not cloud-based and does not involve any intermediary servers. To synchronize, the mobile app establishes a direct network connection to the HandiFox PC by its IP address. All this implies that there are two ways to synchronize HandiFox: over a local network connection and over the Internet.

To synchronize over your local network, your device must be connected to your Wi-Fi hotspot. You will need to find out the computer's IPv4 address on your network and enter it in the HandiFox app. You can view this address in your network connection status in the Network and Sharing Center, or by issuing ipconfig command in Windows command line.

To synchronize over the Internet, your mobile device must have an active Internet connection, and port 2439 on the HandiFox PC must be accessible from the outside. This means that, first, your ISP has to provide you with an external ("white") IP address visible on the Internet, and second, the said port must be forwarded on your modem/router.

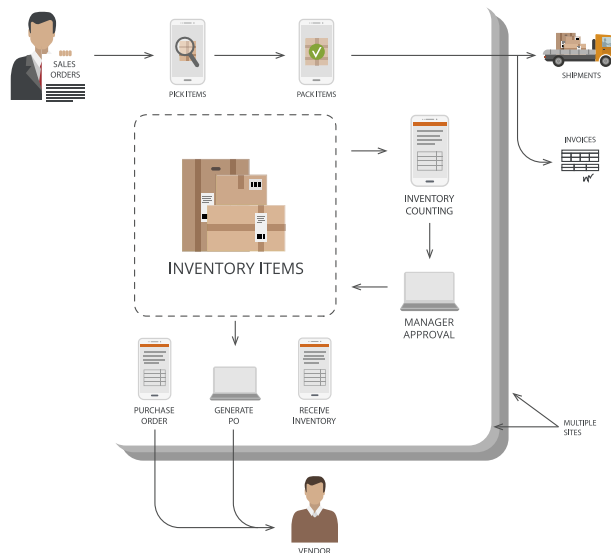
## Inventory Management

When a HandiFox device synchronizes with QuickBooks, it downloads existing inventory items to let you review and manage your stock. If you are using multiple inventory sites (either coming from QuickBooks Advanced Inventory or created within HandiFox itself), it's important to keep in mind that each HandiFox mobile device works with its own site (which you choose for the device when synchronizing it for the first time). This means that the mobile user will not be able to work with inventory located on other sites. Each device can only work with one site, but each site can have multiple devices assigned to it.

Most of inventory-related features are available under Inventory icon on the main screen of the mobile app.

Item List lets you review the list of your items, check quantities available on all sites, view detailed information about items and add item barcodes.

Inventory Counting lets you count inventory on hand at current site. An unfinished counting session can be Saved and completed later. After a counting session is Applied, it will be uploaded to QuickBooks during next sync. HandiFox on the PC can be configured to require manager approval for incoming counting results before they are recorded to QuickBooks.





P.O. Center lets you create, edit and print purchase orders, and receive ordered items.

Bin Locations screen allows you to create/edit bin locations within current site and set bin barcodes. This screen is only available if you have Advanced Inventory with Bin Locations enabled in QuickBooks.

Build Assembly screen allows you to create new pieces of assembly items using parts on hand. To use this feature, you must have at least one Inventory Assembly item created in QuickBooks.

If you have more than one inventory site, it is possible to transfer inventory between sites using the Transfer Center (available on the main screen). Here you can create transfers in order to send items to another site, receive incoming transfers, and also move items between bin locations within current site.

## Barcoding

HandiFox lets you assign barcodes to inventory items and bin locations, scan barcodes for quick item/bin selection (where applicable) and print basic barcode labels.

Barcodes can be scanned using device's camera, a Bluetooth barcode scanner or device's built-in scanner if it has one. Scanning with the camera requires an additional app called Barcode Scanner to be installed. It is free and can be easily found in the Google Play store. To use a Bluetooth scanner with HandiFox, you need to switch it to SPP mode (see scanner's manual for details), pair it with your mobile device and select it in HandiFox mobile app settings.

Adding barcodes is possible from within the mobile app, as mentioned in the previous paragraph. This way is good if you want to add barcodes by scanning them, otherwise the more convenient way of managing your barcodes is to use the Barcodes List window on the PC. It can be found in QuickBooks, under *File → HandiFox → Barcodes List*. Here you can enter barcodes from the keyboard, generate a unique barcode value for every item that does not have a barcode yet, print barcode labels using a label printer, print a complete list of your items with their barcodes, and export the list to an Excel spreadsheet.

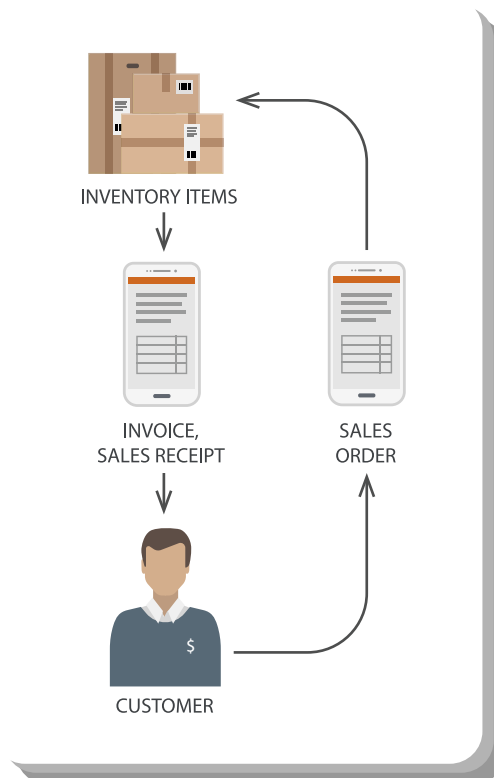
# 3 FEATURES & USAGE

All sales-related features available in the mobile app are gathered in the Customer Center which can be accessed via the Sales icon on the main screen.

To select a customer, start typing a customer name in the Look for Customer field. It is also possible to create new customers.

Once a customer is selected, you can take sales orders, create invoices, receive payments against open invoices, enter sales receipts and credit memos.

Sales orders and invoices can be picked and packed. Picking and packing is a two-stage procedure of verifying ordered items as they are being picked from the warehouse and shipped to customers. Picking and packing is available via the Open Orders and Open Invoices buttons in the Customer Center (for orders and invoices respectively). After a sales order has been picked and packed, HandiFox automatically generates an invoice.



## Printing

This paragraph covers report printing from HandiFox mobile app. Printing can be performed using a Wi-Fi or network office printer, or a Bluetooth-capable receipt printer. Available paper formats are 2" and Letter. Printers can be discovered and selected in the mobile app under [Admin](#) → [Settings](#) → [Select Printer](#).

The following documents can be printed from the mobile app:

- Today's Sales report (lists invoices created by current user for selected period).
- Settlement Report (lists payments and sales receipts entered by the user during selected period).
- Customer Statement report (lists open invoices and credit memos that exist for a certain customer).
- Payment Receipts report
- Sales Orders
- Invoices
- Sales Receipts
- Payment Receipts
- Inventory Adjustments
- Pick Lists
- Packing Slips
- Purchase Orders
- Inventory Transfers

It is possible to customize the design and layout for some of these documents. Customization is available in QuickBooks under [File](#) → [HandiFox](#) → [Customize Reports](#).

# 4 TIPS & TRICKS

- Most HandiFox users synchronize their devices once or twice a day, but you may want to do it more often if you need new transactions to end up in QuickBooks as soon as possible.
- The local IP address of the HandiFox PC can and will change from time to time unless it is static or reserved on the router. This may present an inconvenience, because you will have to check this address and update it in HandiFox mobile app periodically. We advise to use IP address reservation for your computer on the router (if supported).
- Scanning barcodes with device's built-in camera is rather slow, so it may be unsuitable if you plan to scan a lot of barcodes regularly. But this way is good if you don't need to scan something very often, and it does not require any additional hardware.

## Questions?

*If you have encountered a problem or have a question about HandiFox, please visit our knowledge base, your question may already have an answer there.*

*HandiFox support service is available on weekdays, 8 a.m. to 4 p.m. EST. There are several ways to contact support:*



Send an email to [support@handifox.com](mailto:support@handifox.com)



Call the number  
+ 1 - 877 - 942 - 6343



Contact us on Skype:  
[handifox\\_support](https://www.skype.com/people/handifox_support)



Fill in the form on Support Center  
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