

# Oracle<sup>®</sup> MICROS Inventory Management, Mobile Solutions Quick Reference Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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# 1

## Introduction

Designed for Oracle MICROS 700 Series tablets, Mobile Solutions gives you on-the-go access for processing inventory counts, creating orders, receipts, and transfers, as well as support for barcode scanning and assignment.

## The Mobile Solutions Workflow

Mobile Solutions transfers documents to/from Inventory Management. Once imported into Mobile Solutions, documents can be edited. Documents imported by Mobile Solutions are not editable in Inventory Management. When edits are complete, documents can be exported back to Inventory Management for processing. Once exported back to Inventory Management, the documents are editable in the Inventory Management Web Client and are no longer accessible by Mobile Solutions.

## Starting Mobile Solutions

Double-tap the **Oracle MICROS Inventory Management Mobile Solutions** shortcut to open Mobile Solutions.



### Initial Sign In

Before signing in to Mobile Solutions for the first time:

1. Click **Sync Users** on the sign in screen.
2. After sync completes, click **Sign In** to sign in to Mobile Solutions.

### **Signing In**

1. Enter your user name and password.
2. Click **Sign In**.

# 2

## Mobile Solutions Tabs

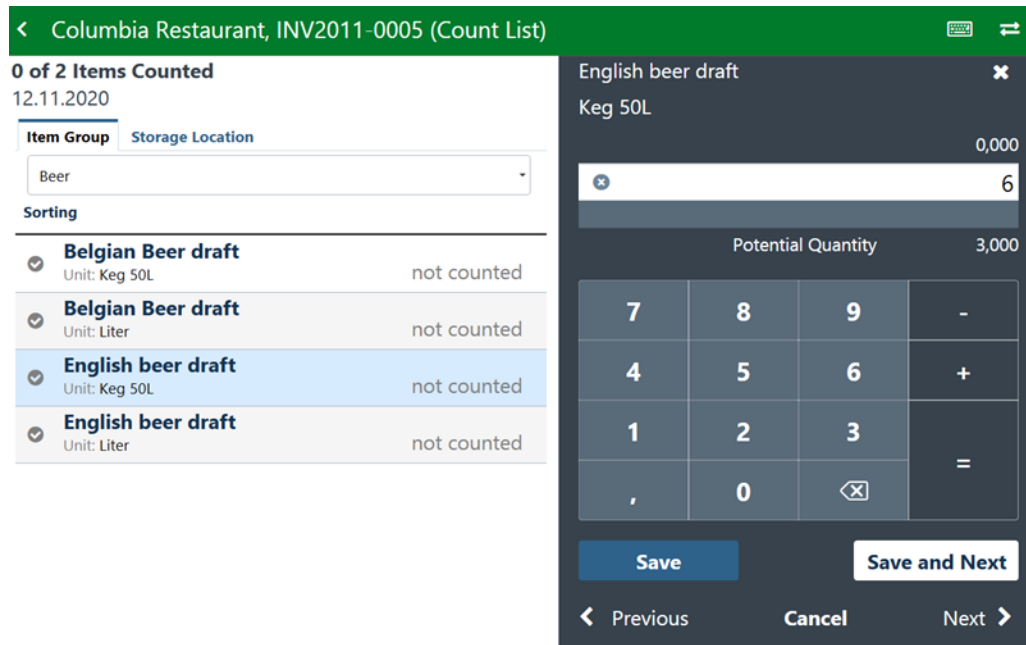
Mobile Solutions provides tabs for Inventory Counts, Orders, Receipts, and Transfers.

### Inventory Counts








The **Inventory Counts** tab displays imported inventories and lets you:

- Import inventory counts
- Export inventory counts
- View items in an inventory
- Filter items by item group or storage location
- Find items by name or barcode
- Scan and assign barcodes
- Modify item quantities

The screenshot displays the Oracle Inventory Management Mobile Solutions interface. At the top, the header includes 'ORACLE | micros Inventory Management Mobile Solutions' on the left, 'PW04123FB03 (Online)' and 'Last Sync 13.11.2020 08:17:54' in the center, and 'COLUMBIA STORE' with a user icon on the right. Below the header is a green navigation bar with four tabs: 'Inventory Counts' (selected), 'Orders', 'Receipts', and 'Transfers'. Underneath the navigation bar, the main title 'Inventory Counts' is displayed on the left, and 'Import' and 'Export all' buttons are on the right. Below the title, there is a summary row for an inventory count: 'INV2011-0005' with a document icon, 'Cost Center/Store: Columbia Restaurant', the date '12.11.2020', the status 'End of Day', and 'Data loaded' with a vertical ellipsis icon on the far right.



### Working with Inventory Counts

 <b>Import</b>   <b>Export all</b>        	<p>Tap <b>Import</b> to import inventory counts.</p>
<p><b>Inventory Counts</b></p> <p> <b>INV2011-0005</b> Cost Center/Store: Columbia Restaurant</p>	<p>Tap <b>Export all</b> to export all counts listed in the Inventory Counts.</p>
	<p>Tap <b>More Options</b> to view details, export a count, or remove a count from the list.</p>
	<p>Tap the back arrow to return to the previous screen.</p>
	<p>Tap the keyboard to open the virtual keyboard.</p>
	<p>Tap the dual arrows to toggle the virtual keyboard left or right.</p>
	<p>Tap anywhere on an inventory row to:</p> <ul style="list-style-type: none"> <li>• View store inventory</li> <li>• Filter by item group or storage location</li> <li>• Find items by name or barcode</li> <li>• Scan and assign barcodes</li> <li>• Modify item quantities</li> </ul>

## Orders


The **Orders** tab lets you create orders, import Suspended Orders, and edit order documents on your tablet. When exported, they are sent as Suspended Orders that must be booked manually in Inventory Management.

ORACLE | micros Inventory Management Mobile Solutions PW04123FB03 (Online)  
Last Sync 13.11.2020 08:17:54 COLUMBIA STORE








Inventory Counts **Orders** Receipts Transfers

Orders + Add | Import | Sync Master Data

---

 **i20-00015 (COLUMBIA STORE)**  
Cost Center/Store: Columbia Restaurant 13.11.2020 ⋮

### Working with Orders

            	<p>Tap <b>+Add</b> to create a new order.</p> <p>Tap <b>Import</b> to import saved purchase orders from Inventory Management.</p> <p>Tap <b>Sync Master Data</b> to update data displayed on-screen. This makes any new order documents or changes in status visible.</p> <p>Tap <b>More Options</b> to view order details, export an order for processing, or permanently delete an order.</p> <p>Tap the back arrow to return to the previous screen.</p> <p>Tap the keyboard to open the virtual keyboard.</p> <p>Tap the dual arrows to toggle the virtual keyboard left or right.</p> <p>Tap anywhere on an order row to:</p> <ul style="list-style-type: none"> <li>• View order details</li> <li>• Add items to an order</li> <li>• Scan a barcode</li> </ul>
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Orders

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 **i20-00015 (COLUMBIA STORE)**  
Cost Center/Store: Columbia Restaurant

 **i20-00016 (COLUMBIA STORE)**  
Cost Center/Store: Columbia Restaurant

## Receipts

The **Receipts** tab enables you to create receipts on your tablet and move receipts created on the tablet to Inventory Management. The Purchase Orders tab enables you to import placed purchase orders and create receipts based on these purchase orders.



#### Note:

You cannot access Inventory Management receipts on the tablet.




ORACLE | micros Inventory Management Mobile Solutions PW04123FB03 (Online) COLUMBIA STORE  
Last Sync 13.11.2020 08:17:54

Inventory Counts Orders Receipts Transfers

## Receipts

+ Add | Sync Master Data

 **Import Receipts**  
No data exists.

Receipts Purchase Orders

### Working with Receipts and Purchase Orders

 **Add**

Tap **+Add** to create a new receipt.

 **Import**

Tap **Import** on the Purchase Orders tab to import placed purchase orders and create a receipt out of it.

 **Sync Master Data**

Tap **Sync Master Data** to update data displayed on-screen. This makes any changes in status visible.

PO202011-00007

Vendor: Mr. Food

PO202011-00008

Vendor: Mr. Beverage

Tap a receipt to:

- View receipt details

## Transfers

The **Transfers** tab displays all suspended transfers currently on the tablet and lets you create new (blank) transfers, import transfers from Inventory Management, and export selected transfers to Inventory Management. The documents offered for import must have a delivery date +/-30 days from system date. Other documents are not visible.

ORACLE | micros Inventory Management Mobile Solutions PW04123FB03 (Online) COLUMBIA STORE  
Last Sync 13.11.2020 08:17:54

Inventory Counts Orders Receipts Transfers

## Transfers

+ Add | Import | Sync Master Data

 <b>ST2010-00001 (Columbia Down Town)</b> Target: Columbia Down Town	14.10.2020	
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### Working with Transfers

 **Add**

Tap **+Add** to create a new transfer.

 **Import**

Tap **Import** to import transfers from Inventory Management. The documents offered for import must have a delivery date +/-30 days from the system date. Other documents are not visible.

## Sync Master Data



## Transfers



ST2010-00001 (Columbia D)

Target: Columbia Down Town

Tap **Sync Master Data** to update data displayed on-screen. This makes any new transfers or changes in status visible.

Tap **More Options** to view details for a transfer, export a transfer for processing, or remove a transfer from the list.

Tap the back arrow to return to the previous screen.

Tap the keyboard to open the virtual keyboard.

Tap the dual arrows to toggle the virtual keyboard left or right.

Tap anywhere on a transfer row to:

- View transfer details
- Find items by item name or barcode
- Add items to the transfer
- Scan a barcode
- Modify item quantities

## Configuring User Settings

The User Settings dialog enables you to customize Mobile Solutions for use in your environment.

From the main screen, tap your user name, and then tap **User Settings**.

### Display Language

The Display Language drop-down list lets you specify the display language for Mobile Solutions. Translations are stored on the tablet only.

Translations include:

- Arabic
- Chinese (Simplified, PRC)
- Chinese (Traditional, Taiwan)
- Danish
- Dutch
- English (United States)
- Finnish
- French
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese
- Portuguese (Brazil)
- Russian
- Spanish
- Swedish
- Thai
- Turkish

 **Note:**

- Sign In screen language is based on the current Microsoft Windows language setting.
- Mobile Solutions defaults to English if Microsoft Windows is set to an unsupported language.
- Additional locale settings, including date/time/decimal format, are based on the current Microsoft Windows **Date and Time** and **Region** settings.

## Virtual Keyboard Settings

The Virtual Keyboard Settings let you customize the orientation and layout of the virtual keyboard.

# 3

## Booking Orders with the Hand-Held-Terminal

Inventory Management Mobile Solutions version 18.1 and later uses an automation service to prepare orders on the hand-held-terminal (HHT) for automatic booking. This process is faster than the process used in version 18.1 and earlier.

### Prerequisites

- Automation service must be in place and running.
- The job **B2B Send Purchase Orders** must be activated. It is recommended to run this job every five minutes.
- For vendors with orders booked from the HHT, set up the vendors to send order via email and/or B2B.
- Configure the vendor for email ordering.

### Configure Vendor Email Ordering

1. Navigate to the **Manage Vendors** page, click **Edit Vendor**, and enter an email address in the **E-Mail** field.
2. Click **Order Settings**.
3. In the **Placing orders method** field, select **E-Mail**.
4. Select the **E-Mail type**.
5. Click **B2B Ordering** and select **Use Scheduler**.

### Export and Book Orders

Version 18.1 and later on the HHT includes a new option to **Export and Book** the order from the order document and also from the Order tab. The screenshots below show this new option.

The screenshot displays the Oracle Inventory Management Mobile Solutions interface. At the top, the order is identified as 'i20-00017 (COLUMBIA STORE) (Order)' with a date of '23.11.2020'. Below this, the 'Cost Center / Store: Columbia Restaurant' is noted. The main content area lists three items:

Item	Unit	Price	Quantity
Cola	Liter	0,70	4,000
Sparkling Water	Each	0,70	5,000
Lemonade	Liter	0,90	12,000

A context menu is overlaid on the right side of the screen, showing the following options: 'Export and Book', 'Export', and 'Remove from List'. The app's navigation bar includes 'Inventory Counts', 'Orders', 'Receipts', and 'Transfers'. The 'Orders' section is active, showing '+ Add', 'Import', and 'Sync Master Data' options. The bottom of the screen shows the Oracle and micros logos, the user ID 'PW04123FB03 (Online)', and the last sync time 'Last Sync: 13.11.2020 08:17:54'.

The message **Order export was successful** appears with a green bar at the top of the screen if successful.

The order is uploaded to the cloud and deleted from the local device. If you want to review or edit the order, click **Import and view Order Details** to download the order back to your device.

Click **Book** to place the order and send to the vendor.

- If the order can't be booked, check the delivery date which must be a date in the future.
- Other booking errors will explain the exact issue.
- Before orders are sent with the automation service, you can view them in the **Open Purchase Orders** page.

Click **Cancel** to suspend the order and return to the purchase order overview page.

i20-00017 (COLUMBIA STORE) (Order)

✓ Order export was successful. ✕

Review the order summary below. To view the order before booking, sign in to Inventory Management or [import and view the order details here](#)

<b>Cost Center</b>	<b>Delivery Date</b>
Columbia Restaurant	13.11.2020
<b>Vendor</b>	<b>Total</b>
Mr. Beverage	4,90
<a href="#">Booking Message</a>	

Cancel

Book

## Ordering

▶ Main Menu ▶ Ordering

Order by	Description
▶ Order Cycle	Create an Order by Order Cycle
▶ Order List	Create an Order by List
▶ Vendor	Create an Order by Vendor
▶ Suggested Order by Vendor	Create an Order using Suggested Order by Vendor
▶ Blank Order	Create a blank Order

View Orders	Alerts	Description / Status
▶ Suspended Orders	22	View Suspended Orders
▶ Open Purchase Orders	43	Open Purchase Order(s)
▶ Booked Orders		View Booked Orders

Cancel