

# ***HandiFox***

Mobile Inventory Tracking & Sales Management Software

## **Installation Procedure**



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# Hello!

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

*This step-by-step guide contains instructions for installing HandiFox on your mobile device and desktop computer, as well as a small troubleshooting section to help you through any errors you may come across during the installation.*



# GATHERING INFORMATION

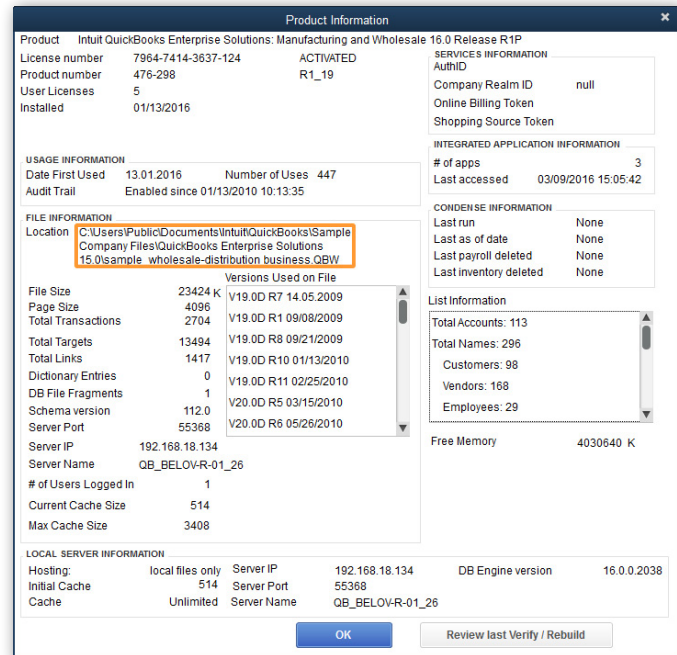
# 1

First, you need to find out the exact location and name of the QuickBooks company file you want HandiFox to work with.

Open QuickBooks and press **F2** to bring up the Product Information window.

Find the **company file address** under **File Information** and copy it to the clipboard or a text document. You will need it later when installing HandiFox.

Also, find out the **administrator's password for QuickBooks** or make sure someone who knows it is nearby to enter it when required.

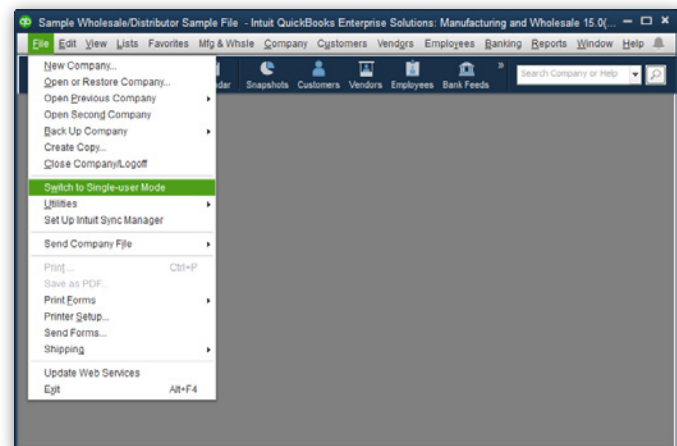


# PREPARING QUICKBOOKS

Designed for 

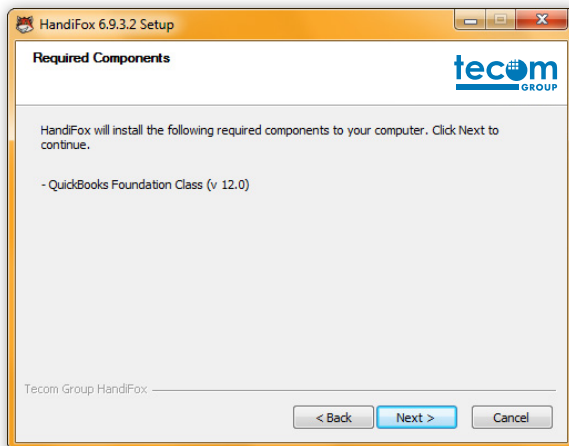
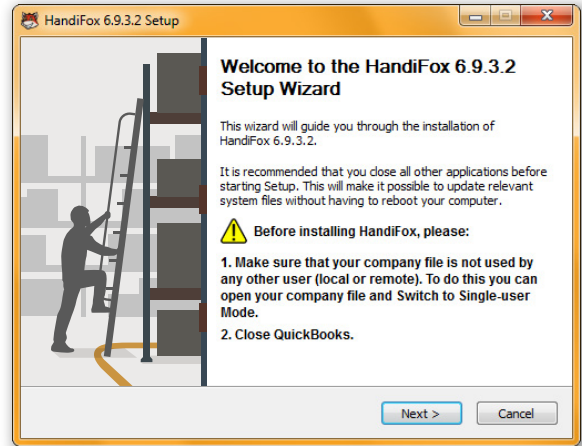
1 Make sure that your company file is not currently opened by any other user, local or remote. The easiest way to do this is switching QuickBooks to Single-user Mode. After the installation you will be able to return to Multi-user Mode.

2 Close QuickBooks.



Run the **HandiFox setup file**.  
The installation wizard will start.

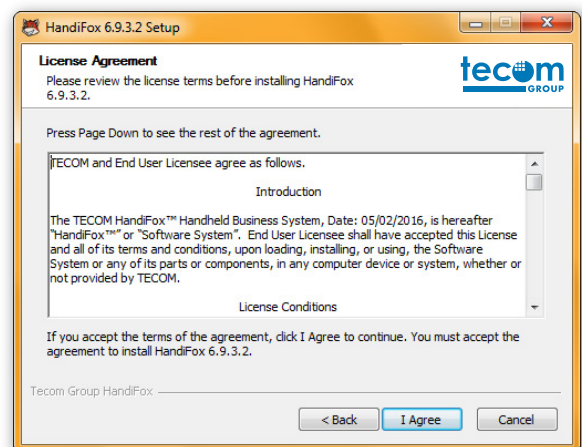
Click **Next**.



If QuickBooks Foundation Class is not installed in your system yet, it will be installed automatically.

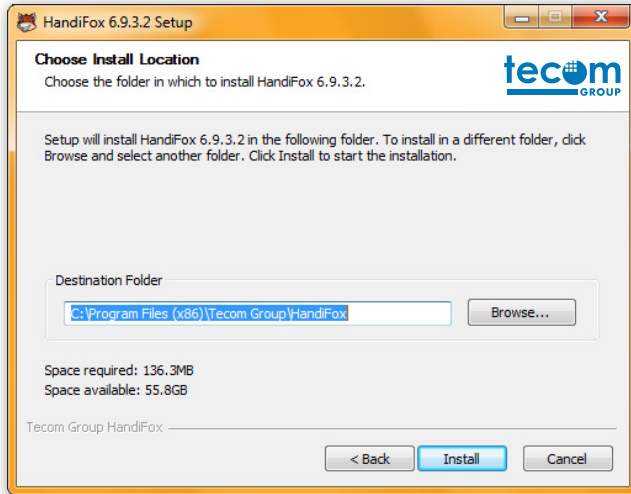
Click **Next**.

Review the license agreement and click **I Agree**.

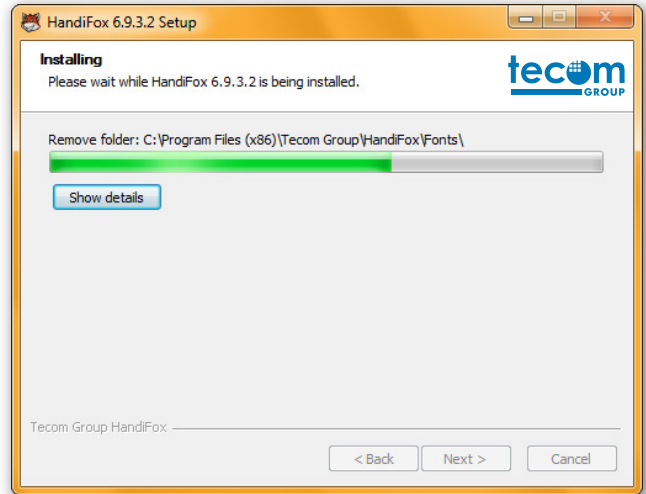


# EXTRACTING FILES

# 3



Choose the installation folder for HandiFox and click **Install**.



Wait until all required files are copied and click **Next**.

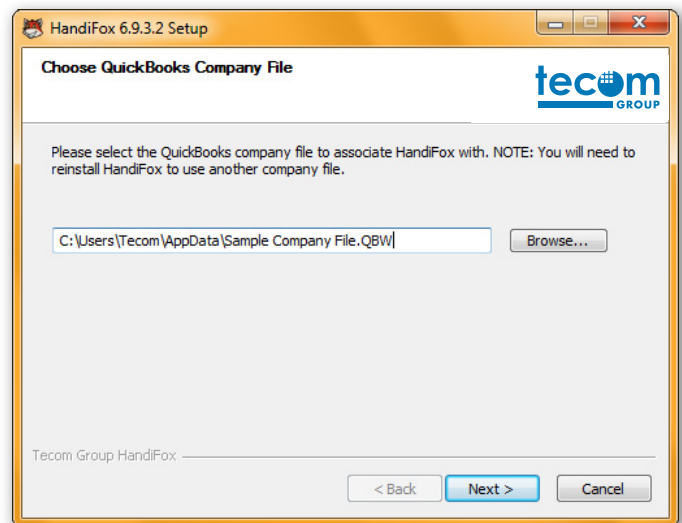
# CHOOSING COMPANY FILE

# 4

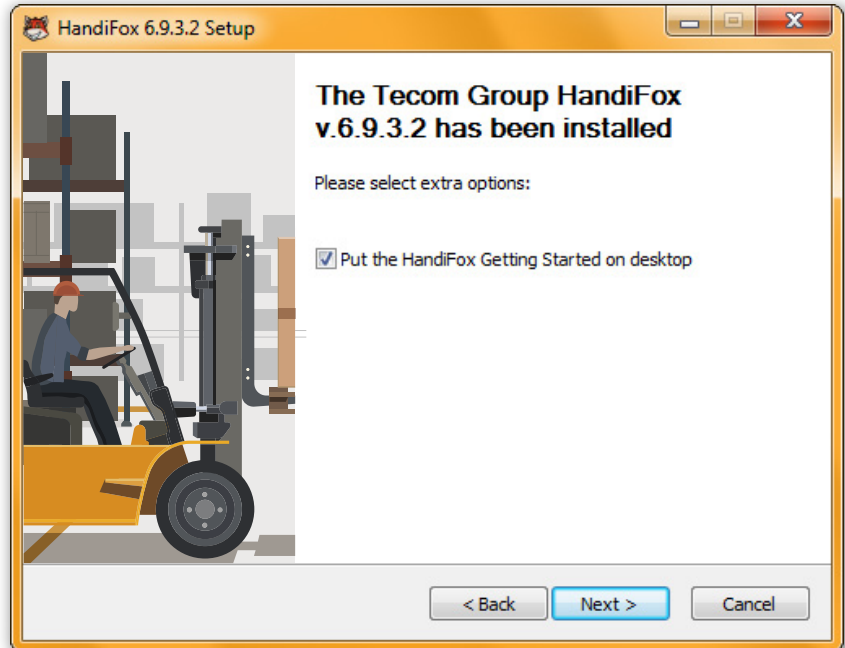
Now you need to **specify the company file** HandiFox will work with. If you have copied the company file address earlier, **paste** it in the text field. Otherwise, click **Browse** to navigate to the file.

***Note:** The company file address you specify must be identical to the one used in QuickBooks.*

***Note:** HandiFox will only work with the company file you choose. If you ever want to start using another company file, you will have to reinstall HandiFox.*



Review the additional options and click **Next**.



It is recommended to **reboot** the system to finalize the installation correctly.

Click **Finish**.

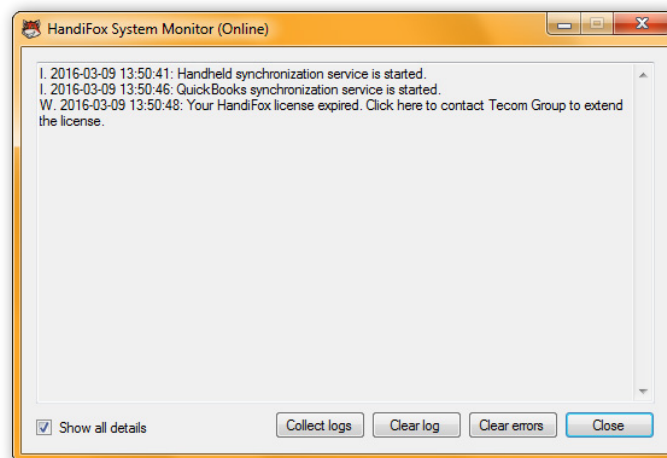


When HandiFox is installed, you will be able to see its **icon in the system tray**. Right-click on the icon to open the menu with some useful commands that allow you to **start/stop services** maintaining synchronization with QuickBooks and mobile devices, view product information, and more.



The appearance of the icon indicates current status of HandiFox services. Normal appearance means that everything is OK. When one or both the services mentioned above are offline, the icon will be de-saturated. If an error has occurred, the icon will display an exclamation mark.

A double click on the icon will bring up the HandiFox System Monitor. This tool allows you to see the detailed synchronization log and any errors that may occur in the process.



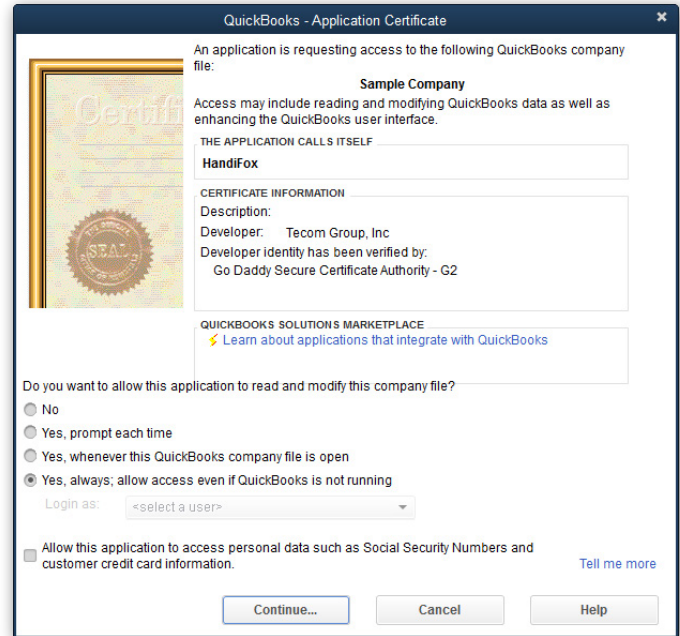
# SETTING UP ACCESS TO QUICKBOOKS

1 Start QuickBooks and **log in as the Admin**. Note that any other user, even with Full Access privileges, will not suit for this operation, since only the Admin is able to set permissions for integrated apps.

2 The **Application Certificate** window will show up. Set all permissions as shown on the screenshot.

3 Note that **"Allow this application to access personal data..."** checkbox at the bottom must be checked too. HandiFox does not process or store social security numbers and credit card information, but this option also gives access to some other kinds of customer data that HandiFox requires to work with.

4 Click **Continue**, and then **Done**.

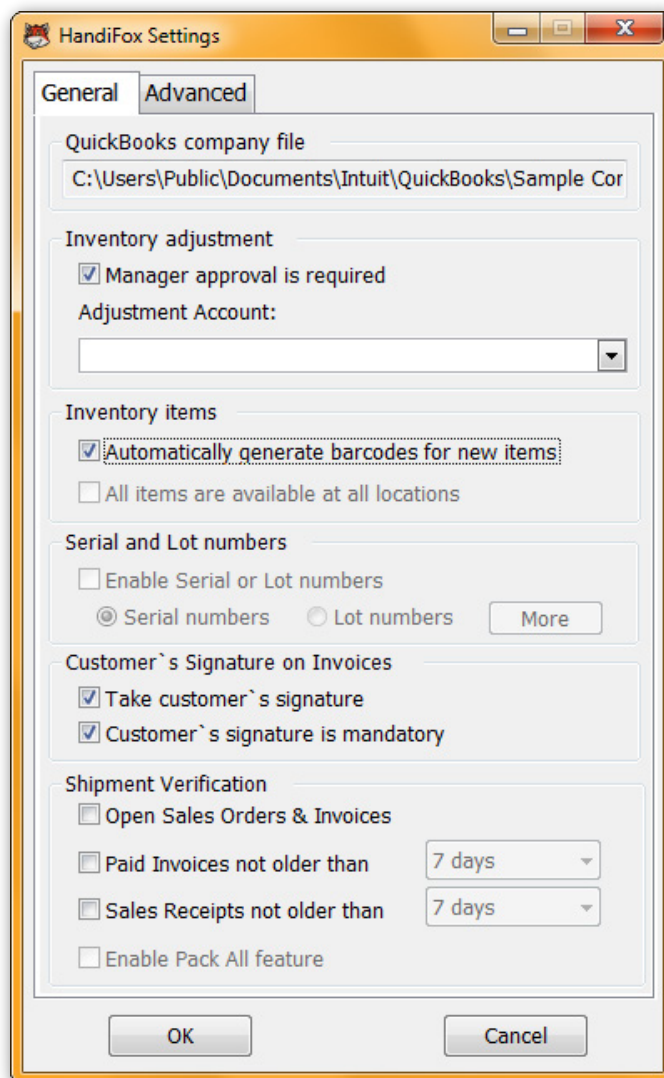




**HandiFox Settings** window will open. Choose the adjustment account and review other options. You can **hover the mouse** over the options to get a hint on what each of them does. You will be able to change any of them in the future.

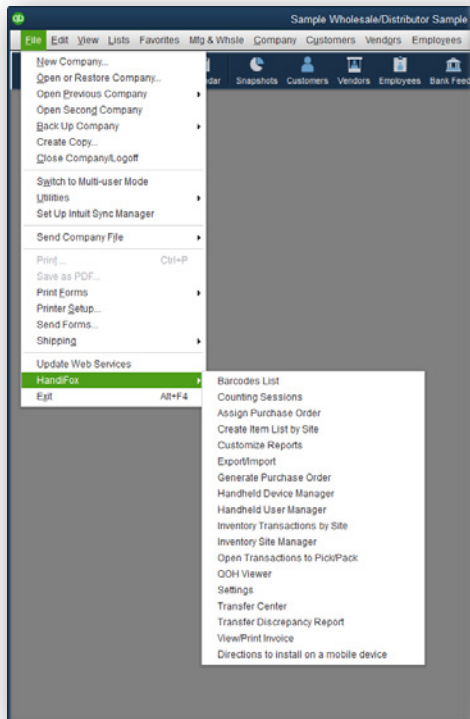
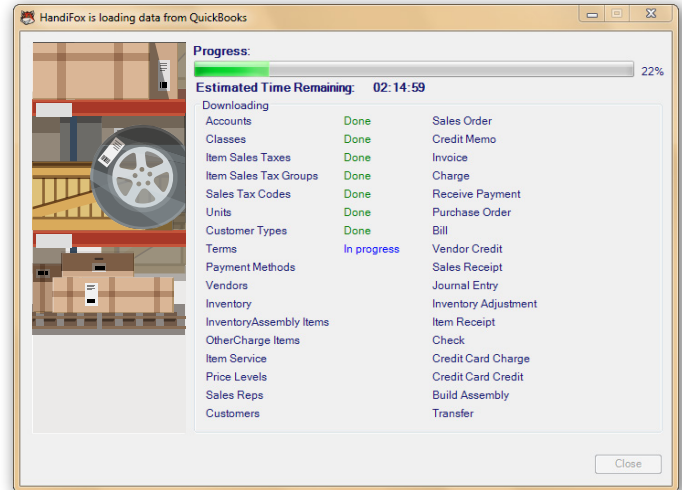
When you are finished, click **OK** to proceed to initial data download from QuickBooks.

*Note: Clicking **Cancel** will prevent HandiFox from performing initial data download from QuickBooks. In this case, you will be offered to continue HandiFox initialization next time you open QuickBooks.*



# DOWNLOADING DATA FROM QUICKBOOKS

- 1 HandiFox will start populating its database with data downloaded from QuickBooks. You will see a window displaying the download progress.
- 2 When the download is finished, click **Close**.
- 3 If an error happens on this stage, check the [Troubleshooting section](#) of this document.



## HANDIFOX MENU IN QUICKBOOKS

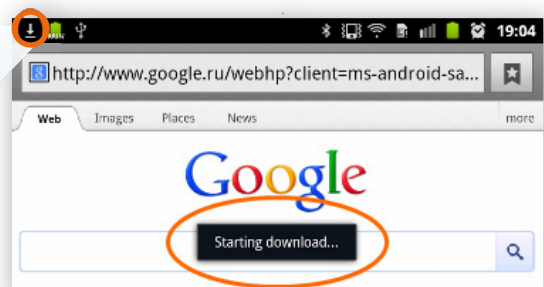
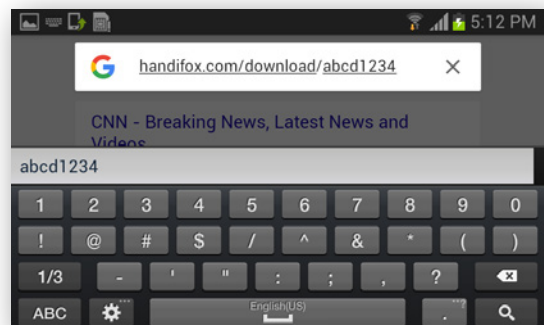
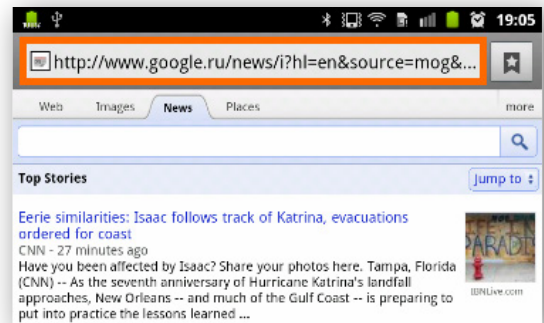
- 1 Most of HandiFox's features available on the PC can be accessed from **the menu in QuickBooks**, under **File** → **HandiFox**.
- 2 If you don't see the menu, check [this page](#).

# DOWNLOADING ANDROID APP PACKAGE



*Note: the interfaces may look different from what you see on the screenshots, depending on your Android version and device manufacturer.*

- 1 Make sure your device has a working internet connection.
- 2 Start the browser, set the cursor in the address bar and type in the mobile app download link.
- 3 If you don't have the link, click with right mouse button on the HandiFox tray icon on the PC and select **"Directions to install on a mobile device"**. This will open a web document where you can find the correct download link. If your device has an app capable of scanning QR codes, you can use the code in the document, instead of typing in the link by hand.
- 4 After typing in the link, touch **Go** or **Enter** on the keyboard, and the download will start.

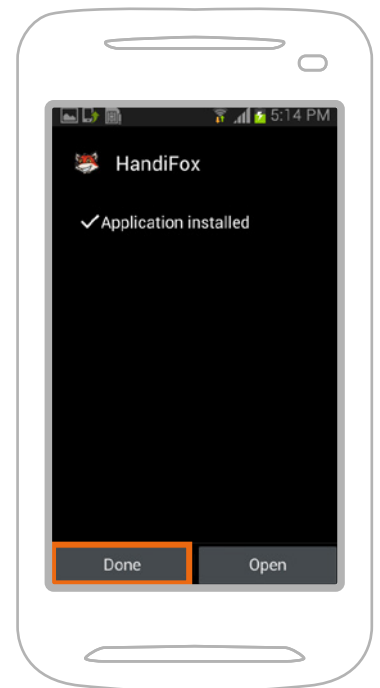
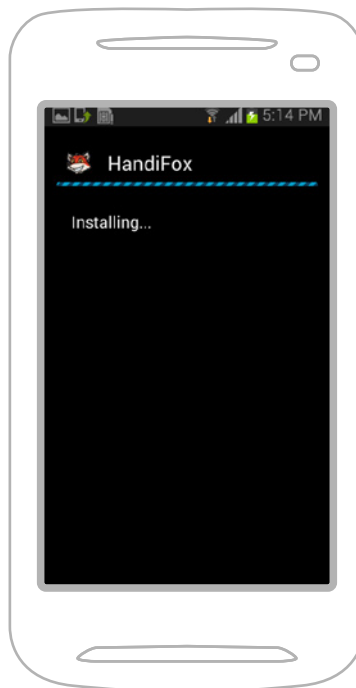
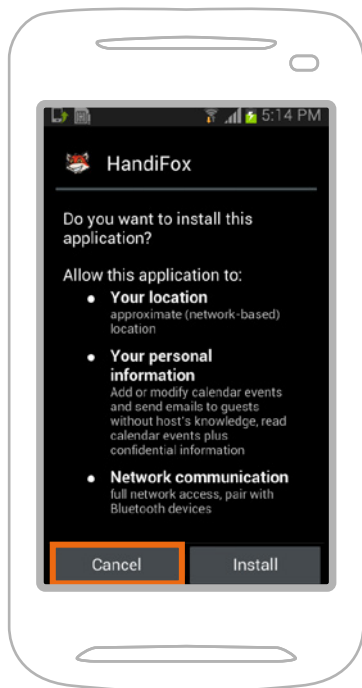


# INSTALLING ON ANDROID



1 When the download is finished, you will see the "Download complete" notification with the name of the install package.  
Touch it to begin installation.

2 *Note: If you see the "Install Blocked" message, go to **Settings** → **Security** and enable the **Unknown Sources** option.*



# CREATING HANDHELD USER

# 8

To work with the mobile app, you need to enter user login and password, which can be set in QuickBooks under **File → HandiFox → Handheld User Manager**.

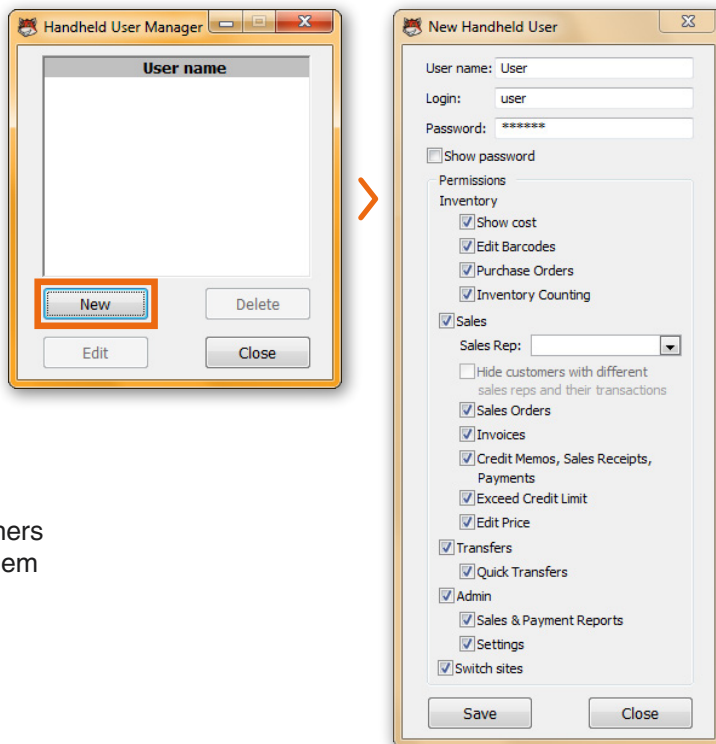
Open the User Manager window and click **New**.

Fill in user's display name, login and password, and set their permissions.

It is possible to have the user see only customers that have a particular sales rep assigned to them in QuickBooks: just enable option **"Show customers assigned to Sales Rep"** and **select a rep** from the list above.

When you are finished,click **Save** to create the user, and then click **Close**.

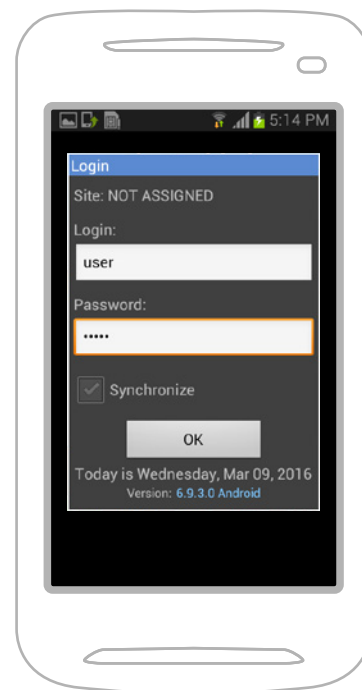
You can create any number of handheld users this way.



# LOGGING IN

# 9

Start HandiFox mobile app and enter the login and password you have set in the Handheld User Manager.



On first start, you need to **synchronize** the mobile app to get it populated with your company data.

After logging in you will see the **Synchronization Settings** window. Here you can tell the app which computer on your network it is supposed to synchronize with.

You can touch **Find Host** to attempt auto-discovering the computer with HandiFox on your network. If it's not found, touch the **plus icon** to add a new host manually.

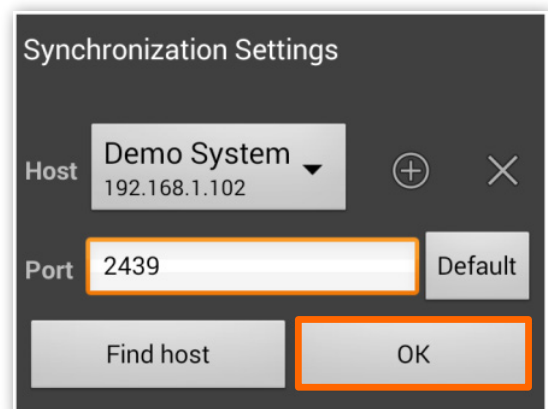
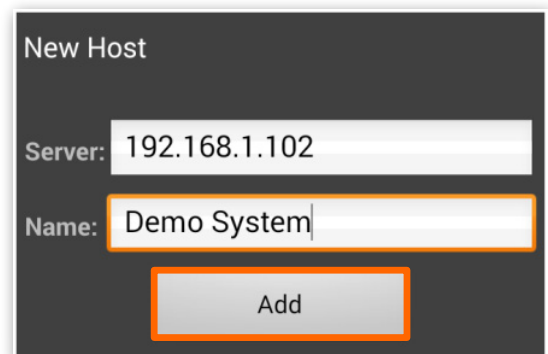
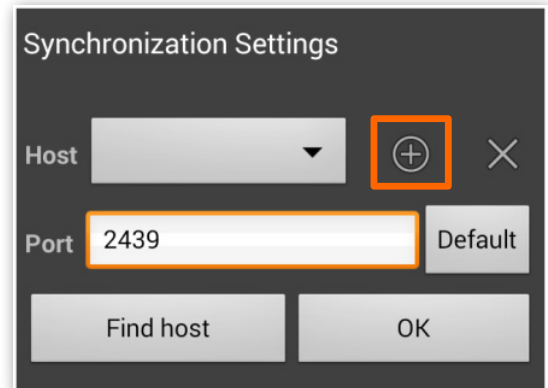
Enter an IP address into the **Server** field and any reference name into the **Name** field.

When you are finished, touch **Add**. Then make sure the server you created is selected as the Host and touch **OK**.

On the Synchronization screen, touch **Sync** to synchronize your device.

### How to find out computer's IP address:

On the computer with HandiFox, press **Win+R**, type "**cmd**" and press **Enter**, then type "**ipconfig**" and press **Enter** again. You will see the command output in the console. The IP address you need will be in "**IPv4 Address**" line.



# ASSIGNING YOUR DEVICE TO A SITE 11

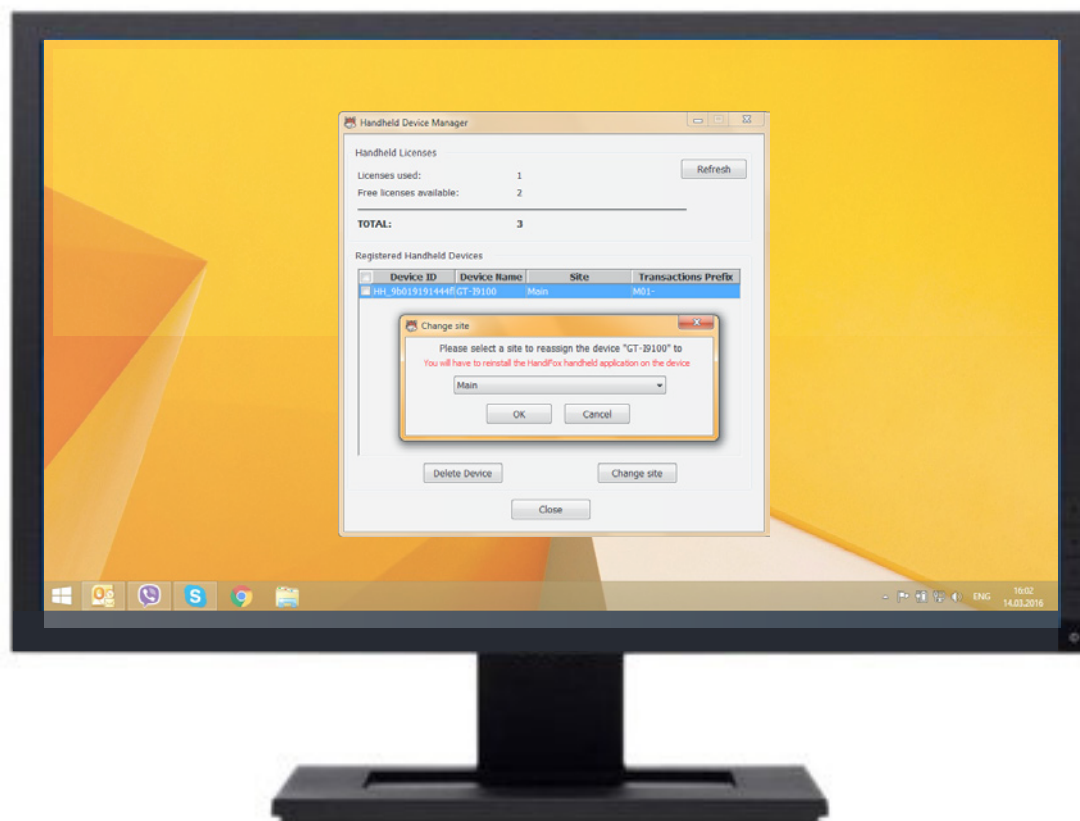
If you have the Multi-Location configuration of HandiFox, the first synchronization attempt will result in a message saying that the device has to be assigned to an inventory site.

To choose a site for your device, bring up QuickBooks window and go to **File → HandiFox → Handheld Device Manager**. Your device will be displayed on the list with "NOT ASSIGNED" in the Site column.

Highlight the device and click **Change Site**, then select a site from the list. Note that every device can only work with the inventory available on its site.

When you've chosen the site, touch **Sync** on the device once again to proceed with synchronization.

If you have the Single Location setup, the device will be auto-assigned to Main - the only available site.

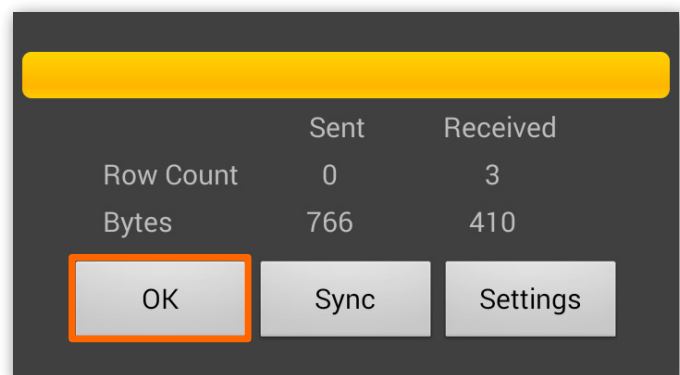
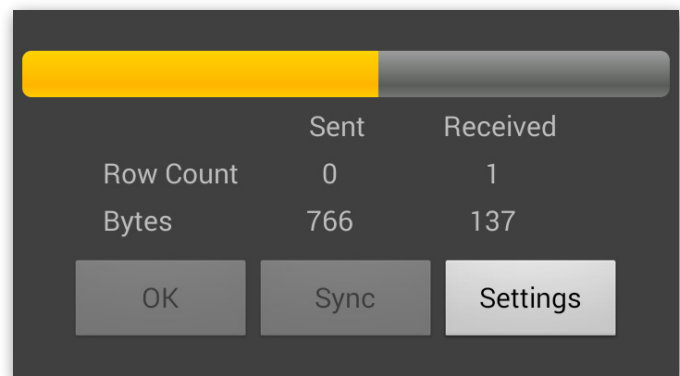
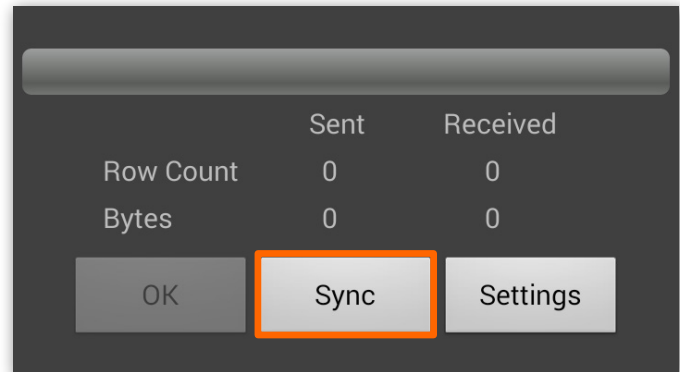


Wait for the device to finish synchronizing. The first synchronization can take up to 10 minutes, depending on the amount of data to be transferred and your network connection speed.

When it's finished, touch **OK**.

If the synchronization fails to complete, see possible solutions on [this page](#).

Now your device is ready for work.





After installation, HandiFox will work in trial mode for 30 days. Trial mode has no feature limitations and allows up to 2 devices to be in sync for Multi-Location configuration, and 1 device for Single Location.

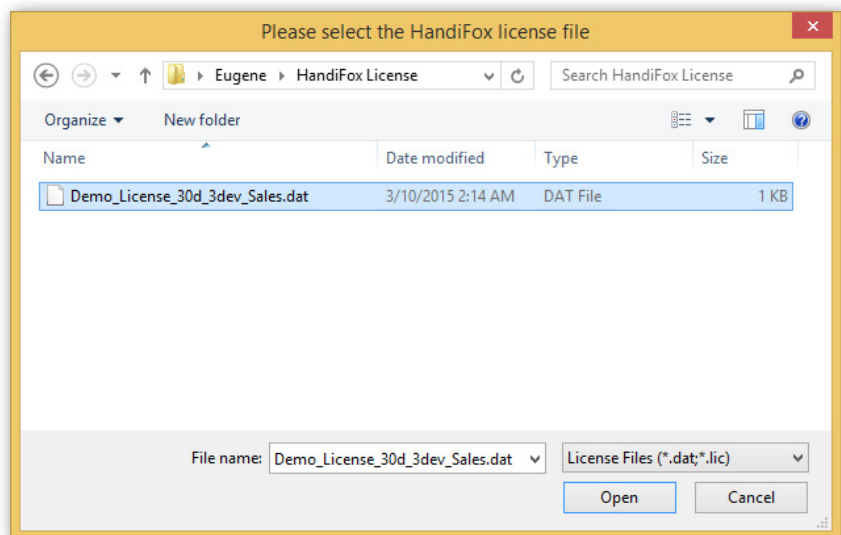
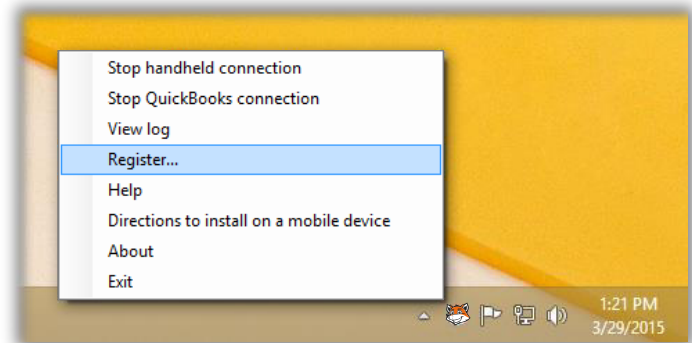
When the trial period ends, HandiFox will need to be registered to keep working. Registering is done by pointing HandiFox to a special file with licensing information called **license file**. If you have one, follow these steps to register HandiFox with it:

Put the license file to some folder on your local hard drive (not a network location).

Click with right mouse button on HandiFox tray icon and select **Register...**

Navigate and choose the license file in the opened file selection dialog.

***Note:** HandiFox will need to check the license file every time it starts, so make sure not to delete the file from it's location. If you need to move it elsewhere, repeat the registration procedure after that.*



# ***HandiFox***

Mobile Inventory Tracking & Sales Management Software



## **TROUBLESHOOTING**

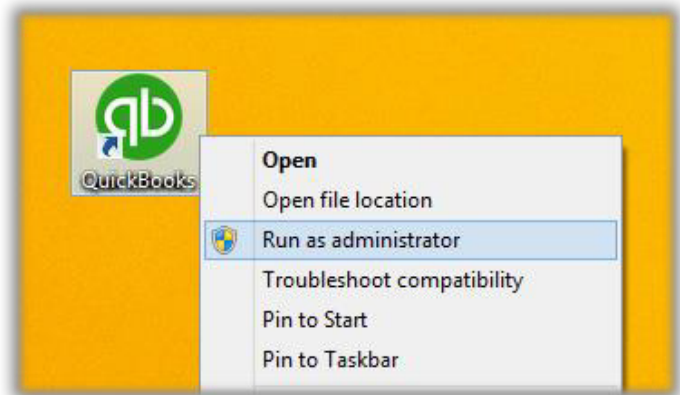
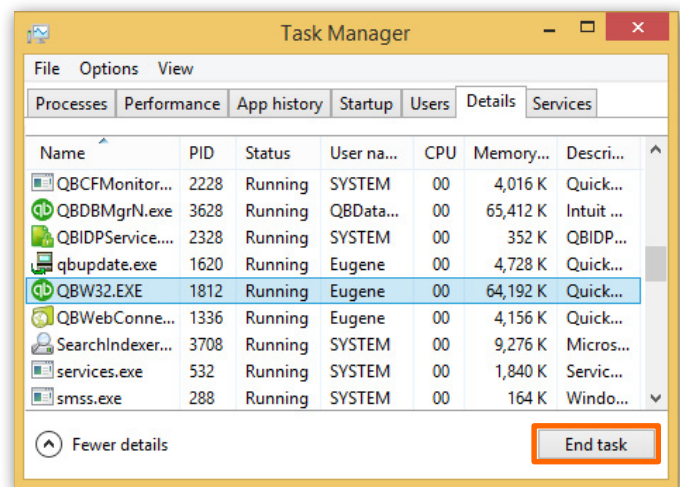
# Problem №1

I don't see the HandiFox menu under file in QuickBooks.

## Solution:

To get the menu to show up, you need to close QuickBooks and restart it as the administrator. Follow these steps:

- Close QuickBooks window.
- Start the **Task Manager** and go to **Processes** tab (**Details** in Windows 8).
- Look for the process called **QBW32.exe**. If it's found, highlight it and click **End Task**.
- Click with right button on the QuickBooks desktop icon or Start menu item, select **Run as Administrator**.
- You don't have to keep starting QuickBooks as Administrator, it is enough do this once, and the menu will stay.

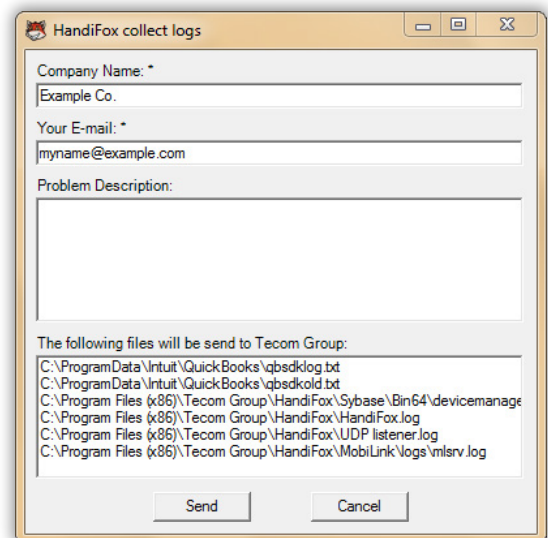
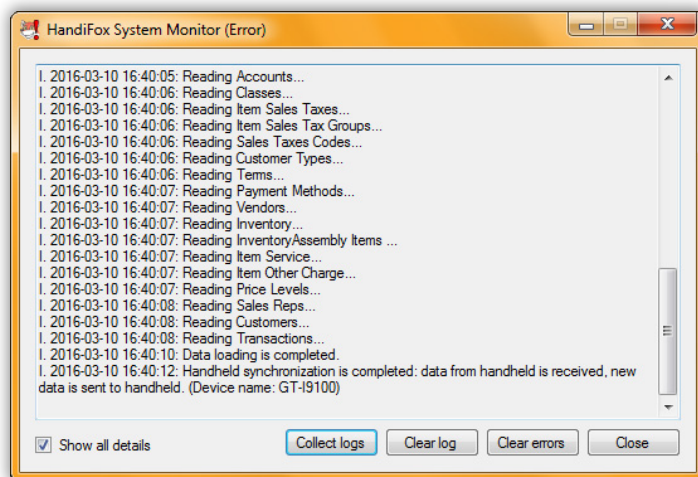


# Problem №2

There is an error during initial data download from QuickBooks.

## Solution:

- There can be many possible causes for such errors. Start [HandiFox System Monitor](#) and look at the error text at the end of the log to learn more about the problem.
- If it does not give you a hint on how to resolve the issue, click **examine** to send the log files to HandiFox support. We will examine the logs and get back to you.



# Problem №3

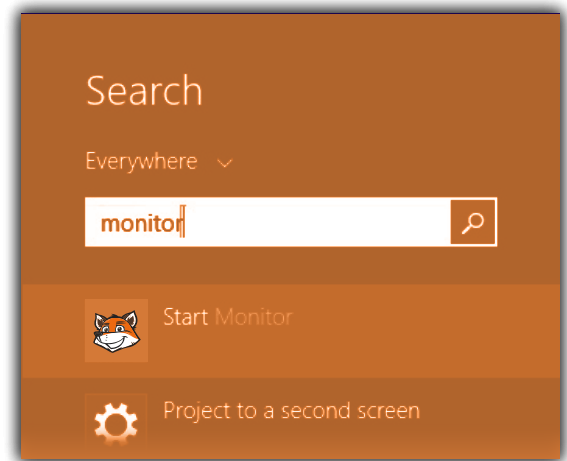
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There is no HandiFox icon in the system tray.

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## Solution:

- Try to start HandiFox System Monitor from **Start → Programs → TecomGroup → HandiFox → Start Monitor**. In Windows 8, just search for **“Monitor”** to find the shortcut.
- If you are not able to start the Monitor that way due to an error message or any other reason, **restart** the system.
- If the problem persists after reboot, report the issue to our [support](#).



# Problem №4

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## Mobile app synchronization fails (error on the server).

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### Solution:

There are several problems that can cause synchronization to fail. To find out more details, bring up the HandiFox System Monitor and check what messages are displayed as you try to synchronize the mobile app:

- *“Handheld application has to be upgraded”* – The mobile app has a different version from the one installed on your PC. Install the correct mobile app version and install it on your device.
- *“Login or password is incorrect”* – Double-check mobile user’s login and password in QuickBooks under **File → HandiFox → Handheld User Manager**.
- *“There is no free license available”* – You already have the maximum number of devices in sync, and current device would exceed the limit set by your license. You can go to QuickBooks **File → HandiFox → Handheld Device Manager** and delete one of the existing devices from the list.
- *“License is expired”* – Most likely, your trial period has run out, and you have not registered HandiFox using a permanent or temporary license. If you have a license file, you can apply it by right-clicking on the tray icon, selecting **Register** and navigating to the file.
- *“Your HandiFox license file is corrupted”* – Find the license file in your emails or request another copy of it from our support, and re-register the file in HandiFox. This error can also occur when the license file is stored on a network location, which is not recommended.
- If **no message** is displayed in HandiFox System Monitor as you try to sync, see the next page.

# Problem №5

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## Mobile app synchronization fails (connection problem).

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### Solution:

If no message comes up in HandiFox System Monitor as you try to synchronize the mobile app, this is most likely a connection problem. Check that all of the following conditions are met:

- The device must be connected to your local network via Wi-Fi.
- Make sure that the handheld synchronization service is running on the PC. Try restarting it by selecting **Stop/Start Handheld Connection** in the tray icon right click menu.
- The incoming connection must not be blocked by the firewall. Try disabling Windows Firewall (or the third-party firewall of your choice), and if it helps, add an exception for inbound traffic on port 2439.
- Double-check the server's IP address, make sure it is correct and has not changed.
- Try rebooting both the PC and the mobile device.

# CONTACT US

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## **Good Bye!**

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*If you observe an error not mentioned in this section, or cannot resolve a problem by following instructions above, feel free to report your problem to our support:*

**+1-877-942-6343**

**e-mail:**

*support@handifox.com*

**Skype:**

*handifox\_support*

