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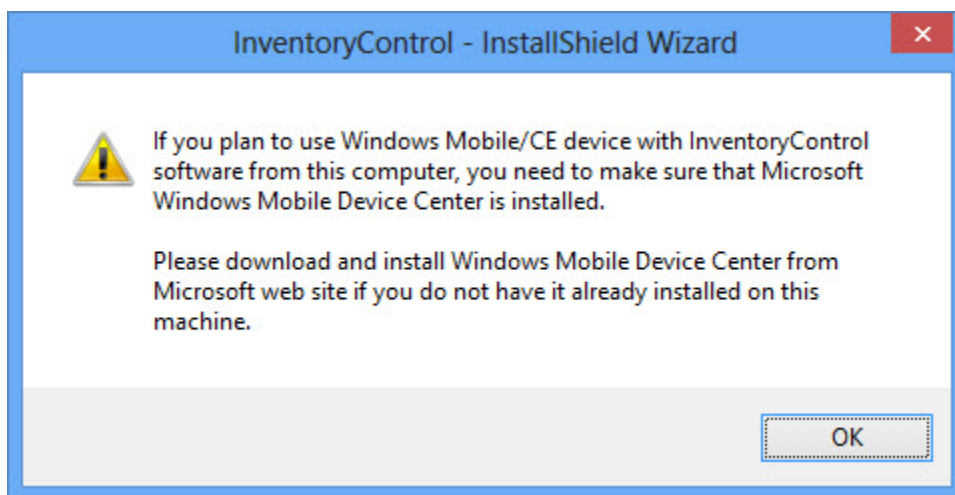
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# Chapter 1 – Install the Software

## 1.1 Install Process

1. Insert the installation disk into your computer. After the setup program finishes preparing the InstallShield wizard, a warning message will appear. The exact message you see will vary depending on your operating system.

### Windows Vista/Windows 7/Windows 8



If you are installing InventoryControl on Windows Vista or Windows 7/8 and plan to use a Windows Mobile/CE device from this computer, you need to make sure Microsoft Windows Mobile Device Center is installed. If it is not installed, you can download and install the latest version from the Microsoft website. See the section of this document entitled "[Installing Windows Mobile Device Center](#)" for detailed instructions on installing the Windows Mobile Device Center.

If you are installing InventoryControl on Windows XP the screen above will look slightly different. If you plan to use a Windows Mobile/CE device from this computer, you must install ActiveSync. The Microsoft ActiveSync software is on the InventoryControl installation disk under **Additional Resources**, or you can download the latest version from Microsoft's website. See the section of this document entitled "[Installing ActiveSync on Windows XP](#)" for detailed instructions on installing ActiveSync.

The steps to install and set up a mobile device start on Step 7 of this section.

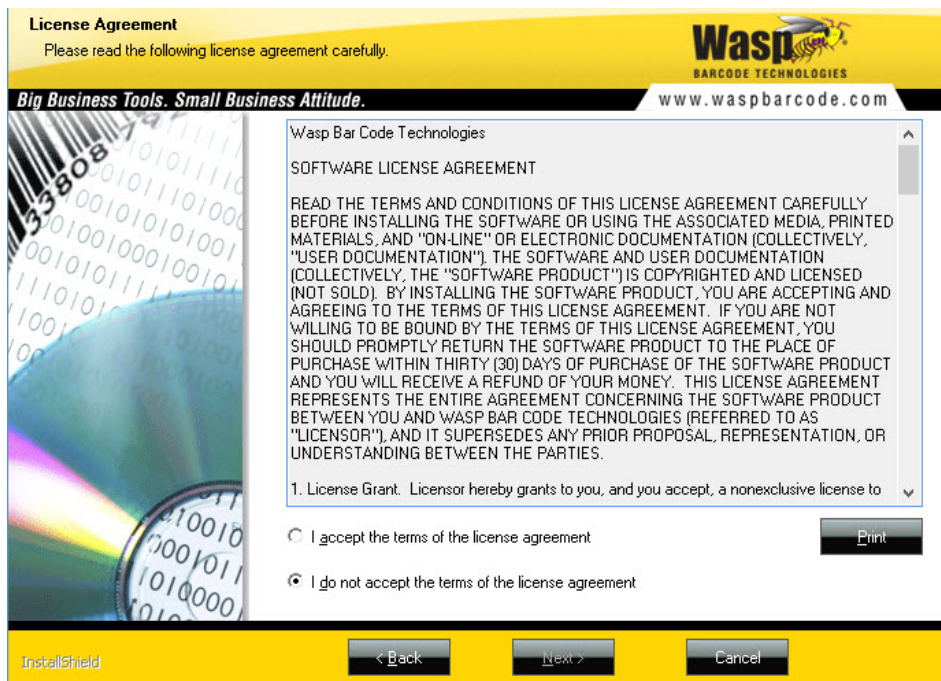
***If the InventoryControl installation program does not automatically start, see the FAQ at the end of this guide for manual start instructions.***

2. Click **OK** on the message screen. The installation wizard **Welcome** screen appears.



Click **Next** on this screen to begin installing InventoryControl.

3. Next the **License Agreement** screen appears.



Review the license agreement, then select ***I accept the terms of the license agreement***. Click the Next button to continue. You will not be able to continue installing the application until you select the ***I accept the terms of the license agreement*** option.

4. The **User Registration** screen appears.

Please enter your name, the name of the company for which you work and the product serial number.

User Name:

Company Name:

Serial Number:

Enter your **User Name** (this can be any name of your choice), your **Company Name** and the **Serial Number** for this product. The serial number can be found on or in the case containing your InventoryControl software. It will be a 19-digit number that starts with 08.

The **Serial Number** (also known as the installation/registration key) determines which version of InventoryControl you are installing (Standard, Pro, Enterprise). Additionally, for Pro and Enterprise users, the serial number determines whether you are installing the InventoryControl RF solution for wireless mobile devices. In most cases you will have one key. Enter it here and the installer will know which version you are installing.

5. Next a screen displays the default **Destination Folder** for the installation of InventoryControl.

32 bit OS location - C:\Program Files\Wasp Technologies\InventoryControl  
 64 bit OS location - C:\program files (x86)\Wasp Technologies\InventoryControl

Setup will install InventoryControl in the following folder.

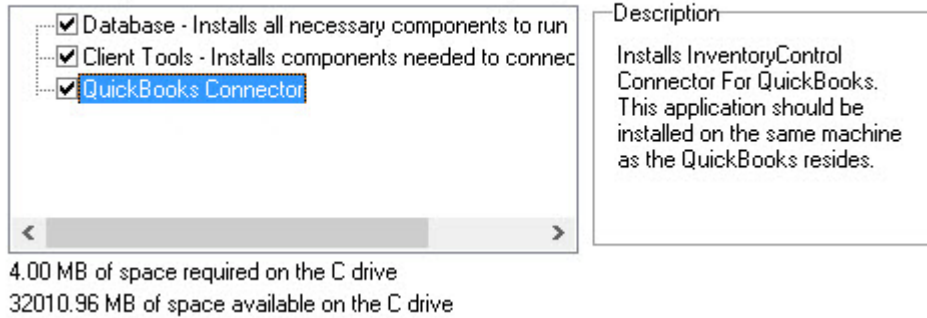
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.

Destination Folder

Select a new destination by clicking the **Browse** button and navigating to a new folder, or accept the default location (recommended) by clicking the **Next** button.

- The **Select Installation Type** screen appears next in Pro and Enterprise installations. The **Select Installation Type** screen shown below is for Pro Installations:

In the Professional/Enterprise Edition, only one computer needs the Database installed. If you have already installed the Database on another computer, un-check the Database install.

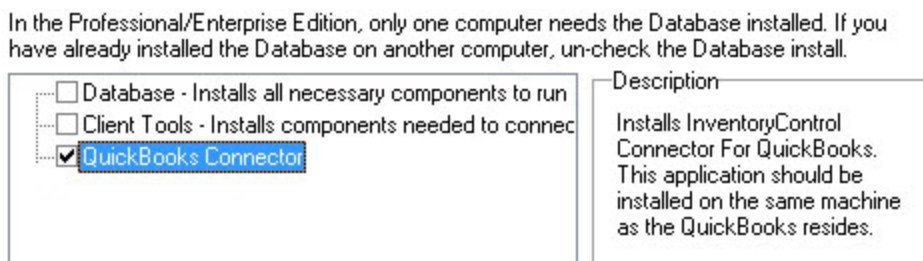


The options that appear on this screen vary depending on whether you are installing the Pro or Enterprise version. Please refer to **Section 2. Professional Edition Installation** or **Section 3. Enterprise Edition Installation** for help deciding which installation type to select.

If you will be using mobile devices on this computer, you must select the Client Tools options.

You should only install the database on one computer.

Keep in mind that the QuickBooks® Connector must be installed on the same machine on which QuickBooks® itself is installed. If you want to install the InventoryControl database and client on a different machine you can do so. Rerun the installation disk on the computer where QuickBooks® is installed. In this case, the **Select Installation** screen will look like the following:



7. If you selected **Client Tools** on the **Select Installation Type** screen (Step 6), the **Select Features** screen will appear:

Select the features you want to install, and deselect the features you do not want to install.

	Description
<input checked="" type="checkbox"/> WDT2200 Device	Installs the necessary components for communicating with the WDT2200, if not already installed.
<input checked="" type="checkbox"/> Windows Mobile/CE Batch Device	
<input checked="" type="checkbox"/> Windows Mobile/CE Wireless Device	

52.33 MB of space required on the C drive  
40719.28 MB of space available on the C drive

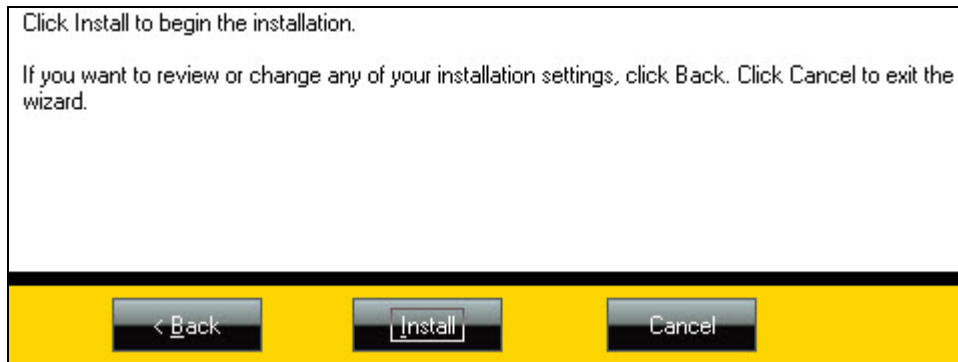
Select the checkbox next to any mobile device type you will be installing. If you are installing the QuickBooks® Connector only, you can leave all checkboxes on this screen blank.

You can simultaneously install all devices or any combination of devices that you need. If you will be using a wireless device, please see the **Troubleshooting a Wireless Connection** topic in the InventoryControl Online Help.

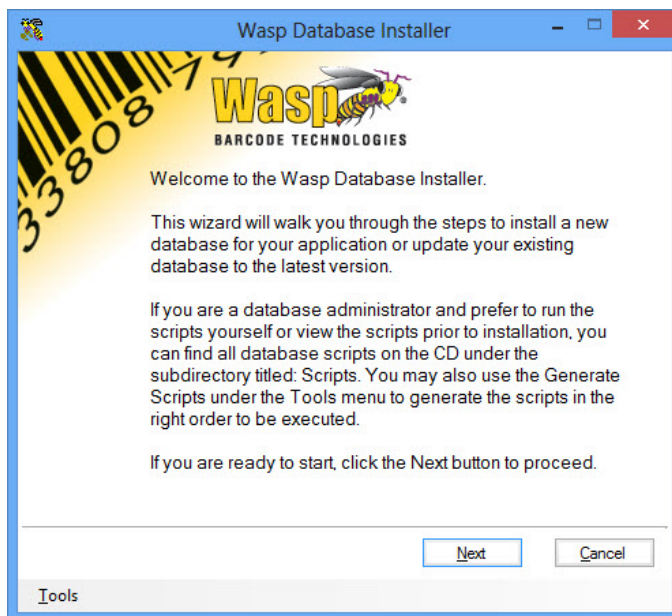
If you are installing a Windows Mobile/CE device on Windows XP and you need to install ActiveSync, please refer to the section **Installing Microsoft ActiveSync on Windows XP** in this document.

If you are installing a Windows Mobile/CE device on Windows Vista or Windows 7/8, please refer to the section **Installing Windows Mobile Device Center** in this document.

8. The **Ready to Install Program** screen appears next. If you want to make changes to your destination folder or any other selections you have made up to this point, click the **Back** button. If you are ready to install InventoryControl, click the **Install** button.

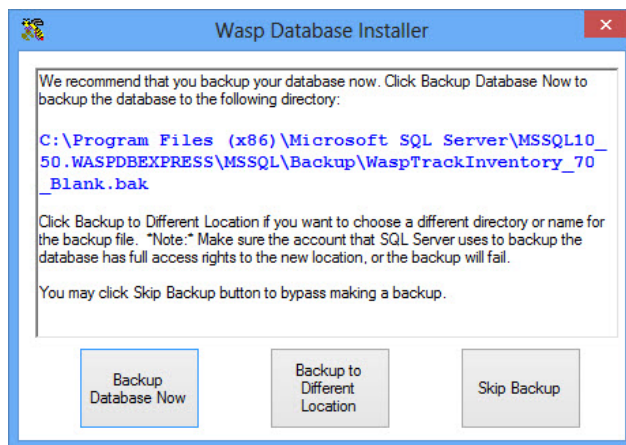


9. A series of progress screens appears. The installation process may take a few minutes. Some of the third party software installations may not show progress; please be patient and give the process a few minutes to complete.
10. If you selected to install the database on the **Select Installation Type** screen, the **Wasp Database Installer** wizard appears next. The wizard will take you through the steps to install a new database or, in the case of a software upgrade, upgrade an existing database.



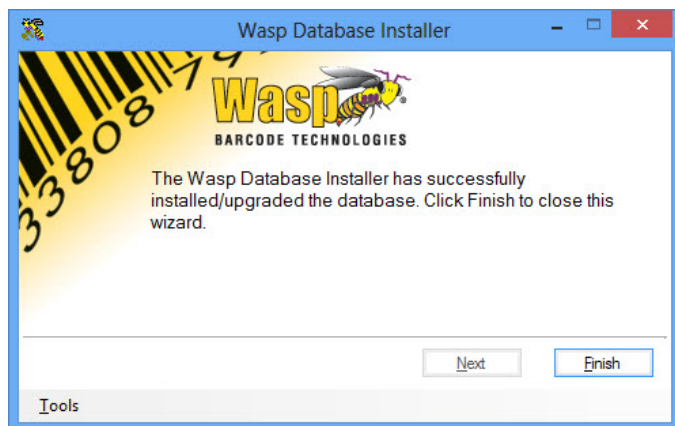
- a. Click **Next** to begin the database installation.

- b. The system will make a backup of your database at the location specified on the backup message:



Click **Backup Database Now** to backup to the default location. **Select Backup to Different Location** to choose a different location or to rename the backup file. Click **Skip Backup** to backup at a later time.

- c. Upon completion of the database installation, the following screen appears:



Click **Finish** to close the Wasp Database Installer wizard.

- d. The Database Installer will run again to install the **Sample Company Database**. You will be prompted to back up the database (as in step 10b). The Sample Company database installation will begin with the screen shown in step 10a.
- e. Click **Finish** on the Database Installer screen to continue.



11. If this is a Pro or Enterprise version, the **Fully Qualified Domain Name For This Machine** screen appears. The Fully Qualified Domain Name (FQDN) is the complete name of your machine.

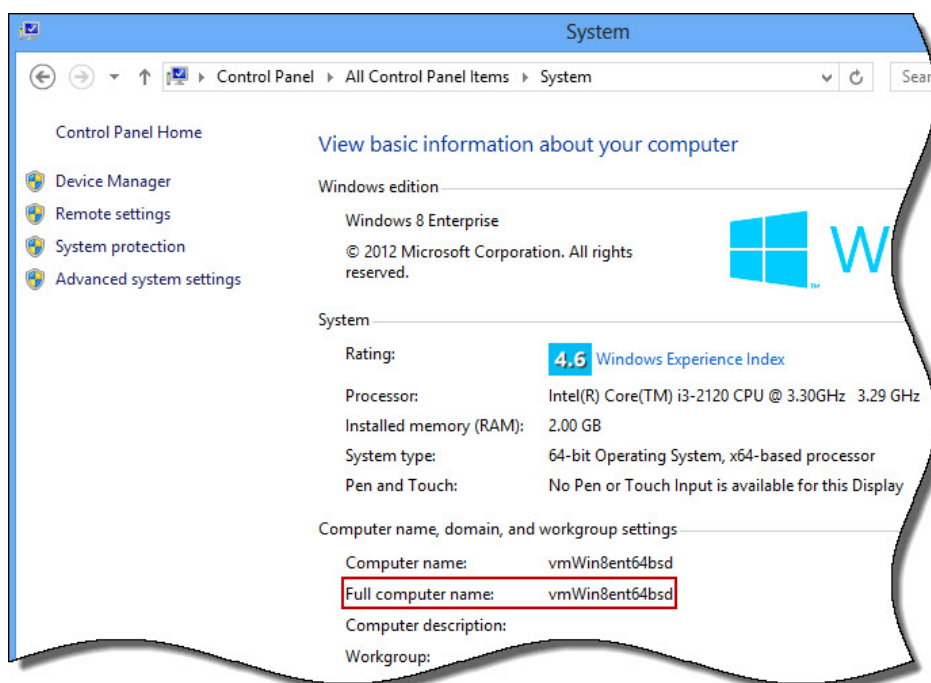
Please verify the fully qualified domain name (FQDN) for this machine. The service will need this information to be accurate to run.

FQDN:

Enter the complete domain name of this machine. The **FQDN** field may appear pre-populated with a machine name. You should verify that the machine name is correct using one of the methods described below:

#### Method 1:

Navigate to **Start > Control Panel** (classic view) > **System**. (In Win8 click Control Panel > System.) The FQDN for this computer is listed as the **Full Computer Name**.

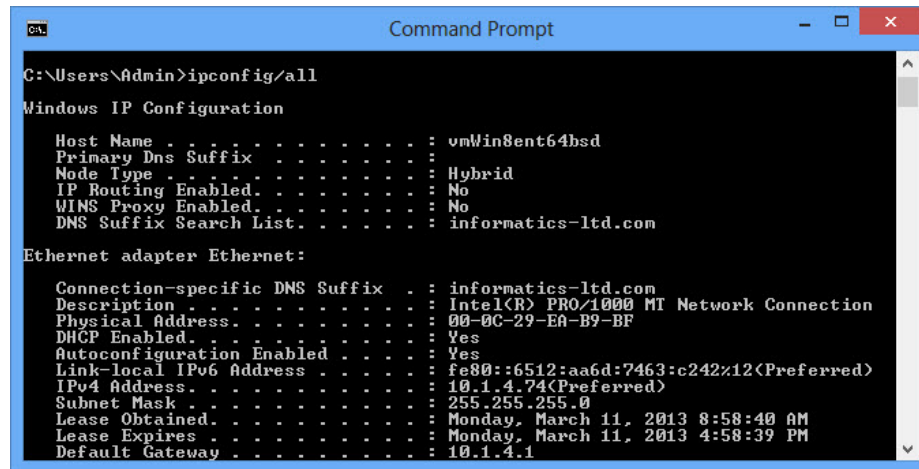


#### Method 2:

- Select the **Start** (Windows icon) key on your keyboard, then enter **CMD** in the search field. CMD.exe will appear in the **Programs** section. (In Win8 select the CMD icon from the toolbar.)
- Select **cmd.exe** from the **Programs** section of the **Start** menu.

The **CMD** screen appears.

- c. On the **CMD** screen, enter **IPCONFIG/all** at the prompt. Configuration information for your machine will appear on the screen as shown below.



```

C:\Users\Admin>ipconfig/all

Windows IP Configuration

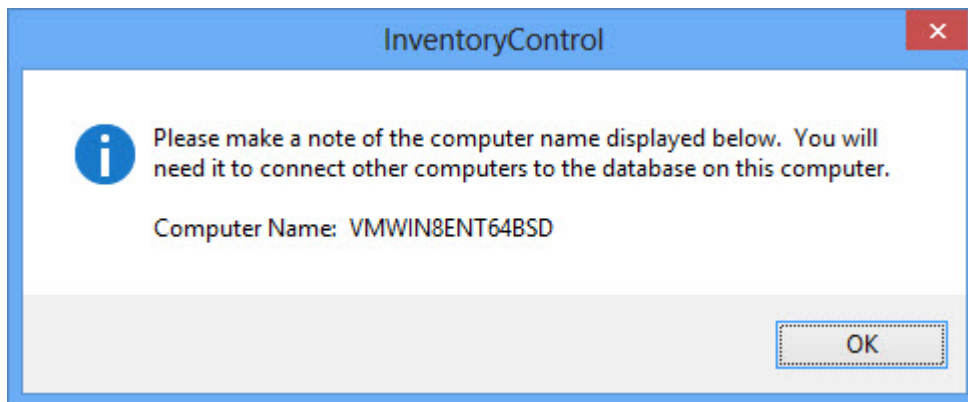
Host Name . . . . . : vmWin8ent64bsd
Primary Dns Suffix . . . . . :
Node Type . . . . . : Hybrid
IP Routing Enabled. . . . . : No
WINS Proxy Enabled. . . . . : No
DNS Suffix Search List. . . . . : informatics-ltd.com

Ethernet adapter Ethernet:

Connection-specific DNS Suffix . : informatics-ltd.com
Description . . . . . : Intel(R) PRO/1000 MT Network Connection
Physical Address. . . . . : 00-0C-29-EA-B9-BF
DHCP Enabled. . . . . : Yes
Autoconfiguration Enabled . . . . : Yes
Link-local IPv6 Address . . . . . : fe80::6512:aa6d:7463:c242%12(Preferred)
IPv4 Address. . . . . : 10.1.4.74(Preferred)
Subnet Mask . . . . . : 255.255.255.0
Lease Obtained. . . . . : Monday, March 11, 2013 8:58:40 AM
Lease Expires . . . . . : Monday, March 11, 2013 4:58:39 PM
Default Gateway . . . . . : 10.1.4.1
  
```

The **FQDN** is the **Host Name** followed by the **Primary DNS Suffix**. You may have to scroll up on the **CMD** screen to view these two fields.

12. On Professional and Enterprise installations with database installations, the **Computer Name** screen appears.



**Important:**

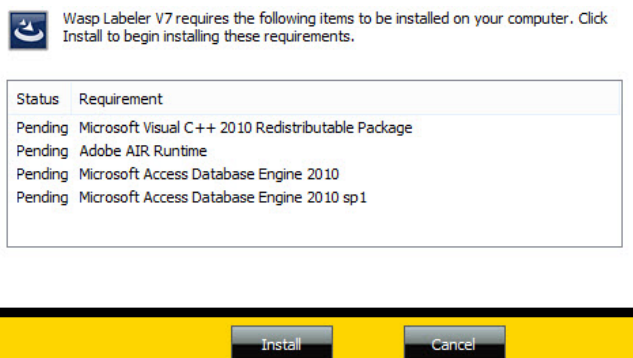
Record your computer name before clicking the **OK** button on this screen. This name must be entered when you perform your Client Tools Installation. Record your computer name here:

---

13. Crystal Reports will install next. A series of status screens will appear. You do not need to do anything during this process.

- After InventoryControl installs, the **Wasp Labeler** application will install. Wasp Labeler installs to allow you to view, edit and print labels that are included in InventoryControl and to create new labels.

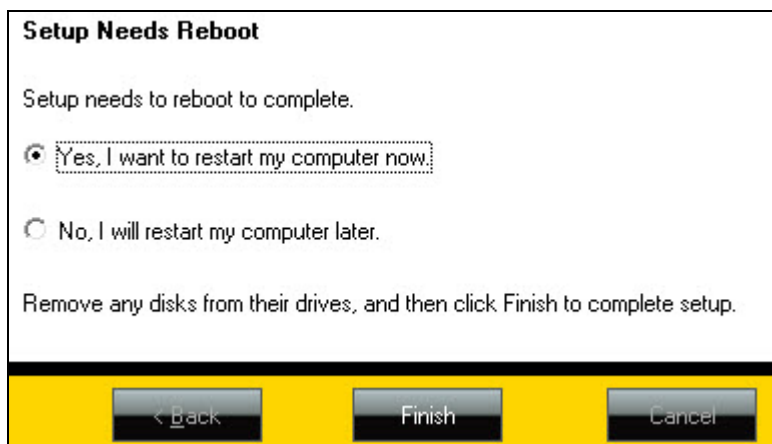
A screen will appear displaying any elements that InventoryControl needs to install in order to run properly.



Click **Install** to install the components.

The select install destination screen for Wasp Labeler appears next. You can select a new destination by clicking the **Browse** button and navigating to a new folder, or accept the default location by clicking the **Next** button.

- A series of progress screens will appear as Wasp Labeler is installing.
- After the entire installation process is complete, a screen may appear asking if you want to reboot your computer.



Select **Yes, I want to restart my computer now**, remove any installation disks from their drives, then click Finish. Your system will reboot.

Select **Yes**, I want to restart my computer now, remove any installation disks from their drives, then click **Finish**. Your system will reboot.

InventoryControl, WaspLabeler and QuickBooks® Connector icons will appear on your desktop.

The default **User Name** for InventoryControl and for the QuickBooks® Connector is Admin and there is no password. Wasp recommends you change the default password for InventoryControl the first time you log in to InventoryControl.

The QuickBooks® Connector password will not change, even if you change the InventoryControl password. To change the Connector password requires changing the name of the SQL server. Changing the SQL password is not recommended as Wasp Support cannot change this password back for you if it is forgotten or compromised.

The first time you run InventoryControl, you should register your software by navigating to **Help > Update License** or by going to our website directly at:

[www.waspbarcode.com/register/register.asp](http://www.waspbarcode.com/register/register.asp).

When you register make sure to pick InventoryControl for Use With QuickBooks® as the product and use the serial number you used during installation. An activation key will be emailed to you that will fully enable the application.

If you are unable to log in to InventoryControl after rebooting, wait a few minutes and try again. Some machines take longer than others to start the Wasp Service after installation.

## 1.1.1 Installing ActiveSync on Windows XP

If you will be using a Windows Mobile/CE device on the Windows XP operating system, you will need to install ActiveSync. A link to the latest version is located on your installation DVD under Additional Resources. You can also obtain a download from the Microsoft website. Instructions for installing ActiveSync are listed below.

1. If you select to install a Windows Mobile/CE Device, the message shown below will appear if you have not installed ActiveSync:



2. Leave the screen as it is and use the InventoryControl disk to install ActiveSync. Follow the prompts on the ActiveSync installation screens. You should install the files to the default directory.

**Reboot Note:** At the end of the ActiveSync installation you may be prompted to reboot your computer. Select **NOT** to reboot at this time (you will be given the opportunity to reboot after the entire InventoryControl installation is complete).

3. When ActiveSync has completed installation, it will try to connect to ActiveSync and the following screen appears:



Connect the cable of your mobile device to the PC, turn on the device then place the device in its charging cradle or connect to the data cable.

If the device is not automatically detected, check the settings and the connection and make sure the device is on. Then select the correct port from the list in the screen and click **Next**.

After the driver is detected, a partnership must be created.



During Partnership Setup, you should use the default settings pre-populated in each section.

4. After returning to the InventoryControl install, click OK on the screen shown in step 7a.

## 1.1.2 Installing Windows Mobile Device Center on Windows Vista or Windows 7/8

If you will be using a Windows Mobile/CE device on the Windows Vista or Windows 7/8 operating system, you will need to install Windows Mobile Device Center (WMDC). You can obtain latest version for your OS from the Microsoft website. Instructions for installing WMDC are listed below.

1. Plug the USB cable into the sync connector port on the device.
2. Plug the other end of the cable into a USB port on the computer.
3. If WMDC is not already installed, it installs automatically.
  - o **Note:** If Mobile Device Center does not start installing automatically, follow these steps:
    - a) Go to [Microsoft's download center](#).
    - b) Click **Continue**.
    - c) Follow the instructions to validate Windows.
    - d) Click **Download** and select **Run**.
4. On the setup wizard, read the Microsoft Software License Terms.



5. Click **Accept**.

6. On the registration request, click **Remind me Later**.

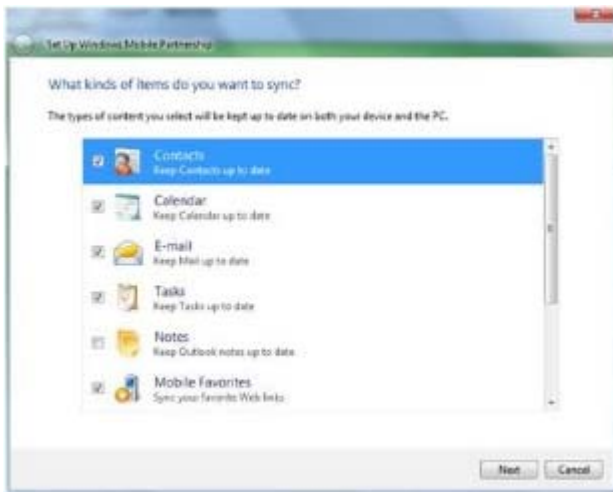


7. After WMDC detects the device and launches the setup wizard, click **Set up your device**.



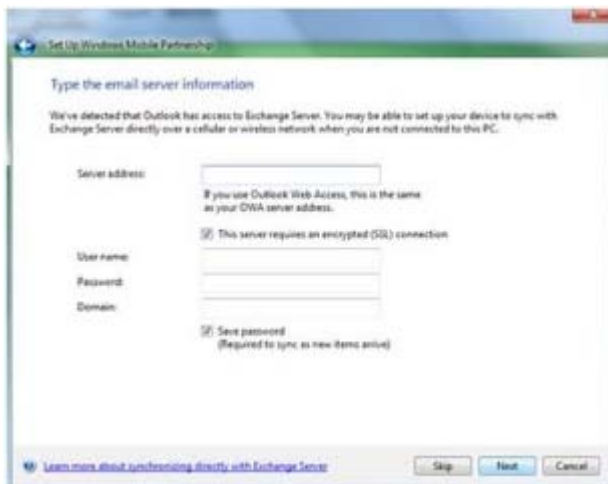


8. Click the check boxes for the items you wish to sync.



9. Click **Next**.

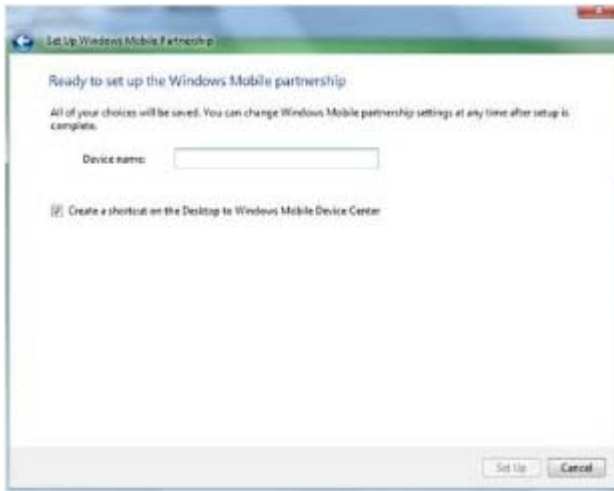
10. Enter your server address, user name, password, and domain.



11. Click **Next**.

12. Enter a name for the device.

13. Click **Set Up**. Mobile Device Center synchronizes your data.



## 1.2 Set Up Your Database

Now that your software is installed, the next step is to enter information into your database. You can create items on the PC or using your mobile device(s). Wasp recommends you create new items using the PC when you are first setting up your database.

For detailed information on how to set up your software, please refer to InventoryControl's online help system. You can access the online help by clicking **Help > Contents** from the toolbar, by selecting the **Help** button, or pressing **F1** on any screen. The Getting Started section in the online help contains step-by-step instructions for setting up your database. Wasp recommends that you read the information found in the Introductory Materials section of the online help file and view the video tutorials ([www.waspbarcode.com/videos](http://www.waspbarcode.com/videos)) prior to beginning setup of your system. The introductory materials and video tutorials define key terms and explain concepts used throughout InventoryControl. These materials provide valuable information to make the setup process smooth and simple.

### Methods of Data Entry (Importing vs. Manual Entry):

There are two ways you can add information to your database: through manual entry or by importing the data from an existing database. Importing data is faster if you wish to transfer a large amount of information from an existing database to InventoryControl. Importing this information also ensures you do not introduce new typographical errors.

You must import the data in a set order. Detailed instructions for importing data using the import feature in InventoryControl can be found in the InventoryControl online help. The outline below details the order in which data must be imported into the system. For a more detailed explanation and outline, please refer to the **Importing into the Database** topic in the InventoryControl online help. InventoryControl will only accept the data in this specific order because each piece of information builds on the next to create a complete profile for your inventory. For instance, inventory must be assigned to a specific location, therefore, you must import your locations first so that InventoryControl will have this information prior to importing your inventory counts. Again, we strongly recommend that you review the information regarding importing data in the online help before you begin the import process.

**If you want to sync your purchase orders and pick orders back to QuickBooks®, you will need to import your Suppliers, Customers and Items from QuickBooks® to InventoryControl using the Wasp QuickBooks® Connector. You can either import Site, Locations, Manufacturers from a spreadsheet or manually enter them into InventoryControl. Detailed instructions for using the Import function in the Wasp QuickBooks® Connector can be found in the Wasp QuickBooks® Connector online help.**

### Import Order:

- A. Site (required)
- B. Locations (required)
- C. Suppliers (optional) – Import these using the Import tab of the Wasp QuickBooks® Connector.
- D. Manufacturers (optional)
- E. Customers (optional - import if you will be checking out/in inventory to customers) - Import these using the Import tab of the Wasp QuickBooks® Connector.
- F. Items (required) - Import these using the Import tab of the Wasp QuickBooks® Connector.
- G. Inventory (optional)

If you plan on importing information, you should also keep in mind that some types of supplemental information cannot be imported. For instance, if you wish to set up primary location settings for item and

item specific supplier information, you will need to manually create these from the Item Edit screen after the item is imported. Imported data must be in .csv format. For further information, please refer to the **Import Specifics** and **Importing Into the Database** topics in the online help. You can also find sample .csv files with the header and one row of sample data installed with the client in the “Import Samples” folder.

## 1.3 Create Inventory Labels

Inventory labels should be printed and attached to inventory in your warehouse. When you set up your items, remember that you entered a number for each item in the item number field of the **Create New Item** screen (if you manually entered your items) or in the item number column (if you imported the data). Now an actual label should be printed that contains the item number and (usually) a barcode for quick identification and tracking. These labels should be affixed to each piece of inventory.

InventoryControl came bundled with the Wasp Labeler application making the creation of these inventory labels simple. Wasp Labeler was installed when you installed InventoryControl. There are three ways to print labels:

1. On the **Item List**, highlight the item for which you want to print labels, then select the **Print Labels** button.
2. Print the needed number of labels from the **Add Inventory** screen. Each time you add inventory, you can specify the number of labels you want to print.
3. (Only use this method if you also want to edit the label.) From InventoryControl's main menu, click the **Labels** icon. The labels menu appears. Select **Inventory Item** from the labels menu. You can now edit and print your label.

## 1.4 Use your mobile device

At this point you can use the InventoryControl interface to create a mobile database, put it on the mobile device, and start using the mobile device. We suggest that the first thing you do with the mobile device is to take an audit. Please refer to the online help for more details.

### Wireless Devices

InventoryControl RF Pro and Enterprise allow you to set up a wireless connection between your mobile device (if it is capable of a wireless connection) and InventoryControl. This allows you to update your InventoryControl database in real time rather than capturing data on the mobile device, then having to sync that data back to the PC (batch process). You can perform all of the basic InventoryControl functions, such as adding, removing, picking, and adjusting inventory. You can also print from the wireless device to any printer/label printer on your network.

## 1.5 Audit Your Inventory

Now that your database is set up, you should take an audit of your inventory. This ensures you have not missed an item, miss-labeled an item, or assigned an item to the wrong location. The fastest way to do this is to use your mobile device to scan each piece of inventory. You will need to set up your mobile device prior to performing this step. Please refer to the **Working With Mobile Devices** section of your online help system for assistance setting up, using and syncing your mobile devices. For detailed information on auditing your inventory, please refer to the topic **Auditing Your Inventory** in the online help.

If you have chosen not to install a mobile device, you will need to do this audit manually by physically checking each piece of inventory and comparing against the database.

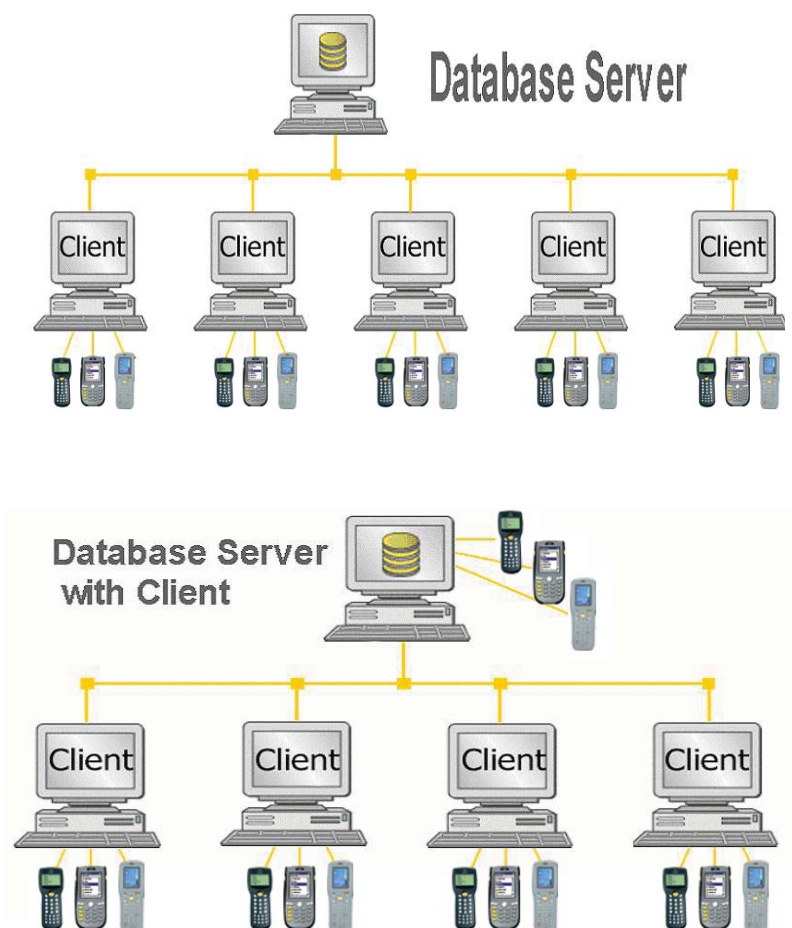
## Chapter 2 – Professional Edition Installation

In this guide, when we refer to a client, we are talking about any machine where you want to use InventoryControl's interface to manage your inventory. The database server is a machine that may or may not also be a client where the database is installed. The server should be a computer that is on all the time and is accessible from all machines that you intend to use as clients.

InventoryControl Pro Edition takes advantage of your existing TCP/IP LAN to allow up to five InventoryControl client workstations to access a single database located at the InventoryControl server. The client software may also be installed on the same machine where the InventoryControl server database is installed.

### Installation

InventoryControl Pro includes one server license and five client licenses. InventoryControl Pro Edition may be installed in your choice of these two configurations:



Refer to the diagram on the previous page and the hardware requirements below to decide how you will deploy the licenses in your environment.

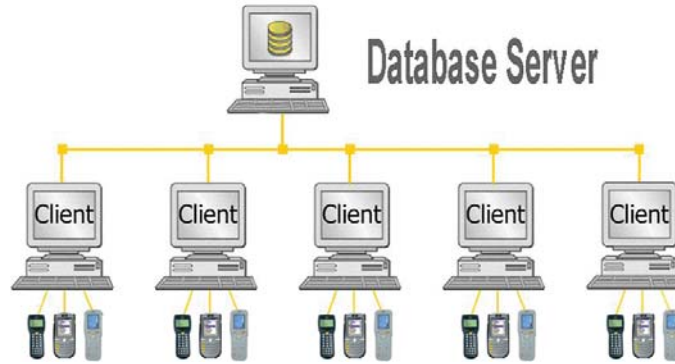
Minimum Server Requirements	Recommended Server Configuration
1.0+ GHz CPU	2 GHz CPU
2 GB of RAM	4 GB of RAM
10 GB of disk space available	20 GB of disk space available
DVD-ROM drive (for installation only)	
32-bit or 64-bit version of Microsoft® Windows XP (SP3), Vista, Server 2008, Server 2008 R2, Server 2003, Server 2012, Windows 7 or Windows 8	
<i>Wasp recommends installing InventoryControl on Professional or higher versions of all operating systems.</i>	

Minimum Server Requirements	Recommended Server Configuration
750 GHz CPU	2 GHz CPU
1 GB of RAM	2 GB of RAM
10 GB of disk space available	
DVD-ROM drive (for installation only)	
1,024x768 pixel display with a color depth of at least 256 colors	
32-bit or 64-bit version of Microsoft® Windows® XP (SP3), Vista, Server 2008, Server 2008 R2, Server 2003, Server 2012, Windows 7 or Windows 8	
<i>Wasp recommends installing InventoryControl on Professional or higher versions of all operating systems.</i>	

**Notes:**

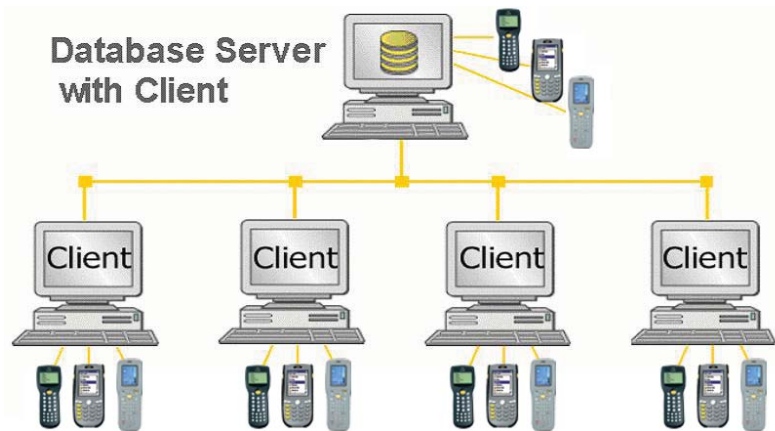
- InventoryControl server and client installation on Microsoft® Windows® 98 SE, NT, ME or 2000 machines is not supported.
- InventoryControl clients will not work without connecting to a running InventoryControl server.
- The database server and the windows service will restart automatically every time the computer is rebooted.
- Installation on Windows® "Home" versions is not supported.

On the **Select Installation Type** screen, when selecting the InventoryControl server configuration, shown below, uncheck the **Client Tools** option and only the database will be installed on this machine.



Database - Installs all necessary components to run  
 Client Tools - Installs components needed to connect

When selecting the InventoryControl server configuration shown below, leave the **Client Tools** and **Database** options selected; then the server and one client will be installed on this machine.

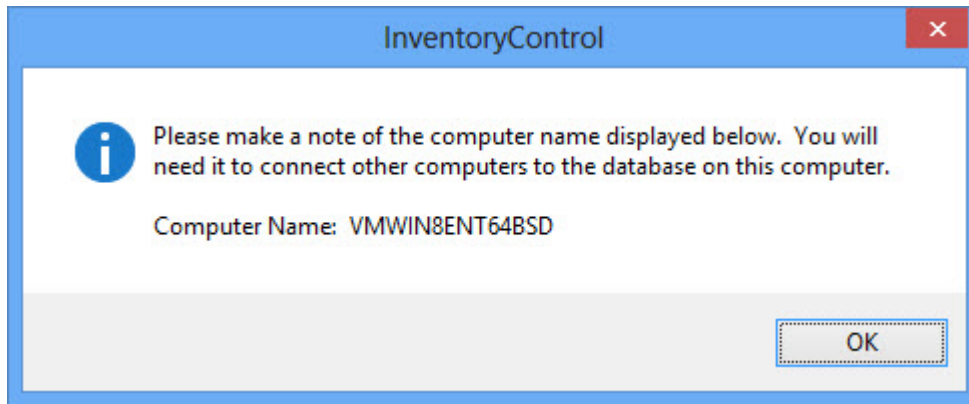


Database - Installs all necessary components to run  
 Client Tools - Installs components needed to connect

Remember that there are only five client licenses, so you might want to deselect the **Client Tools** component if you would rather deploy all of your client licenses on machines other than this server machine. If you deselect **Database** here, you will not be installing the server.



The **Computer Name** screen is displayed once the database server install is complete.



**Important:**

Record your **Computer Name** before clicking the **OK** button. This name must be entered when you perform your **Client Tools** installation. Record your **Computer Name** here:

---

The **Client Tools** component of InventoryControl Pro Edition can be installed once an InventoryControl Server has been installed and is running. See "**SECTION 4. Client Installs**" for instructions.

## Chapter 3 – Enterprise Edition Installation

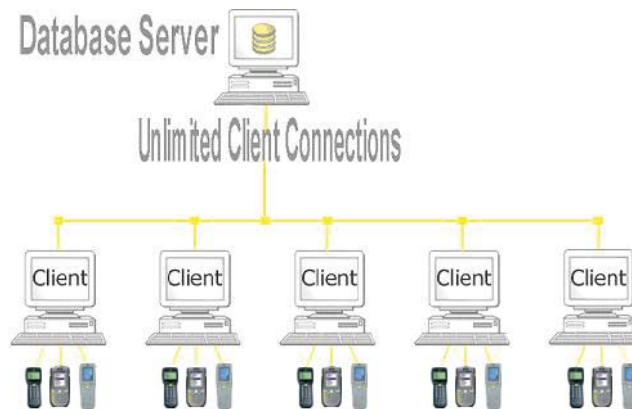
In this guide, when we refer to a client, we are talking about any machine where you want to use InventoryControl’s interface to manage your inventory. The database server is a machine that may or may not also be a client where the database is installed. The server should be a computer that is on all the time and is accessible from all machines that you intend to use as clients.

InventoryControl Enterprise Edition takes advantage of your existing TCP/IP LAN and your current installation of MS SQL Server or MS SQL Express to allow a number of client workstations to access the InventoryControl database. The client software may optionally be installed on the same machine where the database is installed.

### Installation

**Note:** The Enterprise Edition gives you the ability to install your service, database and client all on different machines. If you want to configure your installation using this option, please refer to the Wasp Knowledge Base ([www.waspbarcode.com/support](http://www.waspbarcode.com/support)) for instructions.

InventoryControl Enterprise includes one server license and the ability to connect an unlimited number of clients:



Refer to the diagram above and the hardware requirements below and on the next page to decide how you will deploy InventoryControl Enterprise in your environment.

Minimum Server Requirements	Recommended Server Configuration
1.0+ GHz CPU	2 GHz CPU
2 GB of RAM	4 GB of RAM
10 GB of disk space available	20 GB of disk space available
DVD-ROM drive (for installation only)	
32-bit or 64-bit version of Microsoft® Windows XP (SP3), Vista, Server 2008, Server 2008 R2, Server 2003, Server 2012, Windows 7 or Windows 8	
<i>Wasp recommends installing InventoryControl on Professional or higher versions of all operating systems.</i>	

Minimum Server Requirements	Recommended Server Configuration
750 GHz CPU	2 GHz CPU
1 GB of RAM	2 GB of RAM
10 GB of disk space available	
DVD-ROM drive (for installation only)	
1,024x768 pixel display with a color depth of at least 256 colors	
32-bit or 64-bit version of Microsoft® Windows® XP (SP3), Vista, Server 2008, Server 2008 R2, Server 2003, Server 2012, Windows 7 or Windows 8	
<i>Wasp recommends installing InventoryControl on Professional or higher versions of all operating systems.</i>	

**Notes:**

- InventoryControl server and client installation on Microsoft® Windows® 98SE, NT, ME or 2000 machines is not supported.
- InventoryControl clients will not work without connecting to a running InventoryControl server.
- The database server will run automatically every time the computer is rebooted.
- Microsoft .NET Framework 4.0 must be installed on the server before the Enterprise DB Installer will run.
- Installation on Windows® “Home” versions is not supported.

**Server Installation Procedures:**

Some database administrators would prefer to run the database install scripts manually. We provide all the database creation scripts on the DVD for this purpose, but the order that these scripts are run is critical. We suggest that you review the scripts and then use the following steps to ensure that these scripts are run in the proper order.

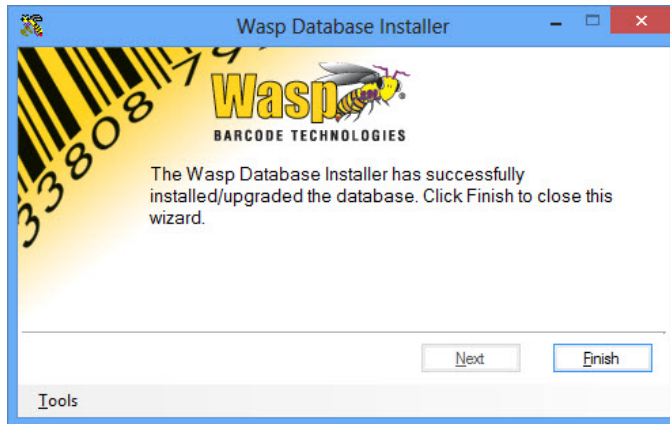
1. Place the DVD into the drive on the server that already has Microsoft SQL Server Full Version installed. Cancel the installation if it attempts to run automatically when the DVD is placed in the drive.
2. Navigate to the disk drive location containing your installation DVD.
3. Locate the **EnterpriseDBInstaller** folder on the installation DVD and double click on it.
4. Double click on the **InventoryDbInstaller.exe** file.
5. Select the desired login method to use:
  - To use **Integrated Security**:  
- Leave the box checked.
  - To not use **Integrated Security**:  
-Uncheck check box and enter **Login ID** and **Password**.

After you select the connection method and security credentials, click **OK**.

**Note:** The **Integrated Security** check box is used to specify that SQL Server request a secure (or trusted) connection to SQL Server. SQL Server uses integrated security to establish connections using this data source, regardless of the current security mode at the server. Any login ID or password supplied is ignored. The SQL Server system administrator must have associated your Windows network ID with a SQL Server login ID.

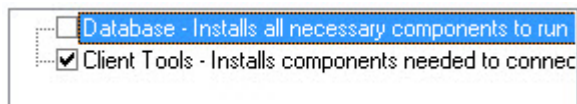
6. Click the **Finish** button when the **Wasp Database Installer** is complete.

Now the server database installation is complete.



## Chapter 4 – Client Installs

When the **Select Installation Type** screen is displayed during the installation process, select only the **Client Tools** option.



The SQL Server Location screen appears.

Please enter the machine name of your remote database server. This was the machine name you were asked to record after installation of the InventoryControl database.

Note: Do not use the UNC Path name (i.e., \\MACHINE). Type only the machine name of the database server. The initial slashes are not needed.

SQL Server Name:

Enter the computer name of the server in the **Server** field and click the **Next** button. The name of the computer on which the server was installed was displayed on the **Computer Name** screen (see step 12 of the software installation process).

## 4.1 Using the InventoryControl Clients

In the Professional version, client licenses are “fixed” to a specific PC. After you install a client and run that client, it will connect to the server and register itself with the server. Information about that computer will be stored on the server. Any authorized user can connect from that computer using that one license. If five clients have been installed and registered with the server, and a sixth client is installed, the sixth client will fail to connect because all licenses have been used. Even if none of the other clients are running the application, the sixth machine will be denied a license.

Functions you perform at any InventoryControl PC client machine will impact other users at one of two possible levels, as illustrated in the following table:

Function Performed On a Client	Affects All Users, Everywhere	Affects Any User Who Logs On to this Client	Affects User Who Performed the Function on Every Client
Change Company Information	X		
Restore the Database	X		
Import Data	X		
Edit Field Names	X		
Set Default Working Site			X
Change any Option	X		
Change Labeler Labels		X	
Change Report Filters	X		
Mobile Device Database Filter Criteria	X		

## Chapter 5 – Getting Started Using the QuickBooks® Connector

The first time you use Wasp Connector for QuickBooks®, the system will guide you through setting up the software. You will need to follow the steps outlined below to enable Wasp Connector to communicate with QuickBooks® and transfer data properly.

**Reminder:** Wasp Connector for QuickBooks® should be installed on the same machine on which your QuickBooks® company file resides in order to connect to it.

1. **Open your Company File** - Make sure your QuickBooks® company file is open.
2. **Login** - The first time you open Wasp Connector for QuickBooks® after installation, the following screen will appear asking for your login information:

The screenshot shows a window titled "Connect To Service" with a blue border and a close button in the top right corner. Inside the window, there are three text input fields. The first field is labeled "Service Address:" and contains the text "http://vmWin8ent64bsd:10005/WaspInventoryService/WindowsServic". The second field is labeled "User Name:" and is empty. The third field is labeled "Password:" and is empty. At the bottom of the window, there are two buttons: "Login" and "Cancel".

The **Service Address** field will populate with the location and name of the InventoryControl service installed when you installed the InventoryControl software.

You must enter your user name and password. The default is:

User Name : **Admin**  
 Password: **Blank**

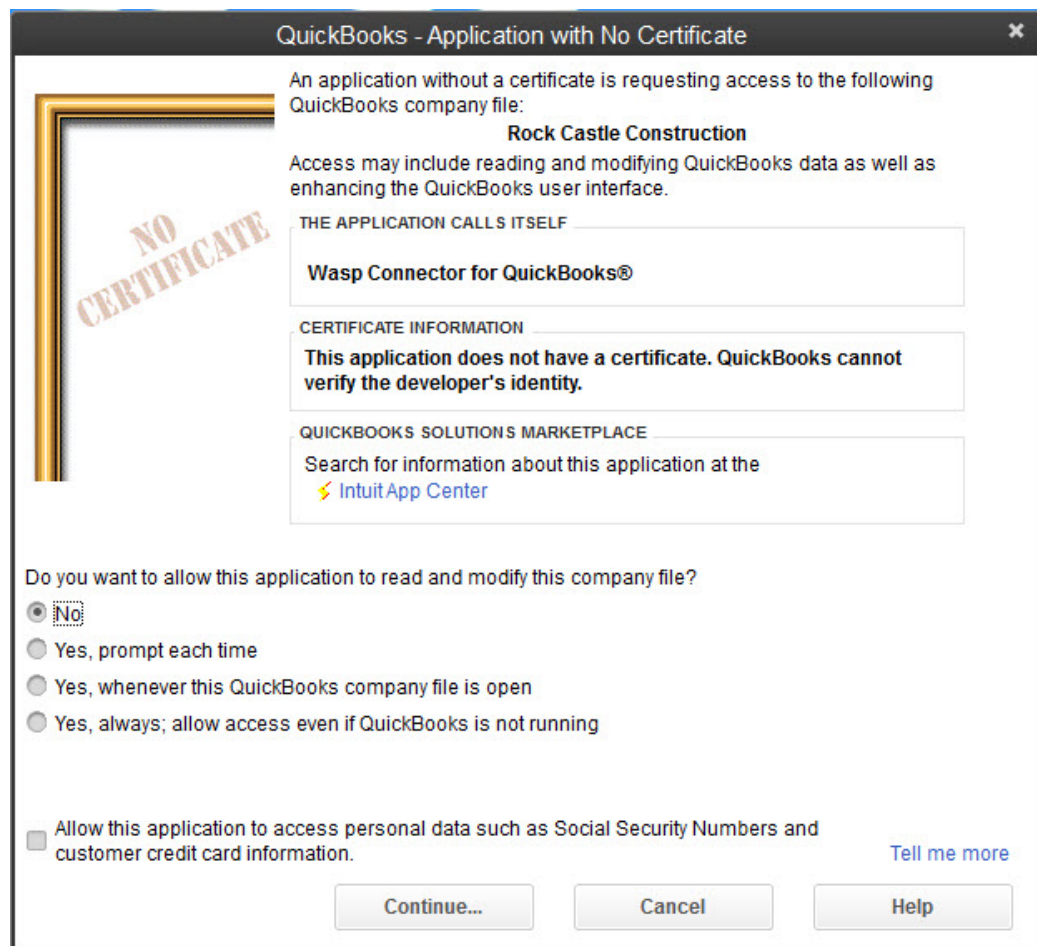
Click **Login** when you have finished entering information.

**Note:** After entering this information once, you will not see this screen again **UNLESS** you have modified the password to something other than the default password. If you have created your own password, you will be prompted for it each time you access the Wasp Connector.

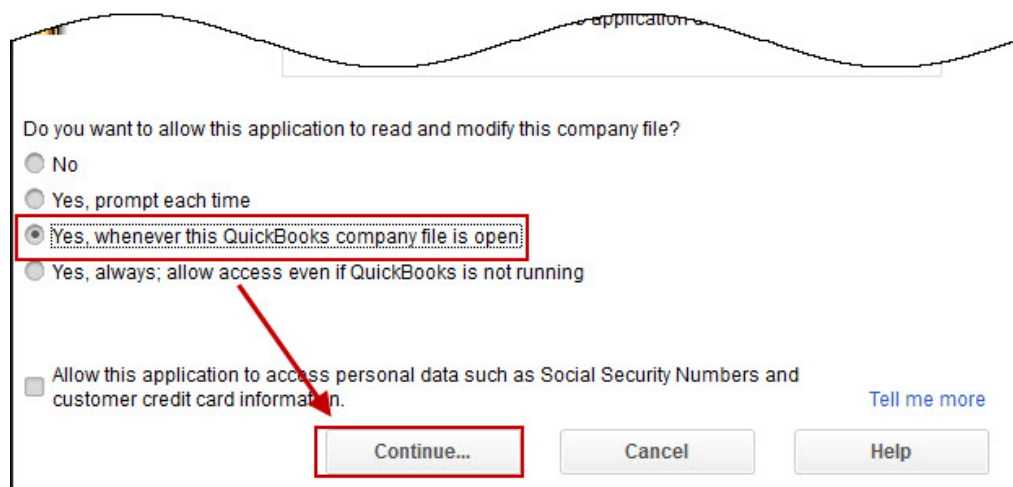
3. **Connect to QuickBooks®** - Upon logging in, Wasp Connector will attempt to connect with QuickBooks®. (Remember that your QuickBooks® company file must be open during this process.) The first time this connection is made, you will need go through a process authorizing the Wasp Connector for QuickBooks® to have access to your company file.

To do this:

- a. The first screen that appears is the following notification screen:

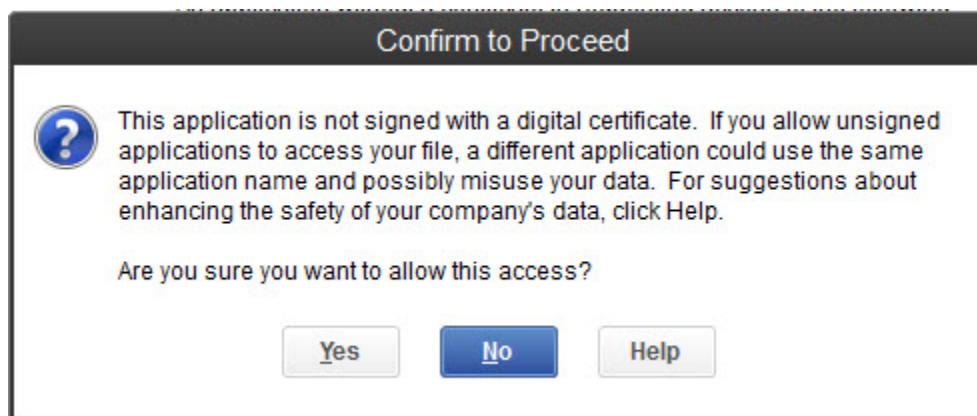


Select **Yes, whenever this QuickBooks® company file is open** and click **Continue**.



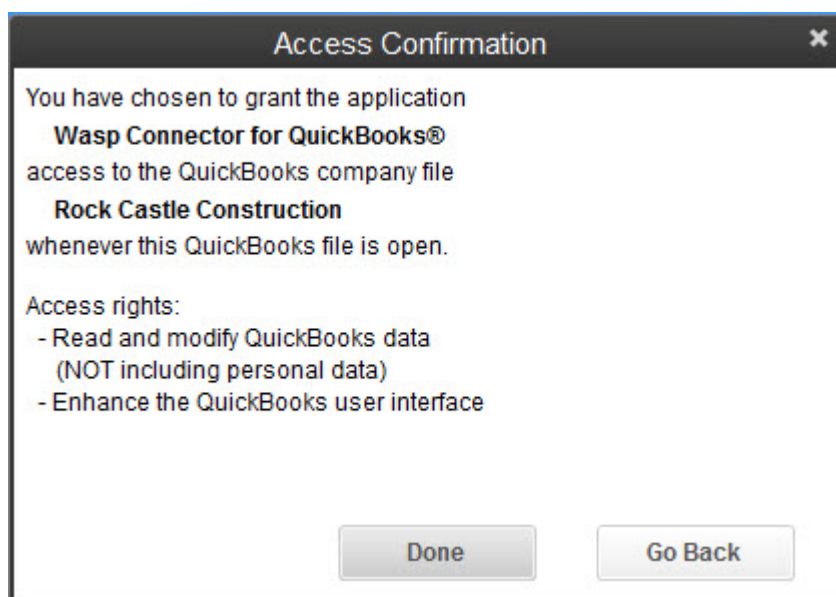


- b. QuickBooks® will ask you to confirm you selection on the following screen:



Select **Yes** to continue.

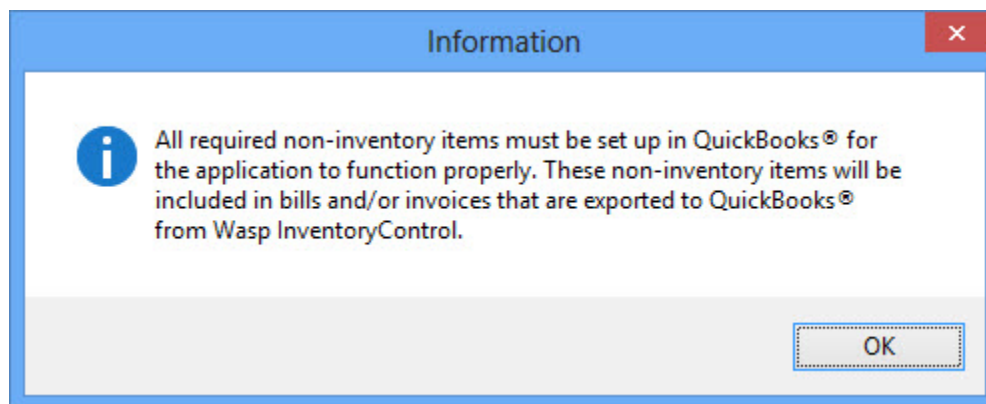
- c. A summary screen will appear outlining your selection:



Click **Done** to proceed.

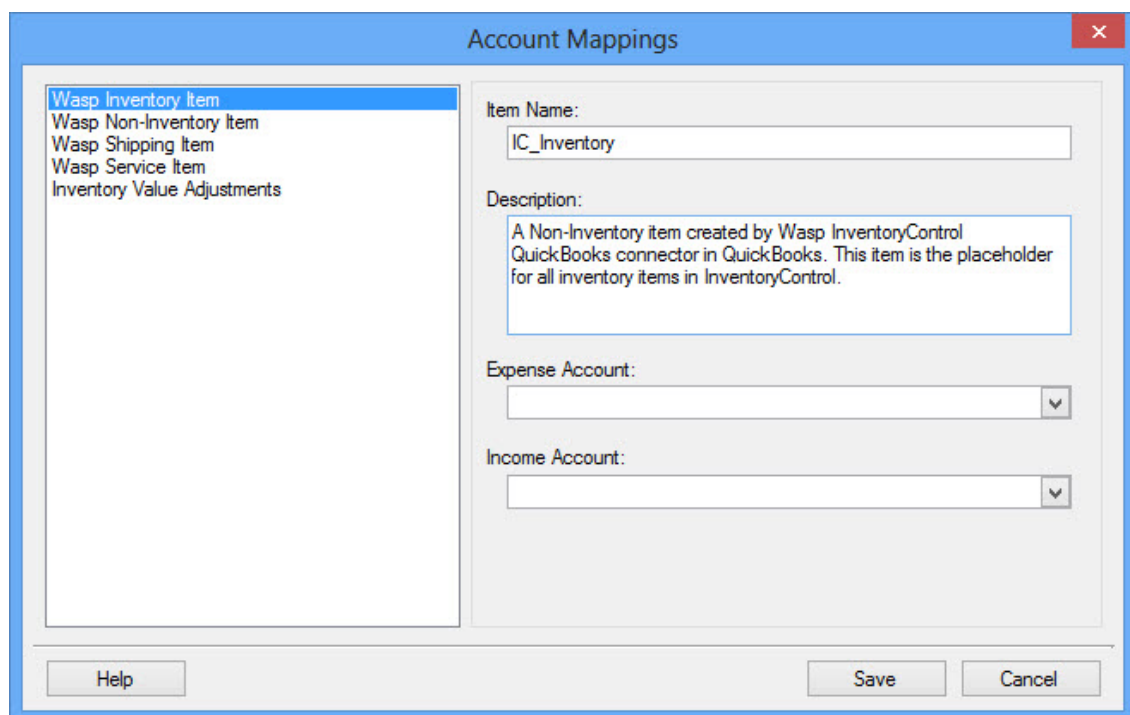
4. **Account Mapping** - Next a message screen appears notifying you that non-inventory items must be created and mapped to certain items in QuickBooks® to enable the Wasp Connector to properly import/export them.

These items include:



Click **OK** on this screen to close it.

The **Account Mappings** screen appears next.



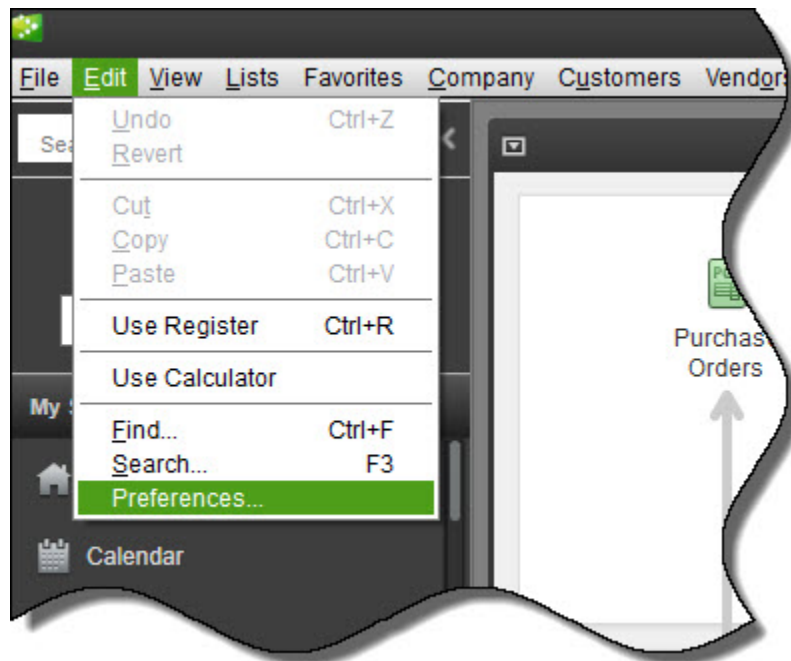
This is where you will map your non-inventory items to the appropriate expense or income accounts. It is very important to map each item type (Shipping, Service, etc.) to the correct account so InventoryControl can properly import and export those items correctly.

The **Expense Account** and **Income Account** drop down lists on the **Account Mappings** screen display the accounts displayed in QuickBooks®. If you do not currently have the "Use Account Number" option turned on in QuickBooks®, we recommend you enable it now. If this

option is not enabled, the accounts in these drop down lists will appear by **Account Name** only. Since **Account Names** are not unique, but **Account Numbers** are, you may have duplicate account names in the lists, making it harder to select the correct account. The "**Use Account Number**" option is not enabled by default.

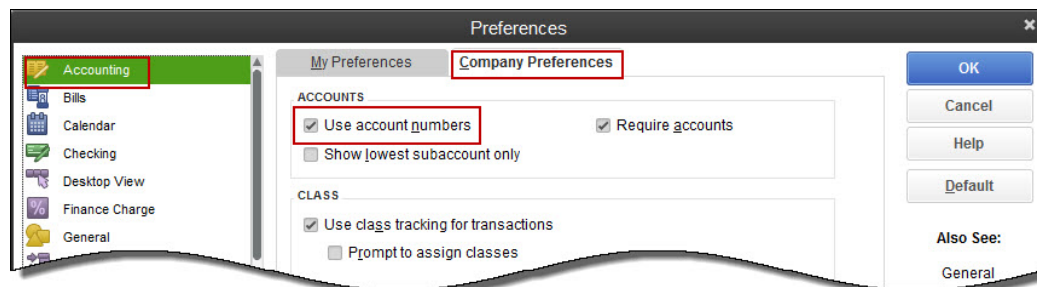
### How to enable Use Account Numbers in QuickBooks®.

- a. In QuickBooks®, select **Edit > Preferences**.



The **Preferences** screen appears.

- b. On the **Preferences** screen, select **Accounting > Company Preferences** tab, then make sure **Use Account Numbers** is selected.



- c. Click **OK** to close the **Preferences** screen and save your changes.

There are four non-inventory items and one adjustment entry for which you need to map accounts. These are

- **Wasp Inventory Item** - These are placeholders created by InventoryControl to take the place of your inventory items in QuickBooks®. Once you import your inventory from QuickBooks® to InventoryControl, you will no longer be maintaining or tracking your inventory in QuickBooks®. Your inventory entries in QuickBooks® will be replaced with this placeholder. The placeholder is what will appear on invoices, sales slips, etc., along with the description of that particular item.

You will need to map an income and expense account to this item.

- **Wasp Non-Inventory Item** - These are placeholders created by InventoryControl to take the place of your non-inventory items in QuickBooks®. Once you import your inventory from QuickBooks® to InventoryControl, you will no longer be maintaining or tracking your inventory in QuickBooks®. Your inventory entries in QuickBooks® will be replaced with this placeholder. The placeholder is what will appear on invoices, sales slips, etc., along with the description of that particular item.

You will need to map an income and expense account to this item.

- **Wasp Shipping Item** - These are placeholders for shipping fees charged on orders in InventoryControl.

You will need to map an income account to this item.

- **Wasp Service Item** - These are placeholders for all service charges charged on orders in InventoryControl.

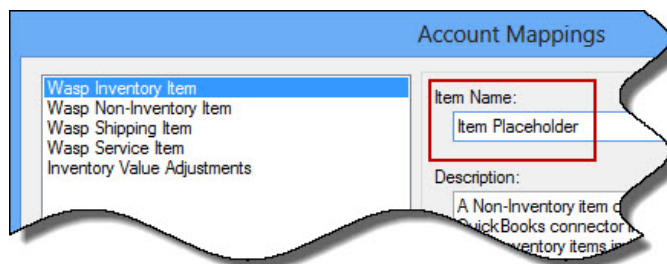
You will need to map an income account to this item.

- **Inventory Value Adjustments** - This represents periodical journal entries created when you adjust the value of an inventory item. You can accept the default Journal Memo text or click in the field and type your own memo.

You will need to map an **Inventory Asset Account** and **Cost of Goods Sold** account to this item.

**To map accounts to these items:**

- Highlight the item (or adjustment) you want to map in the window on the left side of the screen.
- You can accept the default **Item Name** (for example, the **Item Name** for Wasp Inventory is IC\_Inventory) or type a new name field as shown below:



Keep in mind that the name you select here will appear on invoices as shown below:

Bill

Vendor: Holly Electronics

Address: Holly Electronics  
Attn: Chris Holly  
201 S. Cherry Blvd  
E. Batshore, CA 94326

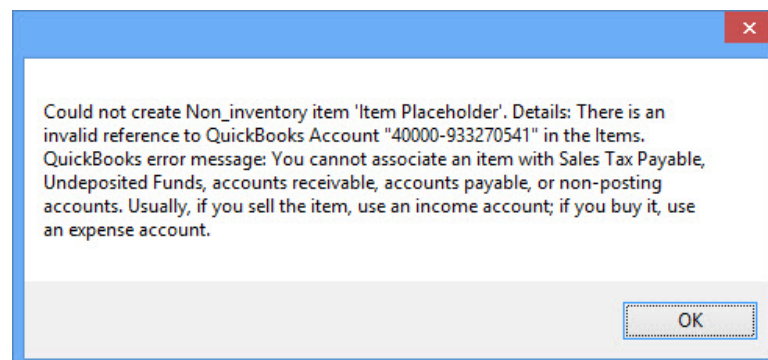
Terms: Net 60 Discount Date

Memo: 00004

Expenses	\$0.00	Items	\$56.00
Item	Description	Qty	Cost
Item Placeholder	CDRW Drive CDRW Drive 24x12x24	1	56.00

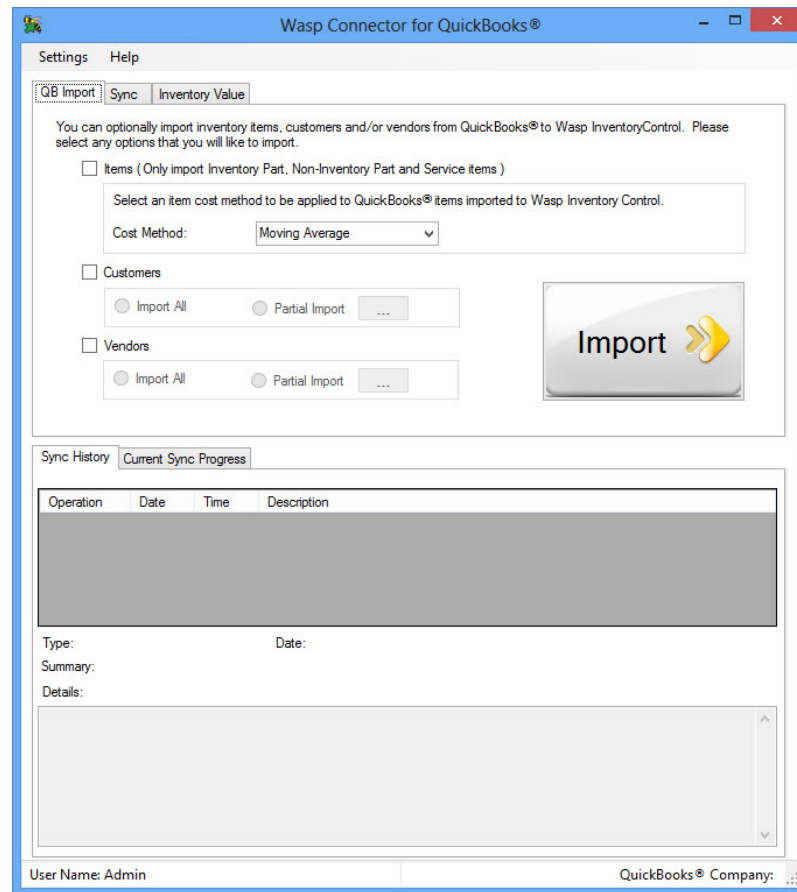
- c. You can accept the default **Description** or type in a different description by clicking in the **Description** field.
- d. Select an **Expense** or **Income** account (or **Inventory Asset/Cost of Goods Sold** for **Inventory Value Adjustments**) to which this item should be associated. Keep in mind that when you sync purchase order and/or invoices from InventoryControl to QuickBooks® the account you selected for these items will be affected by the financial data in those orders. Make sure you are certain you have your mappings correct before you begin syncing invoices/purchase orders back to QuickBooks®.

If you map an expense account where an income account is indicated, or vice-versa, an error message similar to the following will appear:



If you receive this screen, click **OK** to close it, then remap the item to the correct account. You will not be able to save and close the **Account Mapping** screen until you resolve all incorrect mappings.

- e. When you are finished mapping accounts, click the **Save** button. Now that you have finished your preliminary setup, the Wasp Connector for QuickBooks® main screen appears:



**Note:** At this point, you can begin the process of importing your QuickBooks® data to InventoryControl, or you can go to the **Settings** screen to [customize the appearance of the Line Item Description](#) that will appear on invoices and purchase orders. Keep in mind that you can customize the **Line Item Description** at any time; unlike **the Login** information and **Account Mapping**, this does not need to be done before importing your data.

**Import your Data** - You are now ready to import your data from QuickBooks® to InventoryControl. For detailed instructions

## Chapter 6 – Frequently Asked Questions

**Q:** I get this message when I run InventoryControl: “Input string was not in correct format”

**A:** Go to Start › Control Panel › Administrator Tools › Services and select Wasp Inventory Windows Services. Stop the service, wait 10 seconds, then reboot the machine.

**Q:** What is the User Name and Password when InventoryControl first runs?

**A:** The initial User Name is Admin and Admin has no password, so just leave the password field blank and click OK.

**Q:** How do I manually start the install if it does not start when I insert the DVD?

**A:**

1. Right-click on the **Start** icon and click the **Explore** option, or open Windows Explorer.
2. Click on the disk drive location containing your installation DVD to expose the contents.
3. Locate the **CD\_Start.exe** program and double click on it. The DVD menu will open. Manually start the installation process by clicking **Install InventoryControl**.

