

Handheld Mobile Client Upgrade Guide

Electronic Service Control - Version 8

Installation Directions

The following instructions will walk you through upgrading your handheld client. While they may seem involved, the steps are actually very straightforward and easy to accomplish.

Recording Your Current Settings

1. Start the handheld client.
2. Click **Properties | Settings**, write down the results below then click **OK**.
3. If you are using GPS tracking, click **Properties | GPS Settings**, write down the results below then click **OK**.

Primary Server Address: _____

Secondary Server Address: _____

TCP/IP Port: _____

Technician Number: _____

Warehouse Number: _____

GPS Info: Port _____

Baud _____

Data Bits _____

Parity _____

Stop Bits _____

Log Results _____

Deleting the Mobile Database

The handheld client is not capable of upgrading the database it uses so you will have to delete it manually. Before you do that, we highly recommend you synchronize the handheld with the office computer so that no data is lost. These directions will explain the process:

1. Remove any expansion packs or add on cards from the handheld computer.
2. Make sure the handheld is directly connected to a computer in the office network.
3. Use ActiveSync on the desktop computer to ensure you are currently connected to the handheld computer.
4. Open the handheld client and click **Synchronize**. This will transfer any dispatches that have been marked as finished from the mobile database to the office database.
5. Once the synchronization is complete, check to see if any dispatches remain in the handheld client. If so, any information entered about these dispatches on the handheld unit will be lost when we delete the database. To avoid this, either manually copy this information and reenter it on the dispatch showing on the office computer or finish the dispatch and repeat step 2.
6. Close the Handheld Client.
7. Delete the *Coastal.sdf* file from the handheld. Here is one way of doing this, but feel free to use whatever method you are most comfortable with.
 - a. Open Microsoft ActiveSync on the computer to which the handheld device is connected.
 - b. Click **File | Explore**.
 - c. Double-click **My Pocket PC** in the resulting window.
 - d. Right-click the **Coastal.sdf** file (you might not see the .sdf extension but it is the only file named Coastal in this directory).
 - e. Select **Delete** from the resulting menu. Select **Yes** when prompted.

Reinstalling the Handheld Client

1. Insert the *Electronic Service Control Installation* disk on the computer.
2. Select **Install Mobile** from the resulting screen. If the screen does not display automatically within a minute, click **Start | Run** and enter *D:\Setup.exe* and click **OK**. Replace the *D:* with the appropriate CD or DVD drive designation.
3. Select **Handheld Client** from the next screen.
4. If you are upgrading from a previous copy of version 7 skip ahead to step 10. Otherwise, if your handheld device is running version 2002 of the Pocket PC operating system or earlier, select **Install Framework** from the next screen to start the installation of the .NET framework. If you are not sure what version of the Pocket PC operating system your device uses, install this component. It will not hurt anything currently installed on the device and will allow you to continue with the handheld client setup.
5. Select **Yes** on the resulting screen to install the Framework to the default directory.
6. Once the installation has been completed on the desktop computer you will be instructed to look at the handheld device. Accept all defaults during this section as well.
7. After the Framework installation is finished, select **Install Libraries**.
8. Select **Yes** on the resulting screen to install the libraries to their default directory.
9. Once the installation has been completed on the desktop computer you will be instructed to look at the handheld device. Accept all defaults during this section as well.
10. Select **Handheld Client** from the next screen to start the installation process.
11. Select **Yes** on the resulting screen to upgrade the handheld client.
12. Select **Yes** again to install the upgrade in the default location.
13. Once the installation has been completed on the desktop computer you will be instructed to look at the handheld device. If prompted to replace existing files, select **Yes To All**.

14. Once the installation has been completed, click the **Exit** button to close the *Electronic Service Control Installer Menu* on the office computer.

Configuration

To setup your upgraded mobile client for use, simply click the **Properties** menu on your handheld client and enter the values you wrote down at the beginning of this procedure in the appropriate fields.

Downloading Inventory

This step is only necessary if you wish to create invoices or use an electronic price book in the field. You should repeat this step each time you make changes to your inventory that you want to show on the mobile device.

1. Make sure the handheld device is connected to the office network. You can usually verify this by making sure the word *Connected* appears in the ActiveSync program on the office computer it is directly connected to.
2. Start the mobile client by clicking **Start | Programs** and selecting **Mobile Client** from the resulting screen.
3. Click **Inventory | Download** to begin the download. This could take a while, depending on the number of inventory items you have.

Congratulations

You have successfully upgraded the client on your handheld computer.

System Requirements

In order to upgrade the handheld client software it will be necessary to have a handheld computer that is connected directly to a desktop computer. Make sure both devices match the revised requirements shown below.

Handheld Computer

Processor: ARM, MIPS or SH 3
RAM: Minimum: 32MB Recommended: 64MB
ROM: Minimum: 16MB Recommended: 32MB
Operating System: Microsoft Pocket PC (NOT the PALM operating system)
Miscellaneous: Cradle or other method of connecting directly to the computer listed below.
Optional Components: *Navman GPS 3420 – Required for GPS connectivity*
Other GPS devices that connect directly to the handheld computer using an emulated serial port interface should also be compatible.
Wireless Networking Device – Required for remote synchronization
Bar Code Reader – Required for bar code functionality

Desktop Computer

Operating System: Windows 2000, XP or Server 2003
Drives: CD-ROM or DVD-ROM
Required Software: Microsoft ActiveSync version 3.7 or later
<http://www.microsoft.com/windowsmobile/downloads/as-dl38.msp?submit1=I+Accept+%3E%3E>