



# POSitive Retail Manager Installation Manual

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## Introduction to PRM

POSitive Retail Manager is a comprehensive point-of-sale system designed to help store owners run their business better.

Some of the advanced features of POSitive Retail Manager include:

- Multi-monitor support
- Credit card processing with our AveraCharge™ System
- Frequent buyer programs
- Touch screen support
- Gift certificate management
- Inventory control
- Accounting
- Reporting
- E-commerce integration

PRM is easily configured to meet your needs. PRM can be configured for simple cash & carry stores, using the advanced Touch Screen interface; for service-oriented stores, using Invoice-style checkout and quotes; or for stores using a combination of both, such as a garden center that uses Touch Screen for their registers, and does quotes and service scheduling for landscaping.

## System Requirements

POSitive Retail Manager requires a modern computing system with adequate processor speed and memory in order to run at peak efficiency. Below are the MINIMUM recommended hardware specifications. If you can exceed these specs, program performance will be better.

NOTE: We recommend a separate computer to run the SQL Server software. This may not always be possible, so be sure to meet or exceed the minimum specs for a single register.

### Hardware Minimums

#### **Scenario: Single Register running PRM and hosting the SQL Server**

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
2 gb RAM  
Microsoft SQL Express 2005 (included with installation)

#### **Scenario: Single or Multiple Workstations running PRM and with dedicated separate SQL Server**

Register(s):

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
1gb RAM

Server:

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
2gb RAM  
Microsoft SQL Express 2005 (included with installation)

#### **Scenario: Single or Multiple Workstations running PRM and with dedicated separate SQL Server, using Merge Replication with multi-store, per store**

Register(s):

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
1gb RAM

Server:

Modern Processor, dual-core recommended

1024 x 768 Screen resolution, 1280x1024 recommended  
4gb RAM  
Microsoft SQL Server 2005 Workgroup Edition (additional cost)

### **SQL Server Software**

Single store:

Low to Medium volume (1-100 transactions/day) Microsoft SQL Server 2005 Express

Medium to High volume (100 + transactions/day) Microsoft SQL Server 2005 Workgroup Edition

Multi-store:

Low to Medium volume (1-100 transactions/day) Microsoft SQL Server 2005 Workgroup Edition

Medium to High volume (100 + transactions/day) Microsoft SQL Server 2005 Standard Edition

### **Storage**

You should consider your hard drive storage as far as capacity and speed is concerned. For maximum speed, consider 10,000 or 15,000 RPM drives, SAS drives, and striping.

### **BACKUP Solutions**

Unlike PFW there is no auto-backup in PRM, so you must set this up separately. We have no product recommendations at this time, but whatever you use must be able to backup the SQL database and the PRM directory. You can check Microsoft's web site for more information.

Also, consider mirroring drives.

### **Operating System**

Microsoft Windows 2000 or newer\* with all Windows Updates.

\*Special Requirements for VISTA (please call us)

### **Additional Requirements**

When installing SQL Server, it must be installed in MIXED MODE. If it is not installed in Mixed Mode you WILL experience problems in running PRM.

If you are running multiple workstations, MS SQL Native Client must be installed on each workstation. It is included with the retail version of MS SQL 2005 Server, or you may download it from the Microsoft web site.

Install Microsoft SQL Management Studio as well. This will be used for viewing or maintaining the SQL database.

Finally, don't take shortcuts!

## POSitive Features

Here is a brief summary of some of the features in PRM:

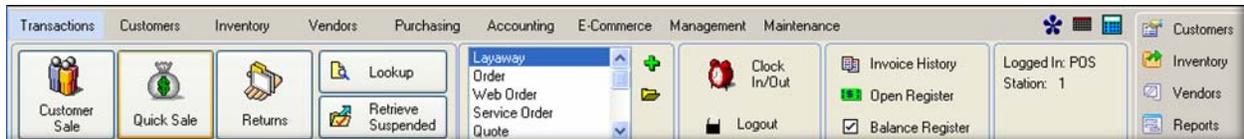
### Advanced User Interface

PRM has an updated, consistent interface

POSitive Control Panel

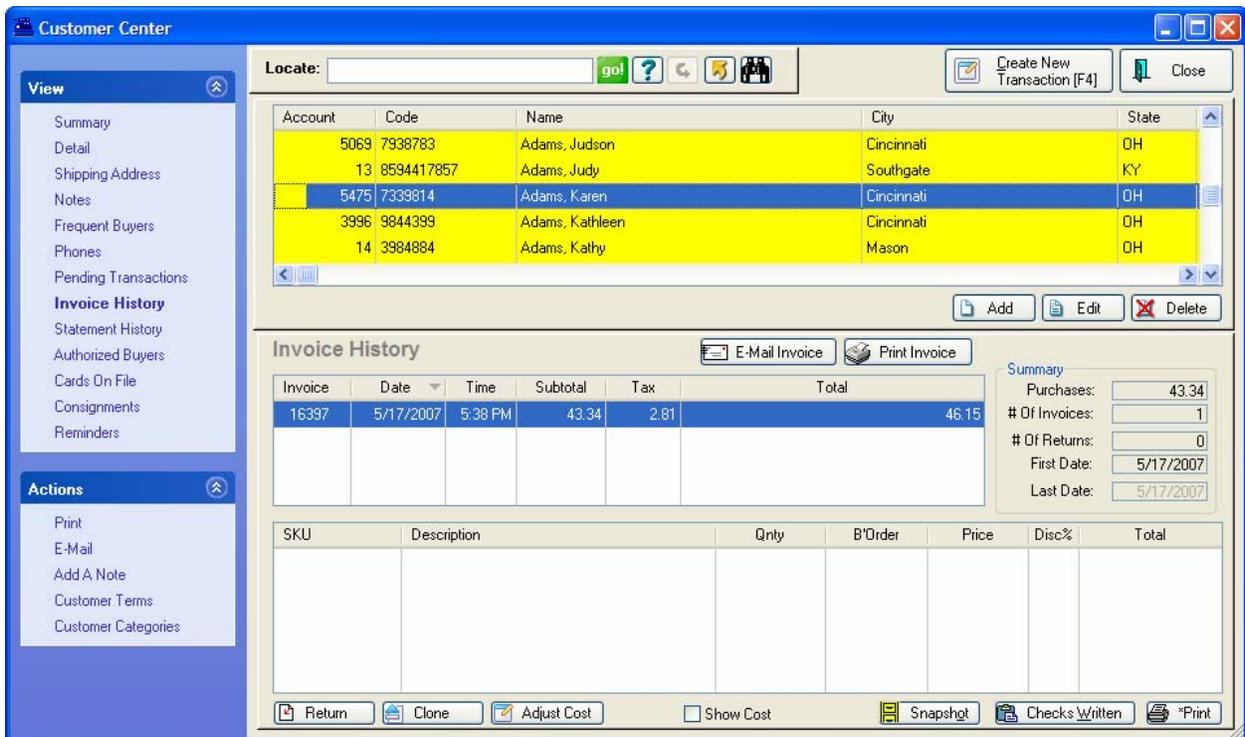
All menu functions moved to new Control Panel

Designed for quick navigation of all features of PRM



### Customer Center

Consistent screen size and layout



New "Search" paradigm

- "ENTER" searches first few characters
- "CTRL-ENTER" searches anywhere in that column

New "Send To" button

- Sends data displayed in the list box to Word, Excel, HTML, or CSV (many options)
- Modify your View, refine your Query, and that is what is "Sent"

Customer-related activities are available here

- Customer Terms
- Customer Categories

## Inventory Center

Consistent interface, easy to browse and edit

The screenshot displays the 'Inventory Center' application window. On the left is a navigation menu with sections: 'General' (Summary, Details), 'View' (Promo Pricing, Price Breaks), 'Stock Management' (Item Notes, Vendors, SKU Management, Item History, Picture Management, Customer Orders), and 'Actions' (To Order List, Change Dept/Catg, Add To Label List, Dept/Catg Manager, Coupon Manager, Promo Manager, Used Items Manager, Mix & Match Manager, Reports, Dispenser Manager). The main area features a 'Locate:' search bar and a table of inventory items:

SKU	Description	SugRetail	Reg. Price	Total Stock	Held	Available
8793ASTPUM	Astibe Pumila #1	12.99	12.99	9.00	0.00	9.00
254CPOUPLER	.25 4" Coupler	6.99	6.99	0.00	0.00	0.00
MATERIALS:STON	1" Washed Gravel - Ton	40.00	40.00	0.00	0.00	0.00
10PDT	10" TERRA COTTA POTS	7.50	14.99	3.00	0.00	3.00
MATERIALS:DRAIN	12X12' Catch Basin W/Grate	75.00	75.00	0.00	0.00	0.00

Below the table are buttons for 'Copy', 'Add', 'Edit', and 'Delete'. A 'Tracking' section shows details for item TN2169-2561:

Received	PO Number	Vendor	Landed Cost	Stock
6/01/2007	0601-107CLM	Adopt-A-Plant	6.7500	3.00

Additional information includes 'Internal ID: 2561' and a summary table:

In Stock	3.00
Held	0.00
Pre-Sold	0.00
Available	3.00
On Order	0.00
Committed	0.00
For Kits	0.00
Extra	0.00
Due	0.00
Units Per	1.00

Fast query, can query thousands of records in seconds

"Send To" button lets you send inventory to Word, Excel, etc.

## Touch-Screen Interface

Flexible, professional Touch-Screen interface is adaptable to any retail application!  
Touch Screen at the point-of-sale

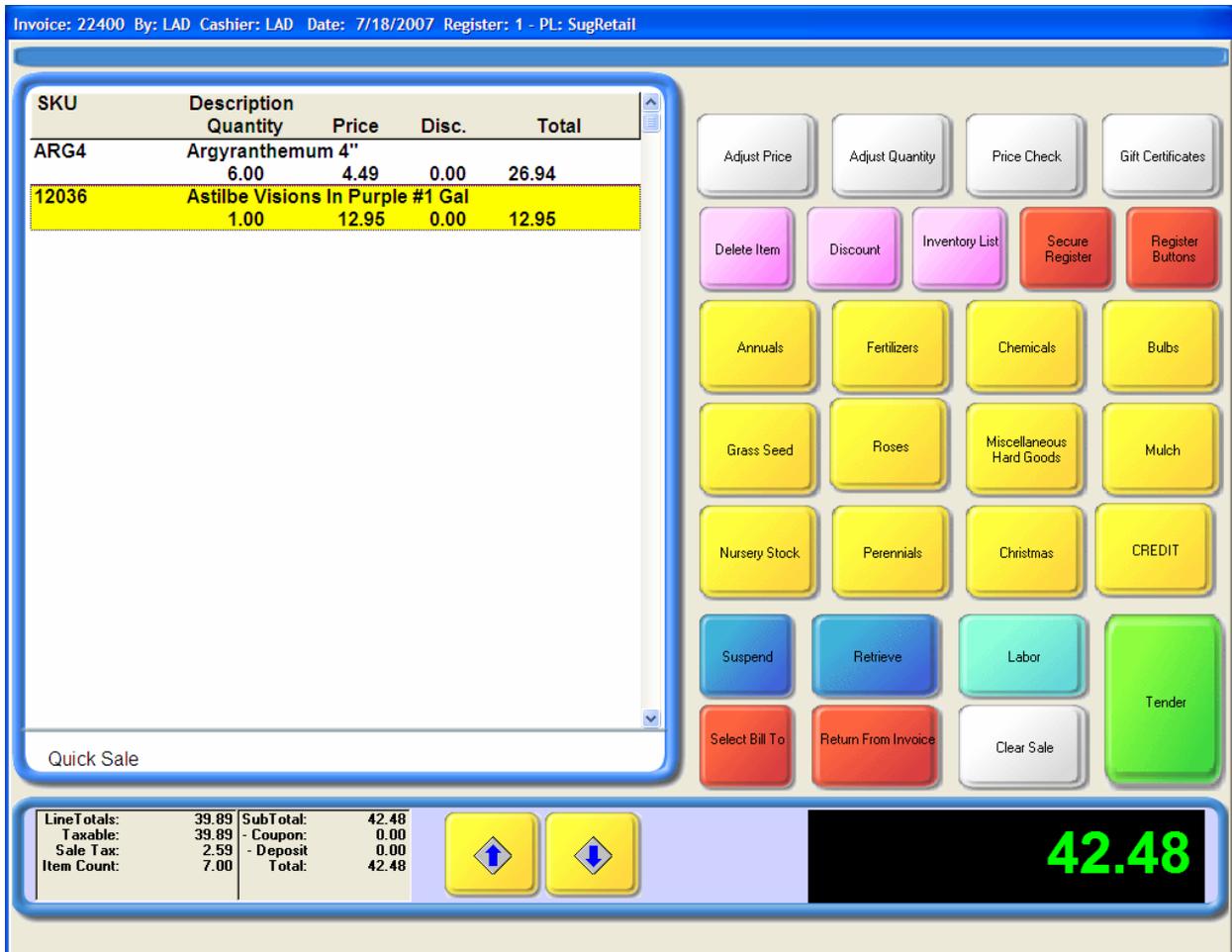
Invoice: 22400 By: LAD Cashier: LAD Date: 7/18/2007 Register: 1 - PL: SugRetail

SKU	Description	Quantity	Price	Disc.	Total
ARG4	Argyranthemum 4"	6.00	4.49	0.00	26.94
12036	Astilbe Visions In Purple #1 Gal	1.00	12.95	0.00	12.95

Quick Sale

Line Totals:	39.89	Sub Total:	42.48
Taxable:	39.89	- Coupon:	0.00
Sale Tax:	2.59	- Deposit:	0.00
Item Count:	7.00	Total:	42.48

42.48



- Set Employee to "Access to Register mode only"
- When employee logs in, they will only have access to register mode.

## Touch Screen Editor

Best used at 1280 X 1024

Buttons can be any size, any color, and any position

Can create packages and subtotals

## Enhanced Reports

Uses included Label designer for designing reports

Can now design any report as customer requires for inventory, customers, vendors, sales

Reports can be exported to PDF, HTML

## SQL Considerations

### What Is SQL?

SQL (Structured Query Language) is a standard interactive and programming language for getting information from and updating a database.

Many of you may be new to SQL, especially those who have been selling POSitive For Windows in the past. POSitive For Windows uses Topspeed files, which are ISAM “Flat File” databases. All the database interaction was controlled by POSitive For Windows. For example, if PFW wanted to populate the Inventory List, it would send a message across the network to retrieve a record, then get the data back, then another message to retrieve the next record, then get the data back, until the list box was full. This can work very well, and has worked well in the past, but if the location’s network experienced any kind of problems, the data could be corrupted. We would have some installations performing over 1000 register transactions per day and never have a problem. On the other hand, we would have an installation performing less than 20 transactions per day and it would experience data corruption. The problem was always hardware, and was always difficult to track down.

SQL is a little different in how it is installed, how it is maintained, and how it behaves. To look at the above example, if we now want to populate an Inventory List box, we send one command over to the SQL server (“give me the first 10 items in alphabetical order starting with “A”) and the server then replies with just those records. The SQL Server is doing all the work, and there is little or no chance of data corruption (so far, we have experienced none whatsoever).

While SQL provides a very powerful database solution, it also can be a little more complicated to install. You can no longer just install POSitive and run it; you have to set up the SQL Server as well. Also, when you run POSitive Retail Manager, the program needs to connect to the database (just as you need to log on to your computer). So, you can really think of POSitive as two distinct programs; POSitive Retail Manager, and Microsoft’s SQL Server 2005.

SQL comes in a variety of flavors. We distribute SQL Server 2005 Express with PRM, because it is free. However, free does have a “price”. It is limited to 1 gig of RAM, for example. These limits, however, should be fine for most small businesses.

SQL is scalable, so as your customer’s business grows and they see a slowdown in their database access, you simply need to upgrade them to the next level of SQL Server. Your customer should be aware of this, so they know that POSitive can grow as their business grows.

Another advantage of SQL is that it has built-in replication. You will need SQL Server 2005 Workgroup Edition at the main office to use as a publisher, but the remote stores can all use SQL Server 2005 Express. Every store’s data is replicated at every other store, so as more stores are added you will need to upgrade the version of SQL Server 2005.

Finally, SQL is an industry standard. Every major software program that accesses a database uses SQL. With a broad base of support from hundreds of 3<sup>rd</sup> party companies, SQL is the de facto standard for modern software products.

## Installing PRM

When installing PRM, it is important to realize that you are installing two separate programs; POSitive Retail Manager, and Microsoft's SQL Server 2005.

POSitive Retail Manager is a straight-forward installation. The program and supporting files are installed into the PRM folder, and links are created on the Window's Desktop.

The POSitive installation CD will install POSitive Retail Manager and SQL Server for you.

## Installing On The Server

Insert the POSitive Retail Manager installation disk into the CD/DVD drive. A menu screen will appear with several choices.

Choose "Install PRM Only" if you already have a version of Microsoft's SQL Server installed, or if you plan to install one.

Choose "Install PRM with MS SQL 2005 Express" if you do not have an SQL Server already installed, and you plan to use SQL 2005 Express.

The installation is very straight-forward, simply follow the prompts.

Once PRM is installed, and the SQL Server is running, you can run PRM and begin setting up a new company.

## Installing On A WorkStation

Once you have installed PRM on the network, you only need to do the following to run PRM on a workstation:

Map a Drive Letter to the Server, if this has not already been done. The Drive Letter should be mapped to the Root directory (NOT the PRM directory).

Create a link on the Workstation that points to the PRM.EXE file on the mapped drive.

Make sure you use the right kind of Windows file sharing when running PRM over a network. If you have problems running PRM over the network, you may be using simple file sharing, which does not provide full access rights.

## Post-Install Review

Once you've installed POSitive Retail Manager, POSitive Support will be contacting you for a post-install review. This is to update our support records, as well as to insure that minimum specifications have been met. Below is a summary of what we will be reviewing with you after installation:

### Hardware:

- Have the minimum hardware specifications been met with all computers running POSitive Retail Manager?
- Have the minimum hardware specifications been met with the computer running SQL Server?

### Software:

- Is the appropriate version of SQL Server installed (SQL 2005 Express, SQL 2005 Manager, etc.)
- Is the SQL Native Client installed on each workstation?
- Are shortcuts to PRM properly installed on each workstation?

### POSitive Retail Manager Configuration

- Does each workstation have a unique Station number?
- Does Pole Display(s) work properly (if Pole Display is used)
- Are Station Settings configured to match the type of business (example: Stay on Invoice, Allow Backorders on Invoice, Require Login, etc.)
- If Touch screen is used, verify Touch screen buttons are configured properly (some specific requirements are needed if creating Orders, for example)

## POSitive Multi-Store

POSitive Multi-Store replicates the POSitive SQL data across multiple locations, and allows control of data from a central location. POSitive Multi-Store includes the following features:

- Control of Inventory descriptions, SKUs, pricing, Departments and Categories from the Master Store
- Ability to print various Reports as related to each individual store from the Master Store location, including Tax Reports, Profit Reports, and Employee Time Sheets
- Ability to set different pricing for each store per item
- Set Pricing, Min/Max Stock, Central Purchasing
- Allows sharing of customers, inventory, invoices, etc. across multiple locations

POSitive Multi-Store is simply POSitive Retail Manager with Replication enabled.

## Principles behind Multi-Store Database Design

PRM was designed from the ground-up to be multi-store capable. Each Store is assigned a unique ID, called a SITE ID. This Site ID is 4 characters long, and can be any combination of letters and numbers.

All Records in the Database contain this SITE ID. Each store displays data filtered on the SITE ID.

Example: Inventory pricing is a separate table linked to the main Inventory table. Each store filters on the SITE ID, and only sees that store's pricing. The master store can look at the data without the filter, and see and set pricing for all stores.

## How It Does It

Example: Inventory pricing is a separate table linked to the main Inventory table. Each store filters on the SITE ID, and only sees that store's pricing.

The master store can look at the data without the filter, and see and set pricing for all stores.

Data is replicated between stores using MSSQL Replication. Replication is the synchronization of data across multiple sites as changes occur at one site, they are replicated to the other sites.

## Overview

There are two components to Multi-Store, Presentation and Transportation.

Presentation involves the Viewing and analyzing of the data in PRM.

Transportation is how the data is moved from location to location. PRM uses Microsoft Replication to move the data from store to store. This requires the Master Store to run MSSQL 2005 For Workgroups or higher.

The cost of MSSQL 2005 For Workgroups is approximately \$700. This includes a five Seat license. Additional seats approx. \$165.

Remote Stores can use SQL 2005 Express. As more stores are added, SQL server can be "scaled up" by moving up to Standard or Enterprise edition at the Master Store.

## Transportation

First, why did we choose Microsoft's SQL Server?

- Proven, reliable database synchronization
- Provides credibility when marketing PRM

It is important to understand that the Transportation aspect of POSitive Multi-Store is SQL Replication. Replication is handled by Microsoft or a third-party solution that uses Microsoft SQL Server 2005. The Replication setup is the responsibility of the Dealer. We can supply the specifications that need to be met (type of replication, tables to be replicated, etc), but we cannot help as far as troubleshooting the Replication installation. Fortunately, there are hundreds if not thousands of certified Microsoft Technicians that can help you with your installation. Be sure to factor in the cost of a professional SQL installer in your Multi-Store quotes.

In order to use Replication, you will need to set up a VPN (Virtual Private Network) over the internet to connect the SQL databases. You will need a broadband internet connection and a Router that supports VPN's. We have found a free VPN product that works well.

LogMeIn Hamachi is a VPN service that easily sets up in 10 minutes, and enables secure remote access to your business network, anywhere there's an Internet connection.

It works with your existing firewall, and requires no additional configuration. Hamachi is the first networking application to deliver an unprecedented level of *direct* peer-to-peer connectivity. It is simple, secure, and cost-effective.

<https://secure.logmein.com/products/hamachi>

## Presentation

Each SQL Table has a SITE ID field which allows us to store all the data from each location in one database, yet only display the data that pertains to a specific store. A good example of how this works is the Sales Summary screen.

In the Sales Summary screen, the list box displays data filtered by SITE ID. By changing the Store Filter, you can easily view sales data from any store, instantly.

Date	Qty	Sales	Cost	Profit	Margin	Returns	Sales>Returns	Month To Date*
7/06/2007	1	30.00	14.00	16.00	53.33	0.00	30.00	30.00
6/14/2007	1	41.67	25.00	16.67	40.00	0.00	41.67	59.67
6/07/2007	1	18.00	10.00	8.00	44.44	0.00	18.00	18.00
5/29/2007	2	85.00				0.00	85.00	274.00
5/21/2007	2	59.00				-10.00	49.00	189.00
5/20/2007	0	0.00				0.00	0.00	140.00
5/19/2007	0	0.00				0.00	0.00	140.00
5/16/2007	0	0.00				0.00	0.00	140.00
5/14/2007	2	40.00				0.00	40.00	140.00
5/07/2007	7	100.00				0.00	100.00	100.00

Daily Tender		Pending		Summary	
Invoices:	32.34	Total Pending:		Month To Date	
Layaways:	0.00	Layaways:	0.00	2007:	30.00
Orders:	0.00	Orders:	330.00	Year To Date	
Service:	0.00	Service:	0.00	2007:	363.67
Internet:	0.00	Internet:	0.00		
Accounts Receivable:	0.00	Total:	330.00		
Refunds:	0.00	Daily			
Total Tender:	32.34	Layaways:	0.00		
Invoices On Account:	0.00	Orders:	0.00		
Refunds On Account:	0.00	Service:	0.00		
		Internet:	0.00		

Some Tables are not sorted by SITE ID. These include Customers, Inventory, Departments, Categories, and Accounts Receivables. Each of these Tables is shared across all locations. Linked to some of these Tables, however, are Tables that contain local data. For example, the Inventory Table will have a linked Table that will contain local pricing. The local pricing Table is filtered by SITE ID. This is how, at the Master Store, we can view pricing for all locations and set pricing at each location separately.

Since all data is replicated, reports can be written to display sales comparisons, employee time card data, etc. using Crystal Reports

## Requirements

- Microsoft SQL Server 2005 Workgroup Edition at Master Store. This provides Replication Services for up to 25 subscribers (remote locations)
- Broadband Internet connection between all stores
- Router capable of supporting a stable VPN connection between locations

## Creating a Master Store

### Register PRM Multi-Store

Make sure you have purchased the proper licensing for PRM Multi-Store. Once you have completed your purchase, register your Master Store's location in order to activate the Multi-Store options.

## Contact POSitive Tech Support

Before setting up multi-store replication, or setting up any Remote Locations, please contact POSitive Tech Support. We can provide complete instructions to make sure you have a successful installation. Below is an outline of the steps needed to configure different scenarios.

### Run Master Store Wizard in PRM

Your next step should be to run the Master Store Wizard in PRM. This will allow you to assign a SITE ID to your Master Store location. The SITE ID is set to “\$\$\$\$” when PRM is installed and running as a single location. The Master Store Wizard will change all the SITE IDs in the database to match your assigned SITE ID.

### Setup "Merge" Replication Publishing on the Master Store Database

You now need to setup Replication services. In Replication, you have a Publisher and Subscribers. The Publisher moves the data from Subscriber to Subscriber.

Your Master Store will become the Publisher.

You will configure the Master Store to use “Merge” replication. Merge Replication will maintain a copy of all data at all locations. To configure Merge replication, you will use SQL Manager, connect to the PRM database, and choose “Replication”. You should contact Tech Support for further instructions.

### Creating a new Remote Location

At the Master Store, run the "Create Remote Store" Wizard. This will step you through creating a new store that is ready for replication.

At the Remote location, configure the remote SQL Server to subscribe to the publication at the Master Store. Be sure to subscribe with a NEW/Blank Database.

Allow the initial snapshot and replication to occur. The store created at the Master store will replicate down to the Remote location.

Install PRM at Remote Location. Run PRM, and create a new store. Do not use the replicated database, but create a brand-new database. Be sure to enter the company name and address exactly as they were entered at the Master store.

After the new store is created, you will need to edit an INI file to set the correct parameters.

Run PRM and stop at the Choose Company screen. Press CTRL-SHIFT-E. A “Change” button will appear. Highlight the new company and click on Change. Edit the SQL database to match the replicated database name.

## Adding an Existing Store

Verify that all sites are running the same version of PRM.

At the Remote location, configure the remote SQL Server to subscribe to the publication at the Master Store. Be sure to subscribe with a NEW/Blank Database.

Allow the initial snapshot and replication to occur. The store created at the Master store will replicate down to the Remote location.

Run PRMMERGE to move the data from the local database to the replicated database.

After the new store is created, you will need to edit an INI file to set the correct parameters.

Run PRM and stop at the Choose Company screen. Press CTRL-SHIFT-E. A “Change” button will appear. Highlight the new company and click on Change. Edit the SQL database to match the replicated database name.

## POSitive Connect

POSitive Connect links the Retailer to their store from any web browser. The Retailer can:

- View Sales data
- Run Reports
- Lookup Customers, Inventory, Vendors, Employees, Invoices
- View streaming video (security cameras)

POSitive Connect is a web server that runs as a service on the store's server. The web server connects to the live store data, and information is served to any browser in real time.

## Requirements

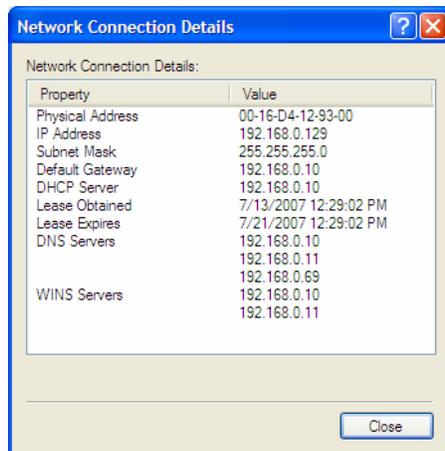
- Connection to the Internet
- Static IP Address OR can register with a dynamic IP Address service such as DynDNS
- Router with ability to do port-forwarding

## Installation And Setup

POSitive Connect is installed automatically with each install of PRM. POSitive Connect requires a registration number in order to run. The registration number is entered through a program called PC Manager, which is also installed with each install of PRM.

Before running PC Manager, the following requirements need to be met:

- The computer that will run POSitive Connect should have a static IP Address
  - Through the Windows Control Panel, select "Network Connections"
  - Right-click on the Local Area Connection and choose Status. Click the Support Tab, and click on Details.



- You will see a screen similar to the one above. Write down the IP Address, Subnet Mask, Default Gateway, DHCP Server, and the first two DNS Servers.

- Close this screen and the Status screen, and right-click on the Local Area Connection, this time choosing Properties
  - Highlight the Internet Protocol selection, and click on Properties
  - Click on “Use the following IP address” and fill in the information you just wrote down.
- At the router, setup port-forwarding to the computer that will be running the server. You can use any port from 1 to 65000. Use the static IP Address you just assigned to the computer running POSitive Connect.

At the computer that will run POSitive Connect, run PCManage. Choose the company you will be connecting to, and enter the port number you chose earlier. Also enter the registration number. Leave other fields blank for now.

Run PRMConnect. Your web server is running and ready to respond to requests.

## Using POSitive Connect

In POSitive Retail Manager, you need to give access to the employee(s) you want to be able to use POSitive Connect.

- At the Employee screen, enter an ID and password for logging in to POSitive Connect.
- At the Security screen, grant access to POSitive Connect.

To test POSitive Connect, go to the computer that is running POSitive Connect and run your browser. In the Address bar, type the following:

localhost:xxxx

Where xxxx is the port number you entered into PC Manager. For example, if you are using port 1021, you would enter:

localhost:1021

You should now see the login screen for POSitive Connect.

To access POSitive Connect from a different computer, you should assign a web address to your router's IP Address. This means, you should have either a Static IP address from your Internet provider, or you can use a Dynamic DNS service to assign a web address to your router. If you are not sure how to do this, contact us for more information (or “google” it!).

Once you have a web address assigned to your router, you can access POSitive Connect from any web browser by entering the web address and the port in your browser. For example, if your web address was mywork.dyndns.org, you would enter:

mywork.dyndns.org:1021

## Google Gadget

If you have an iGoogle page, you can embed POSitive connect on your page.

- From your iGoogle page, choose "Add Stuff"
- Next choose "Add By Url"
- Enter in the URL of your web site, with a "/gadget" on the end. In our example, the URL would be <http://connect.gopositive.com:4155/gadget>
- Go back to your iGoogle page. Your POSitive "Fast Stats" page is there!

## Licensing

POSitive Connect is licensed per company.

POSitive Connect can access multi-store data, so only one license is required to check all stores.

## Using 3rd Party Reporting Tools

POSitive Retail Manager can work together with Crystal Reports to print customized Quotes, Orders, Invoices, or other Reports.

Your customer will need to purchase and install a copy of Crystal Reports.

There are hundreds of companies who specialize in creating Crystal Reports. We provide documentation on our file structures that can be used to help create these reports. The documentation is found in the PRM REPORTS folder in the PRM installation folder.

We also have several dealers who can create reports for you (for a nominal charge). Please contact us for additional information.



# Appendix A

## Sample Customer Evaluation Checklist

1. **Are you interested in a complete POS system or only hardware or software components?**
  - a. Yes- Complete POS system
  - b. No - POS hardware only
  - c. No - POS software only

2. **In what type of business will this point of sale system be used?**
  - a. Apparel or Footwear
  - b. Convenience store
  - c. Liquor or wine store
  - d. Retail or other store - Please specify type

3. **Is this request for a new system or an upgrade of a current point of sale system?**
  - a. New system
  - b. Upgrade/replacement to current system  
If applicable, list current hardware/software:


4. **Please indicate your wiring or installation service needs:**
  - a. I need onsite installation and/or wiring
  - b. I do not need onsite installation
  - c. I am looking for a system that does not require installation
  - d. Please help us determine suitable specific wiring or installation options
5. **Are you interested in receiving information for maintenance/service contracts for your POS system?**
  - a. Yes, we would like info on maintenance/service contracts
  - b. No, we would not like info in maintenance/service contracts
  - c. Not sure, please help us determine the best option for our needs
6. **For how many business locations do you need the pos system?**
  - a. \_\_\_\_\_ (number of distinct business locations)

7. **What is your buying timeframe for this point of sale system?**
- a. ASAP
  - b. 0-3 months
  - c. 4-6 months
  - d. 6 months or longer
  - e. Not sure, please help us determine an appropriate timeline
8. **What type of reporting capabilities will you require for your POS system?**
- a. Not sure, please help us to determine the best option
  - b. Standard (full reports, PLU reports, hourly reports or department group reports)
  - c. Advanced (consolidated report packages for multiple locations or comprehensive polling)
  - d. Web-based (enterprise-level reports)
9. **What input device(s) will your POS system utilize?**
- a. Not sure, please help us determine the best option for our needs
  - b. Keyboards
  - c. Touch screen Monitors
  - d. Barcode scanners
  - e. Scales
  - f. Wireless devices
  - g. Other (please specify): \_\_\_\_\_
10. **If known, please indicate how many of the following POS components you will need for each of your business locations.**

Hardware	Quantity
POS terminals with cash drawers	
POS terminals without cash drawers (order stations)	
Remote printers (for kitchen or bar orders, etc.)	
Receipt printers	
Credit card terminals	

## Appendix B

### Creating and Attaching to Sample Databases

To create a sample database, simply create a new company in POSitive Retail Manager and create your sample data there. You may have sample data you can import into the new company, such as inventory and vendors. Try to tailor your sample data to the industry you are selling to.

Once you have a sample database, you may want to detach it and back it up so you can use it in a demo, and then restore it for the next demo. To do this, you need to export the MDF and LDF database files, and restore them as required.

### Importing and Exporting MDF and LDF files

Importing a MSSQL database from an LDF and MDF file:

1. Open the SQL Management Studio.
2. Right-click 'Databases' and select 'Attach' from the drop down menu.
3. Click Add and locate the MDF file that contains the database structures.
4. Click OK - if there is an error locating the corresponding LDF file, then use the ellipses button corresponding to the LDF file to locate the correct LDF file.

Exporting an MSSQL database to an LDF and MDF file:

1. Open the SQL Management Studio.
2. Right-click on the Database that requires exporting and select Properties.
3. On the Files Properties window make a note of the mdf and ldf files used for the database.
4. Return to the main window - Right-click the database and select detach from the Tasks menu.

The files that you need to save are the mdf and ldf files indicated in step 3.

### To Change The Attached Company Data

At the Choose Company screen, press CTRL-SHIFT-E. A "Change" button will appear. Highlight the company you want to change and click "Change". Enter the new database information and save.

## Appendix C

### PFW to PRM Conversion

#### PREPARATION of PFW

Upgrade to latest PFW version (latest version has special enhancements to aid data conversion)

Copy c:\pfw to c:\pfwconvert (Do not run conversion from “live” PFW directory)

Run PFW in c:\pfwconvert directory

Run Inventory Verification (Inventory: Maintenance:Verify Inventory Files)

Verify Invoices (w/out Tax Verification) (File: File Maintenance: Verify Data Routines: Verify

Transactions: Both Invoices & Orders

Tpsfix ALL files (Exit PFW: Choose Company: Utility Button: Verify Maintain Data: SELECT ALL FILES

RUN PFWtoPRM.exe (If there isn't an icon on the Windows desktop, look in the c:\prm directory and run PFWtoPRM.exe)

Follow Prompts

This will take time (perhaps several hours)

Please contact our support department at 866-368-2266 if you need assistance.