

POS•IM EVO

WINDOWS CONVERSION KIT



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Welcome to POS•IM EVO! This packet is designed to help make your conversion process smooth and simple. Included in this documentation are instructions for downloading EVO, converting your existing database to EVO, and training suggestions for getting the best results possible from this new product. We advise that you read through this documentation before beginning the conversion process so that you have a better understanding of how the process will work. There are some features not included in the first release, and some features that do not have full functionality at this time. We want to be sure you are aware of the restrictions, and also want to introduce you to new features.

EVO vs Premier

EVO has many new features that Premier did not. Following is a list of features that are brand new to EVO, or redesigned to work differently in the new product.

New Features

1. New screens with a modern look and feel
2. Unified Preferences
3. Navigator
4. Pictures for Items, Vendors and Customers
5. Cheat Sheet
6. Three Invoice Views
7. Four Item Card Views
8. Drop Shipments
9. Return to Vendor
10. Date to Date Pricing
11. Family Group Pricing
12. Advanced Styles
13. Category Cards
14. New Barcode Label Designer

Simplified Features

1. Update Process
2. Case Lots
3. Bundles
4. Kits
5. Events
6. Define a Report
7. Layaways
8. Special Orders
9. Quick Add Items
10. Import Manager
11. Hardware Setup

Features Missing in EVO as of March 26, 2012

- GC Link
- Multi-Site
- Cognitive printers
- Any serial printers
- Suspended Credit Card (Premier)
- Rentals
- Open to Buy (Premier)
- Advanced Price Codes (Diamond)
- Market Analysis
- Printing Customer Address Labels
- University option (Diamond)
- Split billing (Diamond)
- Report Schedules (Diamond)
- Customize invoice/receipt
- Ability to select multiple items from the lookup window using the Shift key (Diamond)
- Remote Processing (We have remote sales, but still missing the inventory ordering)

Reports Missing in EVO as of July 1st 2011

- Comparative sales report
- Kits report
- Events report
- RMSA report
- iPhone reports
- Vendor item analysis

Features that Will NOT Convert

- **Sales Tax Preferences** will not convert to EVO. You will need to setup your sales tax preferences. Please see page 8 of the conversion workbook for instructions.
- **Events (Premier)** do not convert to EVO at this time
- **Some Preferences:** The only preferences that will be brought over in the conversion are Company Information, Accounting Chart of Accounts, AR Method, Gift Cards, PayStream IP Address, Rewards, and Price Code Levels. All other preferences will need to be set up after the conversion is complete. This includes your Sales Tax, Document IDs, etc.
- **Case Lot SKU (Premier):** The name for Matrix Quantities has been changed to Case Lots. In EVO, case lot SKUs are automatically assigned as the main SKU plus the quantity of the case. For example, if item 1015 had a case of 20, the case lot SKU would be 1015-20. If in Premier, you had a word in your Matrix Quantity SKU, for example, 1015-Bolt, with a quantity of 20, the conversion will change that case lot to 1015-20. No words will be converted in the case lot SKUs.
- **Reporting Sales Tax:** After the conversion, sales tax information will show on the Closed Invoices and the Sales Tax Report, but the sales amount on the sales tax report will not be correct. We recommend keeping your Premier/Diamond system accessible for reporting sales tax until EVO has live sales tax history.

- **Journal Exports:** After the conversion we recommend you export your journals from Premier/Diamond until EVO has live sales/purchasing history
- **Kit Definitions/Templates (Premier)**
- **Barcode label designs**
- **Employee Privileges**
- **Custom Tab Ordering**
- **Search view definitions**
- **Saved Define A Reports**

If any of these features or reports are vital to running your business, it will be better to wait for further development before converting to EVO.

Windows System Requirements

Operating Systems

- Windows XP - 32/64 Bit
- Windows Vista - 32/64 Bit
- Windows 7 - 32/64 Bit

CPU Speed

- 2.0 GHz minimum

RAM

- 4 GB minimum

Monitor Resolution

- 1024 x 768 minimum

Required Software

- Java Version 1.7 or greater
- MySQL Version 5.1 (Server only, supplied by POSIM LLC.)

Hard Drive

- 10 GB Free

Backup Method

- Onsite and Offsite Backups

Network

- Wired LAN suggested, wireless LAN will be slower and less reliable

Internet

- High Speed Internet is required for credit card processing and remote assistance

Supported Hardware

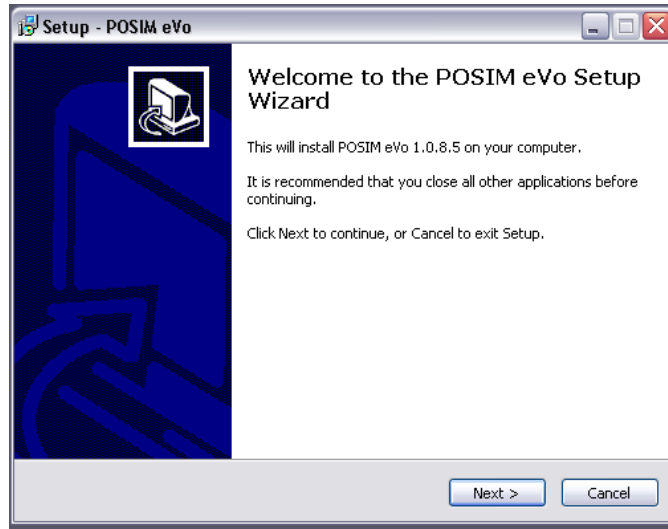
- USB Star TSP 100
- USB Star TSP 600
- USB Zebra 2824 Barcode Printer
- USB APG/MS Cash Drawer
- Star Interface APG/MS Cash Drawer
- Any USB Invoice Printer (8.5 x 11)

- Any USB Barcode Scanner or USB Credit Card Swipe (Track 2 Only)

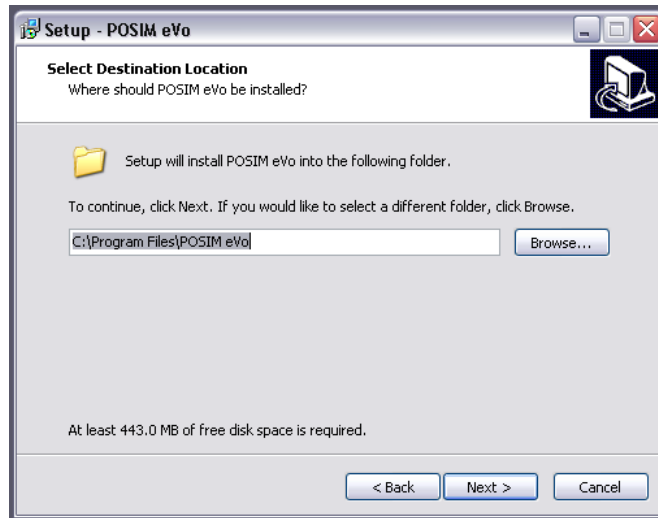
POS•IM EVO Installation for a New Database on a Server Machine for Windows

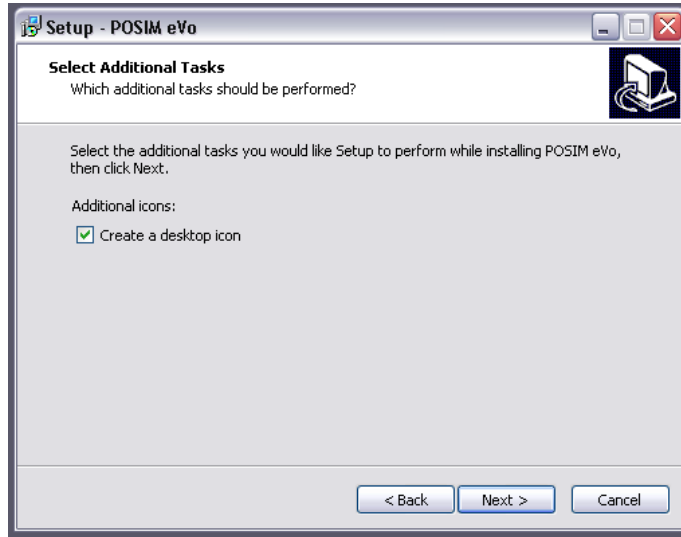
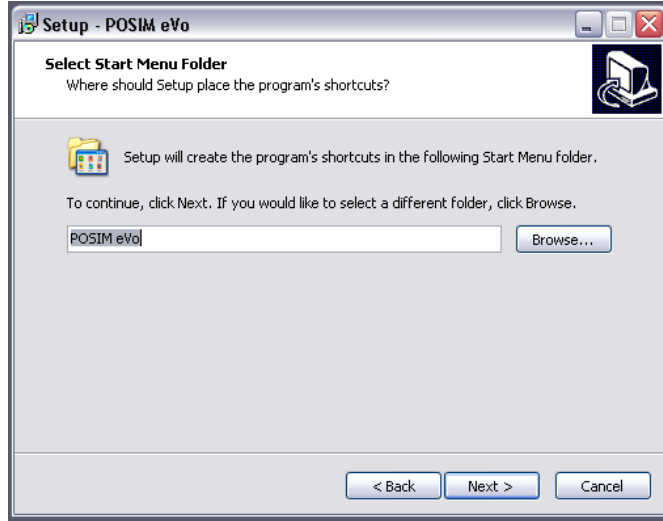
Listed below are the steps for downloading POS•IM EVO onto your Windows computer.

1. Download POS•IM EVO at www.posim.com/download
2. Double Click the POSIM EVO Setup.
3. The POS•IM EVO setup wizard will open

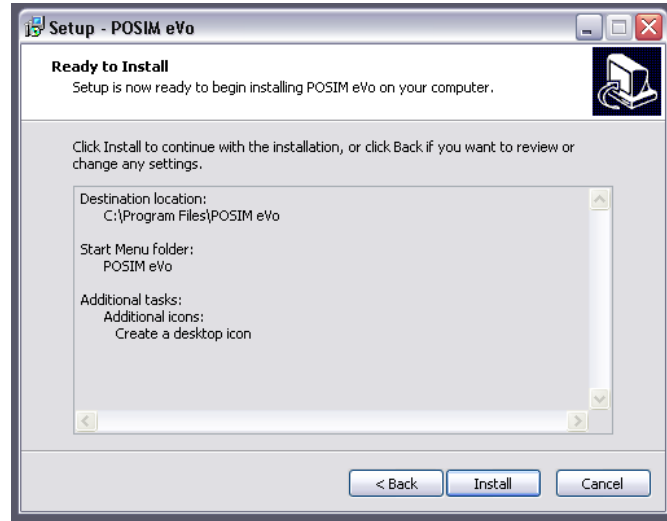


4. Select the Next button, and continue doing so until you reach the Install window.

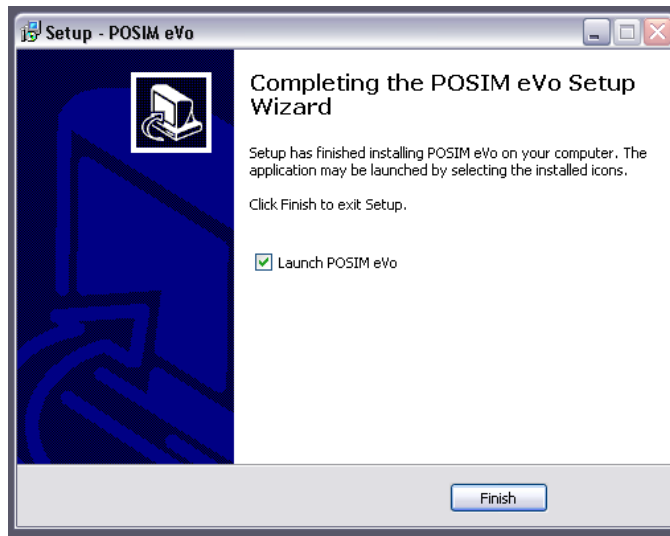




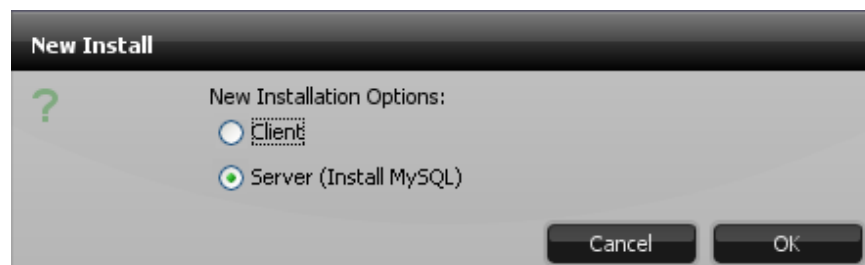
5. Select the Install button.



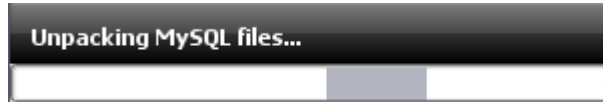
6. To finish the installation, select the Finish button.



7. EVO will launch, and you will choose to install the server.



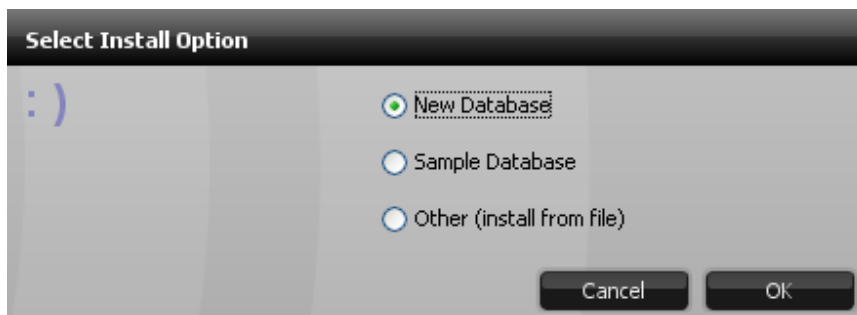
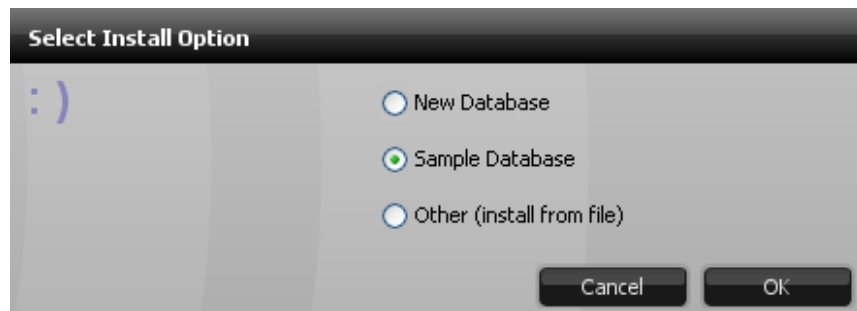
8. POSIM will download MySQL



9. At this point, you will select what database you want installed.

NOTE:

If you want a sample database to use to become familiar with the system, select Sample Database. If you would rather jump straight to a test conversion so that you are able to become familiar with the system using your own items and information, select New Database. These different options will be explained in further detail later in the documentation.



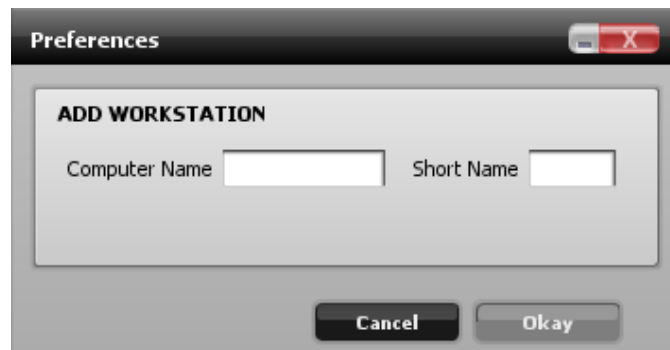
10. If you select New Database, the blank database will be created.

11. Enter the first time user name and password.



A dialog box titled "First-time Admin Account..." with a close button (X) in the top right corner. It contains three text input fields: "Username:", "Password:", and "Verify Password:". At the bottom, there are two buttons: "OK" and "Cancel".

12. Create a Workstation for the computer you are using. We suggest you call the computer name "Server". The Short Name will be automatically created, but can be edited.

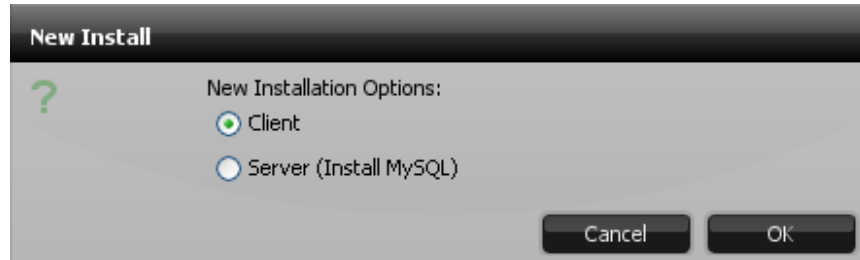


A dialog box titled "Preferences" with a close button (X) in the top right corner. It features a section titled "ADD WORKSTATION" containing two text input fields: "Computer Name" and "Short Name". At the bottom, there are two buttons: "Cancel" and "Okay".

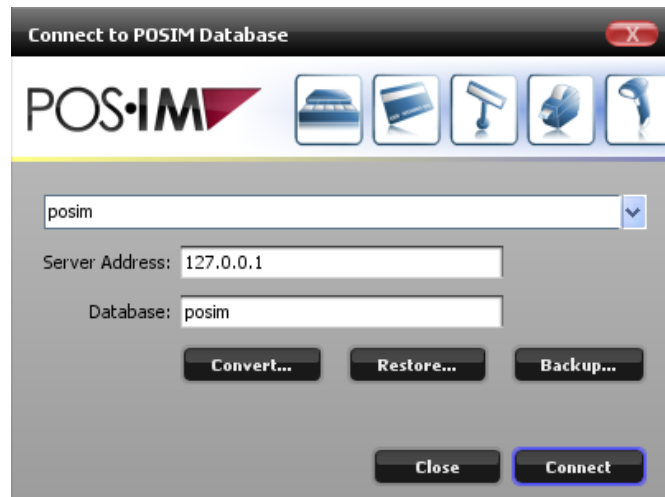
13. POS•IM EVO will open with a blank database.

POS•IM EVO Installation for a New Database on a Client Machine for Windows

1. Download POS•IM EVO at www.posim.com/download
2. Double Click the POSIM EVO Setup.
3. Select the Client option.



4. The connection window will open.



5. In the Server Address field, enter the Server computer's IP Address and select connect. This will connect the two computers to the same database.



After installing POS•IM EVO you have the option of going straight to a test conversion where you can verify your data, train your employees, and become familiar with the system before going live. If this is the option you choose, you will install the New Database, and follow the Conversion steps listed in the next section.

If you want to learn the system before doing a test conversion, you will want to install a sample database that you can use to perform transactions, create items, etc. You will select "Sample" after step 9 in the instructions above. The sample database will be created, and you will be able to use the test database until you are more comfortable with the system. You will then be able to convert your live database when you are ready.

Converting from POSIM Premier to EVO

Here are the steps for converting. All these steps must be performed on the **Server** machine.

1. Update POSIM Premier to 8.3.17.11 or greater
2. Close AR Period if you use Balance Forward
3. Get conversion code from POSIM Tech Support. Email support@posim.com to get these.
4. Create a blank database in POS•IM EVO
5. Login to the newly created EVO database
6. Click "Green Orb" in the navigator
7. Click "Convert"
8. Type in the conversion code you received in step 3. Press OK
9. You will see a warning message asking to continue. Press OK
10. Type your employee username and password
11. Select POSIM Premier then Click OK
12. Type the Premier service name if different from 'posim'
13. Press "Convert"

At this point all the data from POSIM Premier will be sent to POS•IM EVO. This will take some time to finish. The speed depends on the speed of your computer and the size of your database. When the conversion is complete you will see a message letting you know conversion was successful.

After the Conversion

After converting your Premier database to EVO, there are documents that you need to verify to ensure the conversion was successful.

Check and Enter General Preferences

As mentioned earlier, not all of your General Preferences will be converted. At this time, go through the preferences to ensure your Company Information, Accounting Chart of Accounts, AR Method, Gift Cards, PayStream IP Address, Rewards, and Price Code Levels are there. You can then enter the rest of the Preferences.

NOTE:

When filling out your General Preferences, skip the authorization tab for now. You will authorize your database when you are ready to go live.

Reports and Documents:

Run the following reports and check the following documents for errors. It would be best to compare them to reports from Premier to verify the information is correct.

1. On Hand Report
2. Sales Report
3. AR Summary Report
4. Gift Card Report
5. Flip through existing orders

Hardware:

Test your hardware to make sure your computer preferences are set and working. Following are directions for testing your hardware in EVO.

1. Open the Cash Drawer: Go to the Navigator, Administration, and open Computer Preferences. Under the Cash Drawer tab, select the "Test Open Drawer" button. This should open your cash drawer.
2. Print a Receipt: To print a receipt, you need to first set your computer preferences. In the Navigator, under the Administration tab is Computer Preferences. Once inside these preferences, go through the three tabs and make sure you have your receipt/invoice preferences set. When you have finished, you will post an invoice to test. To print an invoice, go to the Navigator, Sales, Invoicing, and open Open Invoices. Create an invoice by scanning or entering items and post the sale. After selecting the method of payment, the cash drawer should open and a receipt should print.
3. Print a label: Labels will not be converted from Premier so you will need to go through the steps for creating and assigning labels. For instructions on how to do this, see the Conversion Workbook.

Training

POS•IM EVO is a new product that has new features and new functionality. We realize there are many differences between EVO and Premier. To help you learn the new system and use EVO to the fullest of its abilities and help you become comfortable with the changes, we have provided multiple methods of training for you and your employees.

1. Conversion Video: This video will cover the basics on how to use POS•IM EVO. It will cover how to create Item Cards, how to Process a Sale, how to purchase and receive items, and much more. This is a great tool for when you are just starting out, and will be a great reference for your clerks. <http://vimeo.com/posim/posim-evo-conversion>
2. Conversion Workbook: The Conversion Workbook is a written version of what the Conversion Video covers. We have put it in written format so that you are able to quickly refer to it when necessary, and learn more about the system when you don't have access to a computer. <http://download.posim.com/PDF/documentation/EVO/CONV/ConversionKitWorkbook.pdf>
3. Training Videos: Located on our website, there are multiple training videos of how to complete specific tasks within POS•IM EVO. These training videos include completing a sale, creating Item Cards, setting up General Preferences, Accounting, and much more. <http://www.posim.com/training/videos/>
4. Beginner's Guide: This beginner's manual is full of how to tips on setup and basic use of the system. <http://download.posim.com/PDF/documentation/EVO/EVOBeginnersGuide.pdf>
5. Page Sensitive Help: Located within the POS•IM EVO program is a complete manual that is page sensitive. If you have any questions about a specific feature, simply click on the question mark (?) located at the top of the window, and a web browser will open with information on that topic.

Converting Live

Once you have completed the test conversion and feel comfortable using your database in POS•IM EVO, you are ready to reconvert and use the system live.

NOTE:

Once you have converted your database and are using it live for your business, there is no going back. We want to make sure you feel 100% comfortable with the system before you convert your live database because there is no way of going back to Premier once you have entered data into EVO.

Here are the steps to converting your live database.

1. Follow the instructions above to reconvert your database from Premier.
2. Set up any client machines
3. Set up any hardware
4. Re-Verify data by following the guidelines listed on page 13.
5. Authorize your Database. You can do this by going to the POS•IM EVO Navigator, selecting Administration, General Preferences, and open the tab Authorizations. Simply select the "Authorize Online" button, and your system will be authorized.