



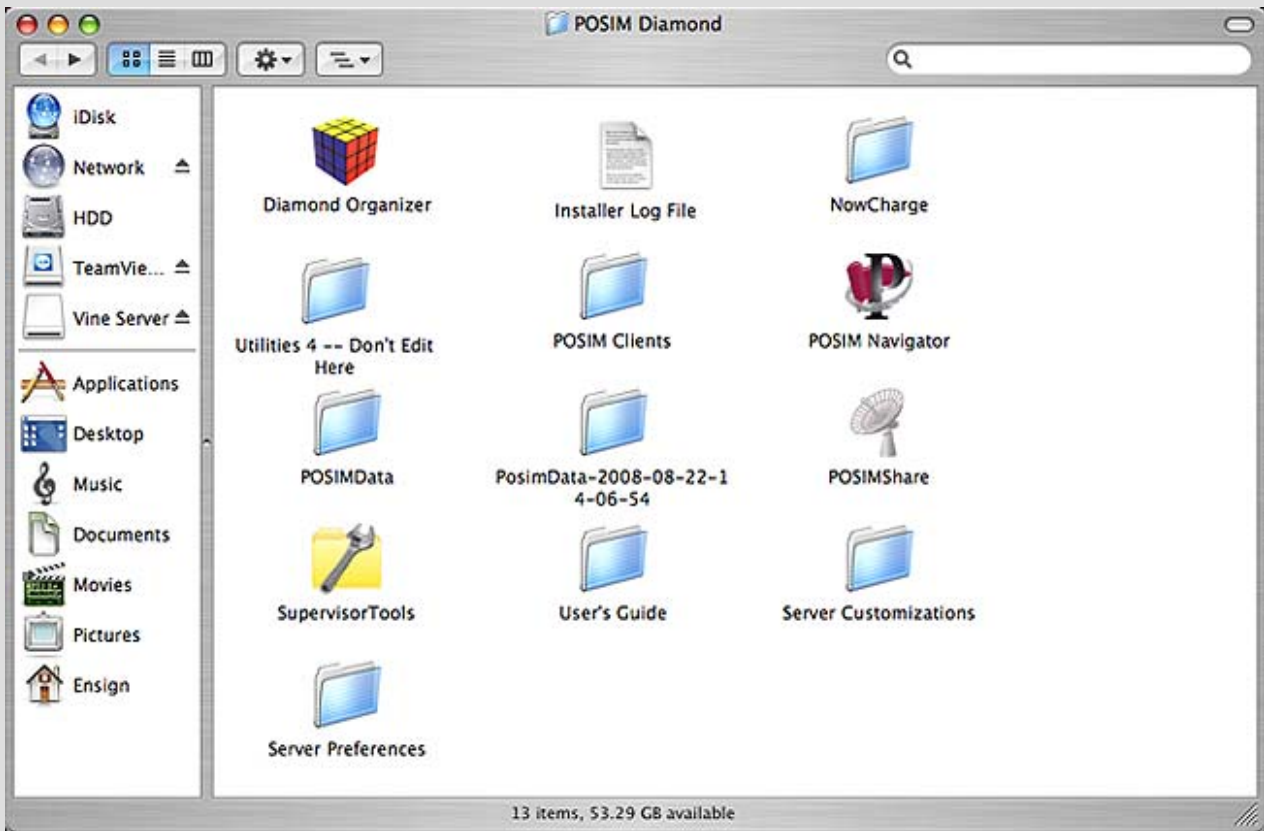
## Off Site Sales

When processing transactions off site, Record Keeping for POS•IM Diamond and Remote Processing for POS•IM Premier, are tools designed to work with minimum effort to track off site sales and transactions in an format that can then be imported into your Server's live database. It's great to use when you are at trade shows, side walk sales, or purchasing or sales that need to be done away from the store location. Or if your Live server goes down you can simply follow the instructions to activate Record Keeping for Diamond or Remote Processing for Windows, and when you are back in the Store, follow the procedures to extract the transaction history and import it into the server. No more hand entering transaction at a time, all the work will inputted into the server with Record Keeping for Diamond or Remote Processing for Windows.

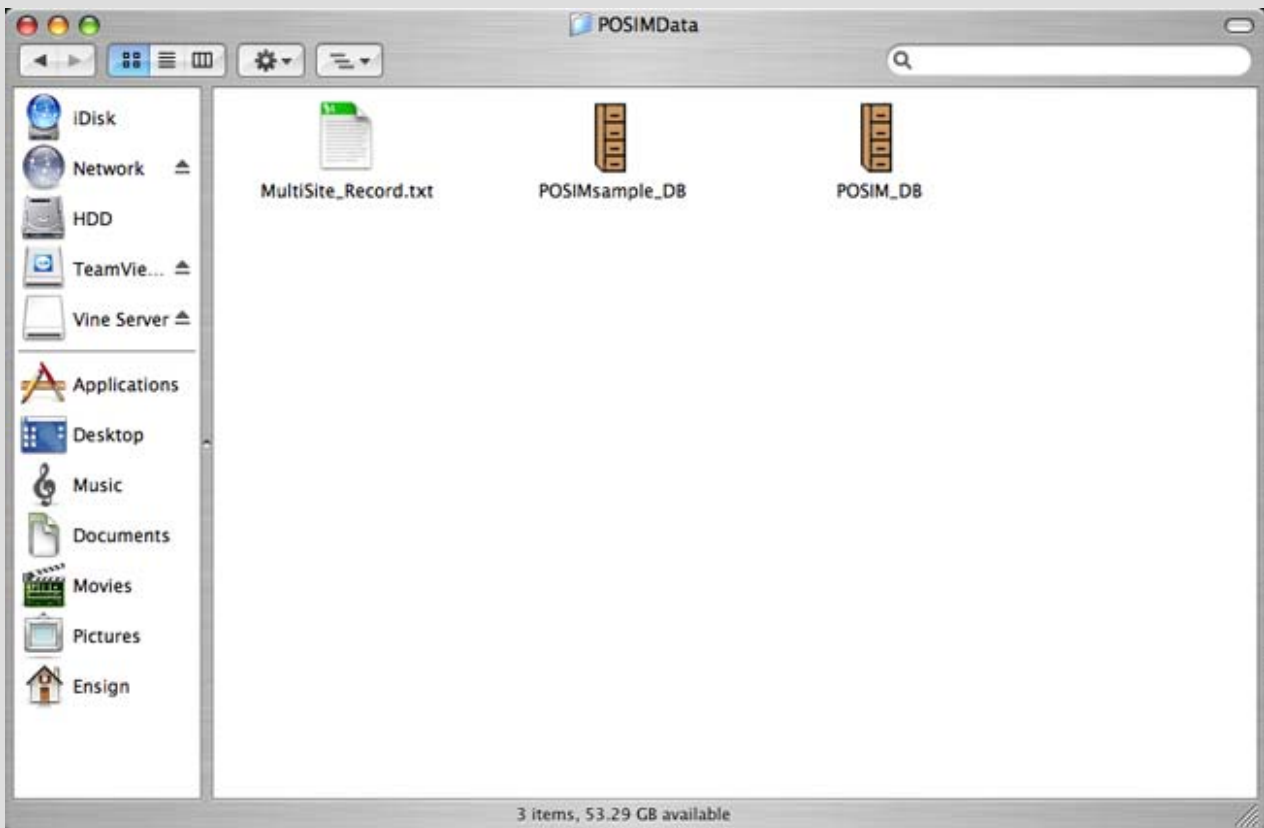
**\*Note: If using NowCharge or PosimCharge, you will need to enter the credit card transactions in through your virtual terminal, unless you have working internet from the location that you are processing from.**

### **For POS•IM Diamond Users:**

1. Make sure the remote computer that you are using has the same POS•IM Diamond version installed on it as your server computer, and that it has been installed as a server as well as a client. (The POS•IM Share must be in the POS•IM Diamond folder on the remote computer)
2. Back up your server's database and take the copy of the back up to the remote computer. (You can do this by using a removable drive, network drive, or CD.)
3. On the remote computer, open the POS•IM Diamond folder and click on the POSIMdata folder.



4. Open your POS•IM Back Up folder and copy the POS•IM\_DB file and then paste the back up file the POSIMdata folder. (If there is already a POSIM\_DB in the folder, rename it so only the new backup says POSIM\_DB)

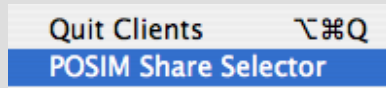


5. Switch the remote computer to a single user. (Single user means it is no longer a client, but

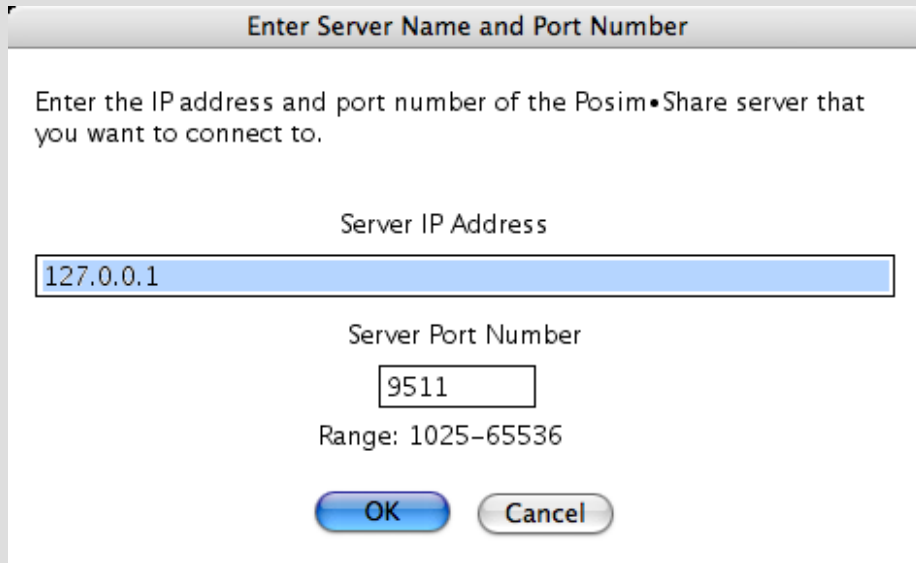
its own single working server/register.)

a. Open the POS•IM Navigator

i. At the in the top menu bar select File >> POS•IM Share Selector.



ii. Type a mirror IP address of 127.0.0.1 click OK.



iii. In the POS•IM Diamond folder, click on the POSIMShare to launch it.

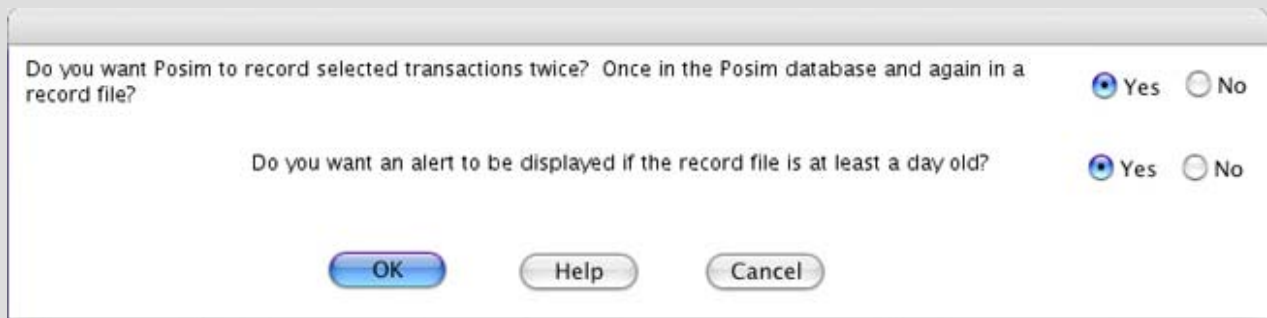
1. It will now be separated from your network server and acting as a single user terminal.

a. Since the database is a copy of your live database, you will only be able to open up the POS•IM modules up to 40 times before you will need to replace the database again. If you see a screen asking you to authorize the database, simply hit the Run icon it the module will open. After 40 usages, you will no longer be able to open run as a single user unless you get a new copy of the live database.

2. Open Sales Client and Inventory Client.

a. Sales Client- Go to File >> Preferences >> Miscellaneous >> Record Keeping. Choose "Yes" for both the "Do you want POS•IM to record selected transactions twice?" And for "Do you want to alert to be displayed if the record file is at least a day old."

b. Inventory Client- Go to File >> Preferences >> Record Keeping. Choose Yes for both "Do you want POS•IM to record selected transactions twice?" And for "Do you want an alert to be displayed if the record file is at least a day old."



3. Go to Sales Client >> File >> Preferences >> Invoice>> ID. Change both radio buttons to yes. (See above picture) Click OK.

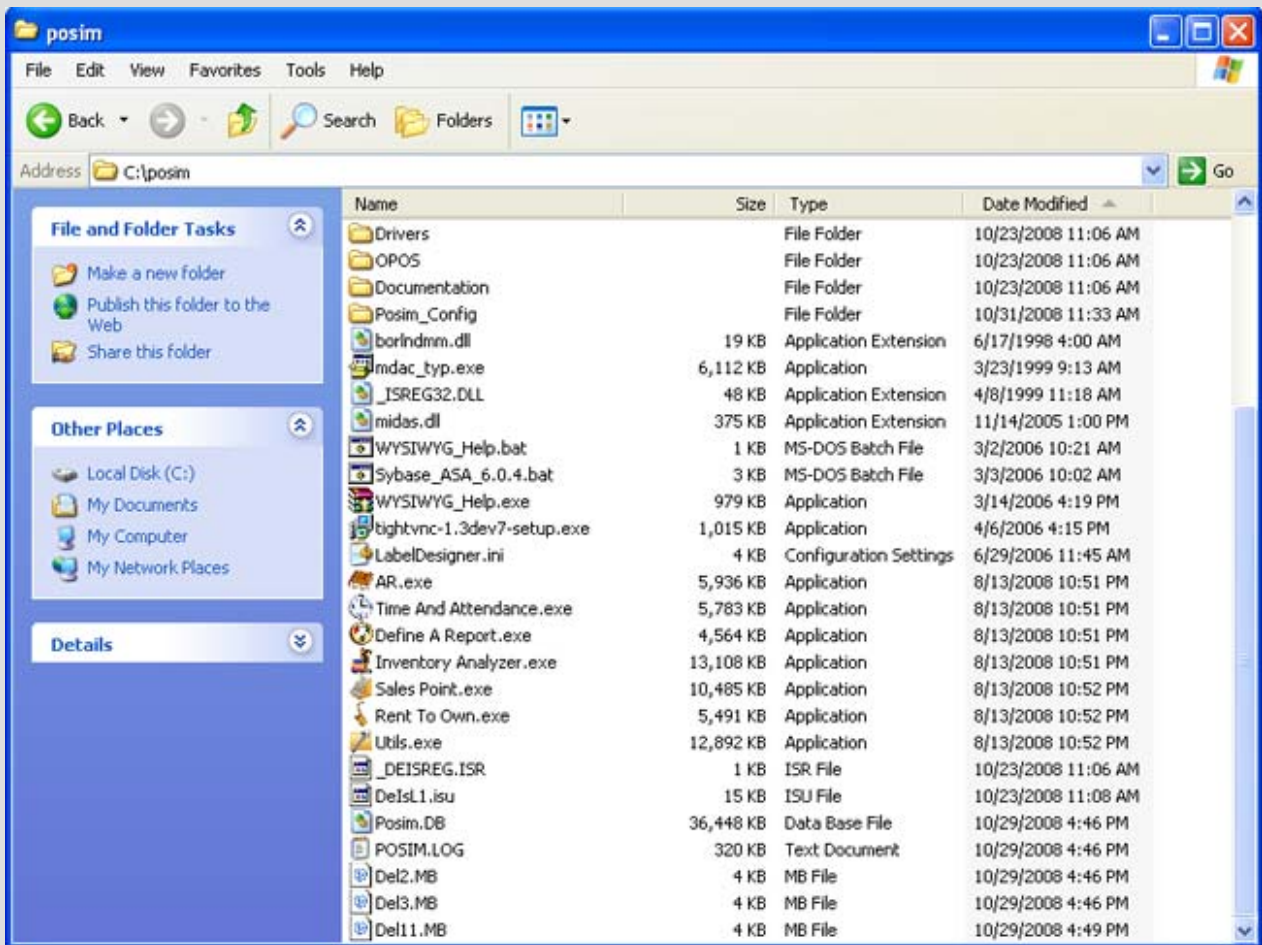
6. Now your changes you make to the database will be recorded in an import ready text file. The text file will be located in the POS•IM Diamond folder >> POS•IM Data folder and is named POS•IM \_record.txt.

**\*Note: you will be able to sell gift cards, but you will not be able to redeem gift cards while using Record Keeping.**

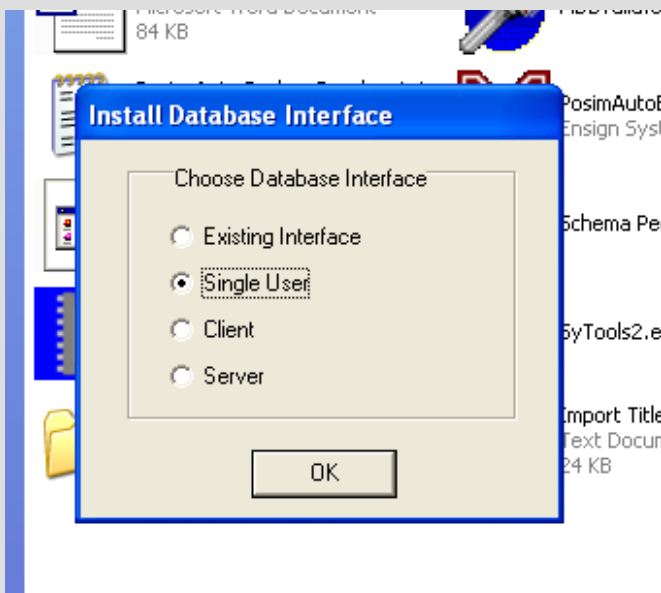
7. When you come back to the store, you will need to import the Record Keeping data into your Live database. The steps below will walk you through the process.
  - a. Take a back up of the Live Database and of the Record keeping Computers database.
    1. Click on the Share on both computers and select the backup POS•IM Database. Click on the Desktop as an easy location to find the back ups. (Backing up the database is just a precaution.)
    2. On your remote Record Keeping computer, open up the back up folder, it should be named, POSIMData-year-month-date-time. Make a copy of the POS•IM \_Record.txt document and take place it on the Live Server computers desktop.
    3. Place the copy of the POS•IM \_record.txt document on a removable drive, network drive or you can email it to the Live Server computer and then paste it on the Desktop.
  - b. Open Inventory Client >> Misc >> Import File.
  - c. Finder will open. Click on Desktop and then double click on the POS•IM \_record.txt.
  - d. Finder will ask you where you would like to put the error log. Select a location and then click open.
  - e. The information will begin to import.
8. When it is finished, checked your processed invoice and/or orders to verify that they imported into your live database.
9. Go to your remote computer and turn Record Keeping off in Sales Client and Inventory Client.
10. Quit the POS•IM share on the remote computer.
11. Go to the POS•IM Navigator and click File >> Share Selector.
  - a. Replace the 127.0.0.1 IP address to the live Sever IP address.
12. Change the Invoice and PO's IDs back if you wish.

### For POS•IM Premier Users:

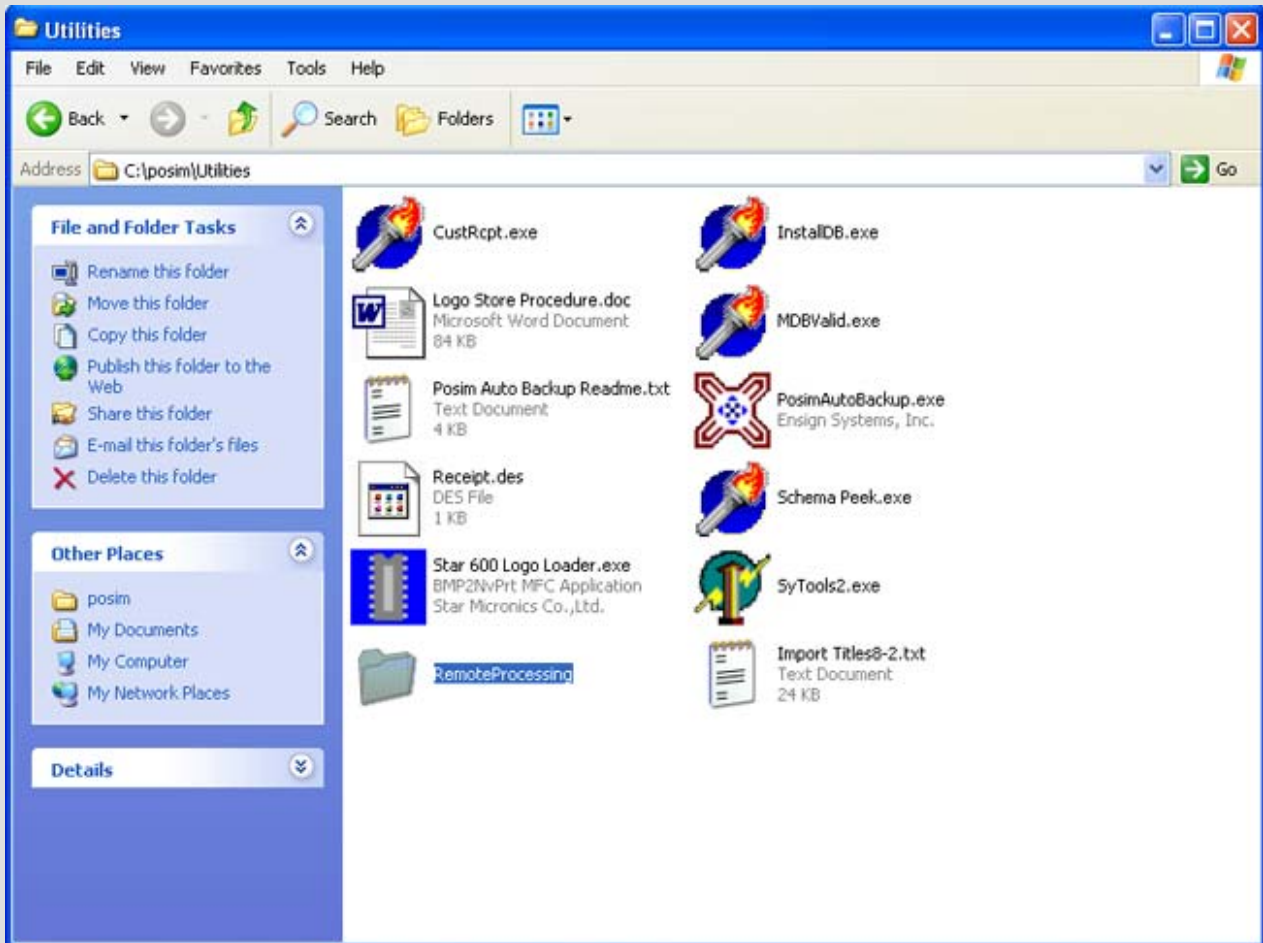
1. Take a back up of your POS•IM .db from your server computer and take it to the remote computer. (You can do this by going into POS•IM Utils >> File >> back up, or by opening the POS•IM folder and taking a copy of the posim.db and the posim .log file.
  - a. On the Remote computer, open the POS•IM folder, usually located in My Computer, C: drive.
  - b. Paste the copy of your live database in the POS•IM folder.



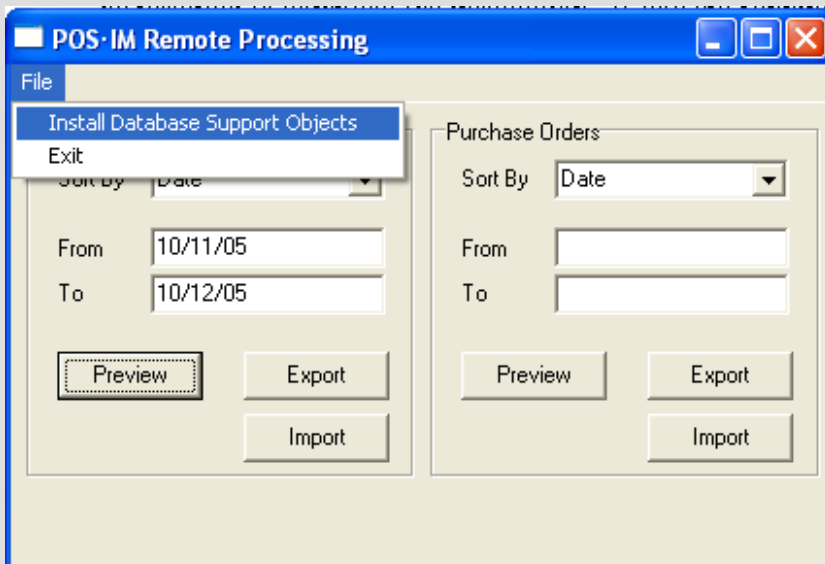
- On the Remote computer, Open the POS•IM Folder >> Utilities folder. Click on Install DB. Select Single User and click OK. Then select Existing Database. The main path should be pointed to your C:\posim\posim.db. Click Okay.



- In the Utilities folder, click on the Remote Processing folder.



4. Double click on the RemoteProcessing.exe. The Remote Processing Screen will appear. Click on File >> Install Database Support Objects. It may take a few seconds.



5. The POS•IM module and the Remote Processing Module will need to be restarted to complete the installation. If you are running Sybase as a windows service, it must also be restarted. To do this, simply close all POSIM applications and reopen them.
6. Open Sales Point on the Remote computer. Click on File >> Share Selector and click on the Register Invoice ID's. Change the Register Working Invoice Prefix and the Processed Invoice Prefix so that it they are different then ID's you may use on the live database.

**Shared User Controls**

Rewards      Serial Numbers      Unfound Items      Add Item

Customer ID    Require    Register Invoice IDs    Layaways    Auto Event IDs    Gift Cards

Central Invoice IDs

W Prefix: ShW      W Suffix: 18      W Size: 6

P Prefix: ShP      P Suffix: 16      P Size: 6

RegisterID	RegisterDesc	WInvPrefix	WInvSuffix	WInvSize
A	Wally's Station	WA	44	6

New Register ID    Remove Register ID

OK    Cancel

7. Repeat this step in the Customer ID Tab, then Click OK.

**Shared User Controls**

Rewards      Serial Numbers      Unfound Items      Add Item

Customer ID    Require    Register Invoice IDs    Layaways    Auto Event IDs    Gift Cards

Customer ID Prefix: SHC

Customer ID Suffix: 2

Customer ID Size: 6

Automatic Company Name

Use POS Window Customer Search

POS Window Customer Search

Customer ID Search Mask Prefix:

Customer ID Search Mask Size:

OK    Cancel

8. Open Inventory Analyzer. Go to File >> Share Selector and click on the P.O. tab. Change the Prefix ID. (You only need to do this if you are making purchase orders while working off site remotely.)

**Shared User Controls**

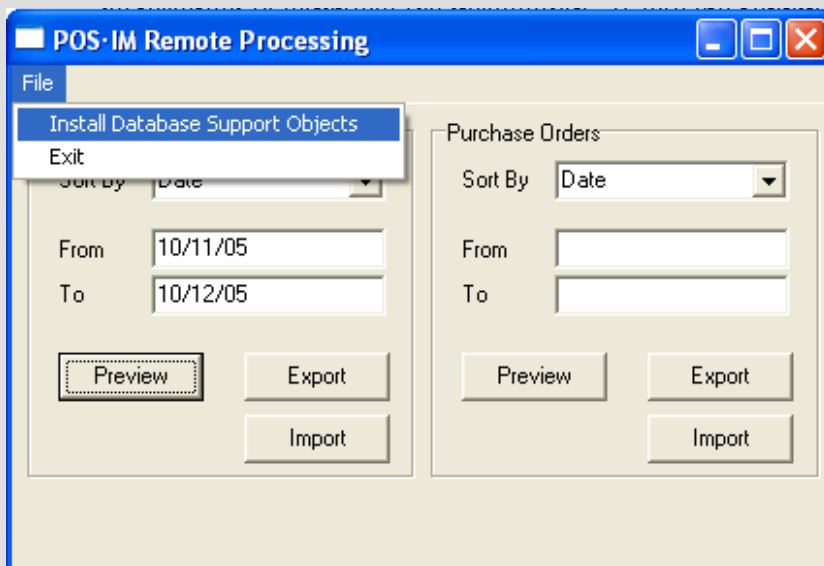
GL 2		Transfers			Transfer Reason Codes		
Item	P.O.	P.O. Defaults	Recv Log	Sales Tax	Pricing	Barcode Reading	GL
Automatic Purchase Order Numbering							
Shared Purchase Order Number							
PO Computer ID	PO Computer Description	PO Prefix	PO Suffix	PO Size	Enabled		
	Shared Purchase Orders	SHD	3	6	<input checked="" type="checkbox"/>		
Customize Purchase Order Numbering							
This is helpful when you have more than one purchasing agent.							

9. Repeat Step 8, but on the Recv Log tab.

**Shared User Controls**

GL 2		Transfers			Transfer Reason Codes		
Item	P.O.	P.O. Defaults	Recv Log	Sales Tax	Pricing	Barcode Reading	GL
Automatic Recv Log ID							
Prefix	SRL	Begin With Number	102				
Size (in characters)	7						
Require Received By							
<input type="checkbox"/> Require Received By							

10. On the remote computer, set up your sales tax by going into Inventory Analyzer >> File >> Shared User Control and select the Sales Tax tab.
11. Once these steps are done, you are now ready to use the Remote Processing program.
  - a. Keep in mind that the copy of the database you are using is an unlicensed database and you will only be allowed 40 usages.
12. To get the Sales into your Live database, you will need to Export Invoices from the Remote Processing program.
  - a. On the Remote Computer, open Sales Point.
  - b. Go to the POS•IM folder on your C:\ drive, Click on the Utilities folder, Click on the Remote Processing Folder, double click to Launch Remote Processing.exe.
  - c. Define which invoices you want exported by filling in the Sort By Date or Invoice Id. Put your search options in the From, and To fields. (EXAMPLE if sort on Date, From may be: 10/01/08 To may be: 10/04/08.
  - d. Click the preview button to make certain you have the correct invoices.
  - e. Click the export button.



f. Name and save the file to the desk top.

**NOTE: Transactions not supported: Invoices with one of these transactions will be rejected, in whole, during the import process.**

- Events manager transactions.
- Layaway transactions.
- Gift card as a method of Payment.

13. Importing the invoices to your Live Server.

- a. Make a back-up of the database before you import any files.
- b. Move the exported file from your remote computers desktop to your computer running POS•IM live database.
- c. Launch any POS•IM Premier module to open the Sybase Database.
- d. Go to the POS•IM folder on the C:\ drive. Open the Utilities folder and open the Remote Processing folder and double click to the Launch Remote Processing.exe.
- e. Click on the import button.
- f. Find the export file that you placed on the desk top in step 12a.
- g. A preview will let you review the invoices before importing them.
- h. Click OK to import. Select a location for your errors and click OK.
- i. If there are errors, click yes to preview.

14. Importing Purchase Orders.

- a. Make a back-up before you import.
- b. Move the exported file from your remote computers desktop to your computer running POS•IM live database.
- c. Launch Inventory Analyzer.
- d. Launch Remote Processing.exe. (to find, follow step 12d above.)
- e. In Remote Processing.exe, click on the import button.
- f. Find the export file that you put on your desk top.
- g. A preview will let you review the orders before importing them.
- h. Click OK to import or Cancel to reselect.

15. On the Remote computer change the Working and Process invoice ids, customer ids and P.O. ID's back.

16. To get the Remote computer working as a client again, go to My Computer >> C:\ drive >> POS•IM folder >> Utilities folder and double click on the Install DB.

- a. Select Client button

b. Select TCP IP

**Note You may want to rename the POS•IM .db and POS•IM .log file located in the POS•IM folder on the remote client to insure that it is no longer working as a single remote client.**