



iVend Retail



Installation Guide






Version: 6.6

November 2019

Table of Contents

Icons	3
Typographic Conventions.....	3
Purpose.....	4
Target Audience.....	4
Hardware and Software Requirements	4
Installation Pre-requisites	5
iVend Components	6
Enterprise Server	6
Store Server	6
Point of Sale.....	6
Integration Service	6
Management Console	6
iVend API	6
Loyalty Customer Portal	8
Installing iVend Retail on Single Machine (Unplugged)	9
Purpose.....	9
Procedure	9
Custom Multi Location Installation	17
Purpose.....	17
Procedure	17
Offline POS Installation	28
Purpose.....	28
Procedure	28
iVend Retail License Activation	37
Activation via Internet	37
Activation via Email	40
iVend Retail Configuration	44
iVend – New Store Initialization (Restore)	45
Replication Service Configuration – At iVend Enterprise	46
Report Web Viewer	49
iVend API	50
Connection Manager	52
Vend Mobile Installation and Setup	54

Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

Purpose

The purpose of this document is to simplify the iVend Retail Software Installation and configuration process.

Target Audience

The target audience of this document are end users and consultants of iVend Retail.

Hardware and Software Requirements

The hardware and software requirement is listed in separate document. Please refer “iVend Retail Hardware & Software Specifications Guide” for detailed hardware and software requirements.

Installation Pre-requisites

The following are the pre-requisite for installing iVend Retail:

- Microsoft Operating System
- Microsoft SQL Server
- Microsoft Office with Access and Excel
- Internet Information Server
- If upgrading from previous iVend Retail versions, create a backup file of all the company's production databases.
- For details on hardware and software requirements, refer to the document "Hardware Software Specifications Guide".

iVend Components

Enterprise Server

The Enterprise Server is a server where enterprise level information is configured. All stores in the enterprise are administered and controlled by the enterprise server. Data from all the stores in an enterprise is collected at Enterprise server.

Store Server

The Store Server is where information is entered about each individual store. The configurations at Store Server are made for administration and control of Point of Sale within that store. Master record information is synchronized to and from the Enterprise Server at this server. This primarily installs database for the store and the replication service on the machine.

Point of Sale

Each register has a point of sale client installed through which all forms of sales transactions are conducted.

Integration Service

Integration Service provides the setting and means to communicate data to and from the Enterprise Server and to monitor that activity.

Management Console

Management console connects to either Enterprise Server or Store Server for providing the User Interface for the data store on these servers. Based on the database server it is connected to, from Management Console settings for the Enterprise or Store can be defined. Inventory transactions including inventory movement, pricing and discounts can be managed from this User Interface.

iVend API

iVend API's enables users to synchronize data between iVend Mobile and iVend Enterprise and also allows user to integrate iVend with third party applications or ERP's. This would also install iVend Web Report Viewer which would allow the user to view iVend Reports and Dashboards through a web browser.

iVend Retail seamlessly integrates with the following ERP Solutions:

- SAP B1
- SAP IS Retail
- Sage 300
- Sage X3
- Microsoft Dynamics 365 Business Central

When upgrading the system from iVend Retail 6.5.6 to iVend Retail 6.6 API Application Pool Alias needs to be changed from iVendAppPool to iVendApiPool.

The following are the steps to change iVend API Application Pool Alias in case of upgrading the system from iVend Retail 6.5.6 to iVend Retail 6.6.

Step 1. Issue command inetmgr on run window (window key on keyboard + R). This opens IIS manager.

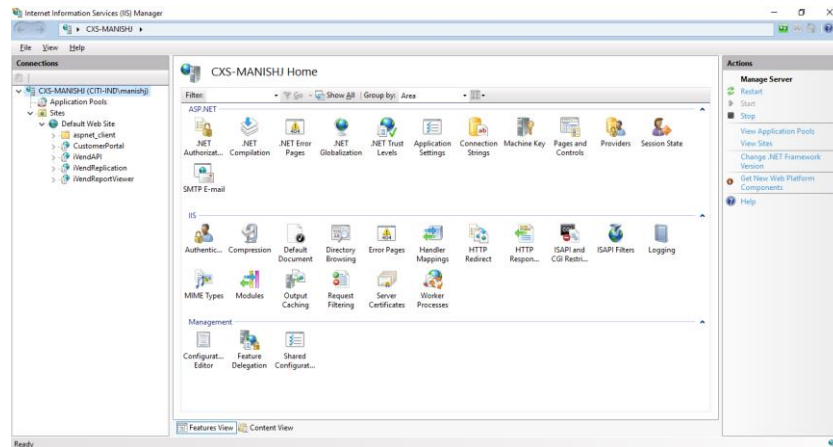


FIGURE 1: INETMGR

Step 2. Click on iVend API

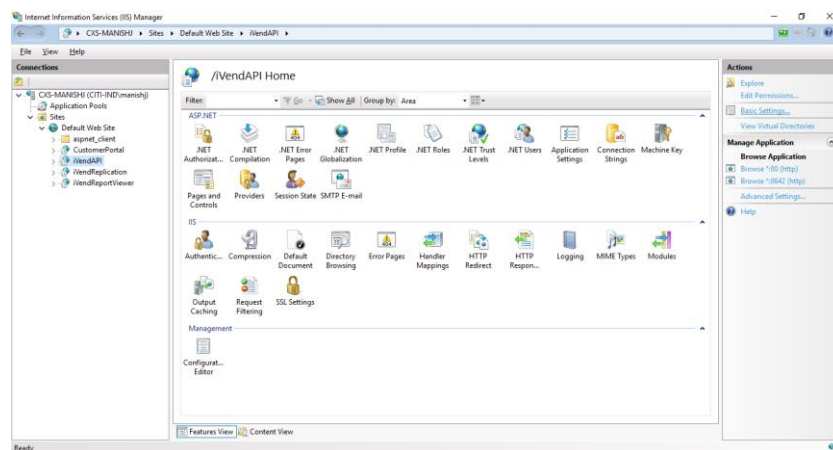


FIGURE 2: IVEND API

Step 3. Click on Base Settings. Edit Application window opens.

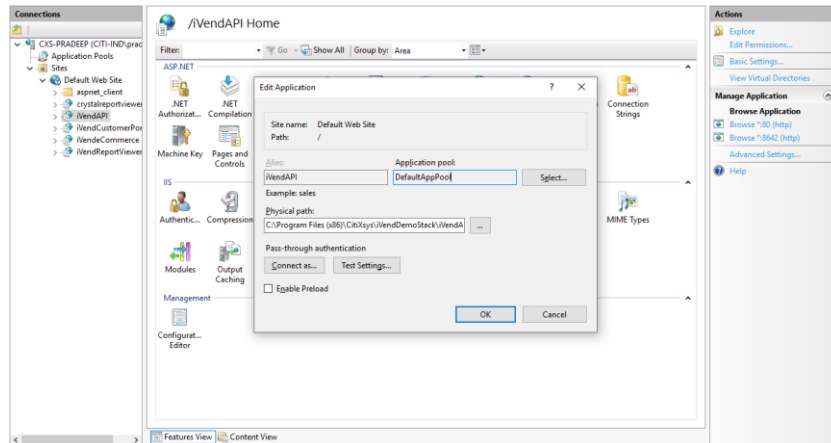


FIGURE 3: iVEND API BASE SETTINGS

Step 4. Change the Application pool to iVendApiPool.

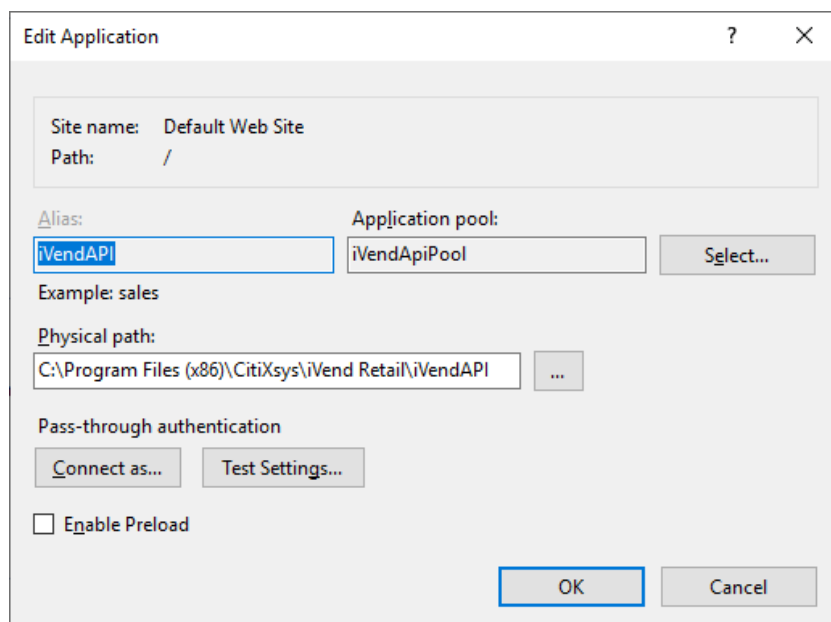


FIGURE 4: APPLICATION POOL

Step 5: After completing the configurations restart IIS by issuing command iisreset on command line interface (opened as administrator).

Loyalty Customer Portal

iVend Loyalty Customer Portal enables retailer's customer to see and manage their loyalty points and transaction information.

Installing iVend Retail on Single Machine (Unplugged)

Purpose

1. For setting up the demo systems.
2. For installing the Single Store, Single POS production environment.
3. Installation includes Enterprise Server, Management Console, Point of Sale and iVend APIs.

Procedure

1. Run setup.exe. This will launch the installation wizard.
2. Follow the instructions on the window to complete the installation of iVend Retail.

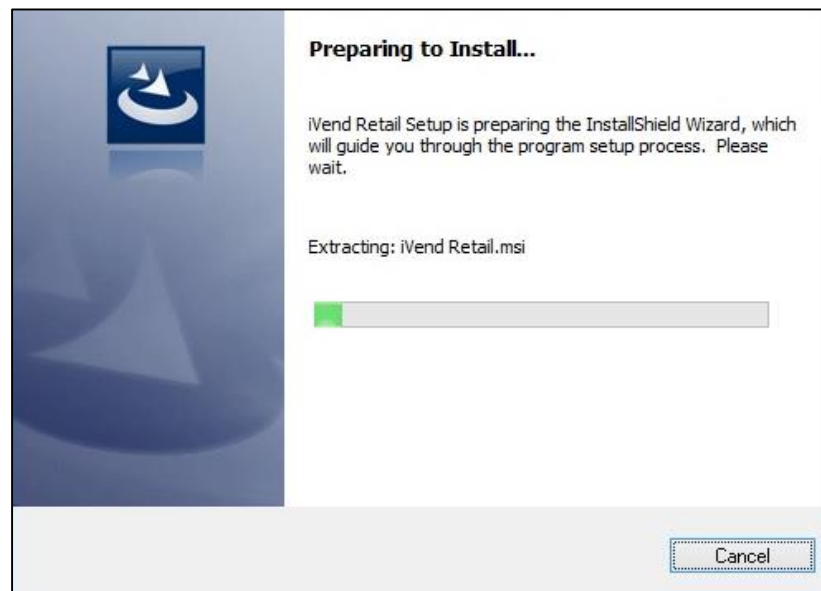


FIGURE 5 - SETUP WIZARD INITIALIZATION WINDOW

3. In the following window, click **Next**.

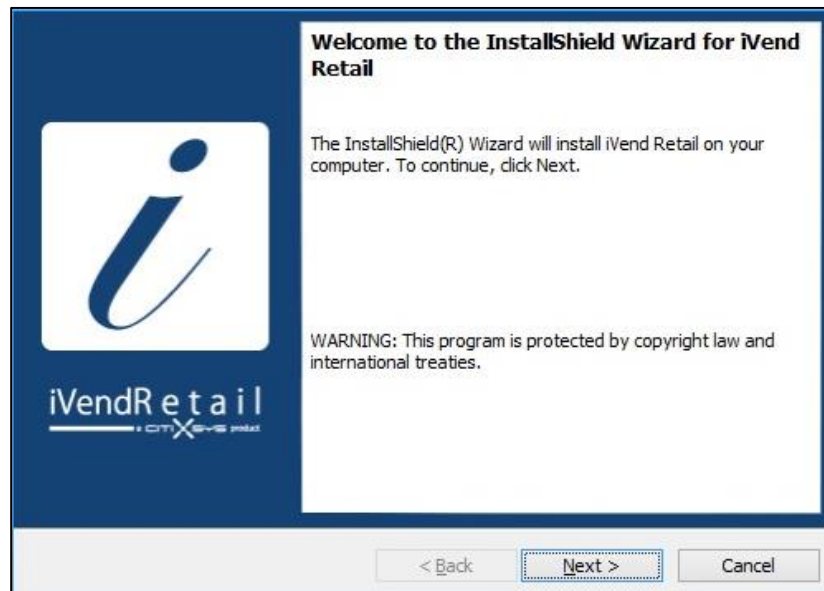


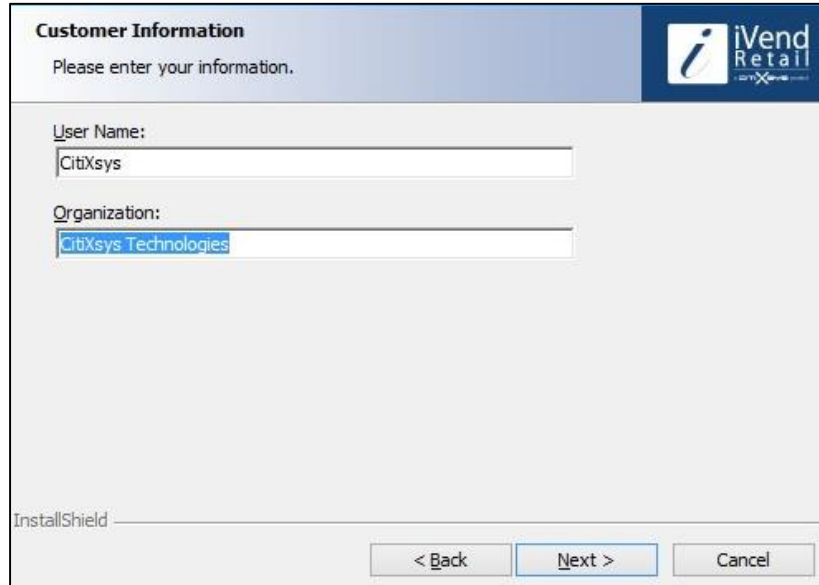
FIGURE 6 - SETUP WIZARD WELCOME WINDOW

4. In the **License Agreement** window, select “*I accept the terms in the license agreement*”. Click **Next**.



FIGURE 7 - SETUP WIZARD LICENSE AGREEMENT WINDOW

5. In the **Customer Information** window, enter User Name and Organization name. Click **Next**.



Customer Information

Please enter your information.

User Name:
CitiXsys

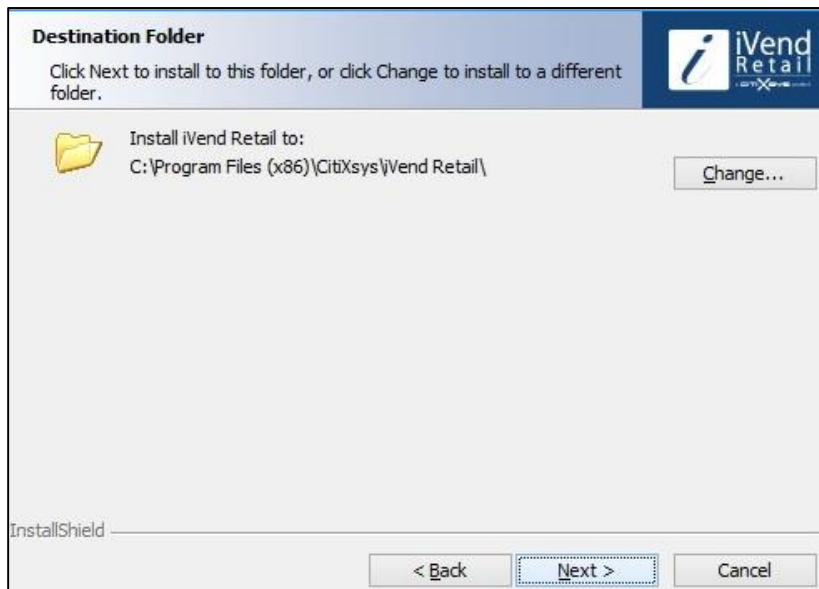
Organization:
CitiXsys Technologies

InstallShield

< Back Next > Cancel

FIGURE 8 - COMPANY/USER INFORMATION WINDOW

6. In the **Destination Folder** window, select **Change** button to change the installation location and click **Next**.



Destination Folder

Click Next to install to this folder, or click Change to install to a different folder.

Install iVend Retail to:
C:\Program Files (x86)\CitiXsys\iVend Retail\

Change...

InstallShield

< Back Next > Cancel

FIGURE 9 - DESTINATION FOLDER WINDOW

- In [Installation Mode Selection](#) window, select [Single Machine Installation](#) icon.

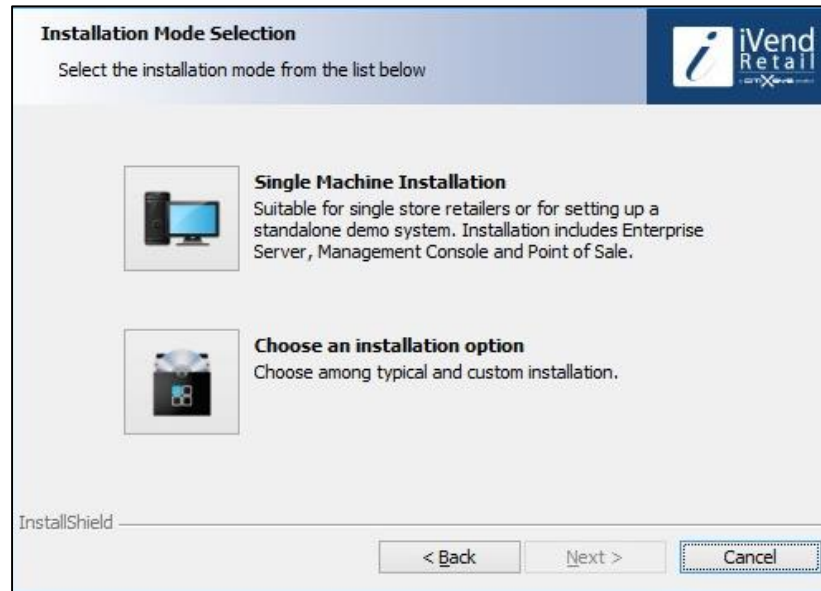


FIGURE 10 - INSTALLATION MODE SELECTION WINDOW

- In the [Database Setup Selection](#) window, select [Database Process Mode](#) and click [Next](#).
 - Create New Database:** Select this option to create a production database.
 - Use Existing Database:** Select this option to use the existing iVend database for this installation.
 - Create Demo Database:** Select this option to set up a demo database.

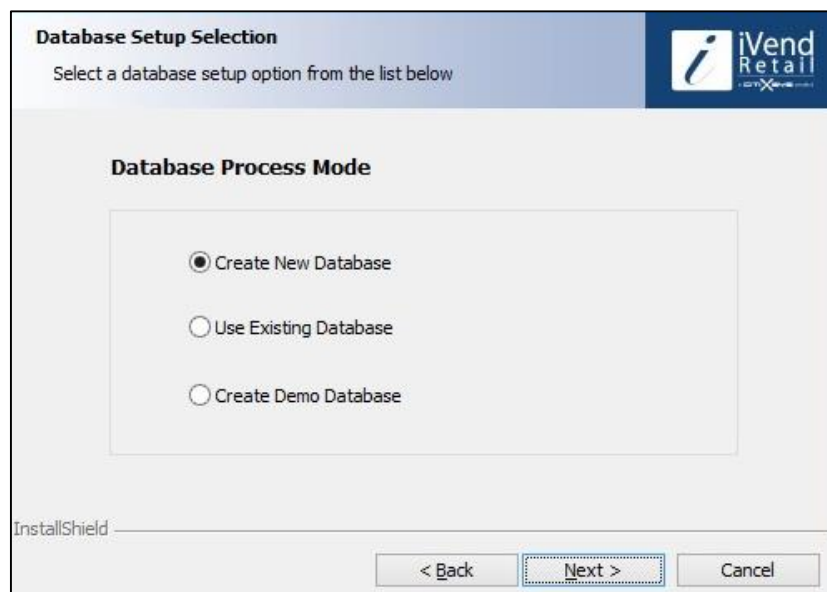


FIGURE 11 - DATABASE SETUP SELECTION WINDOW

- If installer does not find IIS Server installation on local machine, then an option to install IIS Server is shown to the user.
- In the [Database Server](#) window, enter the following information and click [Next](#).

- Database Server: Is SQL Server name on which iVend Retail Database will be installed.
- Login Id: Is login username for connecting to database.
- Password: Is login password for connecting to database.
- Database Name: Is desired database name for iVend Retail.

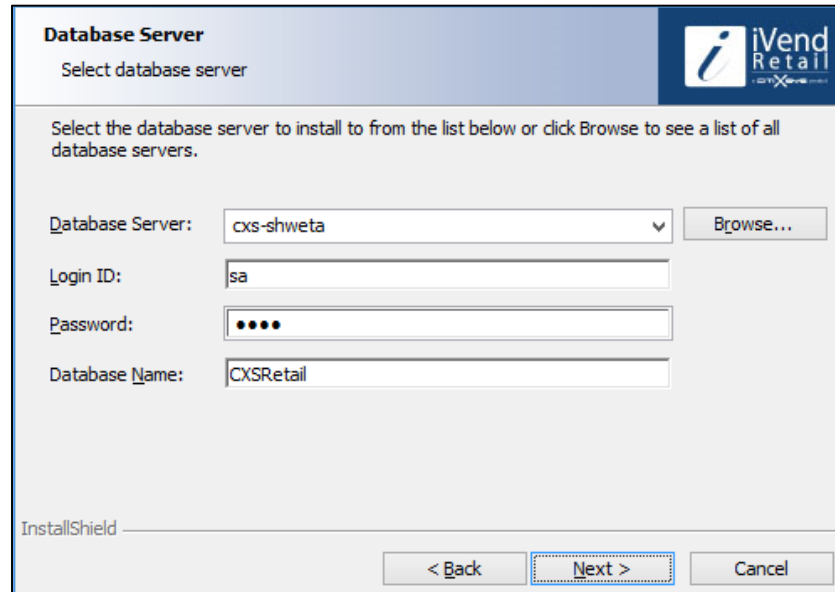


FIGURE 12 - DATABASE SERVER WINDOW

10. In the **Customer Portal Database Server** window, enter the following information and click **Next**.

- Database Server: Is SQL Server name on which iVend customer portal Database will be installed.
- Login Id: Is login username for connecting to database.
- Password: Is login password for connecting to database.
- Database Name: Is desired customer portal database name.

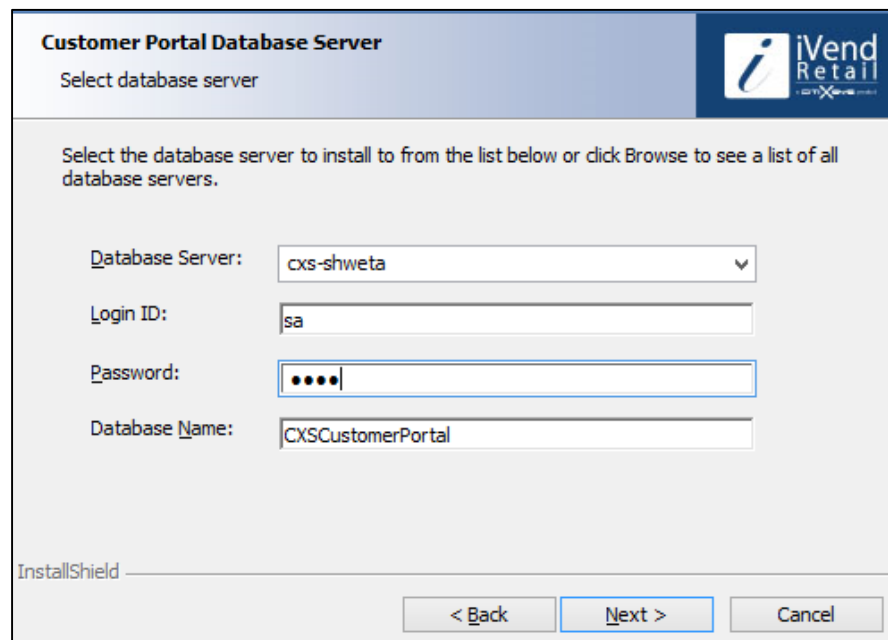


FIGURE 13: CUSTOMER PORTAL DATABASE SERVER

11. In the **Ready to Install** window, click **Next**.

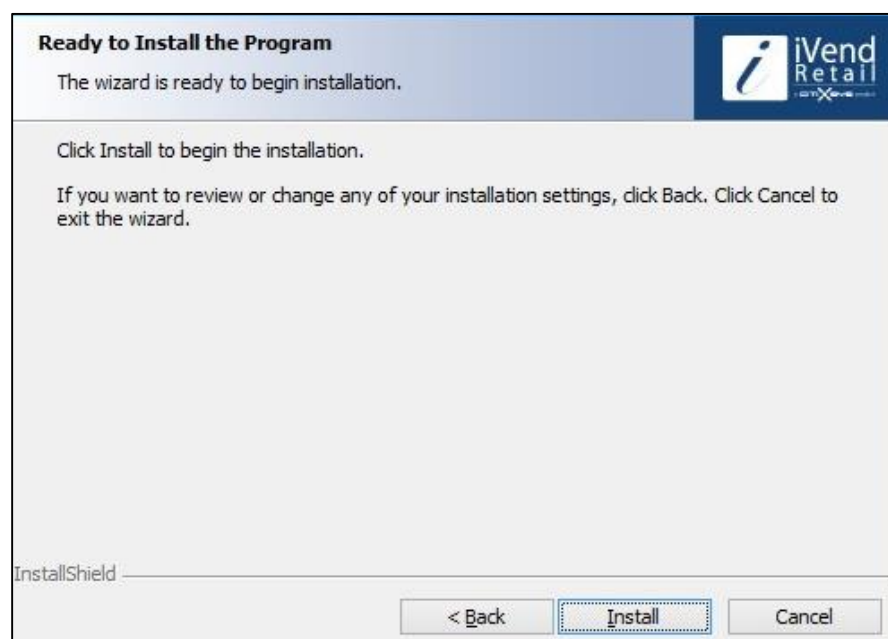


FIGURE 14 - INSTALL WINDOW

12. Installer will run the installation process and would copy the files and database scripts.

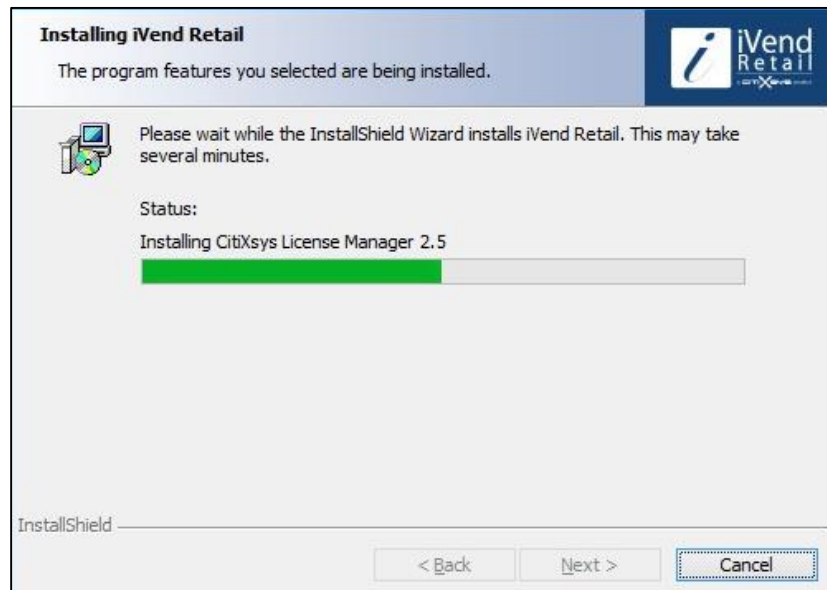


FIGURE 15 - COPYING FILES

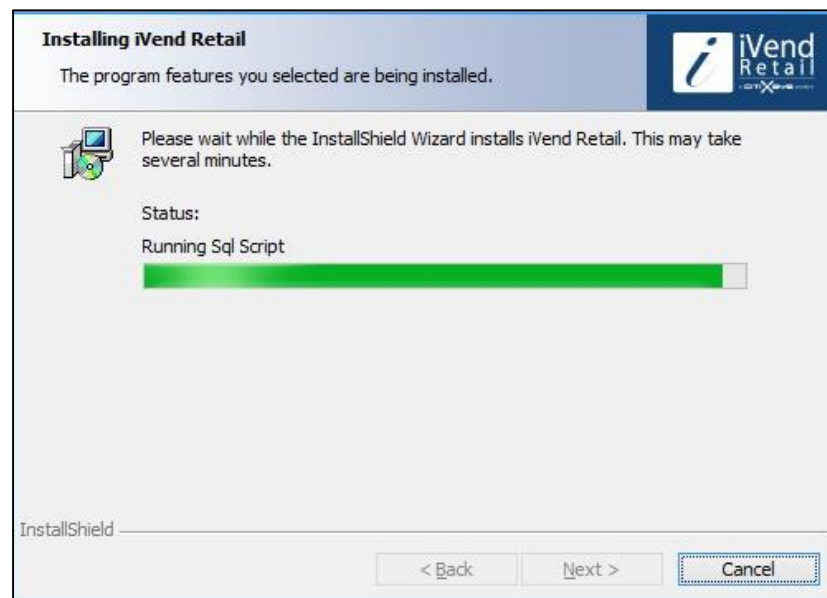


FIGURE 16 - EXECUTING DATABASE SCRIPTS

13. In the following window, click **Finish** to complete the installation.



FIGURE 17 - INSTALLATION COMPLETION WINDOW

Custom Multi Location Installation

Purpose

1. This option installs an instance of the iVend Retail **Enterprise Server** at the head office or a **Store Server** at the store.
2. This option installs an instance of the iVend Retail **Enterprise Server** at the head office.
3. Installing iVend Management Console and Point of Sale.

Procedure

1. Run setup.exe. This will launch the installation wizard.
2. Follow the instructions to complete the installation of iVend Retail.

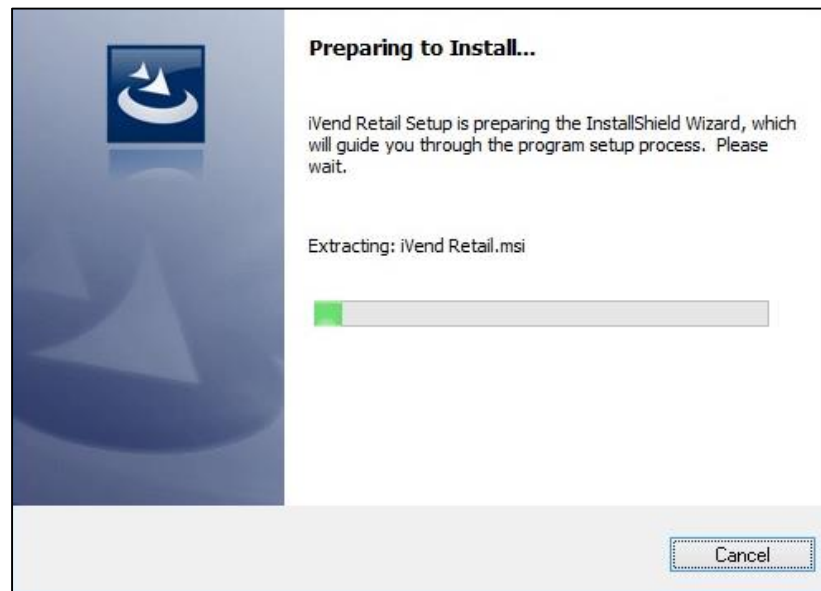


FIGURE 18 - SETUP WIZARD INITIALIZATION WINDOW

3. In the following window, click [Next](#).

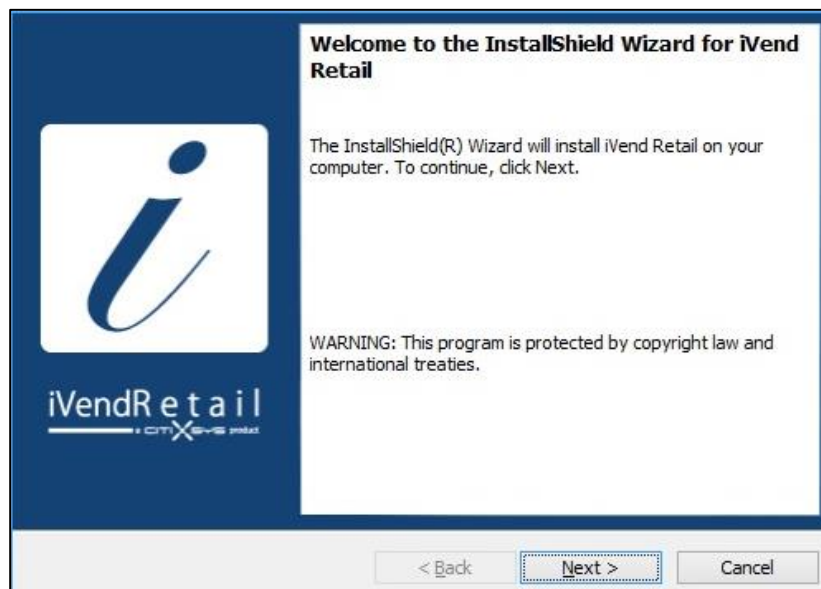


FIGURE 19 - SETUP WIZARD WELCOME WINDOW

4. In the **License Agreement** window, select "I accept the terms in the license agreement". Click **Next**.

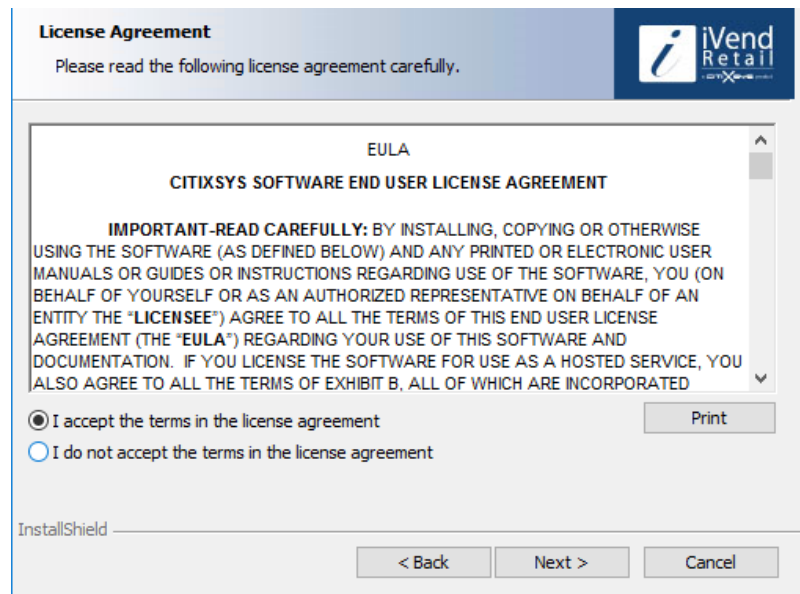


FIGURE 20 - SETUP WIZARD LICENSE AGREEMENT WINDOW

5. In the **Customer Information** window, enter **User Name** and **Organization name**. Click **Next**.

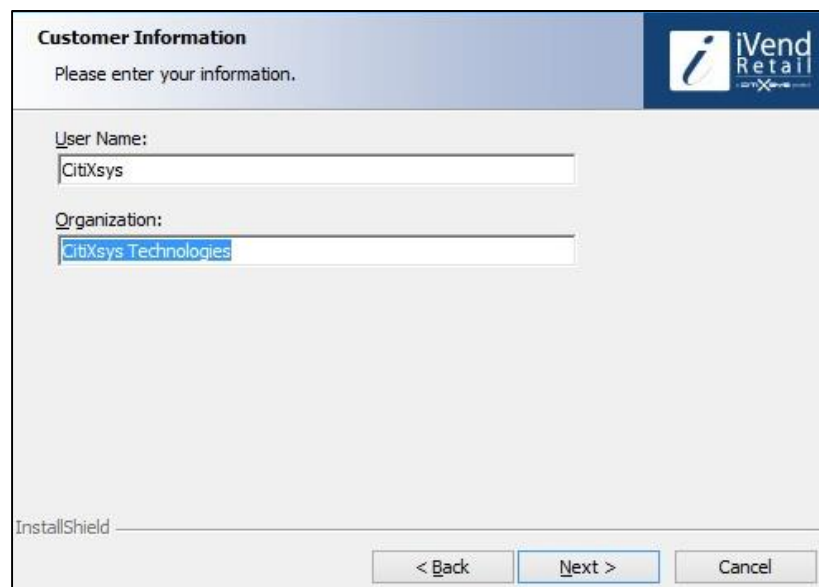


FIGURE 21 - COMPANY/USER INFORMATION WINDOW

- In the **Destination Folder** window, select **Change** button to change the installation location and click **Next**.

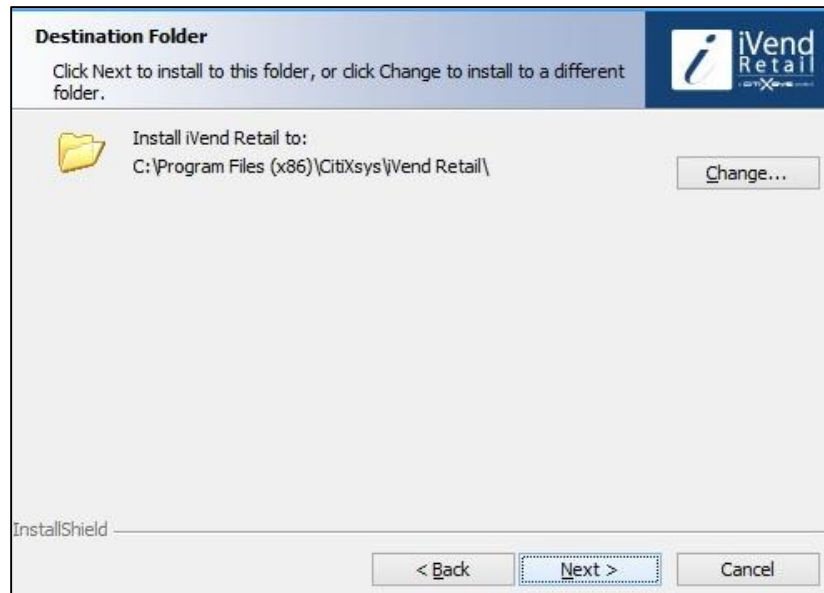


FIGURE 22 - DESTINATION FOLDER WINDOW

- In **Installation Mode Selection** window, select "Choose an Installation option" icon.

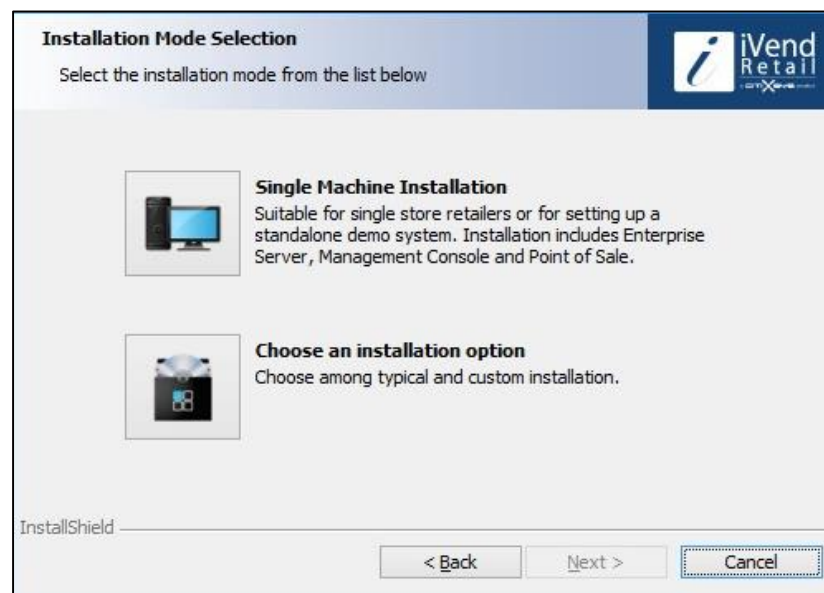


FIGURE 23 - INSTALLATION MODE SELECTION WINDOW

8. In the **Installation Option** window, select one of the options based on the following:

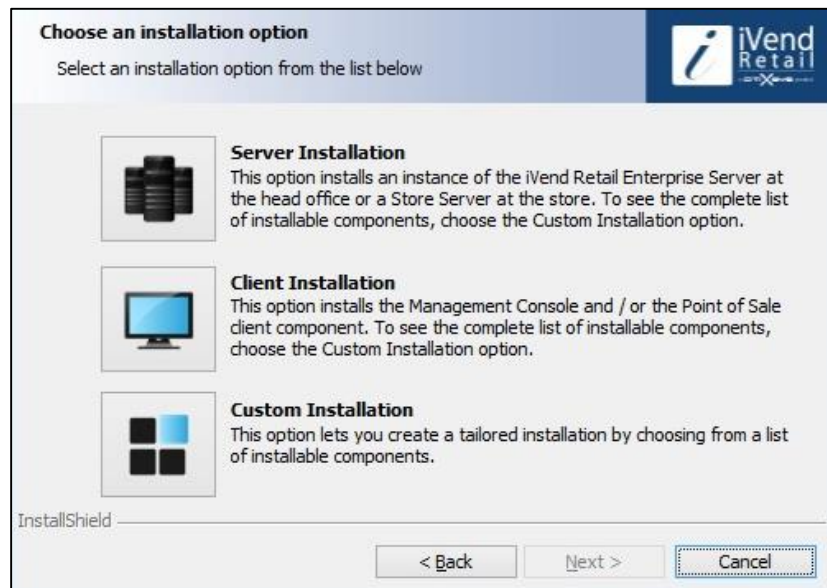


FIGURE 24 - INSTALLATION OPTION WINDOW

- **Server Installation:** Select this option to install iVend Enterprise or iVend Store on the current machine without the client components like Management Console or iVend POS. This will also give an option to install iVend APIs along with other server components. Select iVend APIs as component to install if you would like to connect iVend Mobile to your stores or enterprise server.

For Integration of iVend with SAP B1, the “iVend for SAP B1 connector” is in-built in iVend Retail installer.

For integration with other ERP solutions, the installer for “ERP Connector” is available for download from CitiXsys knowledge portal location <https://knowledge.citixsys.com/downloads>.

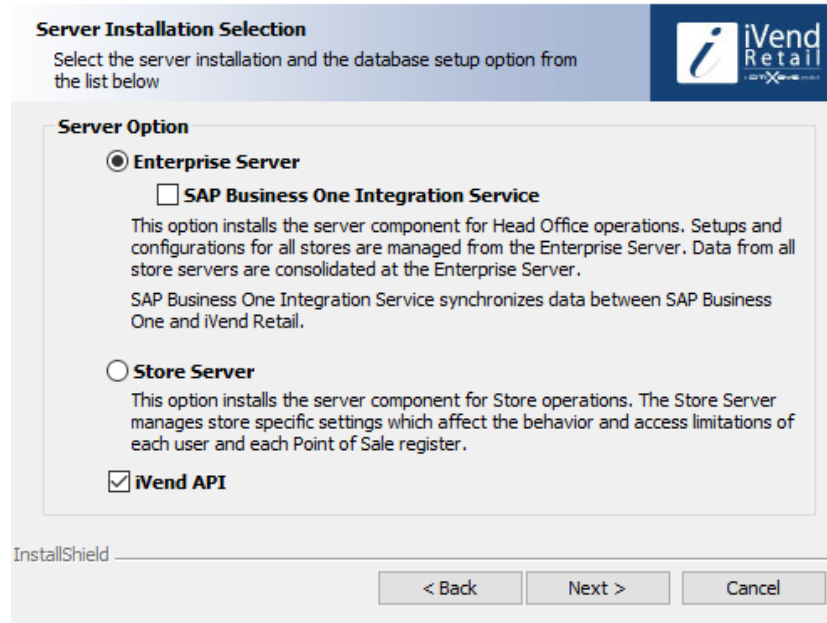


FIGURE 25 - SERVER INSTALLATION OPTION WINDOW

iVend Retail seamlessly integrates with the following ERP Solutions:

- SAP B1
- SAP IS Retail
- Sage 300
- Sage X3
- Microsoft Dynamics 365 Business Central

The iVend connector for the above ERP is available at CitiXsys knowledge portal. The installation and configuration documents for the above ERP Solutions is available at the following location on CitiXsys knowledge portal:

- SAP B1:
- SAP IS Retail :
- Sage 300:
- Sage X3:
- Microsoft Dynamics 365 Business Central:

The iVend connector for Magento is also available at CitiXsys knowledge portal.

- **Client Installation:** Select this option to install iVend Management Console or iVend POS only on the current machine.

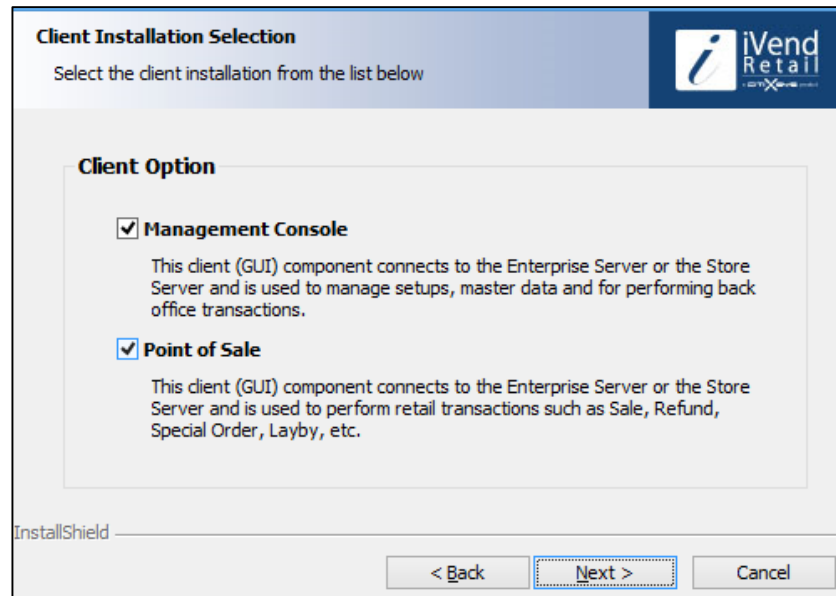


FIGURE 26 - CLIENT INSTALLATION OPTION WINDOW

- **Custom Installation:** Select this option to install both iVend server and client components on the current machine.



FIGURE 27 - CUSTOM INSTALLATION OPTION WINDOW

9. If the **Customer Portal** checkbox (as shown in the Figure 23) is selected then clicking **Next** gives two options for installation; Local Install, and Web Install.

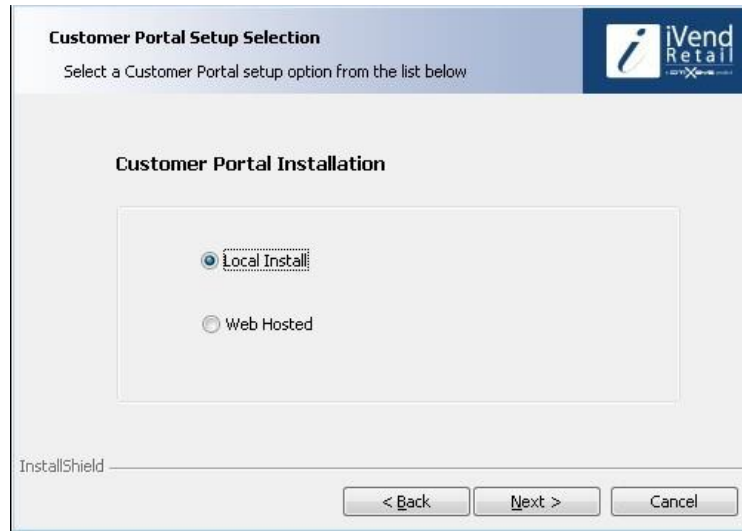


FIGURE 28 CUSTOMER PORTAL SETUP SELECTION WINDOW

- In the **Customer Portal Setup Selection** window, select one of the options based on the following:
 - **Local Install:** The Local Install option installs the Customer Portal Files and Database Scripts then executes them before beginning the installation process.
Selecting the Local Install radio button advances you through the *Database Setup Selection > Database Server > Customer Portal Database Server > Ready to Install Program* window.
 - Web Hosted:** Choose this option to dump the Customer Portal application files and Database Scripts on local machine then begin the installation process.

Selecting the Web Hosted radio button advances you through the *Database Setup Selection > Database Server > Ready to Install Program* screen.

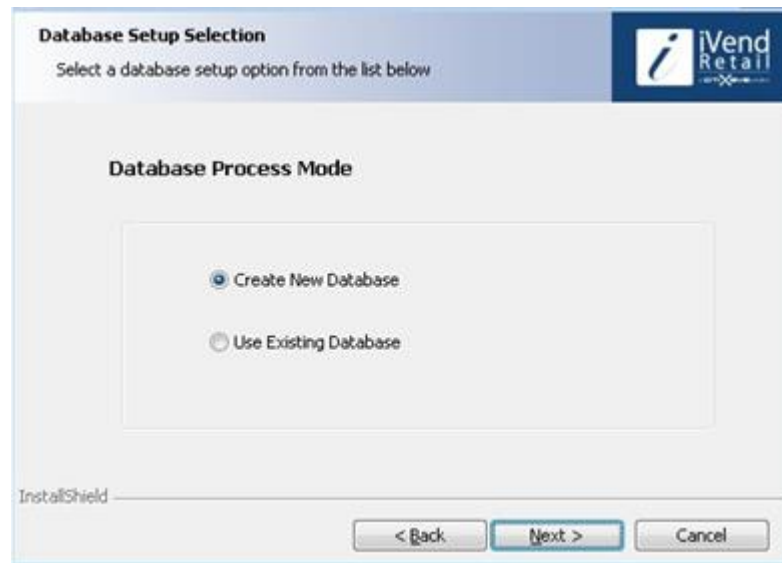


FIGURE 29 DATABASE SETUP SELECTION



Note

Selecting the Create New Database or Use Existing Database radio button takes you to the Database Server window you can enter the database credentials as guided below.

10. In the **Database Server** window, enter the following information and click **Next**.

- Database Server
- Login Id
- Password
- Database Name

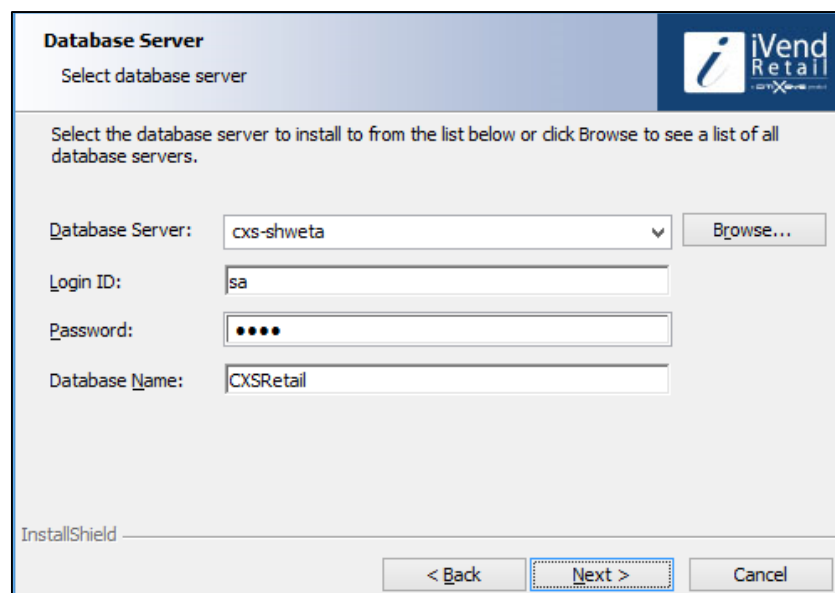


FIGURE 30 - DATABASE SERVER WINDOW

11. In the **Customer Portal Database Server** window, enter the following information and click **Next**.
 - Database Server: This is the server where iVend database is to be created.
 - Login Id: Is Login id for connecting to SQL Server.
 - Password: Is password for connecting to SQL Server.
 - Database Name: Is desired database name of iVend Retail database.

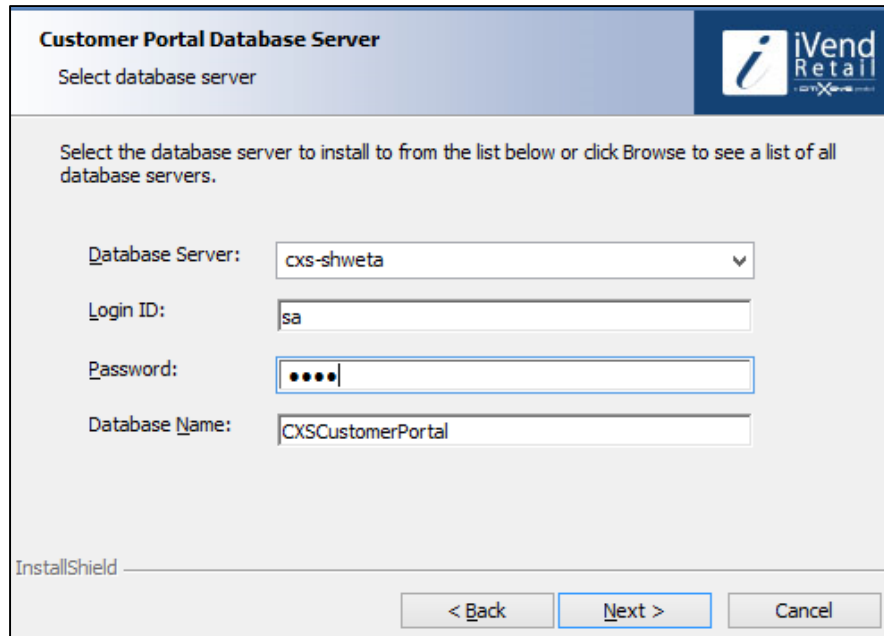


FIGURE 31: CUSTOMER PORTAL DATABASE SERVER

12. In the **Ready to Install** window, click **Next**.

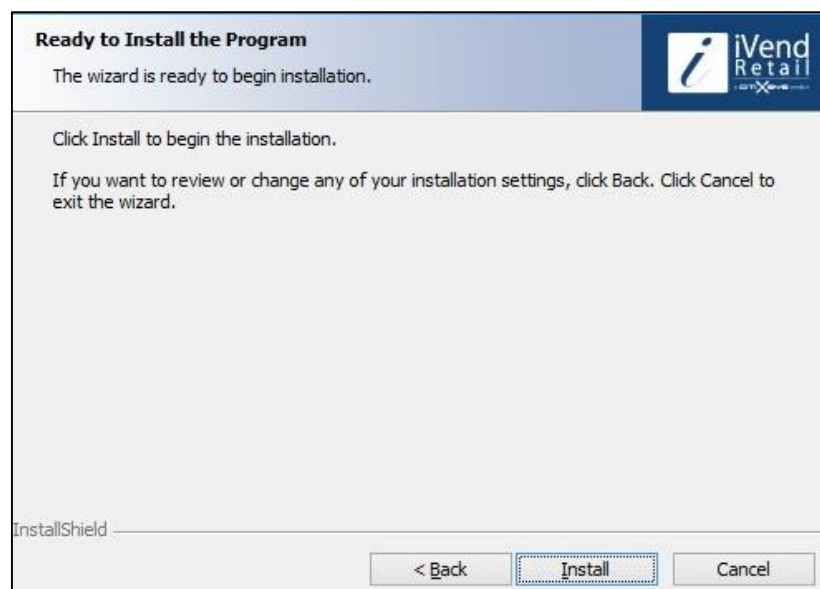


FIGURE 32 - READY TO INSTALL WINDOW

13. Installer will run the installation process and would copy the files and database scripts.

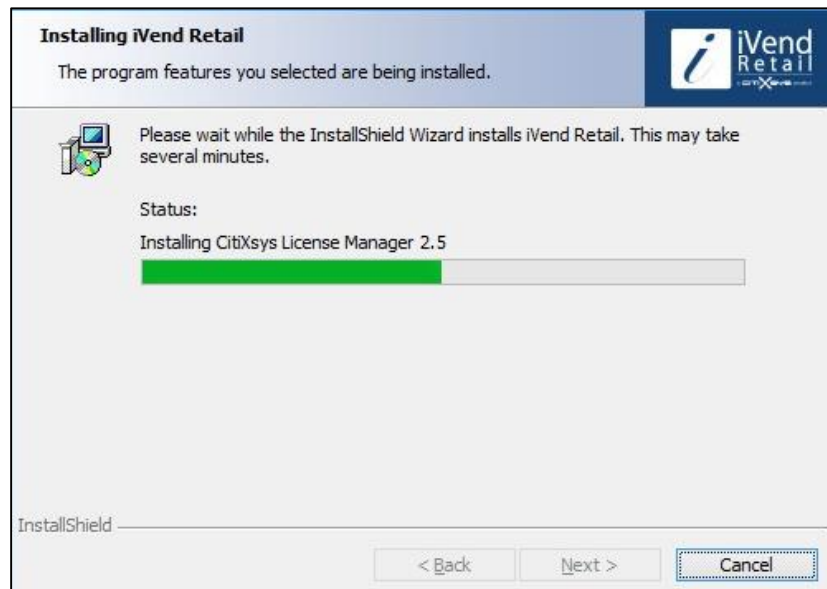


FIGURE 33 - COPYING FILES

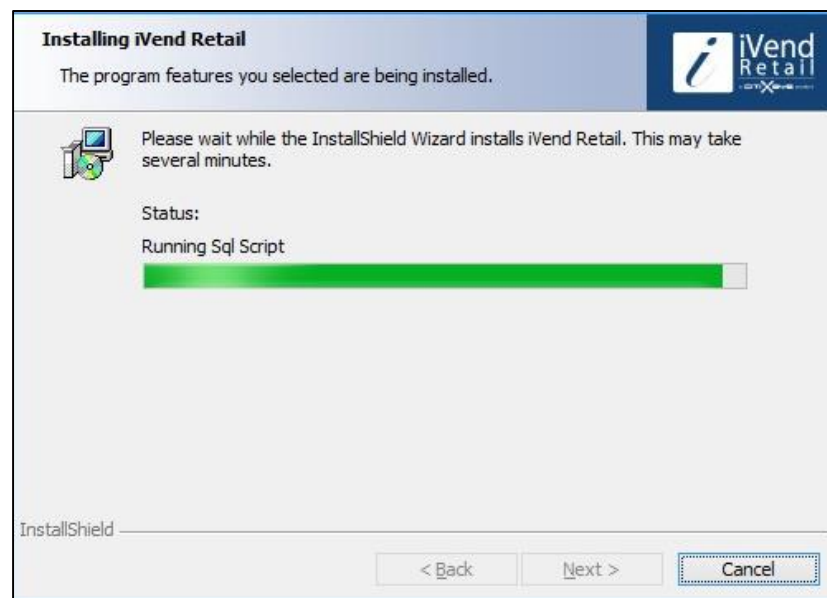


FIGURE 34 - EXECUTING DATABASE SCRIPTS

14. In the following window, click **Finish** to complete the installation.



FIGURE 35 - INSTALLATION COMPLETION WINDOW

After successful installation, configure the Point of Sale, the Management Console and Integration Service credentials with help of "iVend Configuration Manager". Please refer to the "iVend Retail Configuration" section.

Offline POS Installation

Purpose

The option to install POS is available in Custom Installation section and to configure Offline POS is available in the Connection Manager. At planning stage for upgrading the current iVend Retail 6.5.6 to iVend Retail 6.6, consider Offline POS re-implementation for all the existing offline POS. The following are some of the changes made in for supporting offline POS in iVend Retail 6.6:

1. Offline POS no longer has the embedded database. The Offline POS now runs on Microsoft SQL Express edition.
2. SQL Server is required to run Offline POS.
3. Create Offline POS only from the Enterprise Management Console; offline POS cannot be created from Store.
4. For Offline POS, perform Till Remove and Till Close only from the Offline POS and not from the Store.

Procedure

1. Run setup.exe. This will launch the installation wizard.
2. Follow the instructions to complete the installation of iVend Retail.

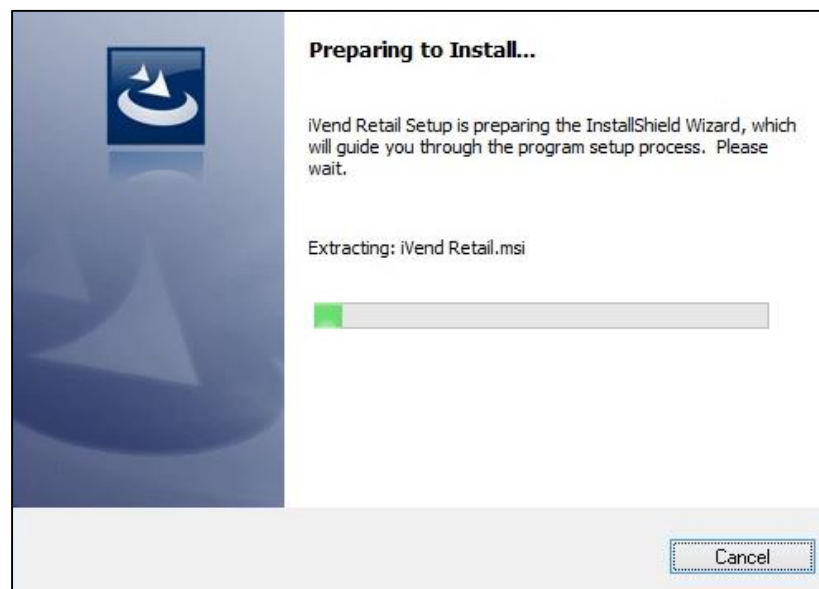


FIGURE 36 - SETUP WIZARD INITIALIZATION WINDOW

3. In the following window, click [Next](#).

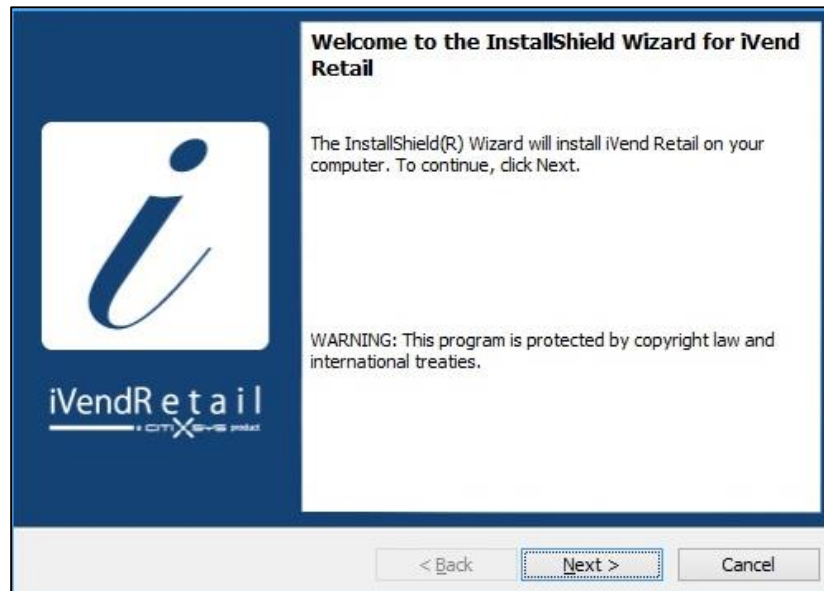


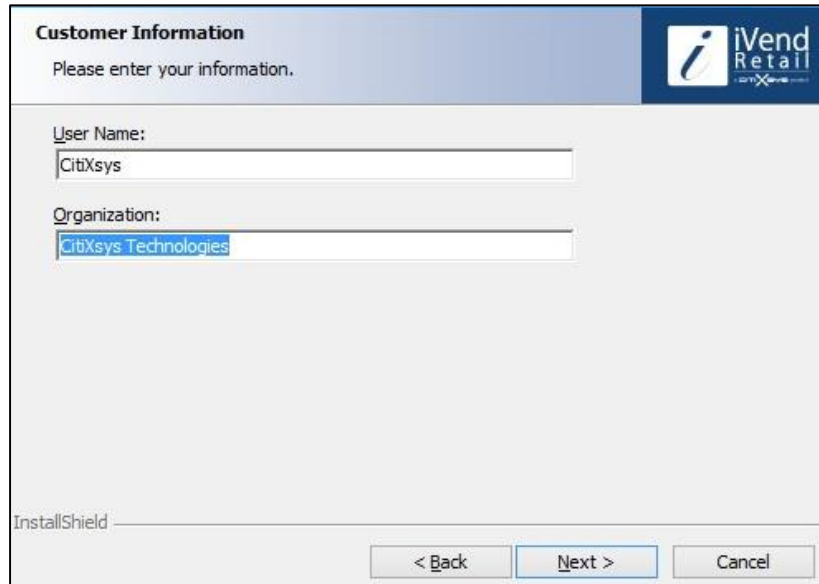
FIGURE 37 - SETUP WIZARD WELCOME WINDOW

4. In the [License Agreement](#) window, select "I accept the terms in the license agreement". Click Next.



FIGURE 38 - SETUP WIZARD LICENSE AGREEMENT WINDOW

5. In the [Customer Information](#) window, enter [User Name](#) and [Organization name](#). Click Next.



Customer Information

Please enter your information.

User Name:
CitiXsys

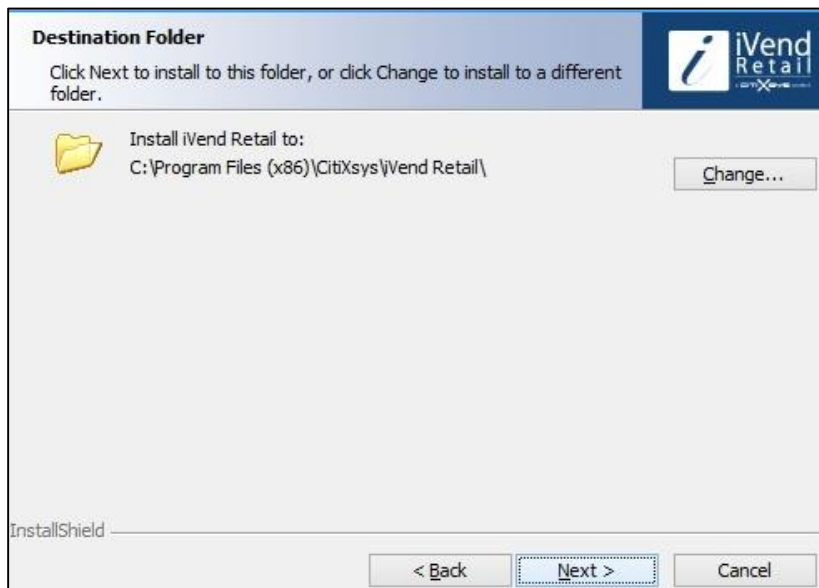
Organization:
CitiXsys Technologies

InstallShield

< Back Next > Cancel

FIGURE 39 - COMPANY/USER INFORMATION WINDOW

6. In the **Destination Folder** window, select **Change** button to change the installation location and click **Next**.



Destination Folder

Click Next to install to this folder, or click Change to install to a different folder.

Install iVend Retail to:
C:\Program Files (x86)\CitiXsys\iVend Retail\

Change...

InstallShield

< Back Next > Cancel

FIGURE 40 - DESTINATION FOLDER WINDOW

- In **Installation Mode Selection** window, select “Choose an Installation option” icon.

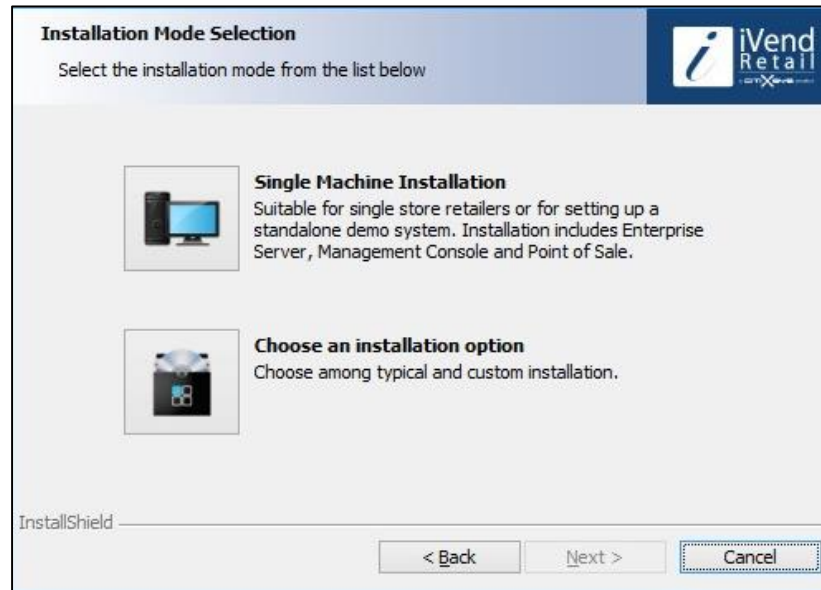


FIGURE 41 - INSTALLATION MODE SELECTION WINDOW

- In the **Installation Option** window, select one of the options based on the following:

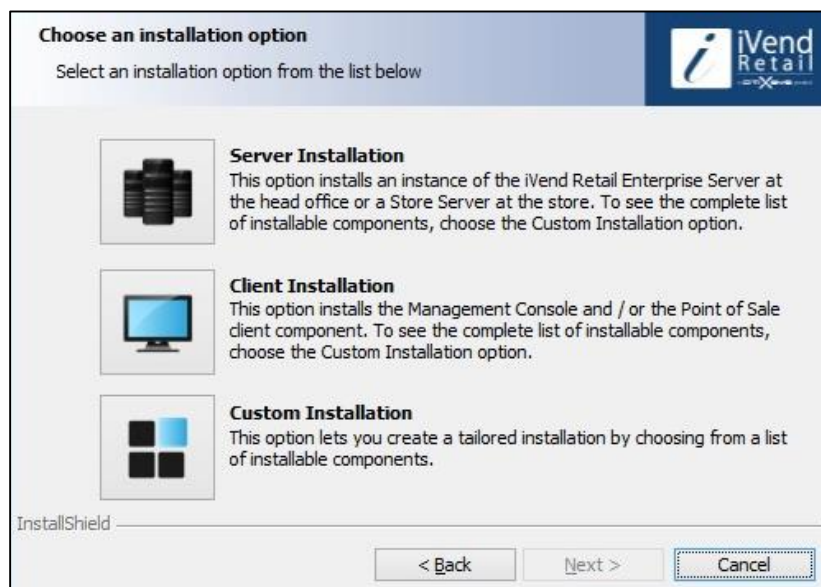


FIGURE 42 - INSTALLATION OPTION WINDOW

- **Custom Installation:** Select this option to install iVend API /Report Web Viewer and Point of Sale.

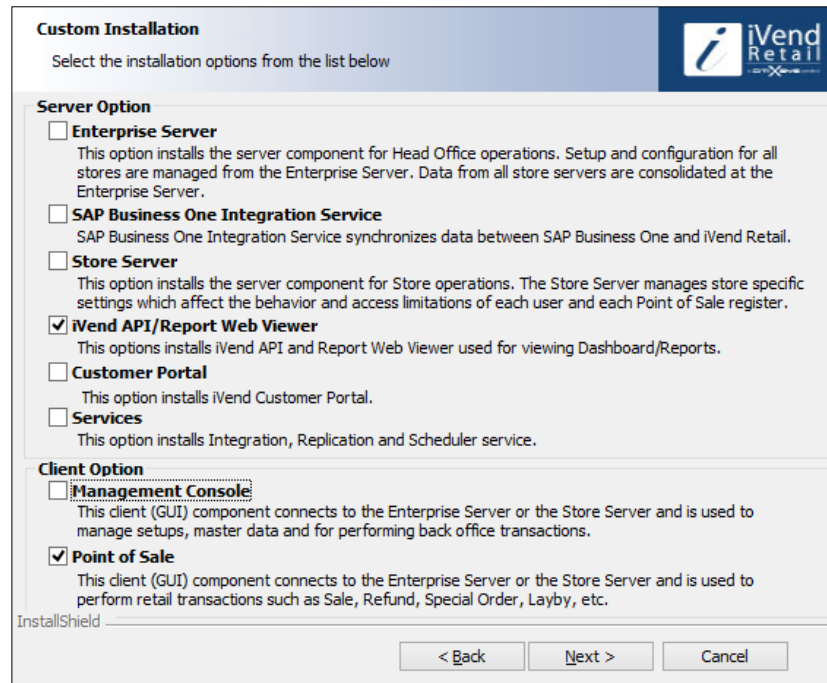


FIGURE 43 CUSTOM INSTALLATION

9. Installer will run the installation process and would copy the files and database scripts.

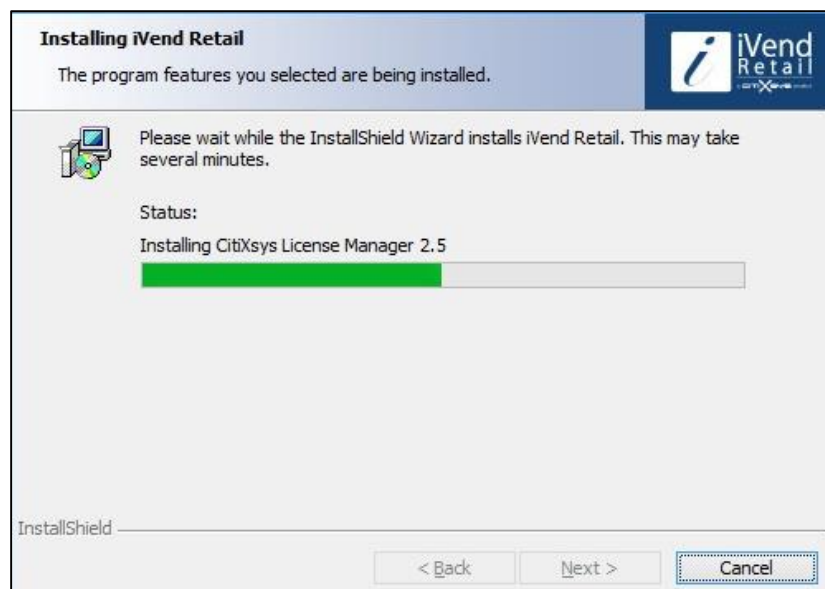


FIGURE 44 - COPYING FILES

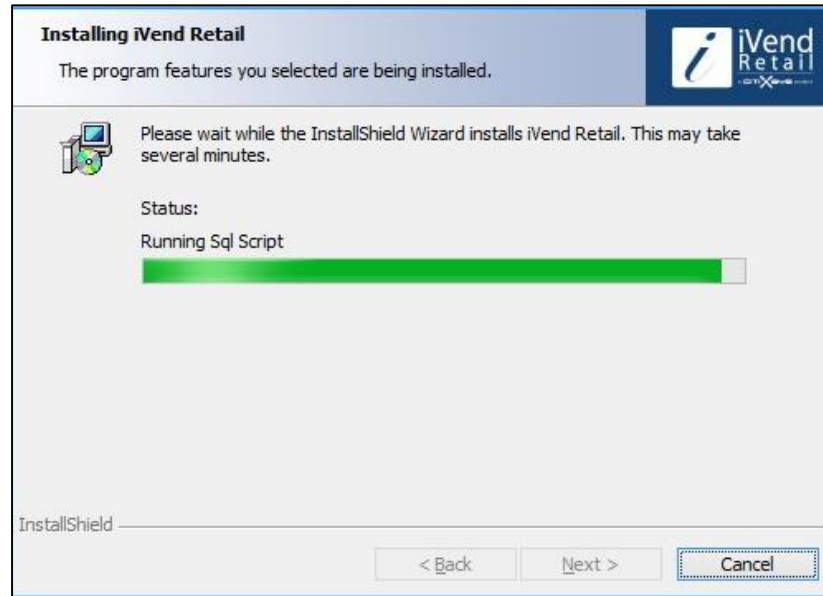


FIGURE 45 - EXECUTING DATABASE SCRIPTS

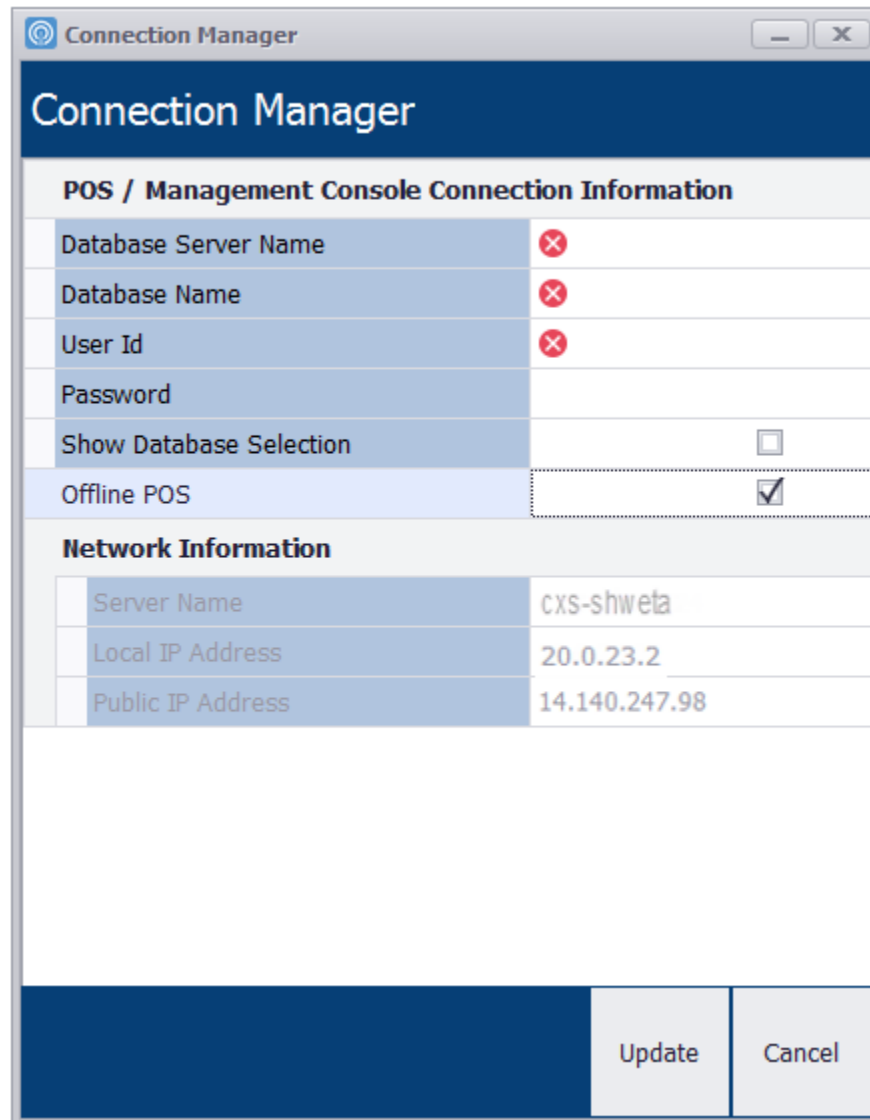
10. In the following window, click [Finish](#) to complete the installation.



FIGURE 46 - INSTALLATION COMPLETION WINDOW

11. After successful installation, configure the Point of Sale, and Integration Service credentials with help of "[iVend Configuration Manager](#)".

12. In the Connection Manager enter the POS/ Management Console connection information. Select the check-box for **Offline POS** and click on **Update** button to save the configurations.



The screenshot shows the 'Connection Manager' window. It has a title bar with a close button. The main content area is divided into two sections: 'POS / Management Console Connection Information' and 'Network Information'.

POS / Management Console Connection Information

Database Server Name		✖
Database Name		✖
User Id		✖
Password		
Show Database Selection		<input type="checkbox"/>
Offline POS		<input checked="" type="checkbox"/>

Network Information

Server Name	cxs-shweta
Local IP Address	20.0.23.2
Public IP Address	14.140.247.98

At the bottom right, there are two buttons: 'Update' and 'Cancel'.

FIGURE 47 OFFLINE POS SELECTION

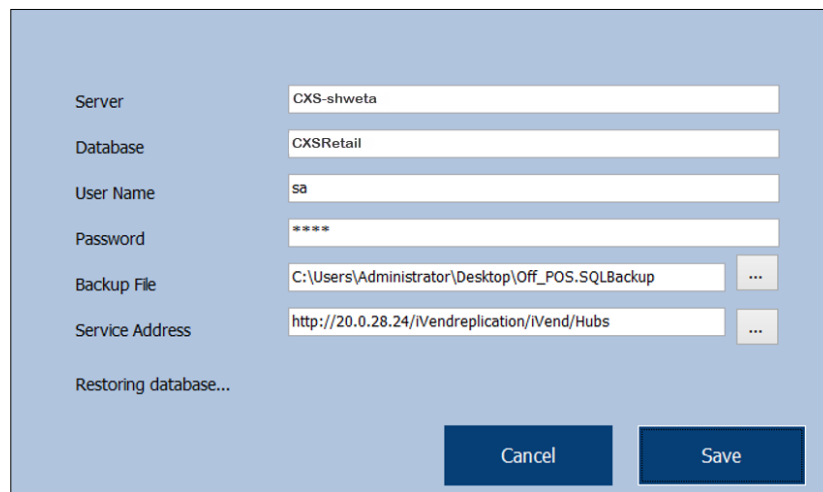
13. In the POS Configuration screen enter the [Server](#) name, [Database](#) name, [Username](#) and [Password](#) to login to database, [Backup](#) File location and [Service Address](#).

14. The service address is the address of the Enterprise server in the following cases
- The store server to which the POS will connect is not marked for "Is On Premises". To check the store for "Is On Premises" go to Management Console> Administration>Retail Configuration> Stores. Then Select and Open the store to which POS is to be connected and verify for the option "Is On Premise" is not selected.
 - The iVend Application is on Cloud.

The service address is the address of the Store server in the following cases

- The store server to which the POS will connect is marked for "Is On Premises". To check the store for "Is On Premises" go to Management Console> Administration>Retail Configuration> Stores. Then Select and Open the store to which POS is to be connected and verify for the option "Is On Premise" is selected.

The Service Address format is <http://<IPAddress>/iVendreplication/Hubs>.



Server	CXS-shweta
Database	CXSRetail
User Name	sa
Password	****
Backup File	C:\Users\Administrator\Desktop\Off_POS.SQLBackup ...
Service Address	http://20.0.28.24/iVendreplication/iVend/Hubs ...
Restoring database...	
<div>Cancel</div> <div>Save</div>	

FIGURE 48 OFFLINE POS CONFIGURATION

Note: To check the store for "Is On Premises" go to Management Console> Administration>Retail Configuration> Stores. Then Select and Open the store to which POS is to be connected and verify for the option "Is On Premise" is selected.

15. Click [OK](#) button on the pop up message "[Setup Complete. Please restart the application](#)" to restart the application.

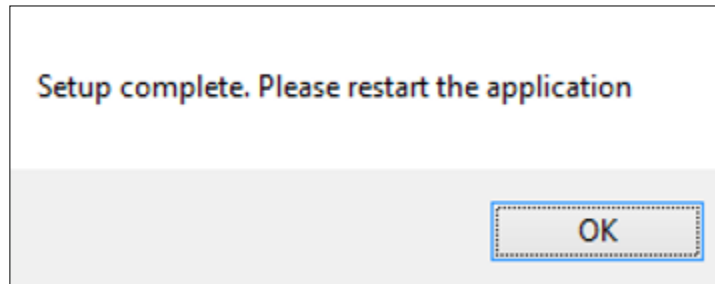


FIGURE 49 OFFLINE POS COMPLETE

iVend Retail License Activation

iVend Retail License can be activated using the following options:

1. Internet
2. Email

Activation via Internet

The following are the steps to activate license using the Internet option:

Step 1. After completing the installation of the iVend Retail, click Start → CXS License Administration Tool

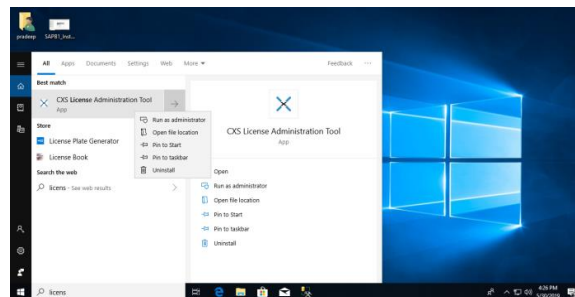


FIGURE 50: LICENSE ADMINISTRATION TOOL

Step 2. CitiXsys Licensing Wizard opens

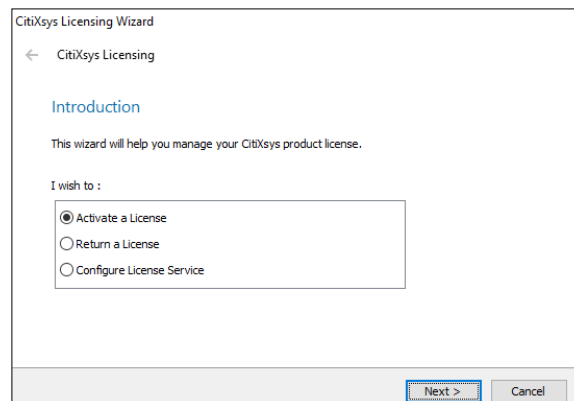


FIGURE 51: CITIXSYS LICENSING WIZARD

Step 3. Select “Activate a License” and click “Next” button.

Step 4. On the License Activate Method screen select “The Internet” as method to activate license and click “Next” button.

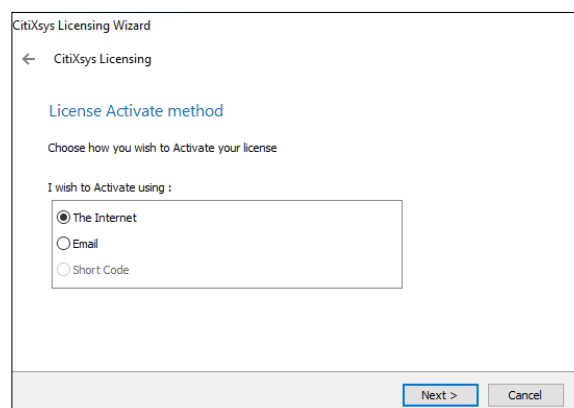
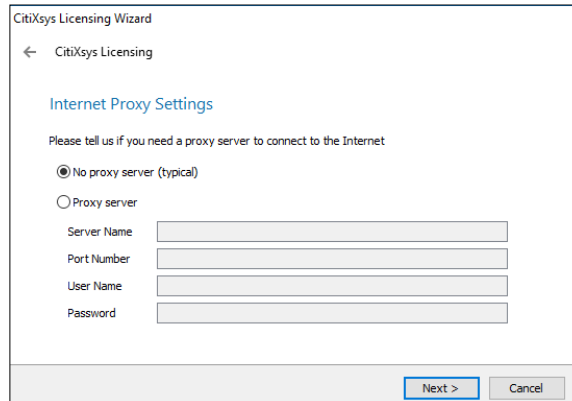


Figure 52- License Activate Method

Step 5. On Internet Proxy Settings screen select the appropriate proxy server option. Select “No Proxy Server” if proxy server is not configured in domain and click “Next” button.



The screenshot shows the 'CitiXsys Licensing Wizard' window, specifically the 'Internet Proxy Settings' step. It includes a back arrow, a title bar, and a section header. Below the header, there is a prompt and two radio button options. The first option is selected. Below the options are four text input fields for proxy details. At the bottom right, there are 'Next >' and 'Cancel' buttons.

CitiXsys Licensing Wizard

← CitiXsys Licensing

Internet Proxy Settings

Please tell us if you need a proxy server to connect to the Internet

☒ No proxy server (typical)

☐ Proxy server

Server Name

Port Number

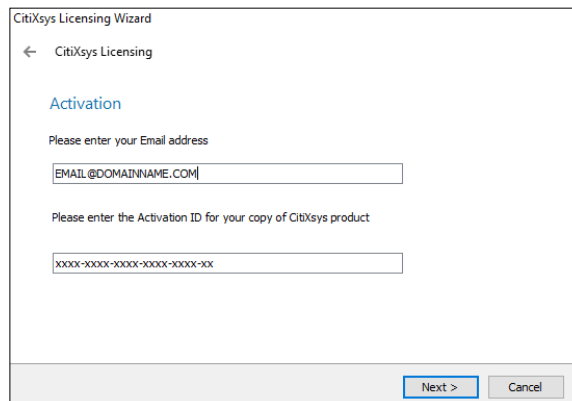
User Name

Password

Next > Cancel

Figure 53- Internet Proxy Settings

Step 6. On the Activation screen enter email id and activation id of your copy of CitiXsys product.



The screenshot shows the 'CitiXsys Licensing Wizard' window, specifically the 'Activation' step. It includes a back arrow, a title bar, and a section header. Below the header, there are two prompts with corresponding text input fields. The first field contains a placeholder email address. The second field contains a placeholder activation ID. At the bottom right, there are 'Next >' and 'Cancel' buttons.

CitiXsys Licensing Wizard

← CitiXsys Licensing

Activation

Please enter your Email address

Please enter the Activation ID for your copy of CitiXsys product

Next > Cancel

Figure 54-Activation Screen

Step 7. License Activation succeeded screen displays that the license is successfully activated.

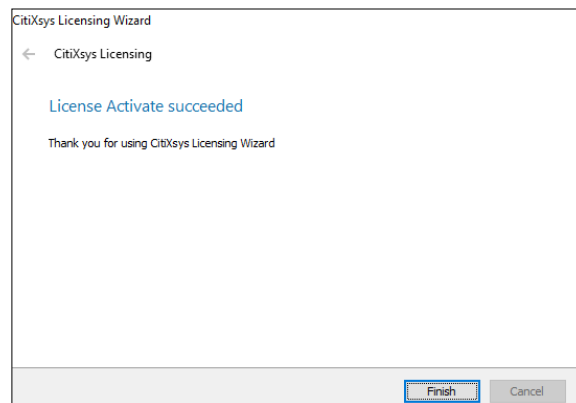


Figure 55- License Activate succeeded

Activation via Email

The following are the steps to activate license using the email option:

Step 1. After completing the installation of the iVend Retail, click Start → CXS License Administration Tool

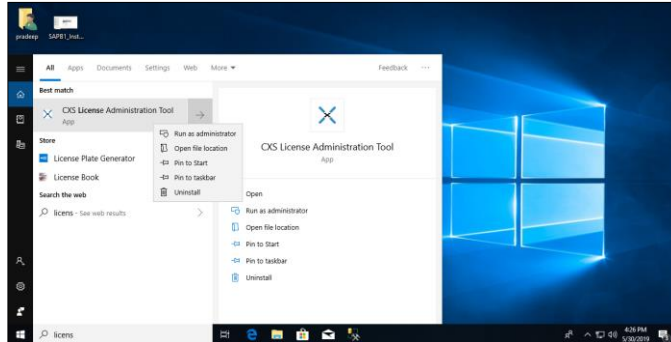


FIGURE 56: LICENSE ADMINISTRATION TOOL

Step 2. CitiXsys Licensing Wizard opens

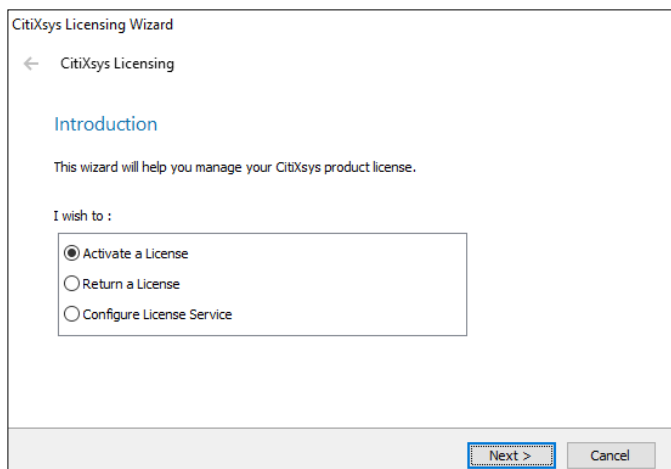
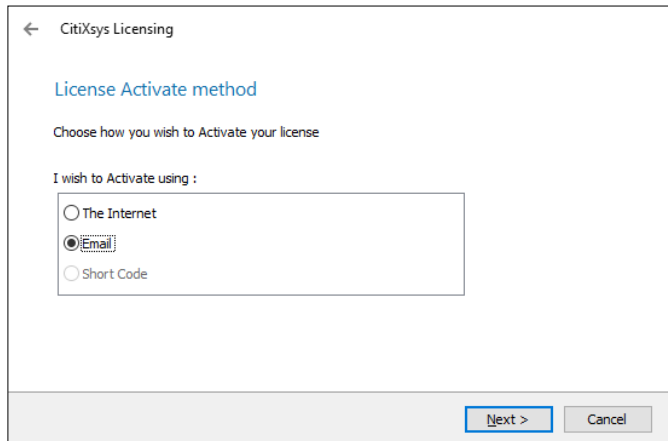


FIGURE 57: CITIXSYS LICENSING WIZARD

Step 3. Select “Activate a License” and click “Next” button.

Step 4. On the License Activate Method screen select “EMAIL” as method to activate license and click “Next” button.



← CitiXsys Licensing

License Activate method

Choose how you wish to Activate your license

I wish to Activate using :

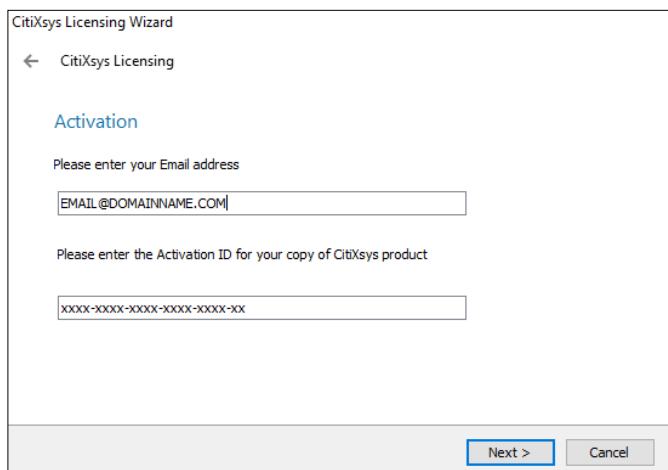
☐ The Internet

☒ Email

☐ Short Code

Next > Cancel

Step 5. On the Activation screen enter email id and activation id of your copy of CitiXsys product.



CitiXsys Licensing Wizard

← CitiXsys Licensing

Activation

Please enter your Email address

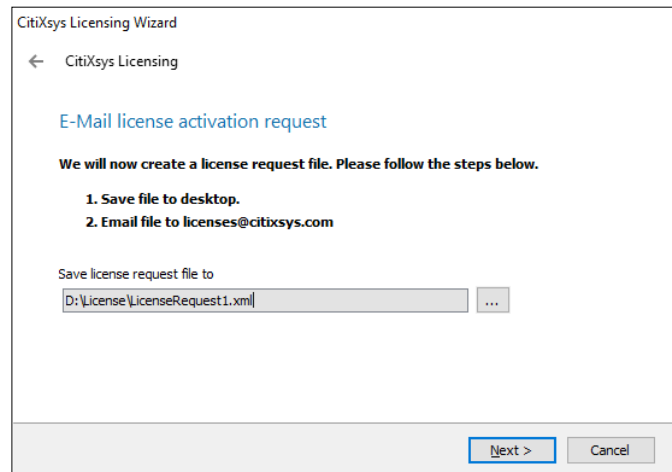
EMAIL@DOMAINNAME.COM|

Please enter the Activation ID for your copy of CitiXsys product

XXXX-XXXX-XXXX-XXXX-XXXX-XX

Next > Cancel

Step 6: Select a location on the machine to save the license request XML file. Click Next to save the file. Send this xml file as attachment to email id licenses@citixsys.com to get activation response from licensing team.



CitiXsys Licensing Wizard

← CitiXsys Licensing

E-Mail license activation request

We will now create a license request file. Please follow the steps below.

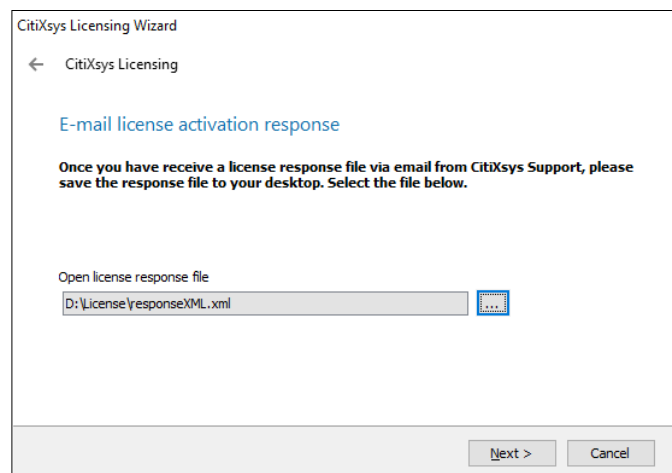
1. Save file to desktop.
2. Email file to licenses@citixsys.com

Save license request file to

...

Next > Cancel

Step 7: Upon receiving email from the licensing team save the file on the server machine. Select the file from the location where the response file is saved. Click Next to proceed.



CitiXsys Licensing Wizard

← CitiXsys Licensing

E-mail license activation response

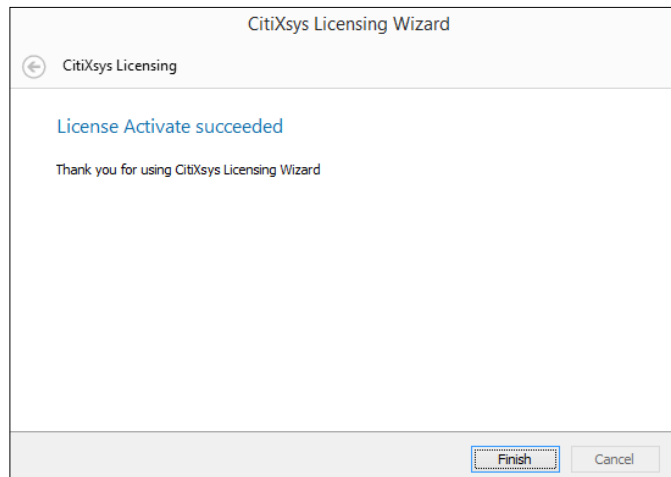
Once you have receive a license response file via email from CitiXsys Support, please save the response file to your desktop. Select the file below.

Open license response file

...

Next > Cancel

Step 8: License Activation succeeded screen displays that the license is successfully activated.




iVend Retail Configuration

After completing the installation of the iVend, click Start → iVend Retail → iVend Configuration Manager.



FIGURE 58 - SYSTEM TRAY SHOWING iVEND CONFIGURATION MANAGER

The  icon is displayed in system tray. Right click on icon and select any of the following menu items.

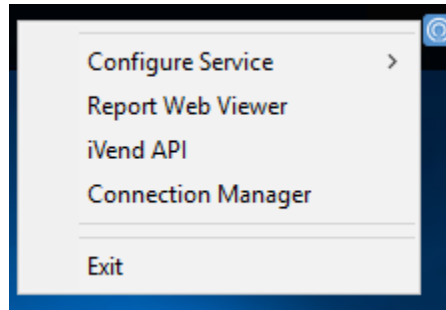


Figure 59 - Integration Service

- Configure Service
 - Replication Service – Only available at iVend Store Server and iVend Enterprise Server
 - Integration Service – Only available at iVend Enterprise Server
 - Scheduler – Only available at iVend Store Server and iVend Enterprise Server
- Report Web Viewer - Available at both iVend Store Server and iVend Enterprise Server
- iVend API - Available at both iVend Store Server and iVend Enterprise Server
- Connection Manager

iVend – New Store Initialization (Restore)

Database Restore option is made available at Store server machine only. Database from the enterprise server can be restored on the store server machine. This is an easy and fast way to bring up store server machine. To restore database go to iVend Configuration Manager → Database Restore

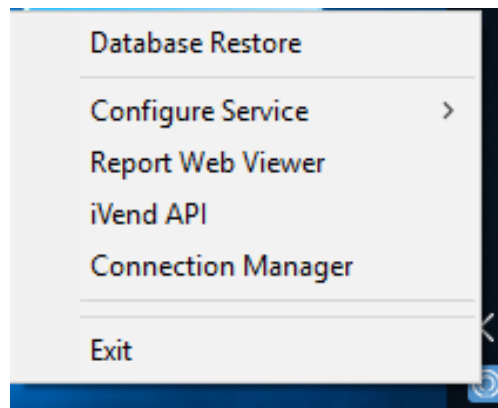


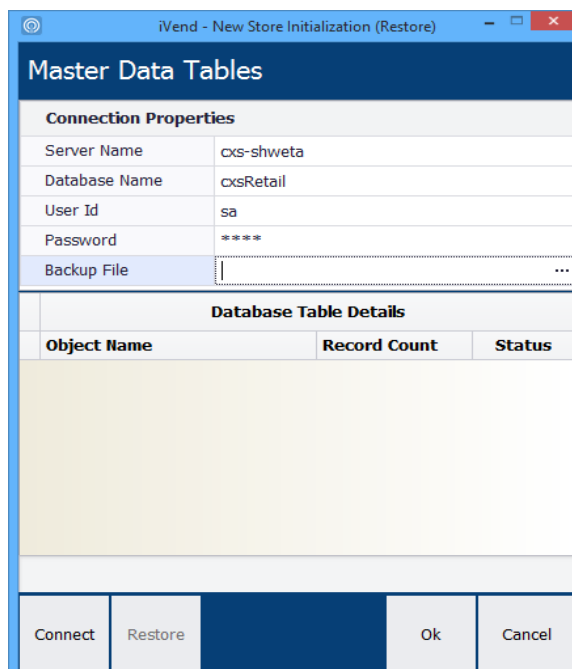
FIGURE 60 - DATABASE RESTORE

This screen allows restoring the master data backup created at the enterprise. This backup can be used to create a new store by using the restore utility thus saving the time and effort required to initialize master data replication for each store.



Note

Before restoring the data at iVend store, at enterprise server machine take backup of the database. For Database backup on enterprise server machine, open iVend Management Console → IT Administration → Database Backup. For more refer “iVend Retail 6.6 – Management Console User Manual”.



The screenshot shows the 'iVend - New Store Initialization (Restore)' window. It has a title bar with standard Windows window controls. The main content area is titled 'Master Data Tables' and contains two sections: 'Connection Properties' and 'Database Table Details'. The 'Connection Properties' section has a table with the following data:

Connection Properties	
Server Name	cxS-shweta
Database Name	cxSRetail
User Id	sa
Password	*****
Backup File	...

The 'Database Table Details' section has a table with the following headers:

Database Table Details		
Object Name	Record Count	Status

At the bottom of the window, there are five buttons: 'Connect', 'Restore', a large blue button (likely 'Next' or 'Finish'), 'Ok', and 'Cancel'.

FIGURE 61 - NEW STORE INITIALIZATION (RESTORE)

Field	Description/Activity
Connection Properties	
Server Name	Sepecify the SQL Server name/IP of the SQL Server of iVend Store Database.
Database Name	Enter the name of the iVend Store Database.
User Id	Enter the SQL DB UserId for the iVend Store Database.
Password	Enter the DB Password for the iVend Store Database.
Backup File	Browse and select the Backup file that was generated at iVend enterprise for this site id.
Buttons	
Connect	Fill the required information and click Connect to establish connection to iVend store database.
Restore	Click Restore for database restoration.
OK	Closes the form with the entered values.
Cancel	Closes the form without the entered values.

Replication Service Configuration – At iVend Enterprise

iVend Configuration Manager → Configure Service → Replication

The Enterprise Replication Windows Service needs to be configured and started. The iVend Enterprise database credentials need to be entered.

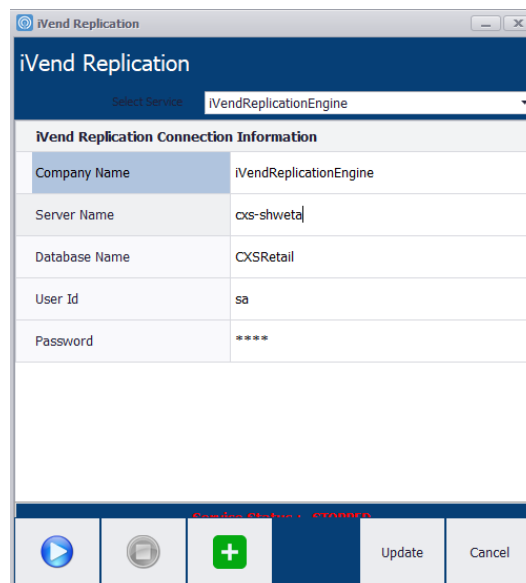






FIGURE 62 - REPLICATION ENTERPRISE SETTINGS INFORMATION

Once the Service Starts a Replication Dashboard page opens in a browser. This dashboard shows the connection status and information about the records to be sent and received. The Connected status is classified as follows

Connected	Color	Description
Green		The store is connected using the socket connection to the enterprise machine. The socket connection provides faster replication between the store and the enterprise machine. .
Black		The store is connected using other connections type (using connection other than socket connection) to the enterprise.
Yellow		The store is connected to the enterprise but is not active.
Red		The store is disconnected from the enterprise.

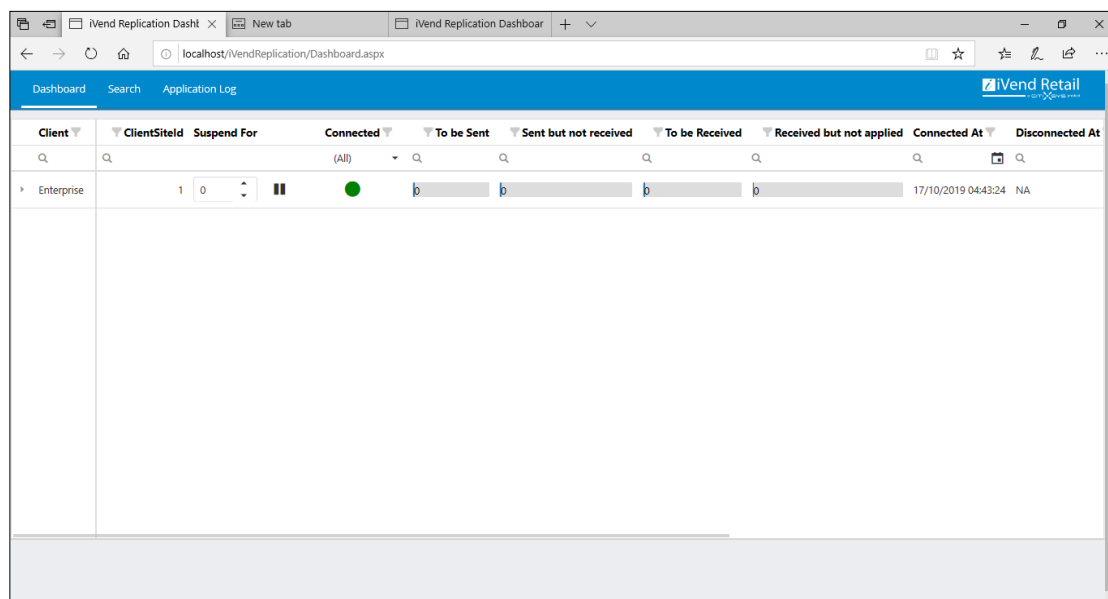


FIGURE 63: REPLICATION DASHBOARD

The Replication Dashboard shows the following information

Field	Description
Client	Lists the Name of the Store/Offline POS connected to the server. Enterprise Dashboard lists all the stores which are marked as OnPremise along with the list of Offline POS which are either connected to Enterprise or are connected to the non-OnPremise stores. Store Dashboard lists the Enterprise along with all the Offline POS connected to the respective store.
Suspend For	To Suspend data exchange with a particular client, specify the period interval in minutes and then press on suspend button. This will suspend the data transfer for the specified interval. Once the interval is elapsed the data exchange with resume automatically.
Connected:	This shows the status of the connection. If a client is connected then a green dot appears while disconnected client appears in red..

To be Sent:	This shows the number of records that are to be sent from server to the client.
Send but not received:	This shows the number of records that are already sent from server to client for which the acknowledgement from the client is pending.
To be Received	Shows the number of records to be received by server from the particular client.
Received but not Applied	Shows the number of records that are received by the server for which the acknowledgement is to be sent to a client.
Connected At	Shows the last connected time when client got successfully connected to server
Disconnected At	Shows the time when the client got disconnected from the server.
Data Sent	Shows the total data transfer in MB from server to client.
Data Sent At	Shows the last data sent time to the client
Data Received At	Shows the last data received time from the client.
Data File Size	Enterprise Dashboard shows the database data file size of the client. Store Dashboard shows data file for enterprise, will always appear as 0.
Log File Size	Enterprise Dashboard shows the database log file size of the client. Store Dashboard shows log file for enterprise, will always appear as 0.

Steps to configure Socket Communication on Windows Server machine:

1. Open Server Manager.
2. Under the Manage menu, click Add Roles and Features.
3. Select Role-based or Feature-based Installation, and then click Next.
4. Select the appropriate server, (your local server is selected by default), and then click Next.
5. Expand Web Server (IIS) in the Roles tree, then expand Web Server, and then expand Application Development.
6. Select WebSocket Protocol, and then click Next.
7. If no additional features are needed, click Next.
8. Click Install.
9. When the installation completes, click Close to exit the wizard.

Report Web Viewer

iVend Configuration Manager → Report Web Viewer.

This screen allows to configure the settings for viewing the reports through web viewer.

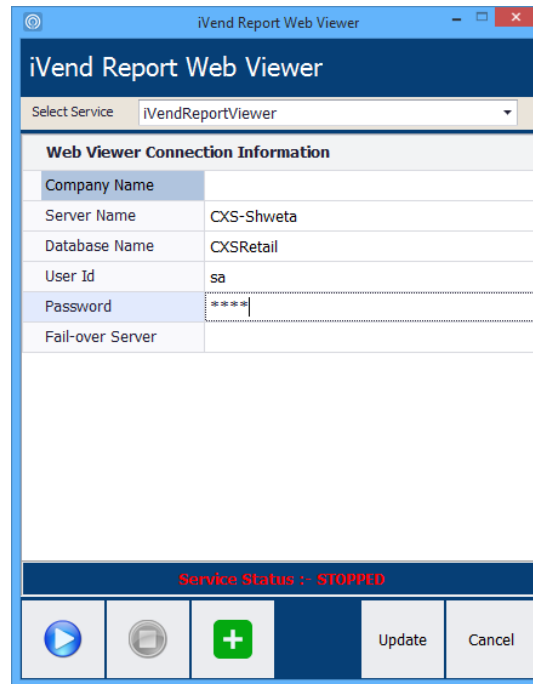





FIGURE 64 - WEB VIEWER CONNECTION INFORMATION

Field	Description/Activity
Web Viewer Connection Information	
Company Name	Specify the unique company name in case multiple iVend Enterprise instances are configured on the same server.
Server Name	Sepecify the SQL Server name/IP of the SQL Server of iVend Store Database.
Database Name	Enter the name of the iVend Store Database.
User Id	Enter the SQL DB UserId for the iVend Store Database.
Password	Enter the DB Password for the iVend Store Database.
Fail-over Server	Enter the SQL Server Name if the mirror server is configured for the server defined in Server Name field. For more information see setting up mirror server
Network Information	
	After filling the required fileds and updating the settings, click button to start the services.
	Click button to stop the running service
	Click button to create new database when creating multiple instances of iVend.
Update	After filling the required filed, click Update to update the changed settings.
Cancel	Click to close the form without saving details.

iVend API

iVend Configuration Manager → iVend API.

iVend API's enables users to synchronize data between iVend Mobile and iVend Enterprise and also allows user to integrate iVend with third party applications or ERP's.

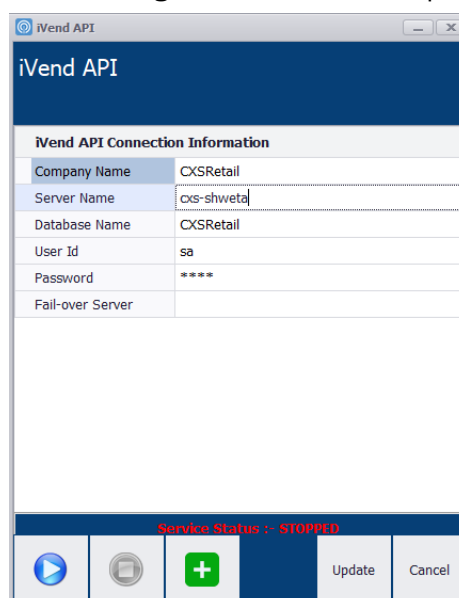





FIGURE 65 - iVEND API

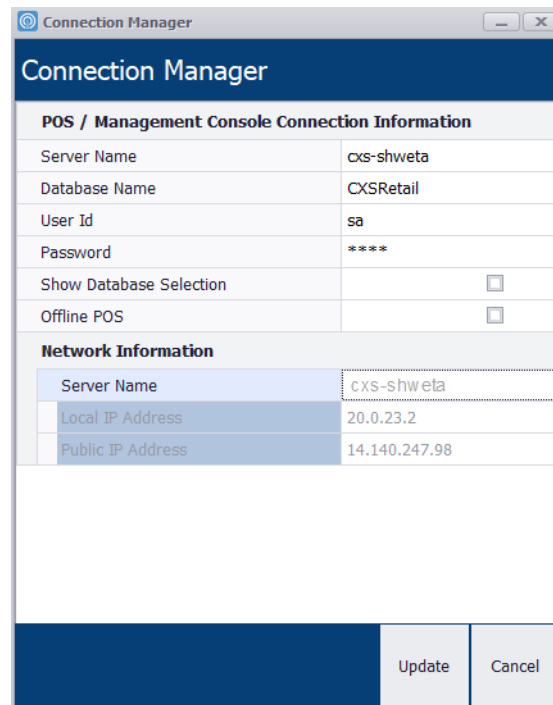
Field	Description/Activity
<i>iVend API Connection Information</i>	
Company Name	Specify the unique company name in case multiple iVend Enterprise instances are configured on the same server.
Server Name	Sepecify the SQL Server name/IP of the SQL Server of iVend Store Database.
Database Name	Enter the name of the iVend Store Database.
User Id	Enter the SQL DB UserId for the iVend Store Database.
Password	Enter the DB Password for the iVend Store Database.
Fail-over Server	Enter the SQL Server Name if the mirror server is configured for the server defined in Server Name field. For more information see setting up mirror server
<i>Buttons</i>	
	After filling the required fileds and updating the settings, click button to start the services.
	Click button to stop the running service
	Click button to create new database when creating multiple instances of iVend.
Update	After filling the required filed, click Update to update the changed settings.
Cancel	Closes the form without the entered values.

Connection Manager

iVend Configuration Manager → Connection Manager.

Connection manager need to be configured on the systems on which any of the following components are installed:

- iVend Management Console
- iVend POS
- iVend APIs



The screenshot shows a window titled "Connection Manager". It has two main sections: "POS / Management Console Connection Information" and "Network Information".

POS / Management Console Connection Information

Server Name	cxs-shweta
Database Name	CXSRetail
User Id	sa
Password	****
Show Database Selection	<input type="checkbox"/>
Offline POS	<input type="checkbox"/>

Network Information

Server Name	cxs-shweta
Local IP Address	20.0.23.2
Public IP Address	14.140.247.98

At the bottom right, there are "Update" and "Cancel" buttons.

FIGURE 66 - CONNECTION SETTINGS INFORMATION

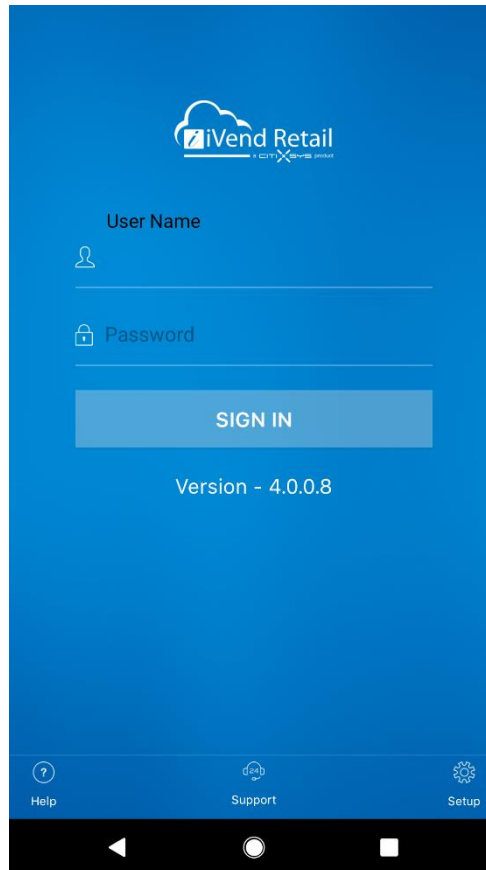
Field	Description/Activity
iVend APIs/POS / Management Console Connection Information	
Server Name	SQL Server Name for iVend
Database Name	iVend Database Name
User Id	User Id for the iVend Database
Password	Password for the iVend Database
Show Database Selection	Check this flag in case multiple iVend instances are installed on the same iVend server.
OfflinePOS	Check this flag if Offline POS is configured.
Shared Folder	Specify the path of the shared folder where automatic upgrade packets are stored. POS and management console will pick the upgrade packets from the specified folder location.
Failover Server	SQL Server Name if the mirror server is configured for the server defined in Server Name field. For more information see setting up mirror server
Network Information	

Server Name	Displays the name of the server. This can be used in iVend Mobile configuration to connect to iVend Server.
Server IP Address	Displays the IP Address of the server. This can be used in iVend Mobile configuration to connect to iVend Server.

Vend Mobile Installation and Setup

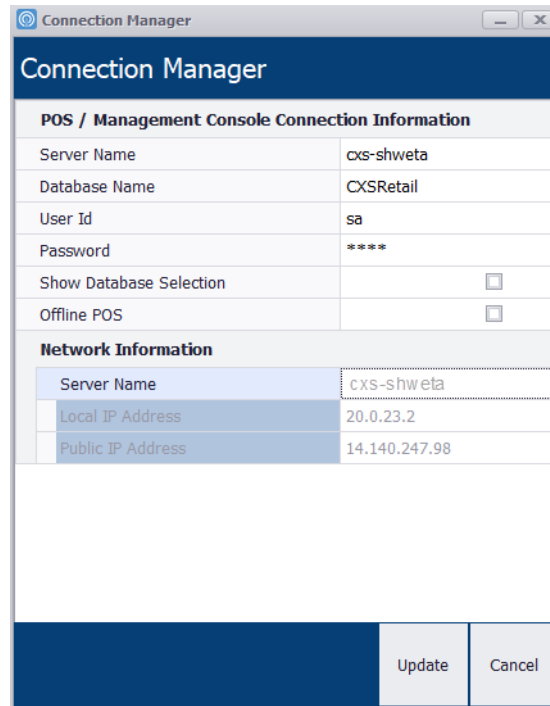
Install iVend POS (Mobile) from Apple App Store.

1. For the same search for iVend POS in Apple Store or
2. Use this link: <https://itunes.apple.com/us/app/ivend-pos/id653409390?ls=1&mt=8>
3. Run the iVend POS app in your mobile device.
4. Go to Setup option



5. Turn off the "Demo Mode" click "Save".

6. Lookup the iVend Connection Manager for your machine IP address.



POS / Management Console Connection Information	
Server Name	cxs-shweta
Database Name	CXSRetail
User Id	sa
Password	****
Show Database Selection	<input type="checkbox"/>
Offline POS	<input type="checkbox"/>

Network Information	
Server Name	cxs-shweta
Local IP Address	20.0.23.2
Public IP Address	14.140.247.98

Update Cancel

7. Enter your machine IP address in the Server Address field and enter the POS API Token in the API token field (API tokens will be generated by the system when creating a new mobile POS from iVend Management Console).



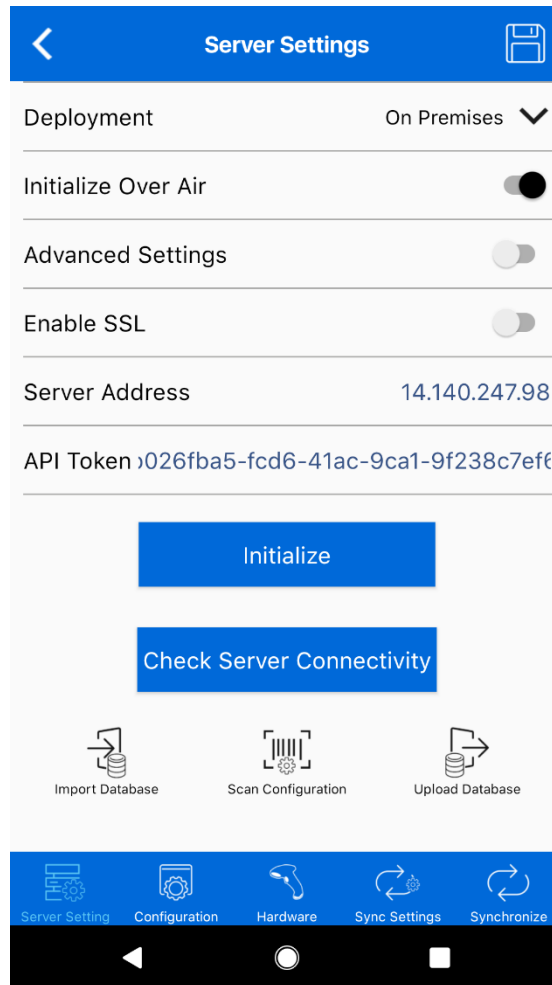
Note

Ensure that you have connectivity between your iVend API server (machine on which iVend APIs are installed) and your mobile device.

You must have port 8642 open in your firewall to allow communication between iVend Mobile POS and iVend Server.

8. Scan the QR Code generated on Management Console for Mobile POS.
9. Enable initialize Over Air on server setting screen of mobile POS.

10. Click Initialize.



11. Wait for the initialization process to complete successfully.
12. Click the **Back** button to display the login view.
13. Login to iVend mobile POS using your user name and password setup in iVend.

This completes the Installation of iVend Retail.