

Retail-Man Point of Sale

Installation and Upgrading

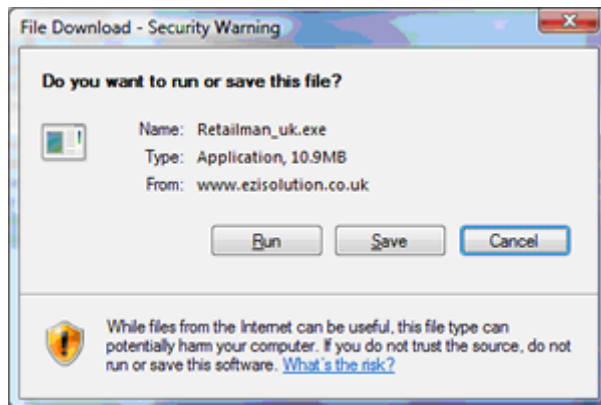


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This document describes how to do a first install and how to upgrade Retail-Man Point of Sale software. A Retail-Man system can only be as fast and reliable as the computer running the program. Ensure there is plenty of space for the data and there is a method of performing regular backups.

On a multi-user system, one PC acts as a server. This has all the data and programs. Please see the Multi User Setup Guide for more information.

1. Download the Latest Software



If there are problems like a hardware failure, the download may be required to re-install the software, so it is best to do a Save and not a Run, then save the file in a safe folder. To be safe, copy the download onto a different computer or write to CD-ROM.

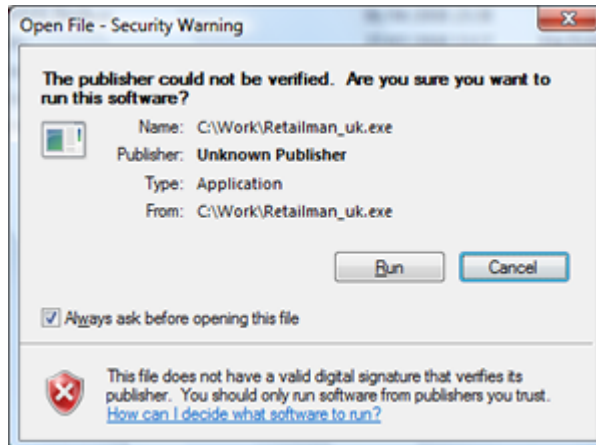
2. Backup Existing Retail-Man Files + Prepare for Upgrade

Before upgrading, always shutdown Retail-Man, then use a program like WinZip to create a backup of all files in the folder contains the software. See section 7 for more details. **In a multi-user system, exit from Retail-Man on all POS stations that use the server.**

First time installation - Create the folder (e.g. C:\Rman or C:\Apps\Rman) using Windows Explorer.

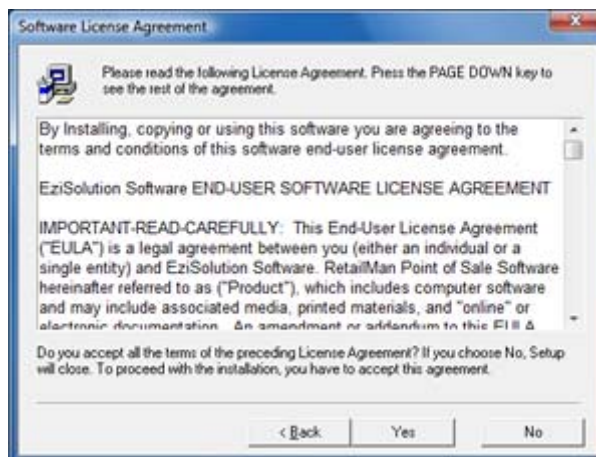
Upgrade installation - Note the folder where Retail-Man is installed. You need to know the version of your current software (see **Help, About**) and the version of the download. Minor upgrades like version 1.80.2 to version 1.80.6 are free and no new licence key is required. A new licence key will need to be purchased before a major upgrade, like version 1.70 to version 1.80. **You need to have your new licence key before you start a major upgrade.**

3. Starting the Installation / Upgrade

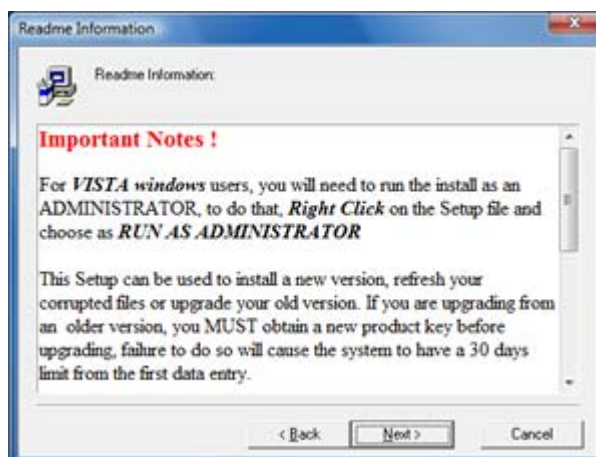


Double-click on the download to start the installation of Retail-Man.

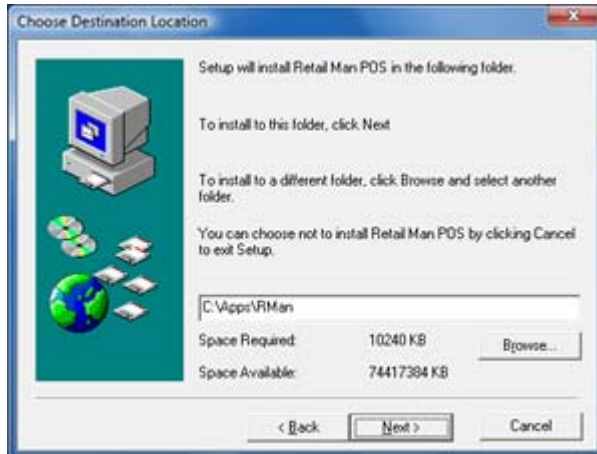
On Windows Vista, right click, **Run As Administrator**



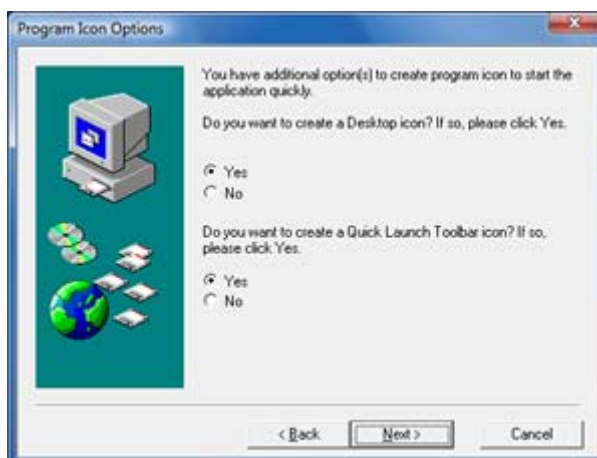
Please read the terms of the license agreement before installing Retail-Man. You accept the terms of the license by continuing with the installation.



The Readme Information has useful information, Especially for Windows Vista.



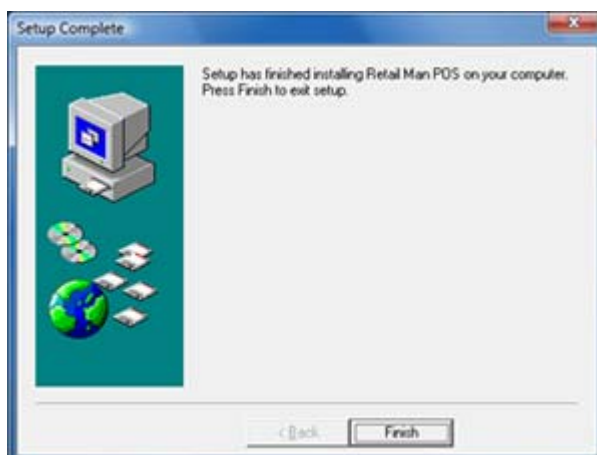
Specify the folder where to install Retail-Man (e.g. C:\Rman or C:\Apps\Rman). The installation will fail if the folder does not exist.



If you expect to be using Retail-Man frequently, it is best to create a Desktop icon and Quick Launch Toolbar icon. The files will then be copied from download file.



Depending on the speed of your system, the files will take a few minutes to install.

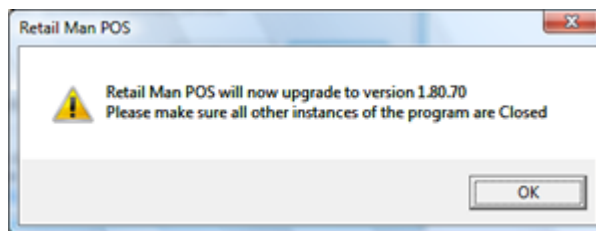


The installation has completed when the Setup Complete screen is displayed, but data files still need to be upgraded.

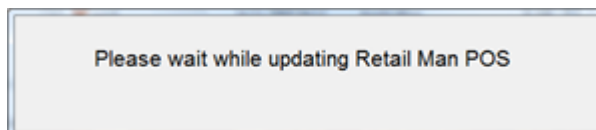
4. Running Retail-Man POS



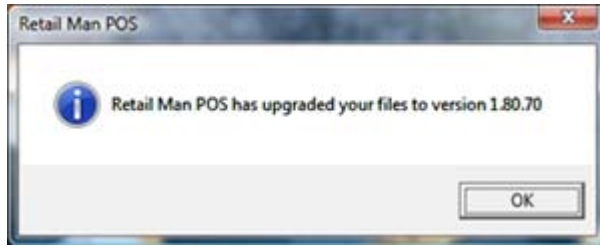
Important – on Windows Vista, Retail-Man must be run as Administrator, so the properties of the Retail-Man application must be changed. Run Windows Explorer then right click on the Rman.exe file.



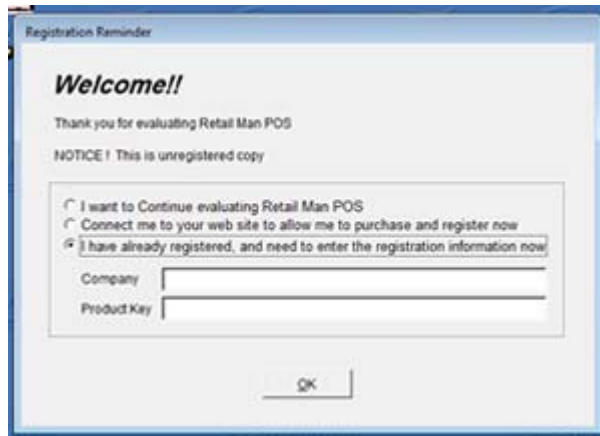
The first time that Retail-Man is run, the data files are upgraded.



For a new install, the process will take a few seconds.



For a system with a large database, the process could take several minutes.

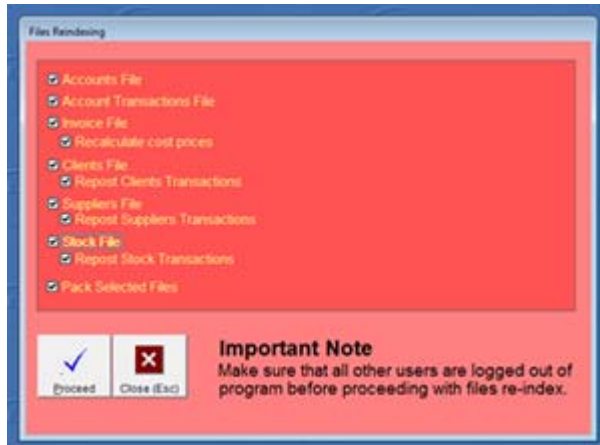


The welcome screen will be displayed after the data files have been upgraded.

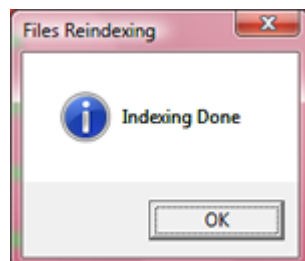
You may evaluate the software for 30 days worth of transactions before a licence key has to be purchased. Please do not leave it too late before you buy a licence key!

After a major upgrade the new licence key needs to be entered here before the software can be used.

5. Re-indexing of Data Files



After an upgrade a full re-index of data is recommended to ensure consistency of data. See **Maintenance, Files Reindexing**



If any errors are reported by the re-indexing of files, these must be investigated before the system is used.

6. Installing POS Hardware

Retail-Man works with many types of hardware. For most efficient operation, a bar-code reader, pole display, receipt (docket) printer and cash drawer are recommended. Electronic scales are also supported. The most common methods of connection are shown below.



- Bar-code reader to same socket as keyboard using a Y connector.
- Pole display using USB connection.
- Receipt printer using serial connection.
- Cash drawer using serial connection, can be shared with receipt printer.

Ezi Solution does not supply POS hardware. Some packages of hardware have been verified by suppliers. These include the packages below. For the best service, we recommend that you use a supplier of hardware that is in your country. Remember to order spare roles of paper for the receipt printer. A spare printer is recommended in case the main printer fails.

| | |
|---------------------|---|
| Budget Bundle | <ul style="list-style-type: none">• Metrologic Pulsar CCD Barcode Scanner• Epson TM-U220D Receipt Printer (Impact)• Posiflex CR3100 Cash Drawer• Customer Display (optional)• POS keyboard (optional) |
| Midrange Bundle | <ul style="list-style-type: none">• Metrologic Voyager Ms9520 Laser Barcode Scanner• Epson TM-T88III Receipt Printer (Thermal)• Posiflex CR3100 Cash Drawer• Customer Display (optional)• POS keyboard (optional) |
| Professional Bundle | <ul style="list-style-type: none">• Metrologic Voyager Ms7120 Laser Barcode Scanner• Epson TM-T88III Receipt Printer (Thermal)• Posiflex CR3100 Cash Drawer• Customer Display (optional)• POS keyboard (optional) |

Please read the instructions from the supplier before connecting up the POS hardware and keep manuals in a safe place as they may be required after installation.

A Windows print queue is required for the receipt printer and the pole display. These have to be created using the drivers supplied by the vendor before Retail-Man can use the devices.

6. Initial Setup for New Installations of Retail-Man POS

The **Currency Symbol** and the **Stationary Size** on the **Maintenance, General** screen.

Ensure that the Temporary Files Path exists (**C:\temp** by default).

The **Business Name, Address** and **Business Logo** can be set on the **Maintenance, Company** screen.

The **Invoice Message** and **Quote Message** should be set on the **Maintenance, Sales** screen.

On Maintenance, POS screen the **Docket Header** and **Docket Footer** should be set for the details for your business.

A driver needs to be selected for the POS Printer. Drivers for several common POS printers are available. These can also be used for similar types of POS printer. Details for the Customer Pole Display and Cash Drawer also need to be set.

Tax File Maintenance

Tax Name
 Tax 1: Tax 2:

| Tax Code | Tax Details | Rate |
|----------|----------------|--------|
| T | TAX | 17.500 |
| I | INPUT TAX | 0.000 |
| N | NON REGISTERED | 0.000 |
| E | TAX EXEMPT | 0.000 |
| X | EXPORT TAX | 0.000 |
| | | |
| | | |

Modify New Close (Esc)

The Tax Name Tax 1 (Local Sales Tax or VAT) should be set on the Maintenance, Tax File Maintenance screen. Also, the rates for Tax, Input Tax, Non Registered, Tax Exempt and Export Tax. Tax Name Tax 2 only should be set were there are two different rates of taxes.

Select Account

| Code | Name | Type | Post To | Group | Level | Stat |
|-------------|--------------------------------|----------|---------|----------|----------|----------|
| 1000 | CURRENT ASSETS | A | | 1 | 1 | 1 |
| 1001 | Cash Drawer | A | | 1 | 1 | 1 |
| 1002 | Bank Account | A | | 1 | 1 | 1 |
| 1003 | petty Cash | A | | 1 | 1 | 1 |
| 1100 | Trade Debtors | A | | 1 | 1 | 1 |
| 1101 | Less Provis for doubtful debts | A | | 1 | 1 | 1 |
| 1200 | Stock on Hand | A | | 1 | 1 | 1 |
| 1300 | Prepayments | A | | 1 | 1 | 1 |
| 1301 | Deposits Paid | A | | 1 | 1 | 1 |
| 1302 | Voluntary Withholding Credits | A | | 1 | 1 | 1 |
| 2000 | NON CURRENT ASSETS | A | | 2 | 1 | 1 |
| 2001 | Plant & Equip - at Cost | A | | 2 | 1 | 1 |
| 2002 | Plant & Equip - Accum Depn | A | | 2 | 1 | 1 |
| 2003 | Furniture & Fittings - at Cost | A | | 2 | 1 | 1 |

Modify New Delete (F4) Close (Esc)

Review the Accounts, Chart of Accounts to see if any new accounts need to be created for sales or purchases.

6. Support for Hardware and Software

A POS system is a key component for a retail outlet. Ensure that the hardware used is reliable. Find a local supplier that can support your computers and POS hardware. Your store may be forced to stop trading when the POS system stops working!

7. Backups of Retail-Man POS

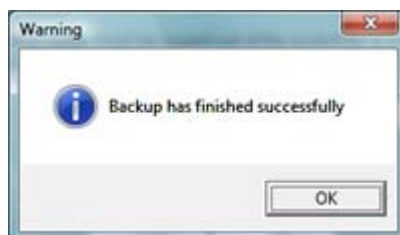
There is the option to backup data files when exiting from the program.



Always backup the data after making significant changes or at the end of the working day.



Specify a folder for the backup that is away from the folder where the software is installed



The backup may take several seconds for systems with larger databases.

A regular full backup is recommended of all Retail-Man files. On busy systems a daily backup is recommended. Retail-Man must be fully shutdown to get a clean backup.

1. A DAT drive can be used with software similar to Tapeware for a simple and secure backup solution.
2. A package like WinZip can be used to create a saveset of selected folders. The saveset can then be written to a CD-Writer.
3. On-line storage sites like Mozy enable data to be stored remotely with the minimum of effort.

At least one DAT tape or CD should be stored off-site and away from the computer systems, or use a facility like Mozy.

<http://www.tapeware.com> Backup solutions for servers

<http://www.winzip.com> WinZip file compression utility

<http://www.mozy.com> Online backup of data