



Retail Pro 9

Enterprise Communication Manager (ECM)

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About this Guide

This document explains how to use the Enterprise Communications Manager (ECM™) to communicate data between stations for Retail Pro version 9.2 (R5).

If you believe the information presented here is incomplete or inaccurate, we encourage you to contact us at emanuals@retailpro.com.

The software described herein is furnished under a license agreement.

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Document Revision History

| Date | Revision |
|------------|---|
| 09/30/2009 | Updated command line parameters. New section on Communicating Inter-Company Transfers. |
| 02/02/2010 | Added info about ECExchange restrictions for Vista/2008/Win7 users. |
| 04/26/2010 | Added Communicating Preferences section. |
| 05/13/2010 | Added info on new setting for run duration minutes. |
| 08/16/2010 | Added info on why INVN_BASE_ITEM section is necessary when importing items. |
| 10/05/2010 | Added section of Communication of Employees. |
| 12/27/2010 | Added info about Sub location checklist options. |
| 03/09/2011 | Added section on Communication of Employee Passwords |
| 03/21/2011 | Added section on FTP Communication. |
| 09/26/2011 | Clarified sections to explain that, for each station, the profile checklist controls the data that is sent; profile tools control how data is received and processed. |

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Introduction

About Communications

Retail Pro 9 communicates data using ECM (Enterprise Communication Manager). ECM takes advantage higher bandwidth networks to deliver data faster and more efficiently than traditional polling. ECM sends data via open transport using XML, which allows open data exchange between Retail Pro and other systems.

Advantages of ECM

Convenience

Setting up stations to exchange data is as simple as specifying the database type (BTF or Oracle), Subsidiary number, Retail Pro location, and station name.

ECM can be run at any time of the day without disrupting store operations. The more often data is sent to Retail Pro, the more current the information will be.

Efficiency

Near real-time data is available to all stations. There's no need to wait until the end of a polling cycle to see updated information.

Transmission errors are automatically caught and corrected by the system, and data flow resumes automatically.

ECM moves only records that have been changed. ECM replicates 100% of a user's Retail Pro data, directly updating the Retail Pro 9 database with the records stored in Retail Pro 8.

Reliability and Flexibility

ECM provides reliability and flexibility in data exchange. As ECM reads data from one database, it transforms the data into the appropriate format and then writes to the other database. No intermediate files are generated during this process.

For the Retail Pro 9 database, a native connection is established via Oracle Net.

For Retail Pro 8 data, the data files are accessed via proprietary database access components developed specifically for this function.

ECM sends changes in information from Retail Pro 9 to each station, simultaneously.

The RP 9 database can reside on the same server as an RP 8 or RP9 installation, on another local server, or on a server at another geographical site.

ECM checks each station's profile checklist and profile tools to determine what data is processed and when.

Checklists and Profile Tools

When configuring a station, you control how the station sends/receives data by configuring checklist options and profile tools.

- The profile checklist controls how data is *sent* by the station
- Profile tools control how data is *received* and processed by the station

Launching/Scheduling Communications

You can launch communications manually, or schedule communications to take place automatically at the times you specify. When exchanging data manually, you can perform a full communications cycle, or just a portion of the cycle.

Setting up Communications

To communicate using ECM, each station needs to:





1. Make sure the necessary ECM program files are installed.
2. Configure ECM workstation preferences for your station, including identification information for your own station, the locations of your data files, rules for processing data, and other communications settings.
3. Create a station record for each station with which you want to communicate.
4. Create a group for employees who need access to ECM, and then assign necessary permissions to the group.










Here are some things to keep in mind when setting up ECM:

- At the Retail Pro 8 and Retail Pro 9 stations, the computer running **EcmProc.exe** must have its language settings for both the system AND user set to the same language.
- In the station record for each station with which you will be communicating, configure the station's 1) checklist and 2) profile tools.
- You can execute multiple ECM processes simultaneously, but only one process at a time per computer.
- ECM supports XML interface via XML schemas and XML data.

ECM Menu Buttons

The following is a description of the menu buttons found when you select **Stations** from the top menu of the ECM Home Screen.

| Menu Button | Description |
|--|---|
|  Station Wizard | Click to access the station wizard (for creating station records). If the Station Wizard button is disabled, check to make sure you have selected a subsidiary. |
|  Load Profile | Click to load an existing profile into the station's record. Loading a profile saves you the time of redefining profile settings for each station. |
|  Communicate Profiles | Click to prepare profiles for communication. The profiles will be sent during the next communications. |
|  Quick Poll | Click to perform a Quick Poll (based on your QuickPoll settings in Options > W/S Preferences). |

| Menu Button | Description |
|---|--|
|  Start Exchange | Click to restart ECMExchange.exe. ECMExchange.exe runs as a service, but if you had to stop it for any reason, you can restart by selecting this button. |
|  Send/Receive | Click to exchange data. Data in your \Out\ folder is sent to the other station(s)'s In\Recvd\ folder. |
|  Profiles | Click to access the profiles area, where you can add, edit, or delete profiles. |
|  Process In | Click to process in data that is currently in your In\Recvd\ folder. |
|  Process Out | Click to process out data that is currently in your \Out\ folder. |
|  Regenerate | Click to regenerate document history or to initialize a station. |
|  Movelist | Click to access movelists. |
|  Templates | Click to create a new movelist template, or to edit an existing template. |
|  Update Movelist | Click to edit an existing movelist. |

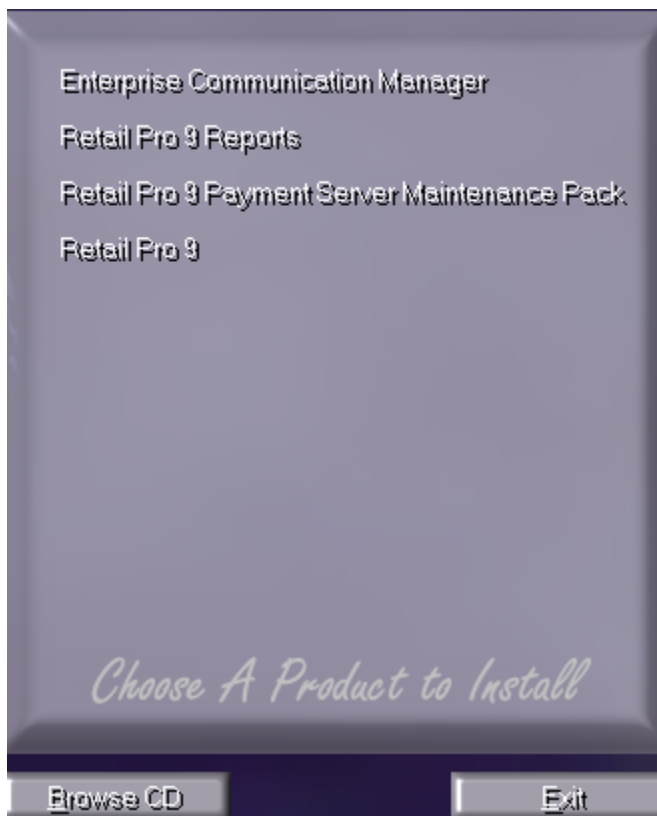
Installing/Launching/Configuring ECM

Installing ECM

Use the following procedure to install ECM at Retail Pro stations.

To install ECM:

1. Insert the installation CD. If the installation program does not launch automatically, launch the CD from the Windows Start menu on your desktop.
2. Select **Enterprise Communication Manager** as the program to install.



Result: The InstallShield opens.

3. Click **Next**.
4. Decide if the default installation folder (...NECM) is acceptable. If it is, click **Next**. If not, click **Browse** to choose a different folder. Click **Next** when you are finished.
5. Verify that the information is correct, then click **Next** to begin copying files.
6. Select to reboot your computer now, then click **Finish**.

Note: The build number of your ECM must match the build number of your Retail Pro® 9 Series installation.



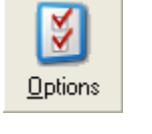
Launching/Exiting ECM

To launch ECM, a user must:

- Log in using the employee’s assigned username and password
- Belong to a group assigned the “Launch ECM” permission

To launch ECM (login required):

1. Double-click the **ECM.exe** icon on your desktop, or select **ECM** on your Windows Start menu. If the security dialog displays, enter your **User Name** and **Password**, select a Subsidiary, and then click **Login (<Alt+L>)**. The ECM Home Screen displays.
2. Select a button to access that program area.

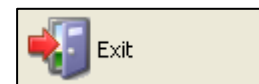
| Button | Description |
|---|--|
|  | Access your list of stations, profiles, and to launch communications manually. |
|  | View the Processing Log and/or Error Log. |
|  | <ul style="list-style-type: none"> ▪ Define Workstation Preferences ▪ Define Network Settings ▪ Define Modem Settings ▪ Log On |

To exit ECM:

1. Click the Enterprise Communications Manager button in the upper right corner until you reach the ECM Home Screen.



2. Click **Exit** on the side menu, then click **OK** to confirm.



About Configuring ECM

Configuring ECM involves the following:

- Assigning security permissions to those employee groups that you want to have access to ECM
- Configure ECM Workstation Preferences
- Create a record for each station with which your station will communicate and configure checklist and profile tool settings for each of those stations

About the Station Checklist and Profile Tools

When configuring a station, you control how the station sends/receives data by configuring checklist options and profile tools.

- The checklist controls how data is *sent* by the station
- Profile tools control how data is *received* by the station

ECM Security

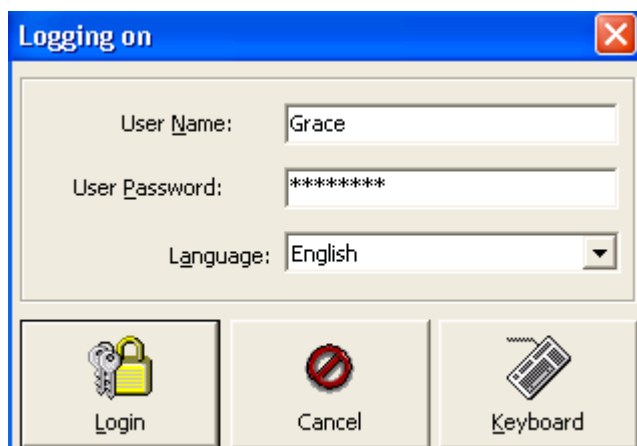
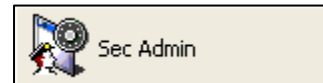
To assign security permissions for ECM, use Security Administrator (**SecAdmin.exe**) found in the **\ECM\SecAdmin** folder.

First, you'll need to register the **ECM.sec** file (found in the **ECM** root folder). Then, assign ECM permissions to your employee groups. If necessary, you can create new groups and add employees to or remove employees from groups.

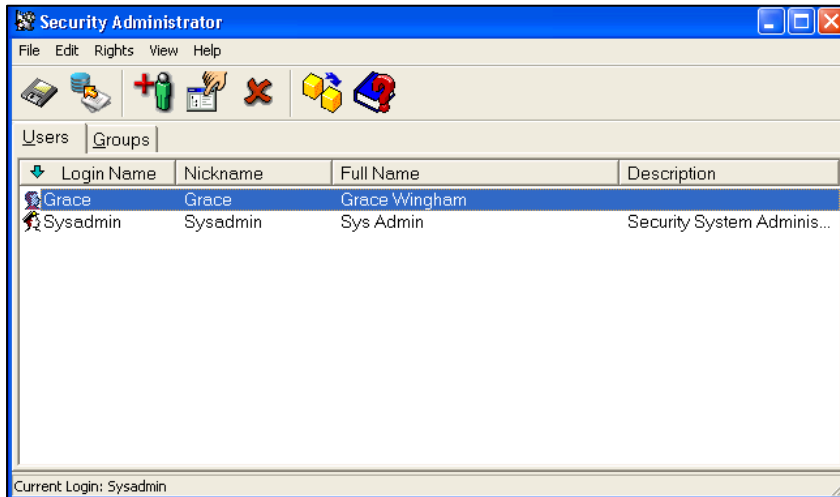
To register ECM.sec and assign group permissions:

1. Click **Options > SecAdmin** from the ECM Home Screen.

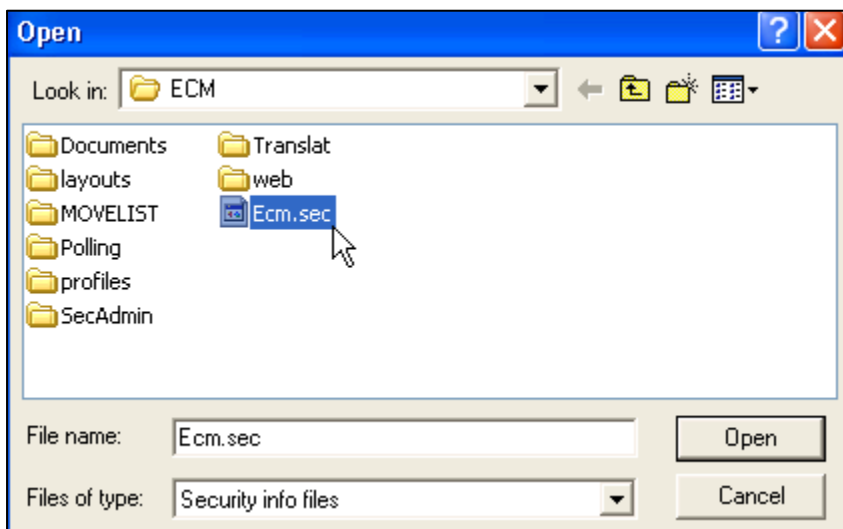
Result: The Log On dialog displays.



2. Enter your **User Name** (<Alt+N>) and **Password** (<Alt+P>), and then click **Login** (<Alt+L>). Security Administrator launches.

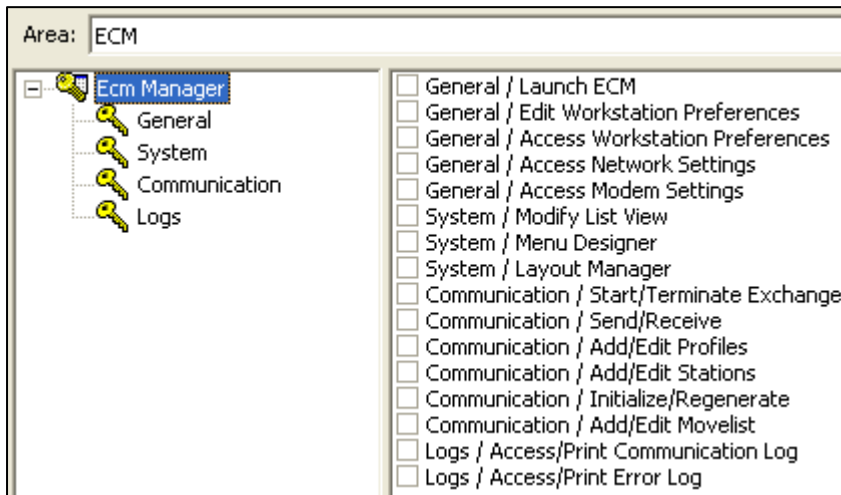


3. Select **File** from the top menu, then click the **Register Security Information** (<F3>). The Open dialog displays.



4. Navigate to and select the **ECM.sec** file (located in the **ECM** root folder), and then click **Open**. The ECM security permissions are available for selection in Security Administrator.
5. Click the **Groups** tab (<Alt+G>).
6. In the **Area** field, select **ECM** from the drop-down list.

7. Select a Group and select/unselect individual permissions, as necessary.



8. Select **File** from the top menu, then select **Save Security Information (<F2>)**. Repeat for additional groups, as necessary.
9. Select **File > Exit (<Alt+F4>)** when you are finished.

Available Security Permissions

You can control employee access to the following ECM features:

| | | |
|---------------------------------|--------------------------------|------------------------------|
| General | | |
| Launch ECM | Access Workstation Preferences | Edit Workstation Preferences |
| Access Network Settings | Access Modem Settings | |
| System | | |
| Modify List View | Menu Designer | Layout Manager |
| Communication | | |
| Start/Terminate Exchange | Send/Receive | Add/Edit Profiles |
| Initialize/Regenerate | Add/Edit Stations | Add/Edit Movelist |
| Logs | | |
| Access/Print Communications Log | Access/Print Error Log | |

Adding the Logon Button to Menu

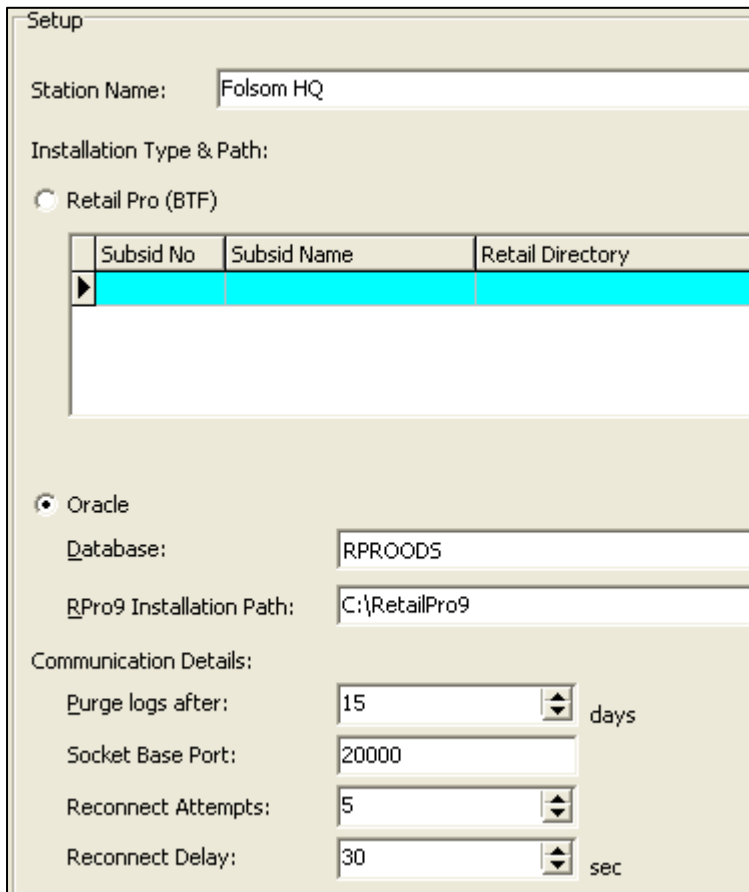
When using security in ECM, you can add Logon as a side menu button of the Options menu to allow users the option of switching users and credentials as needed.

ECM Workstation Preferences

Define ECM workstation preferences at each station. ECM workstation preferences control settings such as the station's type, the path to the station's data files, and processing rules.

To define ECM workstation preference settings:

1. Click **Options > W/S Preferences** from the ECM Home Screen.
2. Select **General > Setup**.



Setup

Station Name:

Installation Type & Path:

Retail Pro (BTF)

| Subsid No | Subsid Name | Retail Directory |
|-----------|-------------|------------------|
| ▶ | | |

Oracle

Database:

RPro9 Installation Path:

Communication Details:

Purge logs after: days

Socket Base Port:

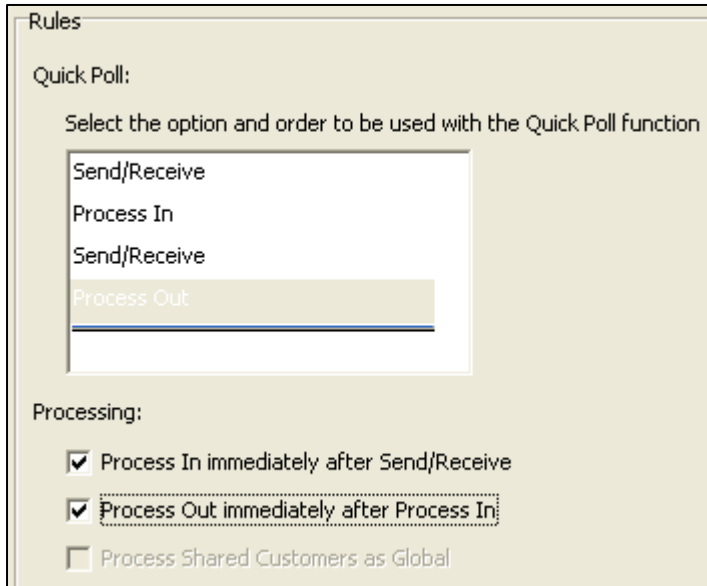
Reconnect Attempts:

Reconnect Delay: sec

Define the following settings as needed.

| Setting | Description |
|--------------------------|---|
| Station Name | Enter a name for the station. |
| Installation Type & Path | <p>Select the type of database installed at your station: Retail Pro (BTF) or Oracle.</p> <p><i>If you select Retail Pro (BTF):</i></p> <p>Enter your Subsidiary No. and Subsidiary Name.</p> <p>Enter your Retail Pro Path: Define the path to your RPRO8.exe files by either manually entering the path, or choosing the browse button and selecting the appropriate path.</p> <p><i>If you select Oracle:</i></p> <p>Select the database you are using in the Database field. (Default = RPRODS)</p> <p>Define the path to your Retail Pro® 9 Series files by either manually entering the Installation Path, or clicking the folder icon to browse to select the appropriate path. No further action is necessary. The Database field is a read-only field that displays the name of your Oracle database (RPRODS).</p> |
| Purge Logs After | Enter or select the number of days to retain log files before they are automatically purged. Default = 15 |
| Socket Base Port | <p>Enter the socket base port address to be used for receiving incoming data calls. All machines must use the same base port address. Default = 20000</p> <p>If you modify the default base port address of 20000, ECM recognizes the change. The ECExchange.exe service is uninstalled, and then reinstalled as ECExchangeXXXXX, where XXXXX is the new base port address.</p> |
| Reconnect Attempts | Define the maximum number of times ECM will attempt to contact the station if unable to connect and validate. Default = 5 |
| Reconnect Delay | Define the number of seconds the station will pause when unable to connect and validate before trying to reconnect. Default = 30 |
| Polling Path | <p>Define the path to your station's communication directories (ECMPolling) by either manually entering the path, or by selecting the browse button and choosing the appropriate path.</p> <p>If the polling directory is changed, and data is found in the original location, it will not be moved to your new polling path. You will have to manually move files that may have been in the original polling directory.</p> |

3. Select **General > Rules**.



Rules

Quick Poll:

Select the option and order to be used with the Quick Poll function

Send/Receive
Process In
Send/Receive
Process Out

Processing:

Process In immediately after Send/Receive

Process Out immediately after Process In

Process Shared Customers as Global

Define the following rules as needed.

| | |
|------------|---|
| Quick Poll | <p>Using the sliding bar in the text window, select which stages of the communications cycle to include when using the Quick Poll feature, and the order in which you want them performed.</p> <p>Send/Receive (first exchange), Send/Receive (second exchange), Process In, Process Out</p> |
| Processing | <p>Process In Immediately After Send/Receive. When this option is selected, your station will process in immediately after completing a manually initiated exchange.</p> <p>Process Out Immediately After Process In. When this option is selected, your station begins processing out immediately after processing in is completed.</p> <p>Process Shared Customers as Global. (Only available if your database type is BTF) Select to automatically mark as global customers in the Oracle database customers who are marked shared (to be shared with all other stations). If it is not selected, shared customers are added to the Oracle database as local customers for the subsidiary to which the station is assigned.</p> <p>Allow ECM Exchange to copy files from a mapped drive. If you select this option, enter your Windows Username and Password. The username and password you enter must be one with administrative privileges to the computer/workstation and to any mapped drives in which ECM may be operating.</p> |

4. Select **General > Network Security**.

Network Drive Mapping:

Allow ECM Exchange to copy files from a mapped drive

User Name:

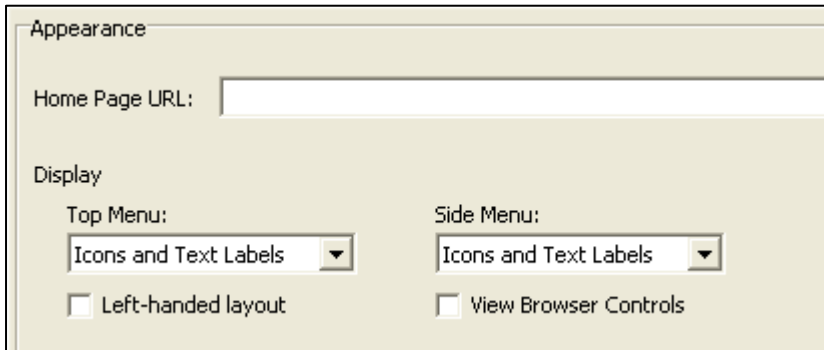
Password:

Domain: ▼

Define the following settings as needed.

| | |
|---|---|
| <p>Allow ECM Exchange to Copy Files from a Mapped Drive</p> | <p>If selected, ECMExchange.exe is allowed to copy files from one location on a mapped network drive to another location on the network.</p> <p>This is typically used when you have multiple 8 Series Main stations on a single server.</p> <p>If you select this option, define the following information that will allow ECM to assume the role of that assigned user when attempting to perform operations outside of the Local Drives assigned for a given system:</p> <p>Username: Enter your network username.</p> <p>Password: Enter your network password.</p> <p>Domain: Select the network domain.</p> |
|---|---|

5. Select **General > Appearance**.



Define the following settings as needed.

| | |
|---------------|--|
| Home Page URL | <p>Define the path to any Web site URL by either manually entering the path or by selecting the browse button and choosing the appropriate path.</p> <p>The URL you enter determines the page that displays in the window of the ECM Home Screen.</p> |
| Display | <p>Top Menu. Select how you want buttons on the top menu to appear: Text and Icons (default), Icons Only, or Text Only.</p> <p>Side Menu. Select how you want buttons on the side menu to appear: Text and Icons (default), Icons Only, or Text Only.</p> <p>Left-handed layout. Select the checkbox to display the side menu on the left side of the screen. Default: not selected</p> <p>View Browser Controls. Select the checkbox to display a browser control bar that allows you to navigate the HTML page displayed on the ECM Home Screen. Default: selected</p> |

6. Select **Printing Preferences**, then select a Log from the list. Choose a printer and define the following settings for printing the Log, or select **Set special printer** to set up a non-Windows printer that does not appear on the printer list.

| | |
|----------------------------------|---|
| Active | If selected, the printer will be active for the selected Log. |
| Preview | Select to automatically display a preview of what will be printed before actually printing it. |
| Design | From a drop-down list, choose the document design to be used when printing the log. |
| Paper Size | From a drop-down list, select which paper size to use with this printer. |
| Copies | Enter the number of copies to print each time the log is printed. |
| Allow Change at Time of Printing | Select the options (Printer, Design, Copies, Preview) you want to be able to change at the time of printing. |

7. Click **OK** to exit ECM Workstation Preferences.

Multiple Mains on Single Server

If you have multiple Retail Pro® Main stations installed on a single server (not recommended), and you want to communicate with Retail Pro® 9-Series using ECM, you will need to define a record for each Main station in ECM Workstation Preferences.

Command line parameters allow you to process in/out for a specific subsidiary or for all subsidiaries.

To define multiple Main stations in ECM:

1. Click **Options > W/S Preferences** from the ECM Home Screen, and then select **General > Setup**.
2. Select Retail Pro (BTF) as the Installation Type, and then click **Add (<Alt+A>)**.

Result: A new row displays in the Subsidiary table, ready for editing.

3. Enter the Main station's Subsidiary No., Subsidiary Name, and Retail Pro Path. You can optionally enter the Subsidiary Name.

Note: When you enter the Retail Pro path, ECM automatically pulls the **Subsidiary No** from that installation's System Preference settings.

4. Repeat as necessary for each additional Main station.
5. Click **OK** to save and exit.

When viewing your list of stations, you can view all stations, or filter the list to display a single subsidiary.

When viewing all stations:

- You don't have access to the Station Wizard.
- You can communicate profiles to a specific station.
- When processing data in/out, data for all active stations will be processed.
- You can initialize or regenerate for a specific station or for all station.

Some other things to keep in mind when multiple Mains are on a single server:

- ECM Workstation Preference rules are shared across all subsidiaries.
- ECM Workstation preference appearance settings are shared across all subsidiaries.
- If the Subsidiary No. is entered prior to the Retail Pro Path, and there is a discrepancy, a warning dialog is displayed.
- ECM Printing preferences are shared across all subsidiaries.

Network Security

When communicating data across shared network resources, you need to define your network user credentials in ECM Workstation Preferences. Entering this information allows ECM to know the correct mapped network drives to use during disk communication.

To enter network user credentials:

1. Select **Options > W/S Preferences** from the ECM Home Screen.
2. Select **General > Network Security**.
3. Click the checkbox for **Allow ECM Exchange to copy files from a mapped drive**.
4. Enter your network User Name and Password and select the network Domain you are using.
5. Click **OK** on the side menu.

Password Changes

If you change your network password, be sure to enter the new password in ECM Workstation Preferences, too, or communication errors may result.

Network Resource Assignment

Ensure that the account assigned within ECM is also assigned to all Retail Pro 9 Series resources and folders. In a multi-main server environment, each **\RetailPro9** folder for each Retail Pro installation must have this account assigned with full access privileges.

Stations

About Stations

A station is a database that exchanges information with another database. You also need to create a station record for each station with which you will communicate.

You can create the following types of stations:

- Remote (RPRO 8x) is an 8-Series Remote station. 8 Series Remote stations use a BTF database and lack some of the capabilities of a Main. Remote stations are typically used for specialized functions such as point of sale or backroom and communicate with 8-Series Mains via polling.
- Main (RPRO8x) is an 8-Series Main station. 8 Series Main stations use a BTF database and serve as smaller hubs.
- Main (Oracle) is the corporate hub station and central data repository for the corporation.
- Retail Pro 9 (Oracle) is a 9-Series (Oracle) Remote station.
- Other is used when sending data somewhere other than to a Retail Pro database. For example, when sending data to a purchasing system, employee management system, or customer management system.
- IPMS is an IPMS database. (Future release)

Each station record specifies:

- The type of station (Enterprise, Main, or Remote), and identification information for the station.
- The communication method being used: Internet, Modem, or Disk.
- The types of data to send/receive. You can do this by assigning a profile, or defining a new profile as you create a station's record.
- Whether or not the station is Active. When communication is launched, your station communicates with all Active stations.

Whether or not the station manages inventory. You can have the Retail Pro 9-Series station manage inventory, or allow the 8-Series Main to manage inventory.

The Station Wizard leads you step-by-step through the process of creating stations.

Checklists and Profile Tools

When configuring a station, you control how the station sends/receives data by configuring checklist options and profile tools.

- The checklist controls how data is sent by the station
- Profile tools control how data is received by the station

Creating a Station

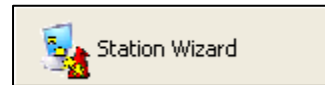
You can create a station manually, or by using the **Station Wizard**. The Station Wizard leads you step-by-step through the process of adding a station.

Before creating a station, consider the following:

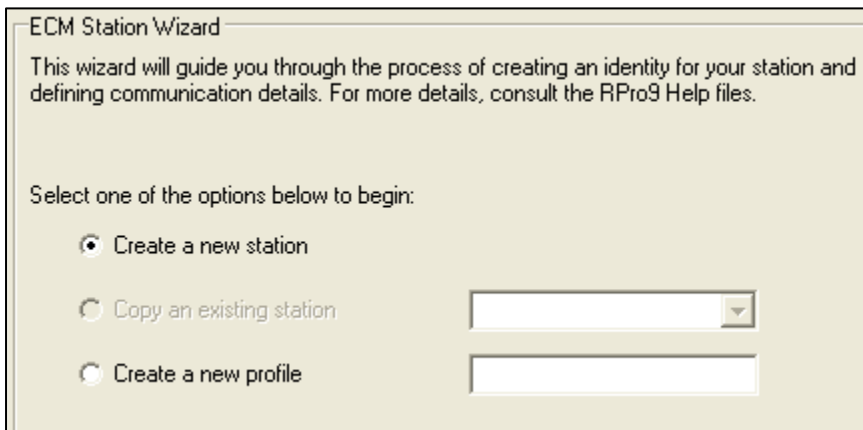
- You must configure your own station's preferences before you can create a station record at another subsidiary. See ECM Workstation Preferences for details about configuring your station preferences.
- To create a station record for Retail Pro 9 (Oracle) on the Retail Pro 8 (BTF) side, follow the instructions in Station Setup at Retail Pro 8.

To create a new station using the Station Wizard:

1. Click **Stations** on the top menu of the ECM Home Screen.
2. Select a **Subsidiary** from the drop-down list, then click **Station Wizard**.



Result: The Station Wizard launches.

A screenshot of the "ECM Station Wizard" dialog box. The title bar reads "ECM Station Wizard". The main text says: "This wizard will guide you through the process of creating an identity for your station and defining communication details. For more details, consult the RPro9 Help files." Below this, it says "Select one of the options below to begin:". There are three radio button options: "Create a new station" (which is selected), "Copy an existing station" (with a dropdown menu to its right), and "Create a new profile" (with a text input field to its right).

3. On the **Select Options** screen, select **Create a new station**, then click **Next**.

Result: A screen for entering details about the new station is displayed.

ECM - Station Location Details

Select the type of station with which this ECM installation will communicate.

| | | |
|---|---|---|
| <p>Retail Pro (BTF-based)</p> <p><input type="radio"/> Main Station</p> <p><input type="radio"/> Remote Station</p> | <p>Retail Pro (Oracle-based)</p> <p><input checked="" type="radio"/> Main Station</p> <p><input type="radio"/> Remote Station</p> | <p>Other Types</p> <p><input type="radio"/> Other</p> <p><input type="radio"/> IPMS</p> |
|---|---|---|

Enter the number of the RPro9 subsidiary to which the station is assigned.

Subsidiary:

Enter the Retail Pro store/station combination to assign to this station. Optionally, enter the Global Store Code assigned to the store/station.

Store/Station: RPro9 Global Store Code:

Enter a unique name for the station. This name is used by ECM only, to make identification of the station easier.

Station Name:

Select the type of station with which this station will communicate:

Retail Pro (BTF-based): If communicating with a Retail Pro BTF database, select if it is a **Main Station** or **Remote Station**.

Retail Pro (Oracle-based): If communicating with a 9 Series Oracle database, select if it is a **Main Station**, otherwise, click **Remote Station**.

Other Types: Select **IPMS** if communicating with an IPMS station, otherwise, select Other.

Subsidiary #: Enter the number of the Retail Pro® 9 Series subsidiary to which the station is assigned.

Store/Station: Enter the Retail Pro Store/Station combination to assign to this station.

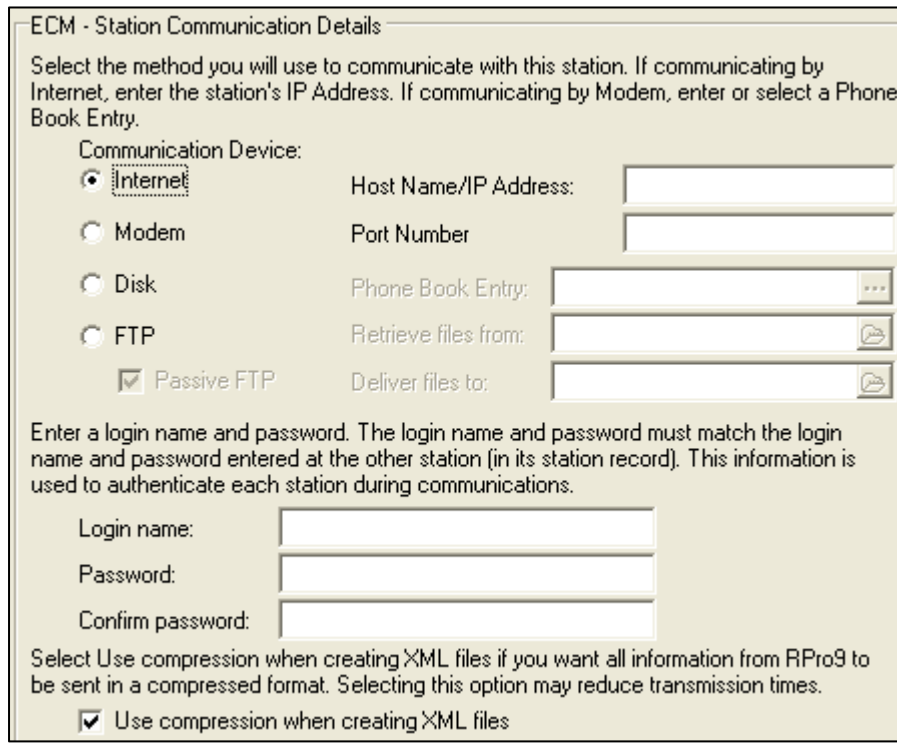
Note: The **Store/Station** field is required for all station types; however, you may also enter a Global Store Code if you create a Oracle-based Main or remote.

Global Store Code: (Optional) Enter the Global Store Code you are assigning to this station.

Station Name: Enter a *unique* name for the station (used for identification purposes).

4. Click **Next** (<Alt+N>) to continue.

Result: A screen for entering details about the communication method is displayed.



5. On the Communication Details screen, make the following selections:

| Section | Description |
|----------------------|---|
| Communication Device | Select a communication method, then enter the location of that device. |
| Login name/Password | <ul style="list-style-type: none"> ▪ The Login name that you enter must be unique (no other station can have the same login name). ▪ ECM used the Login name and Password to verify the station's identity upon startup. |
| Use compression... | Select to send all data from Retail Pro® 9-Series in a compressed format, saving transmission time. |

6. Click **Next** (<Alt+N>).

Result: The Station Completion screen displays.

7. On the Station Completion Screen, select one of the following options:
- Click **Finish** (<Alt+F>) to save the station details and return to the list of stations.
 - Click **Next** (<Alt+N>) to select or create a profile for the station. (See Creating a Profile for instructions.)
 - Click **Repeat** (<Alt+R>) to return to the beginning of the wizard, where you can add another station.

To create a new station (without using the Station Wizard):

1. Click **Stations** on the top menu of the ECM Home Screen.
2. Select a **Subsidiary** from the drop-down list.
3. Click **New** on the top menu.
4. Click **Form** (<Alt+V>).
5. Enter information about the station in the station fields and assign or create a profile.
6. Click **Save**.

Sample Station Records for Retail Pro 8-Series (BTF) and 9-Series (Oracle) Stations

Retail Pro 8 Station Record at Retail Pro 9 ECM Side

| General | | Communication | |
|------------------------|-------------------------------------|-----------------------------|----------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Main (RPRO 8x) |
| Name | Retail Pro Store 1 | Preferred Device | Internet |
| Sbs No | 1 | Host Name/IP Address | 10.40.100.98 |
| Store No | 0 | Login Name | Jerry |
| Station | 0 | Password | ***** |
| Glob Store Code | 0010000 | Phone Book Entry | |

Retail Pro 9 Station Record at Retail Pro 8 ECM Side

| General | | Communication | |
|------------------------|-------------------------------------|-----------------------------|---------------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Enterprise (Oracle) |
| Name | Retail Pro Store 1 | Preferred Device | Internet |
| Sbs No | 1 | Host Name/IP Address | 10.40.100.129 |
| Store No | 0 | Login Name | Jerry |
| Station | 0 | Password | ***** |
| Glob Store Code | 0010000 | Phone Book Entry | |

Copying a Station

A fast way to create a new station is to copy an existing station that offers the closest match. You can copy a station using the Station Wizard or by selecting **Copy** from the top menu in the Stations area.

To copy a station using the Station Wizard:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Click **Station Wizard** on the side menu. The Station Wizard launches.
3. Select **Copy an Existing Station** from the opening screen of the wizard, and then select a station from the drop-down list. Click **Next** after you have selected a station.
4. Navigate through the screens of the wizard, making any necessary changes to the copied information. Be sure to enter a unique **Name** for the station and assign a unique **Store/Station** identifier.
5. Click **Finish** when you reach the Station Completion screen of the wizard.

You can also copy a station directly from the list of stations.

To copy a station:

1. Select **Stations** from the top menu of the ECM Home Screen. The list of stations displays.
2. Select a **Subsidiary** and a station, and then click **Copy**.
3. Enter the stations unique identifying information.
 - Station Name
 - Store/Station
 - Login Name
 - Global Store Code
4. Edit the other fields, if necessary.
5. Click **Save** (<Alt+S>).



Editing a Station

To edit a station:

1. Click **Stations** on the top menu of the Home Screen.

Result: The list of stations displays.

2. Select the station that you want to edit.

Suggestion: For easier editing, select **Form View (<Alt+V>)** from the top menu to display the station record in Form View.

3. Make any necessary changes to the station's fields.
4. Click **Save**.

Deleting a Station

To delete a station record:

1. Click **Stations** on the top menu of the ECM Home Screen.

Result: The list of stations displays.

2. Select the Station that you want to delete.

3. Click **Delete (<Alt+D>)** and then click **Yes** to confirm the deletion.

Result: You are asked if you want to delete the corresponding polling directory for the station. Click **Yes** to delete (clean up) the directory, or click **No** if you think you might recreate the station and want to use the same directory.

Note: It is dangerous to delete a station without also deleting its folder. If the folder contains unprocessed files or files that were not communicated, then these same files will be present and used the next time that station type is created using this same directory.

Station Setup at Retail Pro 8 (BTF)

Define a station record for Retail Pro 9 (Oracle) at each RP8 (BTF) station that will communicate with RP9. Please note that there are some key differences between the subsidiary station records created at the Retail Pro 9 station, and the station record created at Retail Pro 8 stations.

Important: At the Retail Pro 8 station, the computer running **ECMProc.exe** must have its language settings for both the system AND user set to the same language.

Sample Station Records for Retail Pro 8 and 9 Stations

Retail Pro 8 Station Record at Retail Pro 9 ECM Side

| General | | Communication | |
|------------------------|-------------------------------------|-----------------------------|----------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Main (RPRO 8x) |
| Name | Retail Pro Store 1 | Preferred Device | Internet |
| Sbs No | 1 | Host Name/IP Address | 10.40.100.98 |
| Store No | 0 | Login Name | Jerry |
| Station | 0 | Password | ***** |
| Glob Store Code | 0010000 | Phone Book Entry | |

Retail Pro 9 Station Record at Retail Pro 8 ECM Side

| General | | Communication | |
|------------------------|-------------------------------------|-----------------------------|---------------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Enterprise (Oracle) |
| Name | Retail Pro Store 1 | Preferred Device | Internet |
| Sbs No | 1 | Host Name/IP Address | 10.40.100.129 |
| Store No | 0 | Login Name | Jerry |
| Station | 0 | Password | ***** |
| Glob Store Code | 0010000 | Phone Book Entry | |

The table below provides details about the station record fields on the 9-Series side and on the 8-Series side.

| Field | 9-Series (Oracle) Side | 8-Series (BTF) Side |
|-----------------------------|--|--|
| Active | Selected | Selected |
| Name | Enter name for the station with which you want to communicate. | Enter your station's name. |
| Sbs No | Enter the subsidiary number of the station with which you want to communicate. | Enter your station's subsidiary number |
| Global Store Code | Enter the Global Store Code of the station with which you want to communicate (must match the entry on the 8-Series side). | Enter your station's Global Store Code (must match the entry on the 9-Series side). |
| Store/Station | Enter the store number and station identifier (0, A, B, etc.) of the station with which you want to communicate. | Enter your station's store number and station identifier (0, A, B, etc.). |
| Station Type | Select Main (RPRO 8x) as the type of station with which you want to communicate. | Select Main (Oracle) as the type of station with which you want to communicate. |
| Preferred Device | Select the type of device that you want to use for communication. | Select the type of device that you want to use for communication — Internet or Modem. |
| Deliver Files To | (Disc communication only) Enter the path to the remote's \In\Recvd directory, where Exchange delivers files to this station. | (Disc communication only) Enter the path to the remote's \In\Recvd directory, where Exchange delivers files to this station. |
| Pick Up Files From | (Disc communication only) Enter the path to the station's \Out\ directory, where Exchange picks up files from this station. | (Disc communication only) Enter the path to the station's \Out\ directory, where Exchange picks up files from this station. |
| Host Name/IP Address | Enter the station's Host Name/IP Address. On the 9-Series (Oracle) side, this will be the Host Name/IP Address of the 8-Series (BTF) station with which you want to communicate. | Enter the station's Host Name/IP Address (Internet communications). On the 8-Series (BTF) side, this will be the Host Name/IP Address of the 9-Series (Oracle) station with which you want to communicate. |
| Login Name | Enter a Login Name (must be the same as the Login Name entered on the 8-Series (BTF) side). | Enter a Login Name (must be the same as the Login Name entered on the 9-Series (Oracle) side). |
| Password | Enter a password. This password must be the same as the password entered on the 8-Series side. | Enter a password. This password must be the same as the password entered on the 9-Series side. |
| Phone Book Entry | Enter your phone book entry (modem communications). | Enter your phone book entry (modem communications). |

Station Fields

The following table lists the fields available for station records.

| Field | Description |
|-------------------------|--|
| Active | If selected, the station is active and able to send/receive data. If not selected, the station is not able to send/receive data. |
| Checklist | The list of data types that can be selected for communication. |
| Deliver Files to | The full path to the folder where ECM will deliver files for the station. Typically, this is the Polling\[Station]\In\Recvd folder. |
| Exclude Committed Qty | If selected, committed quantities are excluded from communication. |
| FTP Passive | Selected by default when you select FTP as the Preferred Device. |
| Glob Store Code | (Optional) Enter the Global Store Code you are assigning to this station. (Maximum 10 characters) |
| Host Name/IP Address | The Host Name/IP Address of the server. |
| Limit XML File Size | If selected, ECM breaks up a single XML file into multiple files preventing a single data type file from becoming too large. |
| Login Name | The name of the login user allowed to perform communications. (Maximum 30 characters) |
| Name | Enter a <i>unique</i> descriptive name for the station. (Maximum 25 characters) |
| Password | The password of the Login Name user. (Maximum 30 characters) |
| Phone Book Entry | (Modem communications) The phone book entry, when using Modem communication. |
| Pick Up Files From | The full path to the folder where ECM will pick up files for the station. Typically, this is the Polling\[Station]\Out folder. |
| Port Number | The port number to be used for communication. Default = 20000 |
| Preferred Device | Select how communication will be performed: Disk: If you select Disk, enter a Pick Up Files From and Deliver Files To path. Modem: If selected, enter a Host Name/IP Address, Port Number, and Phone Book Entry. Internet: If selected, enter a Host Name/IP Address and Port Number. FTP: If selected, enter a Host Name/IP Address, Port Number, and Retrieve Files From/Deliver Files To paths. |
| Sbs No | The subsidiary to which the station belongs. <i>Reference:</i> See About Subsidiaries |
| Skip Inactive Inventory | If selected, inactive inventory items will be skipped when processing in the station's inventory items. |

| Field | Description |
|-----------------|---|
| Station Type | The type of station that you will be communicating with: Remote (RPRO 8x): Select if this station record is for a Retail Pro 8 Remote. Main (RPRO 8x): Select if this station record is for a Retail Pro 8 Main. Main (RPRO 9x): Select if this station record is for a Retail Pro 9 Remote. Remote (RPRO 9x): Select if this station record is for a Retail Pro 9 Main. Other: Select "Other" if communicating with a type not listed. IPMS: Select IPMS if communicating with an IPMS station. |
| Store/Station | The store/station combination for the station. For example, 001A, 0002B, etc. |
| Use Compression | If selected, ECM will use compression when generating the XML files to minimize their size. |
| Use XML Schema | If selected, the resulting XML files display all information that can be displayed. Selecting this option is useful if you are creating custom XML information because you can see all available information from the schema; however, selecting this option will increase the size of the XML files. If not selected, the XML file only displays schema information that is relevant to the data that is being processed out. Not selecting this option makes the XML files smaller. Default= Not selected |

Profiles

About Profiles

A profile consists of:

- Types of data that will be sent from a station (profile checklist)
- Additional settings for controlling the processing of data received from the station (profile tools)

Rather than defining these settings from scratch for each station, you can create profiles and assign those profiles to individual stations as necessary. Assigning a profile lets you select all of a station's data exchange settings with a single selection and ensures consistency in communications.

Profiles can be created at any station. Profiles created at one station can be communicated to and viewed at other stations, but not modified.

A station's profile is always used during an automated communications cycle. If no profile is assigned to a station, then the default profile is used when processing data. A station's profile can be overridden by manually launching communications from a Remote station.

Changing Profiles

If you assign a profile to a station and then change that profile, the changes will not be updated for that station. To have the changes take effect, you must reassign the profile.

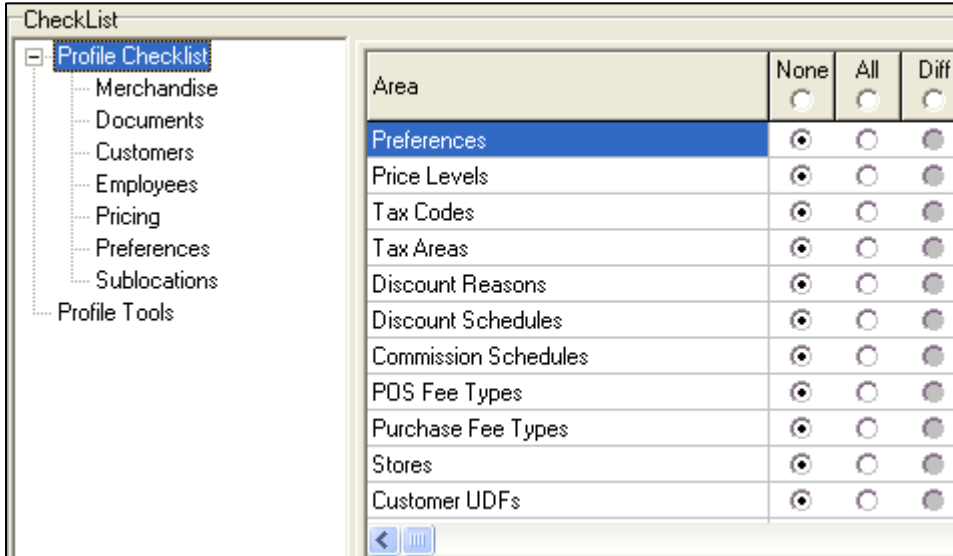
Profiles File

Each profile's configuration details are stored in the **Profiles.xml** file, which is located in the **ECMProfiles** folder.

Profile Checklist

The Profile Checklist is used to control the type of data that is *sent* from a station.

For each data type, you can select when you want to send data to the station. The options vary depending upon the data type. See Checklist Recommendations below for recommended settings.



| Area | None | All | Diff |
|----------------------|----------------------------------|-----------------------|-----------------------|
| Preferences | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Price Levels | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tax Codes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tax Areas | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Discount Reasons | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Discount Schedules | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Commission Schedules | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| POS Fee Types | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Purchase Fee Types | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Stores | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Customer UDFs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

While viewing a profile in Form View, select data exchange options using one of the following methods:

Method 1: Select one of the header options to assign the option to all data types for the station. For example, if you select **All** in the header, then **All** is selected for each individual data type. You can then select a different option, if necessary, for individual data types.

Method 2: Select the plus sign next to the Profile name to display the list of nodes. Select a node and then select an option for individual data types.

When selecting data types, select from the following options:

None: Select **None** if you never want to send the data.

All: Select **All** to always send the data.

Differences: Select **Differences** to send only new or changed records.

Images: Select **Images** to send any images associated with the records. *Warning:* Selecting Images can significantly affect transmission times, so typically it is not selected.

Listed below is a description of each data type category.

Merchandise

| Checklist Option | Description | Available Settings |
|-------------------------|---|------------------------------------|
| Vendor UDFs | User-defined fields for vendor records, defined in Local Preferences > Merchandise > Vendors > User-defined. | None, All |
| Item UDFs | User-defined fields for inventory items, defined in Local Preferences > Merchandise > User-defined/Auxiliary. | None, All |
| DCS | Department records, defined in the Departments area. | None, All, and Images |
| Vendor | Vendor records, defined in the Vendors area. | None, All, and Images |
| Kit Components | Kits and their component items, defined in the Package and Kit area. | None, All |
| Inventory | Inventory information, defined in the Inventory area. | None, All, Differences, and Images |
| Markdowns | Price Markdown information, defined in the Price Manager area. | None, All, and Differences |
| PI Counts | Physical inventory count information, defined in the Physical Inventory area. | None, All |

Documents

| Checklist Option | Description | Available Settings |
|-------------------------|--|---------------------------|
| Receipts | Receipt records from the Receipts area. | None, All, Differences |
| Adjustment Memos | Adjustment Memo records from the Adjustments area. | None, All, Differences |
| Transfer Slips | Out slip records from the Slips area. | None, All, Differences |
| Vendor Invoices | Vendor invoice records from the Vendor Invoices area. | None, All, Differences |
| Vouchers | Voucher records from the Vouchers area. | None, All, Differences |
| Transfer Orders | Transfer Order records from the Transfer Order area. | None, All, Differences |
| Sales Orders | Sales order records from the Sales Order area. | None, All, Differences |
| Purchase Orders | Purchase order records from the Purchase Orders area. | None, All, Differences |
| Former Z-Outs | Former Z-Out reports from the Former Z-Out area. | None, All, Differences |
| Pending APR | Pending Archive/Purge information from the Archive/Purge area of Technician's Toolkit. | None, All, Differences |

Customers

| Checklist Option | Description | Available Settings |
|------------------------|---|-----------------------------------|
| Customer UDF | User-defined fields for customer records, defined in Local Preferences > Customers > UDF/Aux. | None, All |
| Customers | Customer records, defined in the Customers area. | None, All, Differences and Images |
| Customer Address Types | Customer Address Types defined in System Preferences > Local Preferences > Customers > General. | None, All |

Employees

| Checklist Option | Description | Available Settings |
|-----------------------|--|------------------------|
| Commission Schedules | Commission information defined in Employee Mgmt > Commissions. | None, All |
| Time Shifts | Time Shift information defined in Employee Mgmt > Time Shifts. | None, All |
| Employees | Employee records defined in Employee Mgmt > Employees. | None, All |
| Store Sales Target | Sales Target information for stores defined in Employee Mgmt > Sales Targets. | None, All, Differences |
| Employee Sales Target | Sales Target information for employees defined in Employee Mgmt > Sales Targets. | None, All, Differences |
| User Groups | User groups defined in Employee Mgmt > Groups. | None, All |
| Tills | Till information defined in System Preferences > Local Preference > Point of Sale > General > Options. | None, All |

Pricing

| Checklist Option | Description | Available Settings |
|--------------------|---|--------------------|
| Discount Reasons | Discount reasons defined in Local Preferences > Point of Sale > General > Price/Discounts. | None, All |
| Discount Schedules | Discount handling information defined in Local Preferences > Merchandise > Pricing > General. | None, All |
| Price Rounding | Price Rounding information defined in Local Preferences > Merchandise > Pricing > Advanced. | None, All |
| Price Adjusting | Price Adjusting information defined in Local Preferences > Merchandise > Pricing > Advanced. | None, All |

Preferences

| Checklist Option | Description | Available Settings |
|---------------------|---|--------------------|
| Preferences | This option covers preferences not covered by the more specific preference options described elsewhere in this table. | None, All |
| Price Levels | The names of your price levels and their discount percentages relative to the base price level, defined in Local Preferences > Merchandise > Pricing > General. | None, All |
| Tax Codes | The list of tax codes that can be assigned to items, defined in Local Preferences > Taxes > Tax Codes. | None, All |
| Tax Areas | The list of tax areas, defined in Local Preferences > Taxes > Tax Areas. | None, All |
| POS Fee Types | The types of fees to be available for entry on receipts and Sales Orders, defined in Local Preferences > Point of Sale > General > Fees/Shipment. | None, All |
| Purchase Fee Types | The types of fees to be available for entry on purchase orders and vouchers, defined in Local Preferences > Purchasing > General. | None, All |
| Stores | The list of your stores and information about those stores, defined in Local Preferences > Stores > General. | None, All |
| Receipt UDFs | Custom labels for user-defined fields on Receipts, defined in Local Preferences > Point of Sale > Receipts > Comments. | None, All |
| Credit Cards | The list of credit cards and ranges accepted by your business, defined in Local Preferences > Point of Sale > Tenders > Credit Card. | None, All |
| Titles | The list of titles (e.g., Mr., Mrs., Miss) that you can enter in customer and vendor records, defined in Local Preferences > System > Titles. | None, All |
| Allocation Patterns | Allocation Patterns (used to allocate merchandise among multiple stores by specifying the relative quantities to be ordered for each store), defined in Local Preferences > Merchandise > Scales (in the Definition area of the Scales screen). | None, All |
| Scales | The grid scales to be available when creating new styles, defined in Local Preferences > Merchandise > Scales. | None, All |
| Regions | The list of regions and/or districts and the stores assigned to those regions/districts, defined in Global Preferences > Regions > Options. | None, All |

| Checklist Option | Description | Available Settings |
|--------------------|---|--------------------|
| Receipt Comments | The list of comments to be available for entry on receipts, defined in Local Preferences > Point of Sale > Receipts > Comments. | None, All |
| SO Comments | The list of comments to be available for entry on sales orders, defined in Local Preferences > Point of Sale > Sales Orders > Comments. | None, All |
| Slip Comments | The list of comments to be available for entry on slips, defined in Local Preferences > Transfers > Comments. | None, All |
| Voucher Comments | The list of comments to be available for entry on vouchers, defined in Local Preferences > Purchasing > Comments. | None, All |
| Currency | A list of the currencies that you use in your store operations, defined in Global Preferences > Currency. | None, All |
| Rates | Exchange rates for your currencies, defined in Global Preferences > Currency. | None, All |
| POS Tenders | The list of tenders (cash, check, credit card, etc.) that will be available at cash registers, defined in Local Preferences > Point of Sale > Tenders > Tender Requirements. | None, All |
| Purchase Terms | Default payment terms, defined in Local Preferences > Point of Sale > Receipts > Tenders/Terms. | None, All |
| Ship Methods | The list of transportation carriers defined in Local Preferences > Point of Sale > Sales Orders > Options. | None, All |
| Ship Instructions | Shipping Instructions that are available for entry on Purchase Orders, defined in Local Preferences > Purchasing > Comments. | None, All |
| Adjustment Reasons | The list of adjustment reasons to be available when making adjustment memos, defined in Local Preferences > Merchandise > Adjustments. | None, All |
| Postal Codes | Preferences related to handling ZIP/Postal Codes, defined in Local Preferences > System > General. | None, All |
| Sublocations | This setting communicates the following preference settings in Local Preferences > Merchandise > Sub Locations: <ul style="list-style-type: none"> ▪ Enable Sub Locations ▪ Default Sub Locations to Managed ▪ Default New Items to Sub Locations ▪ Restrict Negative Quantities in Sub Locations | None, All |
| Store/Station/WS | Workstations can have default stores/stations assigned, enabling the workstation to make specific types of records and/or documents for those stores and stations. | None, All |
| Transfer Rules | Transfer Rules, defined in Global Preferences > Company > Transfer Rules. | None, All |

| Checklist Option | Description | Available Settings |
|-----------------------|---|--------------------|
| Default Stores | Default stores to be used when creating individual document types. This setting is defined in Local Preferences > Documents > Default Stores. | None, All |
| Field Lengths | Settings for defining the length of various fields. | None, All |
| Track Adjustment Logs | Track Adjustment Logs setting. | None, All |
| Document Sequences | Settings for the next sequential number to be assigned to individual document types, defined in Local Preferences > Documents > Sequences. | None, All |
| Seasons | Season information, defined in Global Preferences > Calendars > Seasons. | None, All |
| Disbursement Reasons | Disbursement Reasons, defined in Local Preferences > Receipts > Disbursement Options. | None, All |
| Countries | Country information, as defined in Global Preferences > Locality. | None, All |
| Languages | Language information, defined in Global Preferences > Locality. | None, All |
| Transfer Reasons | Transfer reasons, defined in Local Preferences > Transfers > Comments/Reasons. | None, All |
| Item Groups | Item group information defined in Local Preferences > Merchandise > General | None, All |
| Item Ranges | Item range information defined in Local Preferences > Merchandise > General | None, All |
| Transfer Fee Types | Transfer fee types defined in Local Preferences > Transfers > General. | None, All |
| Transfer Stores | The estimated in-transit time between store pairs, defined in Local Preferences > Transfers > In Transit Rules. | None, All |
| Transfer Definitions | Verification rule definitions, defined in Local Preferences > Transfers > In Transit Rules. | None, All |
| Receipt Item Reasons | Reasons for items voids and item returns, defined in Local Preferences > Point of Sale > Receipts > Returns/Voids. | None, All |
| Store Classes | Store Classes defined in Local Preferences > Stores > General. | None, All |
| Store Types | Store Types defined in Local Preferences > Stores > General. | None, All |
| Job Titles | Job titles defined in Global Preferences > General. | None, All |

Sub Locations

| Checklist Option | Description | Available Settings |
|-----------------------|---|------------------------|
| Sub Location Segments | Sub location segments defined in System Preferences > Local Preferences > Merchandise > Sub Locations. | None, All |
| Sub Locations | Sub location information defined in Merchandise > Sub Locations. | None, All |
| Default Sub Locations | Default sub locations assigned to individual document types at each store, defined in System Preferences > Local Preferences > Merchandise > Sub Locations. | None, All |
| Sub Location Qtys | The quantities in individual sub locations. | None, All, Differences |

General Checklist Recommendations

The recommendations below are general ones. Each retailer's checklist settings will vary depending upon the features the retailer is using and the retailer's specific needs.

| Area | Retail Pro 9 | Retail Pro 8 Series Main |
|--------------------|--------------|--------------------------|
| Merchandise | | |
| Vendor UDFs | None | None |
| DCS | None | None |
| Vendors | None | None |
| Kit Components | None | None |
| Inventory | Differences | None |
| Markdowns | None | None |
| PI Counts | All | All |
| Documents | | |
| Receipts | Differences | Differences |
| Adjustment Memos | None | None |
| Transfer Slips | All | Differences |
| Vendor Invoices | None | None |
| Vouchers | None | Differences |
| Transfer Orders | All | None |
| Sales Orders | Differences | Differences |
| Purchase Orders | All | Differences |
| Pending APR | All | None |
| Customers | | |
| Customer UDFs | All | None |
| Customers | Differences | Differences |

| Area | Retail Pro 9 | Retail Pro 8 Series Main |
|------------------------|--------------|--------------------------|
| Customer Address Types | All | None |
| Employees | | |
| Commission Schedules | None | None |
| Employees | None | None |
| Time Shifts | None | None |
| Store Sales Target | None | None |
| Employee Sales Target | None | None |
| User Groups | None | None |
| Tills | None | None |
| Pricing | | |
| Discount Reasons | None | None |
| Discount Schedules | None | None |
| Price Rounding | None | None |
| Price Adjusting | None | None |
| Preferences | | |
| Preferences | None | None |
| Price Levels | None | None |
| Tax Codes | None | None |
| Tax Areas | None | None |
| POS Fee Types | None | None |
| Purchase Fee Types | None | None |
| Stores | None | None |
| Receipt UDFs | None | None |
| Credit Cards | None | None |
| Titles | None | None |
| Allocation Patterns | None | None |
| Scales | None | None |
| Regions | None | None |
| Receipt Comments | None | None |
| SO Comments | None | None |
| Slip Comments | None | None |
| Voucher Comments | None | None |
| Currencies | None | None |
| Rates | None | None |

| Area | Retail Pro 9 | Retail Pro 8 Series Main |
|---|--------------|--------------------------|
| POS Tenders | None | None |
| Purchase Terms | None | None |
| Ship Method | None | None |
| Ship Instructions | None | None |
| Adjustment Reasons | None | None |
| Postal Codes | None | None |
| Sublocations | None | None |
| Store/Station/WS | None | None |
| Transfer Rules | None | None |
| Default Stores | None | None |
| Field Lengths | None | None |
| Track Adjustment Logs | None | None |
| Document Sequences | All | All |
| Seasons | None | None |
| Disbursement Reasons | None | None |
| Countries | None | None |
| Languages | None | None |
| Transfer Reasons | None | None |
| Item Groups | None | None |
| Item Ranges | None | None |
| Transfer Fee Types | None | None |
| Transfer Stores | None | None |
| Transfer Definitions | None | None |
| Receipt Item Reasons | None | None |
| Store Classes | None | None |
| Store Types | None | None |
| Job Titles | None | None |
| Sub Locations | | |
| Sub Location Segments | None | None |
| Sub Locations | None | None |
| Default Sub Locations | None | None |
| Sub Location Quantities | None | None |
| Profile Tools | | |
| Manage Inventory Qty and Cost for this Station. | Enabled | Disabled |

| Area | Retail Pro 9 | Retail Pro 8 Series Main |
|--|--------------|--------------------------|
| Manage Inventory Price for this Station | Enabled | Disabled |
| Auto-update Vouchers received from this station. | Enabled | Disabled |
| Purge Marked Slips during Communication | Enabled | Disabled |
| Purge Marked ASNs during Communication | Disabled | Disabled |
| Manage Inventory Descriptions | Enabled | Disabled |
| Manage Customer Balances | Disabled | Disabled |
| Manage Employee Security | Enabled | Disabled |
| Compare Inventory Modified Dates | Disabled | Disabled |
| Manage Committed Qty | Disabled | Disabled |
| Accept Inventory cost for items with zero qty | Enabled | Disabled |
| Accept Inventory price for items with zero qty | Enabled | Disabled |
| Accept Inventory cost for new items with zero qty | Enabled | Disabled |
| Accept Inventory price for new items with zero qty | Enabled | Disabled |

Profile Tools

Profile tools are special settings associated with a profile to give you greater control over a station's data. Profile tool settings determine whether the Retail Pro 9 (Oracle) or 8 (BTF) station manages inventory.

- If you select profile tools for a single station's profile, then the profile rules apply only to that station.
- If you select profile tools for a profile assigned to multiple stations, then the rules apply to all stations using that profile.

To define profile tools for a single station:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Select the Station for which you want to define profile tools, and then click **Form View** (<Alt+V>).
3. Under **Checklists**, select **Profile Tools**.
4. Select the **Enable** field for individual tools, as necessary.

Refer to the following table for information.

| Option | Description |
|---|---|
| Manage inventory quantity and cost for this station | <p>Select this option to have your station manage inventory quantities and costs for the selected station.</p> <p>Only transactional documents received from the station will affect the station's inventory quantities and costs, not the station's inventory file. If someone manually changes an item's quantity at the station (no document created), when your station receives the inventory file, that change would be ignored.</p> <p>When sending data to the selected station, the inventory quantities and costs that you send will overwrite the inventory quantities and costs at the station.</p> |
| Manage Inventory price for this station | <p>Select this option to have your station manage inventory prices for the selected station.</p> <p>Transactional documents received from the station affect the station's inventory prices, but not the station's inventory file. If someone manually changes an item's price(s) at the station (no document created), that change is ignored when your station receives the inventory file.</p> <p>When sending data to the selected station, the inventory prices that you send overwrite the inventory prices at the station.</p> |
| Auto update vouchers received from this station | <p>Select this option to automatically update any vouchers that your station receives from the selected station. If this option is not selected, any vouchers that your station receives from the station will be added to the Pending Voucher file, where they can be reviewed and updated.</p> |
| Purge marked slips during communication | <p>Select this option to automatically delete any slips marked for deletion that your station receives from this station. If this option is not selected, then slips that are marked for deletion will be added to the slips file.</p> |
| Purge Marked ASNs during communication | <p>Select this option to automatically delete any ASNs marked for deletion that your station receives from this station. If this option is not selected, then ASNs that are marked for deletion will be added to the ASN file.</p> |
| Manage Inventory Descriptions | <p>Your station manages inventory descriptions for the selected station. ECM sends ALL inventory item descriptive elements.</p> <p><i>Note:</i> Depending on the size of your inventory, selecting the Manage Inventory Descriptions option can result in a large file transfer during ECM communication.</p> <p>When sending data, the inventory descriptions that you send will overwrite the descriptions at the station.</p> |
| Manage Customer Balances | <p>The station manages customer balances (via the Charge Balance and Charge Limit fields in the customer record) for the selected station.</p> |
| Manage Employee Security | <p>If selected, your station manages employee security settings for the selected station.</p> <p>This means that the following information will not be imported:</p> <ol style="list-style-type: none"> 1) password policies from PasswordPolicies.xml 2) employee logon credentials from Employee.xml 3) employee group assignment from Employee.xml 4) employee store assignment from Employee.xml 5) list of user groups from UserGroup.xml |

| Option | Description |
|----------------------------------|--|
| Compare Inventory Modified Dates | <p>When the Compare Inventory Modified Dates flag is selected for a station, descriptions for existing items will be updated if the Last Modified Date in the Inventory.xml file is NOT OLDER than the Last Modified Date in the database. This allows stores to edit item descriptions without them being accidentally overwritten by data from the station that is managing descriptions. (See Compare Inventory Modified Dates note below for detailed information.)</p> |
| Manage Committed Quantities | <p>If selected, ECM will ignore committed quantities when processing in inventory data and update corresponding fields only when actual order document arrives.</p> <p>If not selected, ECM will update committed fields when inventory records are processed and skip updating of committed fields when handling documents.</p> <p>Recommended configurations:</p> <ol style="list-style-type: none"> 1) Regular v9-to-v9 polling - "manage committed quantities" should be set to the same state as "manage inventory quantity/cost" option. 2) v9-to-v9 polling when source station has "skip committed" option checked - "manage committed quantities" should be selected (checked) at the target station, because the source station will not include committed fields in the XML, and updating them through documents is the only way to propagate them. 3) v8-to-v9 polling - "manage committed quantities" should be selected on the 9-series side, because EcmProc does not include committed fields in the XML when inventory is exported from the v8 BTF database. <p><i>Note:</i> This option is tied indirectly to "manage inventory qty/cost" in the ECM station profile - when you change the state of "manage inventory qty/cost" ECM will automatically change "manage committed quantity" to match it (to support the most common v9 to v9 configuration - see #1 above for details). If you need to change the default setting, you must do it manually. Always select the proper setting for the "manage inventory qty/cost" option first, THEN AND ONLY THEN change the setting for "manage committed quantities," if necessary.</p> <p><i>Note:</i> This option only affects ECM on the 9-series side. On the BTF side, ECM ALWAYS updates committed quantities when it receives a new or updated order document.</p> <p><i>Note:</i> This option is turned OFF by default for existing stations, so be sure to set it properly for existing stations when install the maintenance pack (MP).</p> |

| Option | Description |
|---|---|
| <p>Accept Inventory Price/Cost for items with zero qty</p> <p>Accept Inventory Price/Cost for new items with zero qty</p> | <p>If selected (checked), inventory price/cost values imported into Retail Pro 9 will be accepted under two conditions:</p> <ol style="list-style-type: none"> 1) price/cost is NOT managed on receiving side, OR 2) price/cost IS managed on receiving side AND current on-hand quantities are zero. <p>If not selected (unchecked), price/cost information for zero-quantity items will remain managed (i.e., be ignored). Previously, price and cost information was always accepted for zero-quantity items.</p> <p>These options are only analyzed when the corresponding "manage inventory qty/cost" or "manage inventory price" profile tool is checked.</p> <p>(Default = All options are selected)</p> <p>These flags provide added flexibility in two key situations:</p> <ul style="list-style-type: none"> ▪ When brand new items are imported into Retail Pro 9 inventory ▪ When existing items are (re)imported into inventory <p>Adjustment Memos</p> <p>Cost adjustment memos created for the imported items follow these guidelines:</p> <p>If "Accept Inventory Cost for items with zero qty" is CHECKED, the cost adjustment will not be applied to items when the adjustment quantity is zero. In that case, cost will be delivered by inventory polling.</p> <p>If "Accept Inventory Cost for items with zero qty" is UNCHECKED, the cost adjustment will be applied to ALL items, regardless of their quantity (because inventory cost will be rejected unconditionally). This is applicable to scenarios when the "manage inventory qty/cost" option is CHECKED.</p> <p>Note for 9.20 users: There is a preference called "Create price adjustments for items with zero O/H qty" in System Preferences > Local Preferences > Merchandise > Adjustments page. It is strongly recommended to have this option CHECKED on all stations when "accept inventory price" options are UNCHECKED on the inventory managing polling station. Selecting this option will mean simplify price polling because fewer price adjustment memos will have to be manually created.</p> <p>Does Not Affect Retail Pro 9</p> <p>Clearing these flags do not affect the behavior of Retail Pro 9; only ECM is affected. For example, Retail Pro 9 will NOT produce price/cost adjustments for zero-quantity items when they are edited in inventory. In that scenario, either adjustment memos will need to be created manually or the user should make all price/cost changes on the managing side.</p> <p>Inactive Items</p> <p>If an item has been imported into Retail Pro 9, but as inactive, then the item is considered an EXISTING item. This typically occurs if an item is listed on Invoice.xml or other document XML which was imported before the inventory.xml file was imported.</p> |

5. Click **Save**.

Compare Inventory Modified Dates Flag

The **Compare Inventory Modified Dates** flag gives you greater control over the management of inventory description information. Use the **Compare Inventory Modified Dates** flag with the **Manage Inventory Descriptions** flag to ensure that inventory descriptions are updated correctly.

When the **Compare Inventory Modified Dates** flag is selected for a station, descriptions for existing items will be updated if the Last Modified Date in the Inventory.xml file is NOT OLDER than the Last Modified Date in the database. This allows stores to edit item descriptions without them being accidentally overwritten by data from the station that is managing descriptions.

For example, considering the following scenario:

Store A and Store B are both NOT managing inventory descriptions.

1. Store A deactivates an item at 1pm.
2. Store B edits the item at 2pm and creates a document against it.
3. Store A sends the inactive item to Store B at 3 p.m.

Result: If the **Compare Inventory Modified Dates** flag is selected for Store B, Store B will not accept the item and the changes will be preserved. If the **Compare Inventory Modified Dates** flag is NOT selected, Store B will accept the item, erasing the changes made earlier.

Note: If the **Manage Inventory Descriptions** flag is selected, descriptions for existing items will be rejected, regardless of the item's Last Modified Date

New Item Descriptions

New items and their descriptions are always added to the database, regardless of the settings for Manage Inventory Descriptions and Compare Inventory Modified Dates.

Managing Item Descriptions Using the “Manage Inventory Descriptions” and “Compare Inventory Modified Dates” Flags

The following table lists typical communication scenarios using the Managing Item Descriptions and Compare Inventory Modified Dates flags.

| | Station A | Station B | Notes |
|---|---|--|--|
| Single Station Manages Inventory | Manage Inventory Descriptions = Yes Compare Inventory Modified Dates = No | Manage Inventory Descriptions = No Compare Inventory Modified Dates = No | Manage Inventory Descriptions is selected, so descriptions for existing items will be rejected, regardless of the item's Last Modified Date. |
| Both Stations Manage Inventory | Manage Inventory Descriptions = No (allow editing by both stations) Compare Inventory Modified Dates = Yes | Manage Inventory Descriptions = No Compare Inventory Modified Dates = Yes | Descriptions for existing items are updated if the Last Modified Date in the XML is not older than the Last Modified Date in the database. |
| Station Used Only for Initial Import of Items from 3rd-Party Database | Manage Inventory Descriptions = No Compare Inventory Modified Dates = No | | New items and their descriptions are always added. |

| | Station A | Station B | Notes |
|--|---|-----------|-------|
| Station used for Initial Import and Update of Existing Items from 3rd-Party Database: | Manage Inventory Descriptions = Yes (Alternatively, No, depending on whether you are importing price/cost, or just descriptions) Compare Inventory Modified Dates = Yes | | |

Note: By default the Compare Inventory Modified Dates flag is unchecked for all existing stations.

How Compare Inventory Modified Dates Flag Affects New and Existing Items.

The following table explains how the possible combinations of the Manage Inventory Descriptions and Compare Inventory Modified Dates flags impact new and existing items.

| Inventory Management Settings | New Items | Existing Items |
|---|--|--|
| Manage Inventory Descriptions = Yes Compare Inventory Modified Dates = Yes or No | New items and their descriptions are always added. | If Manage Inventory Descriptions is selected, descriptions for existing items will be rejected, regardless of the item's Last Modified Date. |
| Manage Inventory Descriptions = No Compare Inventory Modified Dates = No | New items and their descriptions are always added. | Descriptions for existing items are always updated. |
| Manage Inventory Descriptions = No Compare Inventory Modified Dates = Yes | New items and their descriptions are always added. | Descriptions for existing items are updated if the Last Modified Date in the XML is not older than the Last Modified Date in the database. |

Updating Price, Qty, Cost

Price, quantity, and cost will be updated when importing inventory items if the corresponding management flag is NOT set.

Price and cost will also be updated when the corresponding management flags are set if you are importing items and all quantities are zero in both Inventory.xml and the database. If quantities in the XML and database are not zero, ECM will reject them and will wait for price/cost adjustments to arrive.

Custom Import Tools

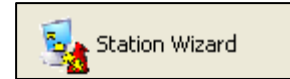
Any custom import tool which communicates directly with the XML processor in the database (as opposed to preparing XML files for EcmProc) will have the field unchecked as well, unless its code is modified.

Creating a Profile

To create a station profile, use one of the methods below. (You can also create a profile by copying an existing profile.)

To create a profile using the Station Wizard:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Click **Station Wizard**. The Station Wizard launches.



ECM Station Wizard

This wizard will guide you through the process of creating an identity for your station and defining communication details. For more details, consult the RPro9 Help files.

Select one of the options below to begin:

Create a new station

Copy an existing station

Create a new profile

3. On the opening screen of the wizard, select **Create a new profile**. Enter a name for the profile, then click **Next (<Alt+N>)**. The Profile Details screen displays.

ECM - Profile Details

Choose the appropriate options [None, All, or Differences] for the merchandise and pricing data types listed below. For DCS (Department Codes), Vendors, and Inventory, you have the option of sending images associated with the records.

Merchandise:

| Area | None | All | Diff | Images |
|-------------|----------------------------------|-----------------------|-----------------------|--------------------------|
| Vendor UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Item UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| DCSs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Vendor | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |

Pricing:

| Area | None | All | Diff |
|--------------------|----------------------------------|-----------------------|-----------------------|
| Discount Reasons | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Discount Schedules | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Price Rounding | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

- Select data exchange options using one of the following methods:

Method 1: Select one of the header options to assign the option to all the listed data types. For example, if you select **All** in the header, then **All** is selected for each individual data type in the group. You can then select a different option, if necessary, for individual data types in the group.

Method 2: Select a data exchange option for individual data types.

- Click **Next (<Alt+N>)** to move through the screens and choose data exchange options as necessary.
- On the Profile Tools screen, select the **Enable** field to apply any necessary profile tools.

ECM - Profile Rules

Enable or disable rules for the profile, as necessary. The rules control the processing of certain types of data for the station.

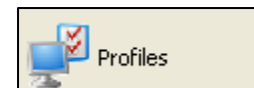
Rules:

| Rules | Enable |
|---|-------------------------------------|
| | <input type="checkbox"/> |
| Manage Inventory Qty and Cost for this station | <input type="checkbox"/> |
| Manage Inventory Price for this station | <input type="checkbox"/> |
| Auto-update vouchers received from this station | <input type="checkbox"/> |
| Purge marked slips during communication | <input type="checkbox"/> |
| Purge marked ASNs during communication | <input type="checkbox"/> |
| Manage Inventory Descriptions | <input type="checkbox"/> |
| Manage Customer Balances | <input type="checkbox"/> |
| Manage Employees Security | <input checked="" type="checkbox"/> |
| Compare Inventory Modified Dates | <input type="checkbox"/> |
| Manage Committed Qty | <input type="checkbox"/> |

- Click **Finish (<Alt+F>)** when you reach the end of the wizard.

To manually create a new station profile:

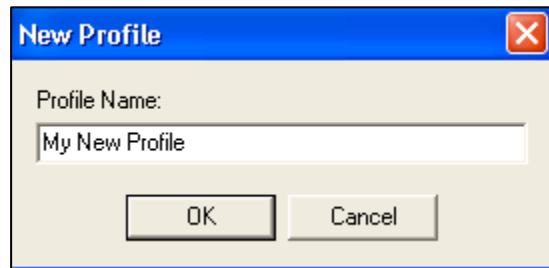
- Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
- Click **Profiles**. The Profiles screen displays.



Profiles Screen

| Area | None | All | Diff | Images |
|------------------------------------|----------------------------------|-----------------------|-----------------------|--------------------------|
| Target Type - Remote (Managed) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Merchandise | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Documents | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Customers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Employees | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Pricing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Preferences | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Sublocations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Profile Tools | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Main | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Enterprise | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Initialize | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Enterprise (Managed) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Main (Managed) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Price Levels | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Tax Codes | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Tax Areas | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Discount Reasons | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Discount Schedules | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Commission Schedules | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| POS Fee Types | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Purchase Fee Types | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Stores | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Customer UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |

3. Click **New**. The New Profile dialog displays.
4. Type a name for the profile, and then click **OK**. Your new profile is added to the existing profile tree.
5. Select data exchange options using one of the following methods:
6. Select the + to display the list of profile areas, then select **Profile Tools**.
7. Select the **Enable** field to apply individual profile tools.



The 'New Profile' dialog box has a blue title bar with a close button (X). It contains a text input field labeled 'Profile Name:' with the text 'My New Profile' entered. Below the input field are two buttons: 'OK' and 'Cancel'.

Note: Restrictions on Profile Names

When creating a new station profile, you may not use (/, ?, \ or *) characters in the profile name.

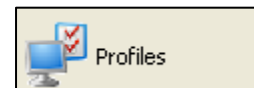
Changing Profiles

If you assign a profile to a station and then change that profile, the changes will not be updated for that station. To have the changes take effect, you must reassign the profile.

Editing a Profile

To edit a profile:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Click **Profiles** and then select a profile on the left.
3. Navigate through the list of data types, select and clearing options as necessary.
4. Click **Save**.



Copying a Profile

An easy way to create a new profile is to copy an existing profile that offers the closest match.

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Click **Profiles**. The list of profiles displays.
3. Select a profile from the list, and then click **Copy**.



Result: The system creates a new profile named **Copy of [profile name]**.

4. Enter a new name for the profile.
5. Navigate through the Profile Checklist and Profile Tools, selecting/un-selecting options as necessary.
6. Click **Save**.

Deleting a Profile

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Click **Profiles**.
3. Select the profile that you want to delete.
4. Click **Delete**. A confirmation dialog displays. Click **Yes** to confirm the deletion.



Note: If you delete a profile that is currently assigned to stations, be sure to assign a new profile to those stations.

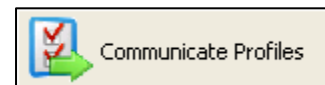
Communicating Profiles

If you change any of your defined profiles, you can communicate the updated profile file to other stations. When preparing files for communication, ECM copies the profiles file (**profile.xml**) from its existing location to the **\Polling \[Station]\Out** directory. The file is then transferred during the next Exchange.

When a **profile.xml** file is sent to another station, it overwrites the existing profiles that were previously defined at the target station.

To communicate profiles:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Select the station to which you want to communicate the new profile(s), and then click **Communicate Profiles**. A confirmation dialog informs you that profiles were successfully prepared for communication.
3. Click **OK**.



Filtering Documents and Merchandise by Store

Filtering Documents by Store


In addition to selecting which documents to send to a selected station, you can choose to send only documents for specific stores during communication. For example, if a Retail Pro 8 Main station communicates with a Remote station, you might only want to process out and send receipts for that station's store.

Likewise, if Retail Pro 9 communicates with an RP8 Main station, then you should process and send documents for all stores.

To filter documents by store:

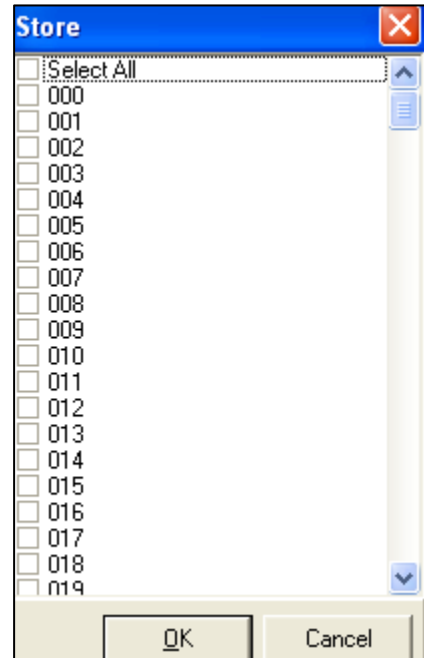
1. Click **Stations** on the ECM Home Screen. The list of stations displays.
2. Select the station you want, and then click **Form View** (<Alt+V>).
3. In the Profile Checklist for the station, select **Documents** from the list.

| Area | None | All | Diff | Images | Stores |
|------------------|----------------------------------|-----------------------|----------------------------------|--------------------------|------------|
| Receipts | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | (None) ... |
| Adjustment Memos | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | (None) |
| Transfer Slips | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | (None) |
| Vouchers | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | (None) |
| Transfer Orders | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | (None) |
| Sales Orders | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | (None) |
| Purchase Orders | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | (None) |
| Former ZOuts | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | (None) |
| Pending APR | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | (N/A) |

4. Click in the Stores field next to the item and click  to open the Store Selection dialog box.
5. Select individual store(s) as necessary, or choose Select All to select all stores. Click **OK** to save your selections and close the dialog.
6. Click **Save** on the top menu.

If no stores are checked for a document type, then ECM sends only documents for the current store.

If a store other than the current store is selected, the store number or the word **Selection** is displayed in the Store column. (The store to which the station is currently assigned is always selected.)




Determining a Document's Store

The following fields are used to determine the document store when sending documents.

| Document | Field | Comments |
|------------------|---------------------------------------|--|
| Receipts | Invoice.Store_no | |
| Adjustment Memos | Adjustment.Store_no | |
| Vouchers | Voucher.Store_no | |
| Transfer Slips | Slip.Out_Store_no Slip.In_Store_no | Includes Slips relayed from one station to another. |
| Purchase Orders | PO.Store_no PO_Qty.Store_no | A Marked For PO directly references the PO record for item quantity information. A Ship To PO will reference the PO Qty file for the item quantity related to any store for which quantity is to be issued. |
| Transfer Orders | TOrd_Qty.Store_no TOrd.store_no | |
| Sales Orders | SO.Trgt_Store_no SO.Store_no | |

Filtering Inventory by Store

When selecting Merchandise communication settings, you can select which stores will be included in communication. This is useful for reducing overall communication times when there is not a need to communicate data for each store.

1. Click **Stations** on the ECM Home Screen. The list of stations displays.
2. Select the station you want, and then click **Form View** (<Alt+V>).
3. In the Profile Checklist for the station, select **Merchandise** from the list.
4. In the Inventory row, click in the Stores field next to the item and click  to open the Store Selection dialog box.
5. Select individual store(s) as necessary, or choose Select All to select all stores. Click **OK** to save your selections and close the dialog.
6. Click **Save** on the top menu.

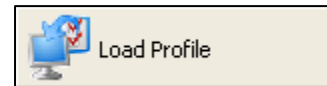
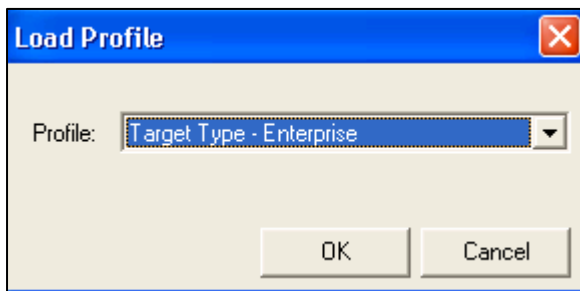
Assigning Profiles to Stations

By assigning a profile to a station, you can define all of the Profile Checklist and Profile Tool settings for the station with a single action.

You typically assign (or define) a profile when creating a station. However, you can assign a new profile at any time.

To assign a profile to a station:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Select the Station to which you want to assign or change a profile.
3. Click **Load Profile**. The Load Profile dialog displays.



4. Select a profile from the drop-down list, then click **OK**. The profile you select replaces any profile previously assigned to the station.

Setting Inventory Management Options

ECM provides great flexibility in managing the updating of specific types of inventory information. Before configuring ECM, think carefully about which station you want to control the following inventory values: Quantity/Cost, Price, Descriptions.

After you have decided which station will control which type of inventory information, make sure that the appropriate checkboxes are selected in the Profile Tools area of the appropriate station. You should never have all stations set to Manage or all stations set to NOT manage inventory. At least one location within any chain of communication should be configured as the controlling station.

Quantity and Cost

Quantity and Cost are managed together in Retail Pro 9 and are usually managed by headquarters. This is because retailers typically “average” the cost of their inventory items. Quantities received at one cost are averaged with quantities received at another cost to arrive at the current “Cost” for the item. If a station were to manage its own quantities but not cost, there would be no way to know the cost at which quantities were received and this would cause accounting discrepancies.

Here are two examples of when a retailer might want to allow remote stations to manage quantity and cost:

- A retailer is importing inventory information from a 3rd party system (via xml files) at the store, and not at corporate headquarters.
- The store is a franchise in which the franchise operator has full control.

In most other situations, you will want the headquarters station to manage quantity and cost. The quantities and costs at headquarters are updated by transaction documents sent from remotes. The resulting Inventory.xml file is then sent back to remotes, overwriting the quantities and costs at the remote.

Price

Price is typically managed by headquarters, but you can select the Manage Price option for remotes to allow them to set their own prices that reflect the local conditions.

If a remote manages prices, any changes in price received in the Inventory.xml file are ignored.

Descriptions

You can select which station manages inventory descriptions. For example, for stores located in foreign countries, descriptions can be controlled locally. The descriptions are entered in the local language, making it easier for associates and managers to work with inventory, but prices, costs and quantities are still controlled centrally.

Setting Inventory Management Options

The Inventory Management options are available in the Profile Tools area for each station.

| CheckList | |
|--|-------------------------------------|
| <ul style="list-style-type: none"> Profile Checklist <ul style="list-style-type: none"> Profile Tools | |
| Rules | Enable |
| Manage Inventory Qty and Cost for this station | <input type="checkbox"/> |
| Manage Inventory Price for this station | <input type="checkbox"/> |
| Auto-update vouchers received from this station | <input type="checkbox"/> |
| Purge marked slips during communication | <input type="checkbox"/> |
| Purge marked ASNs during communication | <input type="checkbox"/> |
| Manage Inventory Descriptions | <input type="checkbox"/> |
| Manage Customer Balances | <input type="checkbox"/> |
| Manage Employees Security | <input checked="" type="checkbox"/> |
| Compare Inventory Modified Dates | <input type="checkbox"/> |

If you want to control inventory quantity, costs, prices, and descriptions for a station, you need to select the appropriate options in the station's profile.

| Option | Description |
|--|---|
| Manage Inventory Qty and Cost for this station | <p>Select this option to have your station manage inventory quantities and costs for the selected station.</p> <p>Only transactional documents received from the station will affect the station's inventory quantities and costs, not the station's inventory file. If someone manually changes an item's quantity at the station (no document created), when your station receives the inventory file, that change would be ignored.</p> <p>When sending data to the selected station, the inventory quantities and costs that you send will overwrite the inventory quantities and costs at the station.</p> |
| Manage Inventory Price for this station | <p>Select this option to have your station manage inventory prices for the selected station.</p> <p>Transactional documents received from the station affect the station's inventory prices, but not the station's inventory file. If someone manually changes an item's price(s) at the station (no document created), that change is ignored when your station receives the inventory file.</p> <p>When sending data to the selected station, the inventory prices that you send overwrite the inventory prices at the station.</p> |
| Manage Inventory Descriptions | <p>Your station manages inventory descriptions for the selected station. ECM sends ALL inventory item descriptive elements.</p> <p><i>Note:</i> Depending on the size of your inventory, selecting the Manage Inventory Descriptions option can result in a large file transfer during ECM communication.</p> <p>When sending data, the inventory descriptions that you send will overwrite the descriptions at the station.</p> |

About Manage Flags

If a station has the **Manage Inventory Price and Cost for this station** and **Manage Inventory Quantity for this station** options selected, the settings affect the station's process-in process and indicate what a local station will do with data received from another station.

If the **Manage Inventory Price and Cost for this station** and **Manage Inventory Quantity for this station** options are NOT selected, it means the data received from this station will be accepted as is, provided that the **Modified_Date** field in the **Inventory.xml** file is not older than corresponding field on the existing item in the database (A time comparison is done considering time zone information).

If flag IS set, it means that the data will be REJECTED from this station and instead will be propagated from documents.

Price, Quantity and Cost

Price, quantity and cost will be updated based on documents received by ECM.

There are two exceptions:

1. If a brand new ACTIVE item is received, ECM will accept its price and cost if on-hand quantities are all zero in the **Inventory.xml** file.

2. If an EXISTING item is received, ECM will accept its price and cost if on-hand quantities are all zero in BOTH the database and the **Inventory.xml** file. Otherwise, they will be left intact (set to zero/null for new items).

Descriptions

Descriptions are only be updated when a new ACTIVE item is received, otherwise they'll be rejected. Keep in mind that things like serial/lot numbers and required quantities for price levels are considered item descriptions and are managed as such.

A descriptive field in this context is defined as a field which cannot be confirmed for an existing item by any received document except for the field entry in inventory. Price, cost, and on-hand/in-transit quantities are NOT descriptive fields, according to this definition, so they are separated into their own groups.

On the other hand, foreign currency cost (not base currency cost) is a descriptive field. This is because base currency cost is affected by vouchers and cost adjustments.

The Tax Code field is also a descriptive field, since there is no document which can confirm its change. The required quantity for discount price levels is also a descriptive field.

Base Item Information

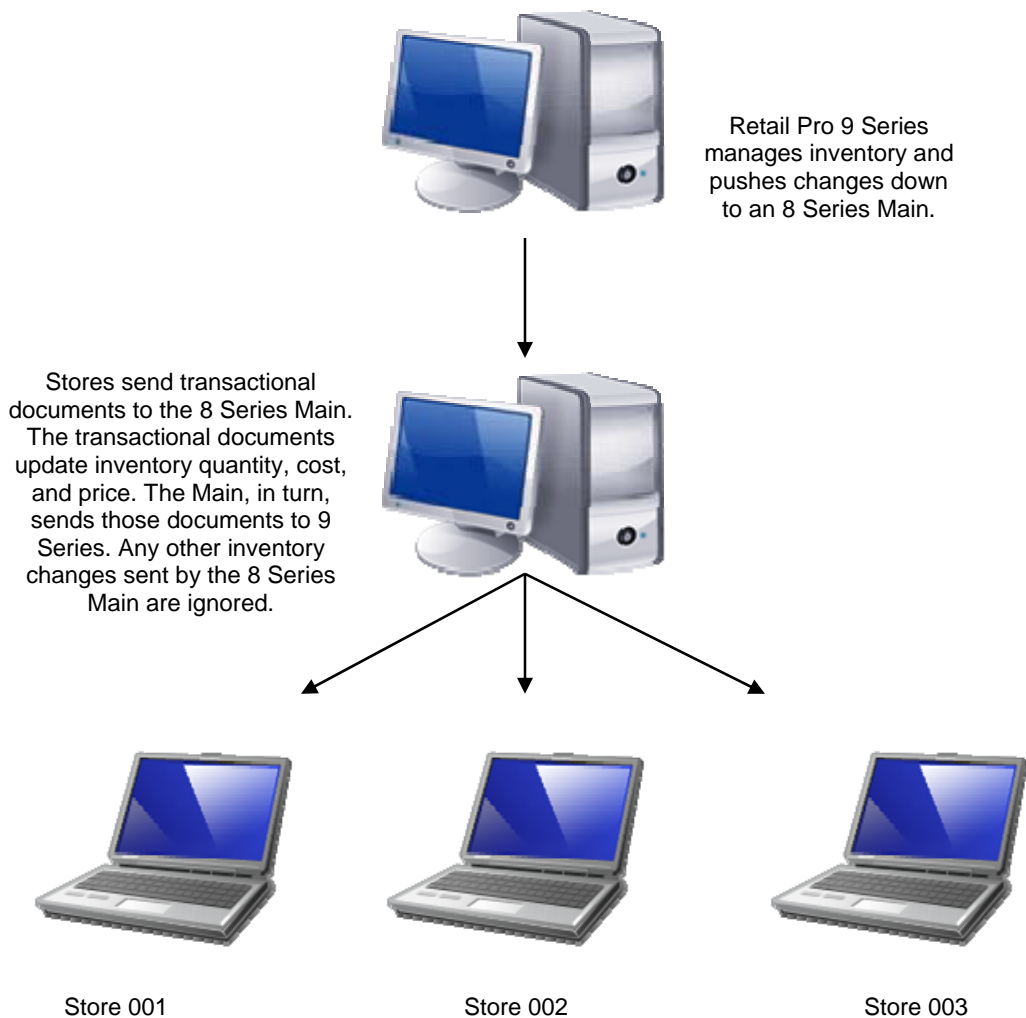
Base item information which is used to create missing items is NOT a confirmation of item data. It's rather a minimal set of data allowing us to create the item AT ALL in order to process the document.

Managing Inventory with Retail Pro 9 Series

This section explains how to configure station records to manage inventory with Retail Pro 9 Series, while communicating with an 8 Series Main station. Using this configuration, the Retail Pro 9 station controls inventory quantity, price, and cost.

Transactional documents sent to the 9 Series station will update the 9 Series database; however, changes to the **Inventory.xml** file (which communicates inventory information) are ignored.

During communication, any changes made to the **Inventory.xml** file at the 9 Series station will overwrite the inventory file at the 8 Series Main.



When Retail Pro 9-Series manages inventory:

- You have central control over inventory quantities, costs, and prices and can prevent individual stations from making unwanted changes.
- During communication. Retail Pro 9-Series overwrites any changes you make to inventory quantities and costs (or price) in 8-Series, other than changes recorded on transactional documents.

At the Retail Pro 9 Series ECM

Station Record for Main (RPRO 8x) Station

In the Retail Pro 9 installation of ECM, create a station record for each 8 Series Main station that you will communicate with. Assign **Main (RPRO 8x)** as the **Station Type**, and select the Manage Inventory flags in the Profile Tool area.

| General | | Communication | | | | | | | | | | | | | | | | | |
|---|-------------------------------------|---|----------------|-------|--------|--|-------------------------------------|---|-------------------------------------|---|--------------------------|---|--------------------------|--|--------------------------|-------------------------------|-------------------------------------|--------------------------|--------------------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Main (RPRO 8x) | | | | | | | | | | | | | | | | |
| Name | | Preferred Device | Internet | | | | | | | | | | | | | | | | |
| Sbs No | 1 | Deliver Files To | | | | | | | | | | | | | | | | | |
| Glob Store Code | | Pick Up Files From | | | | | | | | | | | | | | | | | |
| Store/Station | | Host Name/IP Address | 10.500.12 | | | | | | | | | | | | | | | | |
| | | Login Name | | | | | | | | | | | | | | | | | |
| | | Password | | | | | | | | | | | | | | | | | |
| | | Phone Book Entry | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Use Compression | | | | | | | | | | | | | | | | | | | |
| CheckList | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Profile Checklist <input type="checkbox"/> Profile Tools | | <table border="1"> <thead> <tr> <th>Rules</th> <th>Enable</th> </tr> </thead> <tbody> <tr> <td>Manage Inventory Qty and Cost for this station</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Manage Inventory Price for this station</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Auto-update vouchers received from this station</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Purge marked slips during communication</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Purge marked ASNs during communication</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Manage Inventory Descriptions</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Manage Customer Balances</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> | | Rules | Enable | Manage Inventory Qty and Cost for this station | <input checked="" type="checkbox"/> | Manage Inventory Price for this station | <input checked="" type="checkbox"/> | Auto-update vouchers received from this station | <input type="checkbox"/> | Purge marked slips during communication | <input type="checkbox"/> | Purge marked ASNs during communication | <input type="checkbox"/> | Manage Inventory Descriptions | <input checked="" type="checkbox"/> | Manage Customer Balances | <input type="checkbox"/> |
| Rules | Enable | | | | | | | | | | | | | | | | | | |
| Manage Inventory Qty and Cost for this station | <input checked="" type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Manage Inventory Price for this station | <input checked="" type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Auto-update vouchers received from this station | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Purge marked slips during communication | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Purge marked ASNs during communication | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Manage Inventory Descriptions | <input checked="" type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Manage Customer Balances | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |

Profile for Main (RPRO 8x) Station

When assigning a profile to the station record for the **Main (RPRO 8x)** station, select **Target – Main (Managed)** as the profile. This profile is predefined to control inventory for this station.

Transactional documents received from a station that is assigned this profile will be used to calculate inventory quantity, cost and price at the Retail Pro 9 station.

| Area | None | All | Diff | Images |
|-------------------------------|----------------------------------|----------------------------------|-----------------------|--------------------------|
| Target Type - Remote (Manag | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Main | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Enterprise | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Initialize | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Enterprise (Man | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Target Type - Main (Managed) | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Merchandise | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Documents | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Customers | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Employees | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Pricing | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Preferences | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Sublocations | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Profile Tools | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Preferences | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Price Levels | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Tax Codes | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Tax Areas | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Discount Reasons | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Discount Schedules | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Commission Schedules | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| POS Fee Types | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Purchase Fee Types | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Stores | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Customer UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Vendor UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Item UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Receipt UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Credit Cards | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Titles | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Allocation Patterns | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| DCSs | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Scales | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Regions | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Receipt Comments | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |

At the 8 Series Main ECM

Station Record for Retail Pro 9 (Oracle) Station

In the 8 Series Main station's ECM, create a station record for the Retail Pro 9 station. Assign **Retail Pro 9 (Oracle)** as the **Station Type**, and DO NOT select the Manage Inventory flags.

| General | | Communication | |
|--|-------------------------------------|---|--------------------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Main (RPRO 9x) |
| Name | HQ | Preferred Device | Internet |
| Sbs No | 1 | Deliver Files To | |
| Glob Store Code | | Pick Up Files From | |
| Store/Station | 0000 | Host Name/IP Address | 10.500.13 |
| | | Login Name | |
| | | Password | |
| | | Phone Book Entry | |
| <input checked="" type="checkbox"/> Use Compression | | | |
| CheckList | | | |
| <ul style="list-style-type: none"> + Profile Checklist Profile Tools | | Rules | Enable |
| | | Manage Inventory Qty and Cost for this station | <input type="checkbox"/> |
| | | Manage Inventory Price for this station | <input type="checkbox"/> |
| | | Auto-update vouchers received from this station | <input type="checkbox"/> |
| | | Purge marked slips during communication | <input type="checkbox"/> |
| | | Purge marked ASNs during communication | <input type="checkbox"/> |
| | | Manage Inventory Descriptions | <input type="checkbox"/> |
| | | Manage Customer Balances | <input type="checkbox"/> |
| | | Manage Employee Security | <input type="checkbox"/> |

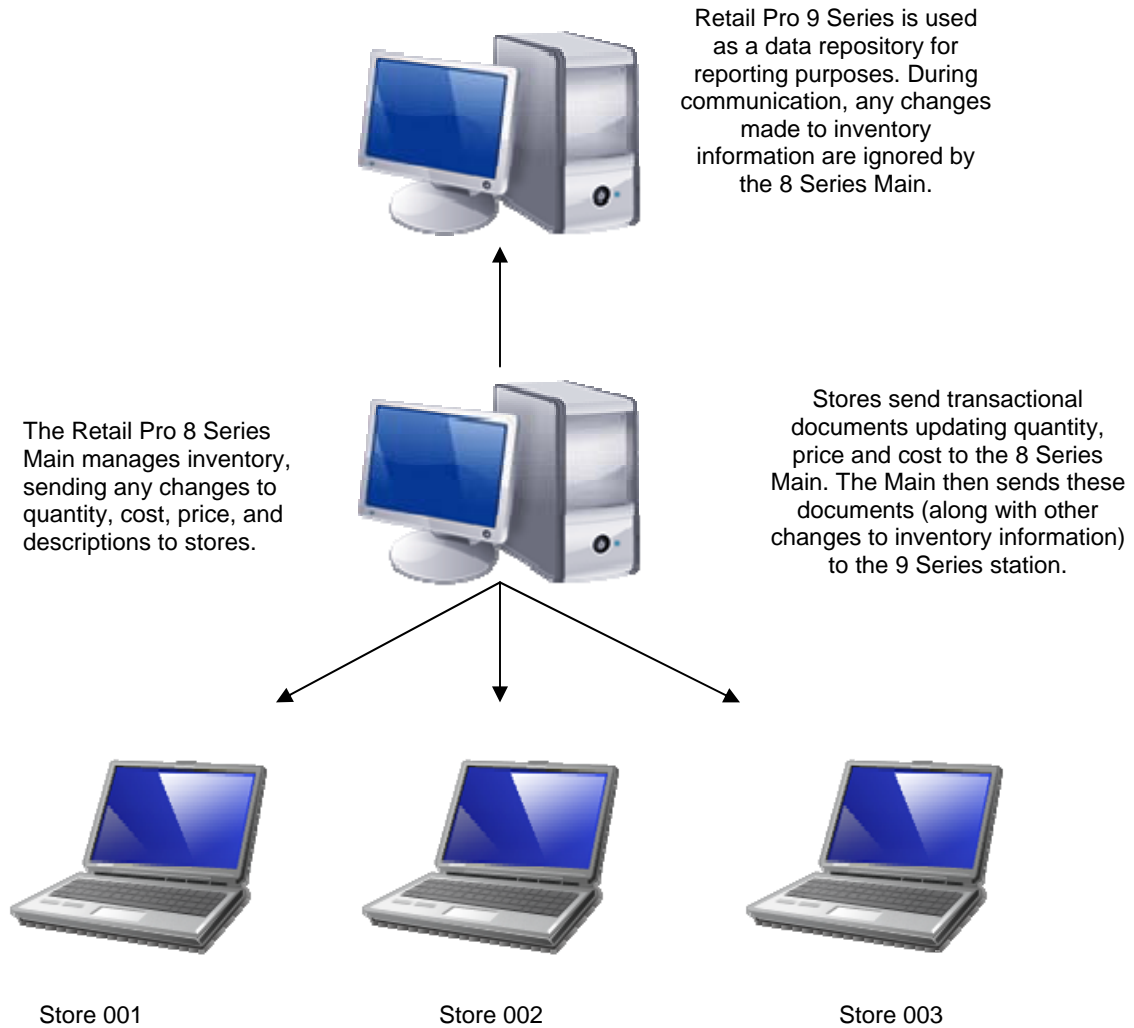
Profile for Retail Pro 9 (Oracle) Station

The Main will not be managing inventory when communicating with the Retail Pro 9 (Oracle) station; therefore, when assigning a profile to this station, select **Target Type – Enterprise** as the profile. This profile is predefined to allow the inventory data file passed to it via the Retail Pro 9 station to update its on hand quantity, cost and price information.

| Area | None | All | Diff | Images |
|-------------------------------|----------------------------------|----------------------------------|-----------------------|--------------------------|
| Target Type - Remote (Manag | | | | |
| Target Type - Main | | | | |
| Target Type - Enterprise | | | | |
| Merchandise | | | | |
| Documents | | | | |
| Customers | | | | |
| Employees | | | | |
| Pricing | | | | |
| Preferences | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Sublocations | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Profile Tools | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Initialize | | | | |
| Target Type - Enterprise (Man | | | | |
| Target Type - Main (Managed) | | | | |
| Area | | | | |
| Preferences | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Price Levels | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Tax Codes | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Tax Areas | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Discount Reasons | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Discount Schedules | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Commission Schedules | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| POS Fee Types | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Purchase Fee Types | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Stores | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Customer UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Vendor UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Item UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Receipt UDFs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Credit Cards | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Titles | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Allocation Patterns | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| DCSs | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Scales | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Regions | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |

Managing Inventory with Retail Pro 8 Series

You can allow a Retail Pro 8 Series Main (BTF) station to manage its own inventory. If a Retail Pro 8 Main manages inventory, any changes to inventory quantities, costs and prices (and optionally descriptions) made at the Retail Pro 9 station are overwritten by the subsidiary Main station during communication.



At the Retail Pro 9 Series ECM

Station Record for Main (RPRO 8x) Station

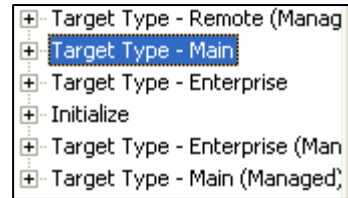
At the Retail Pro 9 Series ECM, define a station record for each 8 Series Main station with which your station will communicate. Select **Main (RPRO 8x)** as the Station Type. Do NOT select the Manage Inventory flags.

| General | | Communication | | | | | | | | | | | | | | | | | |
|---|-------------------------------------|--|----------------|-------|--------|--|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|--|--------------------------|-------------------------------|--------------------------|--------------------------|--------------------------|
| Active | <input checked="" type="checkbox"/> | Station Type | Main (RPRO 8x) | | | | | | | | | | | | | | | | |
| Name | Main | Preferred Device | Internet | | | | | | | | | | | | | | | | |
| Sbs No | 1 | Deliver Files To | | | | | | | | | | | | | | | | | |
| Glob Store Code | | Pick Up Files From | | | | | | | | | | | | | | | | | |
| Store/Station | 0011 | Host Name/IP Address | 10.500.14 | | | | | | | | | | | | | | | | |
| | | Login Name | | | | | | | | | | | | | | | | | |
| | | Password | | | | | | | | | | | | | | | | | |
| | | Phone Book Entry | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Use Compression | | | | | | | | | | | | | | | | | | | |
| CheckList | | | | | | | | | | | | | | | | | | | |
| <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Profile Checklist <input type="checkbox"/> Profile Tools | | <table border="1"> <thead> <tr> <th>Rules</th> <th>Enable</th> </tr> </thead> <tbody> <tr> <td>Manage Inventory Qty and Cost for this station</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Manage Inventory Price for this station</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Auto-update vouchers received from this station</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Purge marked slips during communication</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Purge marked ASNs during communication</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Manage Inventory Descriptions</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Manage Customer Balances</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> | | Rules | Enable | Manage Inventory Qty and Cost for this station | <input type="checkbox"/> | Manage Inventory Price for this station | <input type="checkbox"/> | Auto-update vouchers received from this station | <input type="checkbox"/> | Purge marked slips during communication | <input type="checkbox"/> | Purge marked ASNs during communication | <input type="checkbox"/> | Manage Inventory Descriptions | <input type="checkbox"/> | Manage Customer Balances | <input type="checkbox"/> |
| Rules | Enable | | | | | | | | | | | | | | | | | | |
| Manage Inventory Qty and Cost for this station | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Manage Inventory Price for this station | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Auto-update vouchers received from this station | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Purge marked slips during communication | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Purge marked ASNs during communication | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Manage Inventory Descriptions | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Manage Customer Balances | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |

Profile for the Main (RPRO 8x) station:

In this configuration, Retail Pro 9-Series is serving as a repository of data received from the Main station and thus not managing the inventory.

At the 9 Series ECM, when assigning a profile to the station record of the 8 Series Main, select **Target – Main**. This profile is predefined to allow inventory information received from this station to update inventory for the Retail Pro 9 Series station.



At the 8 Series Main ECM

Station Record for the Retail Pro 9 (Oracle) station

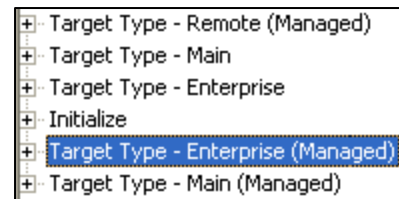
At the 8-Series Main Station, define a station record for the Retail Pro 9-Series station, which will be the target station for communication. Select **Retail Pro 9 (Oracle)** as the station type.

Select the **Manage Inventory Qty and Cost** for this station flag in the Profile Tool area. Any changes to inventory quantities and costs made at Retail Pro 9 Series will be overwritten by the 8 Series Main station during communication.

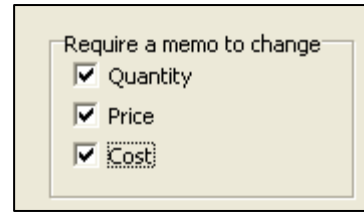
You can also select the **Manage Inventory Price for this station** and **Manage Inventory Descriptions for this station** options. If selected, any price or description changes made at Retail Pro 9 Series will be overwritten by the 8 Series Main during communication.

Profile for the Retail Pro 9 (Oracle) station

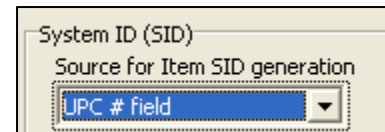
The 8 Series Main will be managing inventory with respect to this Retail Pro 9 Series station; therefore, select **Target – Enterprise (Managed)** as the profile. This profile is predefined to allow only transactional documents passed to it via this Retail Pro 9 station to update its on hand quantity, cost and price information.



In addition, at the Retail Pro 8 Series Main, set the Retail Pro System Preference setting to Require a Memo to Change: Quantity, Price, and Cost (**System Preferences > Adjustments**). Make sure Quantity, Price, and Cost are all selected.



Auditing and reporting are far more accurate when a history trail can be associated with inventory information; therefore, select the Source for Item SID generation option to UPC (**System Preferences > Merchandise**). Having a unique UPC ensures that all transactions involving the item are tracked correctly.



Managing Inventory with a Retail Pro Remote

It is not recommended that remote stations manage their own inventory; however, a remote station is allowed to act as a stand alone subsidiary that can communicate directly with a Retail Pro® 9-Series (Oracle) station.

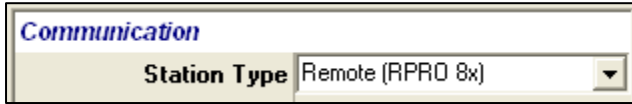


When a Remote 8 Series station manages inventory, the Remote sends inventory changes to 9 Series both by changing the inventory.xml file, as well as by transactional documents that are sent to 9 Series.



Station Record for Remote (RPRO 8x) Station

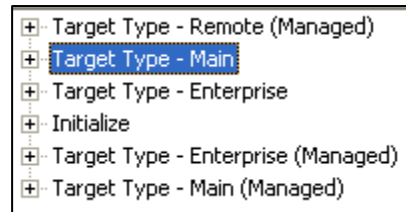
At the Retail Pro 9 ECM, create a station record for the 8 Series Remote station. Select **Remote (RPRO 8x)** as the **Station Type**. Do NOT select the Manage Inventory flags.



Profile for the Remote (RPRO 8x) station:

The Retail Pro 9 Series station will act as a repository of data received from the 8 Series Remote station and thus will not manage the inventory.

At the 9 Series ECM, select **Target Type – Main** as the profile. This profile is predefined to allow inventory information received from this 8 Series station to update inventory for the Retail Pro 9 Series installation.



At the 8 Series Remote ECM

Station Record for the Retail Pro 9 (Oracle) station

At the 8-Series Remote Station, define a station record for the Retail Pro 9-Series station, which will be the target station for communication. Select **Retail Pro 9 (Oracle)** as the station type.

Select the **Manage Inventory Qty and Cost for this station** flag in the profile tool area. Any changes to inventory quantities and costs made at Retail Pro 9 Series will be overwritten by the Remote station during communication.

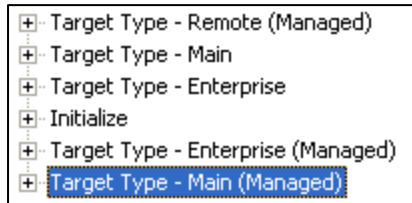
You can also select the **Manage Inventory Price for this station** and **Manage Inventory Descriptions for this station** options. If selected, any price or description changes made at Retail Pro 9 Series will be overwritten by the Remote during communication.

| Rules | Enable |
|---|-------------------------------------|
| | <input checked="" type="checkbox"/> |
| Manage Inventory Qty and Cost for this station | <input checked="" type="checkbox"/> |
| Manage Inventory Price for this station | <input checked="" type="checkbox"/> |
| Auto-update vouchers received from this station | <input type="checkbox"/> |
| Purge marked slips during communication | <input type="checkbox"/> |
| Purge marked ASNs during communication | <input type="checkbox"/> |
| Manage Inventory Descriptions | <input checked="" type="checkbox"/> |
| Manage Customer Balances | <input type="checkbox"/> |
| Manage Employee Security | <input type="checkbox"/> |

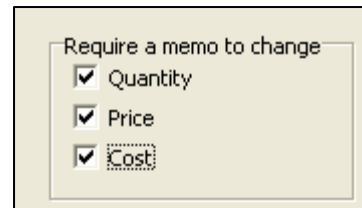
Profile for the Retail Pro 9 (Oracle) station

The 8 Series Remote will be managing inventory with respect to this Retail Pro 9 Series target; therefore, select **Target – Enterprise (Managed)** as the profile.

This profile is predefined to allow only transactional data file passed to it via this Retail Pro 9 station to update its on hand quantity, cost and price information.



In addition, at the Retail Pro 8 Series station, set the Retail Pro System Preference setting to Require a Memo to Change: Quantity, Price, and Cost (**System Preferences > Adjustments**). Make sure Quantity, Price, and Cost are all selected.



Auditing and reporting are far more accurate when a history trail can be associated with inventory information; therefore, select the Source for Item SID generation option to UPC (**System Preferences > Merchandise**). Having a unique UPC ensures that all transactions involving the item are tracked correctly.

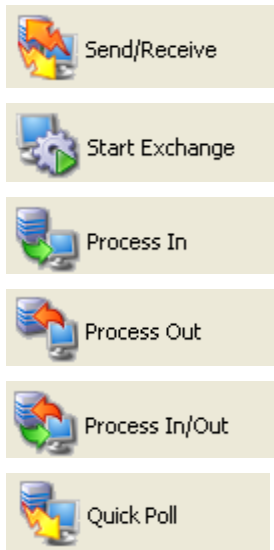
Launching/Scheduling Communications

Launching Communications Manually

Typically, you will schedule communications to take place automatically, but you can also launch communications manually.

To exchange data manually (for all active stations):

1. Click **Stations** on the top menu of the ECM Home Screen.
Result: The list of stations displays.
2. Select the station that you want to communicate with, and then click one of the following options:



- Transfer data.
- Perform an exchange.
- Process in data.
- Process out data.
- Process in data, and then process out.
- Perform a Quick Poll with the station.
Reference: See Quick Poll section

3. Follow any additional displayed instructions for your selection.

Communication Launched at Stores

Retail Pro 9s cannot start a data exchange with an 8-Series station. Individual stations initiate data exchange by sending requests and data to Retail Pro 9 for processing. Retail Pro 9 makes the data available and the store retrieves it.

Canceling a Communication Session

You may cancel data exchange at anytime. When you cancel a data exchange session, ECM continues processing until it is finished with the current request, then generates a response. All files are held until the next data exchange session. When the next data exchange session begins, the store retrieves the response files and sends any unsent requests to the Retail Pro server.

Scheduling Communications

You can automate the communication process using Scheduler (or Windows Scheduler, etc.).

When scheduling communications, you need to add a task for each operation that you want performed, and chain the tasks together. For example, to schedule a full end-of-day communications cycle:

1. Schedule **ECMProc.exe** at the 8-Series station. **ECMProc.exe** will process out data and move it to the **\Out** folder (in the 9-Series station directory).
2. Schedule **Exchange.exe** at the 8-Series station with the restriction that it does not take place unless process out is completed. Exchange will move the station's data from the **\Out** folder to the **\In\Recvd** folder at the 9-Series station.
3. Schedule **ECMProc.exe** at the 9-Series station. **ECMProc.exe** processes in the data it finds in the **\In\Recvd** folder.
4. Schedule **ECMProc.exe** again at the 9-Series station. **ECMProc.exe** will process out data.
5. Schedule **Exchange.exe** at the 9-Series station. Data is transferred to the 8-Series station (placed in the **\In\Recvd** folder).
6. Schedule **ECMProc.exe** at the 8-Series station. The data in the **\In\Recvd** folder is processed,

When **Exchange.exe** is launched using Scheduler, it will ignore the ECM workstation preference to process in immediately after Exchange.

Command Line Parameters

ECM.exe

Use the following command-line parameters when scheduling **ecm.exe**.

| Parameter | Allowed Values | Description and Rules | Expected Format |
|-----------|---|--|--------------------|
| -user | Defined Windows user name. | Logon name Note: -user and -password parameters in ECM.exe are used for launching it with procin/procout/exchange parameters (when no UI interaction is expected, e.g. from Scheduler). | -user:sysadmin |
| -password | The defined password for the specified Windows user name. | Logon password | -password:sysadmin |
| -procout | | Process out for all defined (active) stations. Profiles assigned to given station will be used automatically during the process. | -procout |

| Parameter | Allowed Values | Description and Rules | Expected Format |
|------------|----------------|--|-----------------|
| -procin | | Process in for all defined (active) stations. | -procin |
| -exchange | | Exchange data with all active stations using the assigned communication method. | -exchange |
| -clear_log | | This parameter will clear ecm.log file, but only when ECM is launched with either -procin, -procout, or -exchange parameters | -clear_log |
| /nosplash | | Prevents the display of the ECM splash screen. Note: This parameter MUST be preceded with "/", not "-". | /nosplash |

ECMProc.exe

| Parameter | Allowed Values | Description and Rules | Expected Format |
|-----------|--|---|---|
| -user | Defined Retail Pro user name. | Retail Pro logon name. | -user:sysadmin |
| -password | The defined password for the specified Retail Pro user name. | Password for the defined logon name. | -password:sysadmin |
| -out | | Process out for all defined (active) stations. Profiles assigned to given station will be used automatically during the process. | -out:mm/yyyy proc out with optional starting date |
| -in | | Process in for all defined (active) stations. | -in |
| -a | | auto mode (closes upon completion) | -a |
| -show | | Show main form | -show |
| -sub | -sub:<3-digit subsidiary number> | Subsidiary number | -sub:XXX |
| -stid | -stid:<station_id> | <p>Station ID</p> <p>Enables EcmProc to process a single station instead of all active station (entire subsidiary).</p> <p>The format for <station_id> is XXXYYYZ, where XXX is subsidiary number, YYY – store number, Z – station code (leading zeros are meaningful, and station code is capitalized). The same station id can be seen as a folder name in the ECM polling folder.</p> <p>This parameter is used for EcmExchange, but you can also use it when running EcmProc from the command line.</p> | -stid:001001A |
| -prf | -prf:profilename | Overrides profile for all stations being processed in this run | -prf:<profilename> |

| Parameter | Allowed Values | Description and Rules | Expected Format |
|----------------------------------|---|---|----------------------------------|
| -prfopt | <p>-prfopt:<1-digit number></p> <p>0 = keep nothing - override all parts (default)</p> <p>1 = keep store filter from station settings</p> <p>2 = keep processing rules (proc-in rules, profile tools) from station settings</p> <p>4 = keep area options (all/none/diff/images) from station settings</p> <p>Example:</p> <p>a) override area options and rules, but not store filter: -prfopt:1</p> <p>b) override area options only, keep store filter and processing rules -prfopt:3</p> | The part of the original station profile to keep (add numbers together) | <p>Example:</p> <p>-prfopt:0</p> |
| -ora_skip_style_relink | | Do not rebuild style SIDs | -ora_skip_style_relink |
| -ora_force_style_relink | | Rebuild style SIDs for all active stations | -ora_force_style_relink |
| -ora_update_created_date_on_hist | | Allow receipt/voucher/slip/memo to update its created_date when processed in to Oracle for existing documents | -ora_update_created_date_on_hist |

Hidden Switches

There are two hidden switches which can be accessed by creating the **EcmProc.ini** file manually (file must reside in the same folder where **EcmProc.exe** is). The **EcmProc.ini** file should look like this:

```
[ECM_BTf]
SkipSerial=0
SkipLot=0
```

If set to "1" EcmProc will ignore serial/lot numbers while processing inventory file into 8-series

ECMExchange.exe

| Parameter | Allowed Values | Description and Rules | Expected Format |
|------------|----------------|---|-----------------|
| /ws | /ws:<ws_no> | Tells what 8-series workstation number to use while reading preferences (WS100 by default). | /ws:01 |
| /install | | Installs ECM Exchange. | /install |
| /uninstall | | Uninstalls ECM Exchange. | /uninstall |
| /silent | | Suppresses a popup dialog during installation/uninstallation. | /silent |

Note: The /ws:<ws_no> parameter must be passed to EcmExchange during installation. - This way, it will automatically be recorded as a parameter for the system service it is installing.

Examples of Command Line Parameters

Examples

(Launching process out)

ECM.exe -user:sysadmin -password:sysadmin -procout

(Launching exchange)

ECM.exe -user:sysadmin -password:sysadmin -exchange

(Launching process in)

ECM.exe -user:sysadmin -password:sysadmin -procin

Installing Scheduler as a Service

The tasks that you define in Scheduler Editor won't be run unless you install Rpro9Schedule.exe from the command line, and then start the service.

To install Scheduler as a service:

1. From the desktop, select Start > Run.
2. In the command line prompt, type the path to your Rpro9Schedule.exe, add a space, and then type install:

Example: C:\RetailPro9\Rpro9Schedule.exe /install

To start the Scheduler Service:

1. Select Start > Control Panel.
2. Open Administrative Tools.
3. Open Services.
4. Select Task Scheduler from the list of services.
5. Make sure the Status field says Started. If the Status field reads Stop, right-click and select Start.

Communication Programs and Files

The following ECM programs carry out communications between Retail Pro® 9-Series and stations.

ECM

The **ECM.exe** application controls communication configuration, allowing users to manually launch communication cycles and troubleshoot the process.

ECM:

- Requires a unique identifier, or Global Store Code, for each station.
- Uses command line parameters when scheduling communications.
- Displays a progress dialog when running manually.
- Can be scheduled via Scheduler.
- Interacts with Scheduler to provide continuous communications.
- Writes to a processing log.

ECM Exchange

Exchange (**ECMExchange.exe**) transfers data between two stations. To exchange data, **ECMExchange.exe** must be running at both stations. Once installed, **ECMExchange.exe** is launched automatically when you start your system.

At Retail Pro® BTF stations, the service is configured, by default, to use WS100 as its workstation. You can change the workstation after installation, if necessary.

ECMExchange.exe:

- Updates the Windows Event Log when a connection request is initiated.
- Updates the Windows Event Log when a connection request is terminated.
- Listens on a specified port (default = 20000).
- Can be used by third-party developers for sending .xml files.
- Supports server initiated connections with stations.
- Writes to a log file in the **ECM\Polling\Log** folder.
- Performs encryption of XML files prior to transmission, with decryption occurring on the receiving end prior to writing the data to the hard disk.

ECM Proc

ECMProc.exe processes data that is being sent or received. Data is processed according to the profiles and processing rules that you define. **ECMProc.exe** writes the results of each process in/process out operation to the Processing Log.

ECMProc.exe:

- Supports XML interface via XML schemas and XML data.
- Optionally compresses data using a compression stream, so no intermediate files (i.e., mailbags) are created.
- Executes your defined rules for processing in and out of data.
- Processes data in.
- Processes data out.
- Provides a progress report for each process in and process out operation.
- Writes to a log file in the **ECMPolling\Log** folder.

Quick Poll

Quick Poll lets you perform a full or partial communication cycle with a single touch. When doing a Quick Poll, the operations that you specified in ECM workstation preferences are included, and are performed in the order you defined.

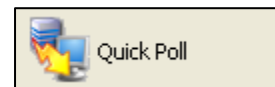
Typically, when performing a Quick Poll, a full polling cycle is not performed. Instead, only the minimum necessary operations are performed. For example, a process out and exchange can be performed to update a station's inventory quantities.

Reasons for a Quick Poll include:

- Updating on-hand quantities at stations.
- Updating the station's information for reporting purposes.

To perform a Quick Poll:

1. Select **Stations** from the ECM Home Screen. The list of stations displays.
2. Select a station from the list and then click **Quick Poll**.



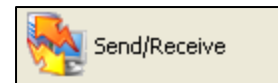
Note: When performing a Quick Poll, the ECM Workstation Preference options to **Process in Immediately after Exchange** and **Process Out Immediately after Process In** are ignored.

Sending/Receiving Data

If you want to immediately transfer data between stations, you can use the send/receive feature. The data in each station's **\Out** folder (data that has been processed out, but not sent) is transferred to the other station's **\In\Recvd** folder, where it will wait to be processed in.

To send/receive data:

1. Select **Stations** from the ECM Home Screen.
Result: The list of stations displays.
2. Select the station with which you want to send/receive data.
3. Click **Send/Receive**.



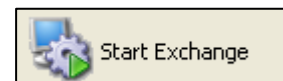
Starting Exchange

For two stations to communicate, **ECM Exchange** program must be running at each station. When ECM is installed, **ECM Exchange** is installed as a service, meaning it is launched each time your workstation is started. If necessary, you can manually start ECM Exchange from within ECM.

To start ECM Exchange:

1. Launch ECM.
2. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
3. Select a station from the list and then click **Start Exchange**.

Result: **ECMExchange.exe** starts.



Restrictions for ECM Exchange for Windows Vista/2008/Win7 Users

- If you are using Windows Vista/2008/Win7 you must turn OFF User Account Control.
- If you are logged in as a user without administrator privileges AND if EcmExchange is installed as a system service you have to guarantee that EcmExchange system service is started before Ecm.exe will try to communicate with it.
- If you have EcmExchange installed as a system service and you want to change the socket port number in ECM workstation preferences (not in station settings) you have to be logged in to Windows as a system administrator (because it requires re-configuring system service and it cannot be done without Windows administrator privilege).
- Vista/2008/Win7 will not automatically display EcmExchange/EcmProc windows if EcmExchange is running as a system service; neither will you see icons in the taskbar notification area.

Communications Cycle

A communications cycle is the series of events that occur when ECM exchanges data between two stations.

A full communications cycle is typically performed in the following order.

| Step | Description |
|--|---|
| 1. Process out at the Main (or Remote) | The station prepares data files to be communicated to Retail Pro 9. The data typically includes receipts for the day's sales, vouchers for merchandise received, slips for merchandise transfers, plus any sales orders and customers added or changed that day. |
| 2. Exchange | The station sends Retail Pro 9 its prepared data files and picks up any files waiting for it. A starting time and duration of an Exchange is normally scheduled at Retail Pro 9. This interval allows sufficient time for all stations to connect and exchange. If a station is unable to connect during that period, data files that were prepared will simply accumulate and be exchanged the next time the station connects. |
| 3. Process in at Retail Pro® 9 Series | Retail Pro processes in the data it has just received. This updates inventory, history, customers, and other data. |
| 4. Process out at Retail Pro® 9 Series | After processing in all data, Retail Pro 9 prepares data to be sent to each Remote, including the new data just processed in. |
| 5. Exchange | With ECM, it is possible for either the sending or receiving station to initiate a request for exchange of data. |
| 6. Process in at the Main (or Remote) | After the second exchange, each station processes in the data it just received from Retail Pro 9. This updates the inventory to reflect that day's activities. Other data files are also updated with any data received. |

A partial communications cycle can include any of the above steps, in any order. For example, to pull sales data from a station into Retail Pro, you can perform the following steps:

| Step | Description |
|--|--|
| 1. Exchange | Any data that is processed out at Retail Pro 9 (but perhaps not sent) is transferred to the station. |
| 2. Process in at the 8 Series Main (or Remote) | The Main (or Remote) processes in any data that was sent from the Retail Pro 9 station. |
| 3. Process out at the 8 Series Main (or Remote) | The station processes out its data, including the most recent sales data. |
| 4. Exchange | The data is transferred to the <code>\\In\Recvd\</code> folder at Retail Pro 9. |
| 5. Process in at the Retail Pro 9 Series station | Retail Pro 9 processes in the data, updating company data as well as data for the Remote. |

Processing Steps

The following sections detail the specific processing steps taken during communications.

Processing Out

1. ECM Procs reads the profile of the station with which you are communicating.
2. ECM Procs creates XML files in the station's **\Out** directory. (You can also place other XML files in **\Out**.)
3. ECM Procs compresses all files (if the compression option is selected in the station's record).

Management of Files During Process Out

When processing out, ECM Procs creates separate data files for each station. This helps limit the size of each data file as well as controls the distribution of sensitive data to the stations.

Planned Markdowns

When immediate price or cost changes are made in Retail Pro® 9-Series, the selected store's inventory is updated. The updated inventory data is communicated to the appropriated target station. No separate markdown file is created at the target station.

For planned price/cost changes, ECM processes out the planned price/cost changes and exchanges the data with the appropriate target station. When the planned markdown data is processed in at the 8-Series (BTF) target station, the system creates a Retail Pro markdown file (MkDn.dat).

Retail Pro makes the changes associated with the planned markdown file and updates inventory. The system communicates the resulting inventory change to the Retail Pro 9 installation.

Planned markdowns created in Retail Pro 8 are not communicated to a Retail Pro 9 (Oracle).

Store Credit and Customer Balances

When using store charge accounts, customers may have charge balances. Retail Pro 9 can build an accurate sequence of events related to customer charge balances. The accuracy of those balances is determined by how often stations communicate with Retail Pro. The more often stations communicate with Retail Pro 9, the greater the likelihood that customer charge balances and store credit are up to date.

Inter-Company Transfers

When an out slip is processed in at Retail Pro, ECM determines if the slip is part of an inter-company transfer. If it is, ECM automatically generates an ASN (advance shipping notice) for the target station. The ASN contains a special number that is a concatenation of subsidiary number, store, and slip number. This number is written to the **ASN Package #** field on the newly created ASN.

Example: 00200000056

- Subsidiary number = 3 digits. If the subsidiary number is less than three digits, leading 0s are added.
- Store = 3 chars. Station identifier (a,b,c...) is not used within this number identification.
- Slip number = 5 chars. If the document number is less than 5 digits, the numbering sequence contains leading zeroes.

If the out slip already references a document, then no ASN voucher is created.

Flagging Records as Transmitted

Records are marked transmitted when a confirmation file is processed in. The confirmation file lists the records that were successfully processed in by the target station.

Exchange

1. ECM Exchange moves files from the local **\Out** directory to the other computer's **\In** directory.
2. At the source station, ECM Exchange copies sent files to **\Out\Sent** and deletes the original files from **\Out**.
3. At the target station, ECM Exchange copies received files to **\In\Recvd** and deletes the original files from **\In**.

Processing In

1. ECM Procs checks for files in **\In\Recvd**.
2. ECM Procs decompresses files (if compression was used).
3. ECM Procs moves the files to **\Temp** and processes them on a file-by-file basis.
4. ECM Procs then creates confirmation file for return to the source station.

Management of Files during Process In

When processing in data, Exchange may attempt to transfer to the station's **\In\Recvd** folder a file that already exists there. This would happen if a second process out and exchange occurred before the target station had a chance to process in. In this situation, ECM Exchange will attempt to overwrite the file that is currently being processed in. To prevent the source installation from receiving an error during the exchange, the following occurs:

When processing in, any files residing within the **In\Recvd** directory are moved to a temporary folder (**\Temp**) in the processing station's directory.

ECM Procs moves only the file which it is working on at that instant to the **\Temp** folder. Processing of these moved files begins within the **\Temp** folder.

This allows Exchange to occur and writes new or updated XML information to the **In\Recvd** directory during processing.

Once ECM Procs has successfully processed the XML file, the file is deleted from the **\Temp**

Oracle Database Objects

Retail Pro® 9-Series uses objects to store the files that ECM Procs will be processing at any given time. This means that an XML file that is being processed into an Oracle database will be loaded in the database as an object, and processing will be done on this object and not directly from the file sitting within the **\In\Recvd** directory.

Deletion of the file does not occur within the **\In\Recvd** directory, because ECM Procs has no way of ensuring that the file being deleted is not in fact newer than the one it has just finished processing, thus potentially deleting new data information.

Management of Data Files

Maximum File Size

The maximum file size that can be processed by ECM is 2GB. When processing out files greater than 50MB, ECM will split the file into multiple, smaller files

If files are being split, the first XML file for any data type that is processed out is known as the *primary* file and will not have a sequential number assigned. Each XML file is assigned a sequential number as it is processed out.

Example

Processing out a 200MB Customer file yields the following files:

Customer.xml (50MB) - primary customer file

Customer1.xml (50MB) - enumerated file

Customer2.xml (50MB) - enumerated file

Customer3.xml (50MB) - enumerated file

Note: The splitting of a given data file will occur regardless of whether you are using compression or not using compression.

Overwriting of Existing Files at Target Station

When ECM Exchange transfers a data file:

- If only an enumerated file is being sent, then that file overwrites any existing copy at the target station.
- If the primary file exists at the target station, that primary file and any enumerated files are first deleted, and then the new data file(s) are placed in the target station's **In\Recvd** folder.

Why does ECM delete the existing files at the target station?

Deleting the existing files prevents the following type of situation from occurring:

A retailer creates a large number of inventory items or documents by mistake. The retailer processes out. ECM splits the file into a primary file and enumerated files. The retailer runs Exchange, which places the files in the station's **In\Recvd** folder. The retailer then realizes his/her mistake and deletes the documents or items. The retailer processes out again. The file is now small enough that it doesn't need to be split. The retailer processes out. If the retailer runs Exchange before the target station has processed in, the new primary file would overwrite the primary file at the target station, but the enumerated files would not be affected. In other words, the target station would be processing in invalid data.

Maximum File Size

The maximum size of your .xml data files is 2GB. When files are greater than 50MB, ECM will split the files into multiple smaller files.

Importing Documents

You can import any document in xml format into Retail Pro using the Enterprise Communication Manager (ECM). This enables you to import documents created at a different store or import documents created on outside or legacy systems into Retail Pro.

When importing documents, be sure to include the required fields for that document type.

Important! To import the Invoice.xml file, the INVN_BASE_ITEM section is required.

To import documents into Retail Pro:

1. Add the transaction information to the appropriate xml file. For example, add sales transaction information to the **Invoice.xml** file. (Make sure the file includes INVN_BASE_ITEM)
2. Place the file in the **ECM\Polling\[Station]\In\Recvd** directory.
3. Perform a Process In operation using the Enterprise Communications Manager (ECM).

Why INVN_BASE_ITEM is Required when Communicating Receipts

When a receipt (invoice) is transmitted from one station to another, it cannot be guaranteed that the receiving station will have the items that are listed on that receipt in the stations' inventory. When ECM is importing a receipt into Retail Pro, if an item that is on the receipt is not in inventory, then that item will be created by ECM and marked as inactive. This enables the receipt to be created successfully at the importing station. To do that, ECM needs to know basic details about the item and this information is contained in the <INVN_BASE_ITEM> section of the XML file.

Flag Field Must Be Set to "0" for Receipts to Update On-Hand Quantity

If importing items into Retail Pro, be sure to set the **Flag** field in the **Inventory.xml** file to "0". If you don't set the **Flag** field to "0" in the **Inventory.xml** file, receipts that are imported into Retail Pro will not update the item's on-hand quantity.

Required Fields for Retail Pro Document Types

The required fields for each Retail Pro document type are listed below:

Adjustment Memos (ADJUSTMENT table)

| | | |
|--------------|---------------|---------------|
| ADJ_SID | SBS_NO | STORE_NO |
| CREATED_DATE | MODIFIED_DATE | CMS_POST_DATE |

Purchase Orders (PO table)

| | | |
|--------------|---------------|---------------|
| PO_SID | SBS_NO | STORE_NO |
| CREATED_DATE | MODIFIED_DATE | CMS_POST_DATE |

Receipts (INVOICE table)

| | | |
|----------------|---------------|---------------|
| INVN_BASE_ITEM | CMS_POST_DATE | INVC_SID |
| SBS_NO | STORE_NO | INVC_NO |
| INVC_TYPE | CREATED_DATE | MODIFIED_DATE |

Sales Orders (SO table)

| | | |
|---------------|---------------|--------|
| MODIFIED_DATE | CMS_POST_DATE | SO_SID |
| SBS_NO | STORE_NO | |

MODIFIED_DATE

CMS_POST_DATE

SO_SID

SBS_NO

STORE_NO

Slips (SLIP table)

| | | |
|--------------|---------------|---------------|
| SLIP_SID | SBS_NO | OUT_STORE_NO |
| IN_SBS_NO | IN_STORE_NO | UNVERIFIED |
| CREATED_DATE | MODIFIED_DATE | CMS_POST_DATE |

Transfer Orders (TORD table)

| | | |
|---------------|--------------|---------------|
| TO_TYPE | CREATED_DATE | MODIFIED_DATE |
| CMS_POST_DATE | TO_SID | SBS_NO |
| STORE_NO | | |

Vouchers (VOUCHERS table)

| | | |
|--------------|---------------|---------------|
| VOU_SID | SBS_NO | STORE_NO |
| VOU_NO | VOU_TYPE | VOU_CLASS |
| CREATED_DATE | MODIFIED_DATE | CMS_POST_DATE |

Importing Items

You can import items from outside or legacy systems in xml format into Retail Pro 9 using the Enterprise Communication Manager (ECM).

This section explains how to import new items into the Retail Pro v9 database from an external system and how to perform updates.

To import new items into Retail Pro:

1. Add the item information to the Inventory.xml file.

Reference: See Required Information for New Items

2. Place the file in the **ECM\Polling\[Station]\In\Recvd** directory, and then perform a Process In operation using the Enterprise Communications Manager (ECM).

Importing New Items

Item Definition/Description

The first time you import items from an outside system into Retail Pro, you must enter values in the following fields:

| | | |
|----------------|----------------|--------------|
| sbs_no | dc_s_code | description1 |
| created_date | modified_date | tax-code |
| flag | ext_flag | kit_type |
| max_disc_perc1 | max_disc_perc2 | unorderable |
| print_tag | active | mark_for_del |
| cms_post_date | eci_flag | regional |
| qty | store_no | |

Important!: Do not leave a required field blank or use empty quotation marks (“ ”)

Active Field Must Be Set to 1

When importing items, it is crucial that the **Active** field is set to "1" .

Note: You can import departments and vendors whose active field is set to "0", but not items.

Defining Store Quantities

In the INVN_SBS_QTYS section of the Inventory.xml file, enter a **store_no** for each store and the qty of the item at the store. You do not need to enter a **qty** of “0” for those stores where the on-hand quantity is zero.

For example, if you want to import an item and set its quantity to zero at all stores, the XML will look like this:

```
<INVN_SBS_QTYS>
<INVN_SBS_QTY store_no="1"/>
<INVN_SBS_QTY store_no="2"/>
<INVN_SBS_QTY store_no="3"/>
<INVN_SBS_QTY store_no="4"/>
....
<INVN_SBS_QTY store_no="250" qty="0"/>
</INV_SBS_QTYS>
```

In this example, after the item is in Retail Pro, the retailer could create adjustment memos to adjust the quantity.

If you want to define (or update) non-zero item quantities, list every store_no and qty.

Example:

```
<INVN_SBS_QTYS>
<INVN_SBS_QTY store_no="1" qty="10"/>
<INVN_SBS_QTY store_no="2" qty="10"/>
<INVN_SBS_QTY store_no="3" qty="10"/>
<INVN_SBS_QTY store_no="4" qty="10"/>
<INVN_SBS_QTY store_no="250" qty="40"/>
</INV_SBS_QTYS>
```

Store 250

Store 250 is used to store the on-hand quantity for the entire company. Be sure to enter the correct company quantity for store 250 when importing items into Retail Pro for the first time.

You must either pass correct store 250 quantities, OR use Technician’s Toolkit after the import to recalculate company quantities. If you don’t enter the correct quantity for store 250 or run Technician’s Toolkit, Retail Pro inventory will display incorrect quantity values for the company.

Flag Field Must Be Set for Transactions to Update On-Hand Quantity

When importing new items into Retail Pro, be sure to set the **Flag** field in the **Inventory.xml** file. If you don’t set the **Flag** field in the **Inventory.xml** file, receipts that are imported into Retail Pro will not update the item’s on-hand quantity.

The flag field is a bit array field:

| Bit | Function |
|-----|---|
| 0 | Skip Committed flag |
| 1 | Skip Inventory flag (i.e. Non-inventory item) |
| 2 | Non-editable flag. An example of this would be the CMS flag, used in v9 but not used in v8. |
| 3-7 | Reserved for future use. |

The following table lists the integer value that should be entered in the **Flag** field to achieve the desired setting.

| Integer Value | Description |
|---------------|---|
| 0 | All flags deselected (0000 0000). An item with this setting would be included in Committed, would not be a non-inventory item, and would be editable. |
| 1 | Enables the Skip Committed flag (0000 0001) |
| 2 | Enables the Non-Inventory flag (0000 0010) |
| 3 | Enables both the Skip Committed and Non-Inventory flags. (0000 0011) |
| 4 | Enables the CMS flag (0000 0100)(|
| 5 | Enables the CMS and Skip Committed flag (0000 0101) |
| 6 | Enables the CMS flag and the Non-Inventory flag (0000 0110) |
| 7 | Enables the CMS flag, Non-Inventory flag, and the Skip Committed flag (0000 0111) |

Sample Inventory.xml file:

```

- <INVENTORY>
  <INVL_STYLE style_sid="5682598658871595004" style_code="" style_image="" />
  <INVN item_sid="416220729893366117" upc="20015" use_qty_decimals="0" prod_cost="" reclass_item_sid=""
  image="" />
  <INVN_SBS sbs_no="1" alu="2001" dcs_code="M TP CS" vend_code="STAN" scale_no="12" description1="SHORT SLEEVE COTTON SHIRT" description2=""
  description3="" description4="" attr="RED" siz="L" cost="32.49" spif="" fc_cost="" fst_rcvd_date="2007-04-20T08:15:56" lst_rcvd_date="2007-04-20T08:15:56"
  lst_sold_date="2007-05-29T10:20:22" marked_date="" discont_date="" created_date="2007-05-23T09:05:12" modified_date="2007-08-28T16:57:08-07:00"
  tax_code="0" comm_code="" sched_no="" fst_price="" markdown_price="" qty_per_case="" lst_rcvd_cost="" flag="0" ext_flag="0" edi_flag="" kit_type="0"
  max_disc_perc1="100" max_disc_perc2="100" min_ord_qty="" vend_lead_time="" vend_list_cost="" trade_disc_perc="" udf1_date="" udf2_value="" unorderable="0"
  print_tag="1" active="1" mark_for_del="0" item_no="" cms="1" cms_post_date="2007-08-28T16:57:08" eci_flag="0" regional="0" gift_flag="" item_state=""
  orderable_date="" sellable_date="" long_description="" currency_name="" createdby_sbs_no="" createdby_empl_name="" modifiedby_sbs_no=""
  modifiedby_empl_name="" />
  <INVN_SBS_SUPPLS>
    <INVN_SBS_SUPPL udf_no="1" udf_value="" />
    <INVN_SBS_SUPPL udf_no="2" udf_value="" />
    <INVN_SBS_SUPPL udf_no="3" udf_value="" />
    <INVN_SBS_SUPPL udf_no="4" udf_value="Button Front" />
    <INVN_SBS_SUPPL udf_no="5" udf_value="Cotton CoolMax" />
    <INVN_SBS_SUPPL udf_no="6" udf_value="" />
    <INVN_SBS_SUPPL udf_no="7" udf_value="" />
    <INVN_SBS_SUPPL udf_no="8" udf_value="" />
    <INVN_SBS_SUPPL udf_no="9" udf_value="" />
    <INVN_SBS_SUPPL udf_no="10" udf_value="" />
    <INVN_SBS_SUPPL udf_no="11" udf_value="" />
    <INVN_SBS_SUPPL udf_no="12" udf_value="" />
    <INVN_SBS_SUPPL udf_no="13" udf_value="" />
    <INVN_SBS_SUPPL udf_no="14" udf_value="" />
    <INVN_SBS_SUPPL udf_no="15" udf_value="" />
    <INVN_SBS_SUPPL udf_no="16" udf_value="1" />
    <INVN_SBS_SUPPL udf_no="17" udf_value="" />
    <INVN_SBS_SUPPL udf_no="18" udf_value="" />
  </INVN_SBS_SUPPLS>
  <INVN_SERIALS />
  <INVN_SBS_VENDORS />
  <INVN_SBS_SUBLOCS />
  <INVN_SBS_PRICES>
    <INVN_SBS_PRICE price_lvl="1" price="0" qty_req="" season_code="None" active_season="0" />
    <INVN_SBS_PRICE price_lvl="1" price="59.99" qty_req="" season_code="SPR" active_season="0" />
  </INVN_SBS_PRICES>
  <INVN_SBS_QTYS>
    <INVN_SBS_QTY store_no="0" qty="19" min_qty="" max_qty="" transfer_in_qty="" transfer_out_qty="" sold_qty="" rcvd_qty="" onorder_qty="" to_in_ord_qty=""
    to_in_sent_qty="" to_out_ord_qty="" to_out_sent_qty="" po_ord_qty="384" po_rcvd_qty="10" so_ord_qty="" so_sent_qty="" />
    <INVN_SBS_QTY store_no="250" qty="20" min_qty="" max_qty="" transfer_in_qty="" transfer_out_qty="" sold_qty="" rcvd_qty="" onorder_qty=""
    to_in_ord_qty="" to_in_sent_qty="" to_out_ord_qty="" to_out_sent_qty="" po_ord_qty="" po_rcvd_qty="10" so_ord_qty="" so_sent_qty="" />
    <INVN_SBS_QTY store_no="5" qty="10" min_qty="" max_qty="" transfer_in_qty="" transfer_out_qty="" sold_qty="" rcvd_qty="" onorder_qty="" to_in_ord_qty=""
    to_in_sent_qty="" to_out_ord_qty="" to_out_sent_qty="" po_ord_qty="" po_rcvd_qty="" so_ord_qty="" so_sent_qty="" />
  </INVN_SBS_QTYS>

```

Importing Updated Item Information

To import updated item information into Retail Pro:

1. Add the item information to the Inventory.xml file.
2. Place the file in the **ECM\Polling\[Station]\In\Recvd** directory, and then perform a Process In operation using the Enterprise Communications Manager (ECM).

Updating Item Quantities

If you want to import updated item quantities, list each store_no and qty in the IVNV_SBS_QTY section.

Example:

```
<IVNV_SBS_QTYS>
<IVNV_SBS_QTY store_no="1" qty="10"/>
<IVNV_SBS_QTY store_no="2" qty="10"/>
<IVNV_SBS_QTY store_no="3" qty="10"/>
<IVNV_SBS_QTY store_no="4" qty="10"/>
<IVNV_SBS_QTY store_no="250" qty="40"/>
</IVNV_SBS_QTYS>
```

Communication of Receipts

IVNV_BASE_ITEM Info Required

When a receipt (invoice) is transmitted from one station to another, it cannot be guaranteed that the receiving station will have the items that are listed on that receipt in the stations' inventory. When ECM is importing a receipt into Retail Pro, if an item that is on the receipt is not in inventory, then that item will be created by ECM and marked as inactive. This enables the receipt to be created successfully at the importing station. To do that, ECM needs to know basic details about the item and this information is contained in the <IVNV_BASE_ITEM> section of the XML file.

Communication of Customers

ECM uses different logic for processing out customers depending on whether the station has a Station Type of MAIN, or a Station Type of Remote.

When setting up the station records of the stations yours will communicate with, make sure that the Station Type reflects the actual type of the station it is: Retail Pro 8/9 Main or Retail Pro 8/9 Remote. Remember, you are selecting the type of station you are communicating with, not your own station's type.

Note: Station type Other behaves similar to a Retail Pro 9 Main station. IPMS station type also behaves like a Retail Pro 9 Main, with the addition of auto-confirming every processed out document.

Rules for Processing Out Customers

Processing Out to a Main station:

- 1) Local customers are sent to the station's own subsidiary
- 2) Global customers are sent to all subsidiaries
- 3) Non-shared customers are sent to the station's own subsidiary
- 4) Regional customers with an UNDEFINED District are sent to the station's own subsidiary
- 5) Regional customers with a DEFINED Region and District from the CORP subsidiary (-1) are sent to the subsidiaries included in that region's list of locations
- 6) Regional customers with a DEFINED Region and Sector from any other subsidiary are sent to that subsidiary

Note that these rules ignore Store Number. This is a desired behaviour when data is polled TO the main station.

Processing Out to a Remote Station.

- 1) Local customers are sent to all stores in the station's own subsidiary
- 2) Global customers are sent to all stores in all subsidiaries
- 3) Non-shared customers with a NON-BLANK Store Number field are sent to the station's own store only
- 4) Non-shared customers with a BLANK Store Number field are sent to all stores in the station's own subsidiary
- 5) Regional customers with an UNDEFINED District goes to its own store, if store number is also blank it goes to all stores in its own subsidiary
- 6) Regional customers with a Region and District selected from the CORP subsidiary (-1) are sent to all stores in the subsidiaries included in that region's list of locations
- 7) Regional customers with a region and sector selected from any other subsidiary are sent to the list of stores specified in that region's list of locations.

General Rules

- 1) A non-shared customer with a blank store number field behaves like a local customer.
- 2) A regional customer behaves like a non-shared customer if region/district is not selected.
- 3) When proc-out is preparing data for another MAIN station, it will not filter customers by stores.

Note: This change affects ECM on both Retail Pro 8 and Retail Pro 9 sides.

Share With and CMS Fields in Customer Records

The Share With field in customer records is used when processing out from Retail Pro 8. The CMS field is used when processing out from Retail Pro 9.

CMS (Retail Pro 9) Field Values

| Value | Description |
|-------|-----------------------------|
| 0 | Local customer (CMS_0) |
| 1 | Global customer (CMS_1) |
| 2 | Regional customer (CMS_2) |
| -1 | Non-shared customer (CMS_3) |

SHARE_WITH (Retail Pro 8) Field Values

| Value | Description |
|-------|--|
| 0 | Share with all stores (SHARE_WITH_0) |
| 1 | Share with MAIN only (SHARE_WITH_1) |
| 2 | Not shared at all, i.e. not polled (SHARE_WITH_2) |
| -1 | Share with all stores as a GLOBAL customer (SHARE_WITH_GLOBAL) |

Rules for SHARE_WITH and CMS Flags

| Polling Scenario | Result |
|---|---|
| Customer is polled between two 9-series stations | CMS flag is used and is updated based on customer modified date. |
| Customer is polled between two 8-series stations | SHARE_WITH flag is used and is updated based on customer modified date. |
| Customer is polled between 8-series and 9-series and this is an EXISTING customer on the target station | Neither flag is updated |
| Customer is polled from 8-series to 9-series and it is a new (or reactivating) customer record | Flags are mapped as follows: a) SHARE_WITH_0 -> CMS_0 b) SHARE_WITH_1 -> CMS_3 c) SHARE_WITH_2 -> CMS_3 d) SHARE_WITH_GLOBAL -> CMS_1 |
| Customer is polled from 9-series to 8-series and it is a NEW customer record | Flags are mapped as follows: a) CMS_0 -> SHARE_WITH_0 b) CMS_1 -> SHARE_WITH_0 c) CMS_2 -> SHARE_WITH_0 d) CMS_3 -> SHARE_WITH_1 |

Communication of Preferences

When you communicate preference information to another station, the resulting Preferences.xml file only shows two values: the PREF_ID and the PREF_TYPE.

See Appendix A for a table listing preferences and by PREF_ID and PREF_TYPE.

Communication of Transfer Documents

Retail Pro 9 handles transfer documents differently than Retail Pro® 8-Series, so special processing rules are used. The processing rules allow for the unique database types to maintain a document trail that is accurate for their respective databases, while eliminating the chance of a single document making multiple updates at a given database.

Out Slips

In both Retail Pro 9 and 8, creating an out slip updates the source location's inventory. In RP8, however, the out slip also updates the target store's inventory.

In Slips

Retail Pro 8 users can optionally require In Slips when receiving transferred merchandise, but the In Slip is only used to verify the transfer and correct any discrepancies; In Slips themselves have no impact on inventory. Retail Pro 9, on the other hand, requires a voucher to update the target location's inventory.

The following sections explain how ECM handles communication of slips between Retail Pro 9 and 8.

Unverified Slips sent to Retail Pro 9 (Oracle)

When unverified out slips are communicated to the Retail Pro 9 (Oracle) station, ECM recognizes that the slip is not verified and does not currently exist within the database. Retail Pro 9 generates an ASN voucher that references the out slip. Both the slip and the ASN are then saved to the database. At this point, both the RP8 (BTF) database and RP9 (Oracle) database contain the unverified out slip. What happens next depends whether or not the out slip is verified at the 8-Series station, or if an ASN is updated at the RP9 station.

If the Out Slip is verified in Retail Pro

Verifying an out slip in Retail Pro, confirms the updating of the target station's inventory.

During the next communication with Retail Pro 9, ECM recognizes that Retail Pro already has the out slip, and that the slip references an ASN (automatically created by Retail Pro when the out slip was first sent).

Retail Pro generates a voucher from the ASN, and the target station in Retail Pro is now updated.

During the next communication, the voucher is sent to Retail Pro. ECM at the Retail Pro station recognizes the reference to the existing out slip, and the voucher is not filed into the Retail Pro (BTF) database.

If an ASN Voucher is updated in Retail Pro

You can generate a voucher directly from the ASN (or reference the ASN on a new voucher). When the voucher is updated, the target station's inventory is updated, and the out slip is marked Verified.

During the next communication, the out slip is sent to Retail Pro 9. At the Retail Pro station, ECM recognizes that the slip already exists, but is coming in as verified. ECM also notes that the slip references a voucher. The voucher created in Retail Pro is not actually processed into the Retail Pro database; however, a confirmation will be sent back to Retail Pro 9, as though it had. The out slip is then filed.

Verified Slips Sent to Retail Pro 9 (Oracle)

When a verified slip is sent to Retail Pro 9, ECM recognizes that the slip is verified and does not currently exist in the Oracle database.

Retail Pro 9 automatically generates a voucher, referencing the out slip, that updates the target station's inventory.

During the next communications cycle, the voucher is sent back to the RP8 Main station. ECM recognizes the reference to the out slip (which is already in the RP8 BTF database), and the voucher is not processed in; however, a confirmation is sent to the RP9 station to confirm that the voucher was seen during communication.

Inter-Company Transfers sent to Retail Pro® 9-Series (Oracle®)

When sending a slip for an inter-company transfer, ECM will create an ASN.

References between the slip and ASN do not need to be maintained because the documents will be distributed to separate subsidiary stations. Each subsidiary will make the change, as needed, on their respective documents.

Updating In Transit Information in Retail Pro 8 (BTF)

When communicating slips from Retail Pro 9 to RP8, different rules apply depending on the tracking in transit configuration at the target station.

If not tracking in transit and not requiring in slips

Out slips created in Retail Pro 9, when sent to an RP8 BTF station, immediately update the source and target stations' inventory. The out slip is then filed.

- The out slip's **Target Updated** field is selected, indicating that the target station's inventory has been updated.
- There is no update of in-transit quantity information.

If not tracking in transit and requiring in slips

The out slip created in Retail Pro 9, when sent to an RP8 BTF station, immediately updates both the source and target stations' inventories.

- The out slip's target updated flag is selected.
- The out slip is moved to the unverified slips file to await verification. To complete verification, an in slip referencing the out slip must be created. Upon verification, both slips are filed.

Note: The target station will not be updated twice when the unverified slip is moved to the former slips file because the out slip's target updated field is selected.

If tracking in transit and not requiring in slips

When tracking in transit, out slips created in Retail Pro 9 Oracle stations perform a different function during inventory updates.

- Out slips only affect the source station's inventory.
- Because tracking in transit is used, after the source station is updated, the slip is filed in the unverified slips file.
- The in-transit quantity information is updated.

Note: An out slip is truly considered to be tracking in transit when it contains a **Days in Transit** value greater than 0.

RP8 BTF stations are not aware of tracking in transit. If tracking in transit is set, and an out slip is created at a Remote station, the **Days in Transit** value is set to -1. When the out slip is sent to the Main station, the process in program recognizes that this is a system-assigned value, and the correct days in transit is entered on the document (retrieved from the system preference setting at the Main).

After the out slip is verified, the slip is filed, the target station's inventory is updated, and the slip's **Target Updated** field is selected.

If tracking in transit and requiring in slips

Out Slips created in Retail Pro 9 update only the source station's inventory. When the out slip is sent to the RP8 (BTF) station, the out slip is placed in the unverified slips file, and the in-transit quantity information is updated.

If a referencing in slip is found, then verification takes place regardless of the days-in-transit status. The out slip and in slip are then filed, the target station's inventory is updated, and the **Target Updated** field is selected.

Now that the out slip has been verified, the previous effects on In-Transit quantity will be reversed.

If the days-in-transit value has expired and no in slip is found, you have an unverified out slip that performs the following actions:

- The target station's inventory is updated.
- The slip's target updated field is selected.
- The previous effect on in-transit quantity is reversed.

An in slip will still be required to move the out slip to the former slip file. After the in slip is created, both documents are filed with no additional impact on source or target inventories or in-transit quantities.

In Slips

Retail Pro 9 does not recognize in slips as a document type that affects inventory. Any in slips communicated from an RP8 (BTF) database are simply filed in the RP9 (Oracle) database.

Reversed Slips/Vouchers

The rules that are applied depend on where the out slip was created and what type of tracking in-transit configuration is used at the Retail Pro 8 BTF station.

If you reverse an out slip at a BTF station, ECM handles the document differently depending on whether or not the document previously existed in the Oracle database, and whether or not it was in a verified state.

Out slip does not exist in Oracle database

If the out slip was not previously sent to the Oracle database, it won't be in the database. In this case, the BTF station sends the original out slip (now marked **Reversing**), as well as the new out slip that reverses its effect (marked **Reversing**). ECM processes in both documents.

The **Reversed** out slip is considered a verified document. Because the document SID does not exist in the Oracle database, the out slip is filed and no changes are made to the source station's inventory.

The **Reversing** out slip is processed in. Because the document SID does not exist in the Oracle database, the system creates a voucher to update the target station's inventory, and immediately reverses it. The voucher contains a reference to the **Reversing** out slip, and thus is not sent back to the BTF database (preventing duplicate updates of inventory).

Verified out slip exists in Oracle database (with a related voucher affecting target station)

Retail Pro 8 (BTF) stations send both **Reversed** and **Reversing** out slips to RP9 Oracle databases. ECM processes in both documents.

A **Reversed** out slip is considered a verified document. The document already exists in the Oracle database, but in a different state, so ECM updates the source station's inventory with the correct quantity on the out slip.

The **Reversing** out slip recognizes the voucher in the Oracle database that updates the target station's inventory. The system reverses and files the voucher.

The **Reversed** voucher maintains its reference to the out slip. This prevents the BTF station from processing in the document and mistakenly updating its inventory again.

Unverified Out Slip exists in Oracle database (with a related ASN)

A **Reversed** out slip is, by nature, a verified document. The out slip is filed and no changes are made to the source station's inventory.

A **Reversing** out slip inactivates the ASN associated with the out slip.

Communication of Inter-Company Transfers

In Global Preferences > Company > Transfer Rules, you can select the specific locations that can perform intercompany transfers. This preference area provides two main benefits:

- Makes it easier to configure inter-company transfers
- Enables locations to view the entire configuration chain established at the Corporate headquarters, something they were previously not able to do

| Masters Information | | | |
|---|--------------------------|------------------------------|-------|
| Last updated: 10/6/2009 1:55:30 PM | | | |
| Source Subsidiary: 1 : 001 | | Target Subsidiary: 2 : JAPAN | |
| <input type="radio"/> Define Single rule for all stores <input checked="" type="radio"/> Define Unique rule for each store | | | |
| Store Number | Store Name | Store Code | |
| 0 | FOLSOM | 000 | |
| 1 | SAN FRANCISCO | 001 | |
| 2 | NEW YORK | 002 | |
| 3 | BOSTON | 003 | |
| 4 | CHICAGO | 004 | |
| Store Number | Include All | Store Name | Store |
| 0 | <input type="checkbox"/> | TOKYO | 000 |
| 1 | <input type="checkbox"/> | OSAKA | 001 |

When defining transfer rules, you can define:

A single rule for all stores in the subsidiary, or a unique rule for each store in the subsidiary.

Define Single Rule for all Stores

If Define Single Rule for all Stores is selected, you are deciding that all stores at the source subsidiary will have the same rules with respect to the target stores with which they will perform intercompany transfers.

At any point in time the user can unselect this option after an array has been saved and make changes to an individual source store as needed. Un-checking this option after an array has been set, will result in each store still having the same set of configurations.

Define Unique Rule for Each Store

If Define Unique Rule for Each Store is selected, you not only have a list of the stores that are assigned for a selected subsidiary, you can highlight a specific store and update target subsidiary\store combinations as needed. You can do this for each individual store.

Default = Define Single Rule for all Stores

In you toggle from 'Single Rule' to 'Unique Rules', all defined target locations are held. In essence, all source stores will still be the same, but you can manually change details for a specific store as needed. If you move from 'Unique Rules' to 'Single Rule' all defined stores will be removed and it will be as though you are starting from the beginning of the process. A warning message is displayed to warn you defined rules will be lost.

Source Subsidiary

The Source Subsidiary is listed on the left side of the screen and is the location from which an inventory transfer is being requested.

All subsidiaries defined at the given installation are listed, except the default corporate subsidiary (-1). The information in the drop down is displayed in [sbs_no]: [sbs-name] format. When a subsidiary is selected, all active stores assigned to the given subsidiary are displayed.

The two radio buttons are a unique attribute for each subsidiary. This gives retailers the flexibility of some subsidiaries using the same rules for all stores and other subsidiaries using unique rules.

Source Stores

Only active stores are displayed. If you configure a rule for a sub\store combination that is active for one location but inactive at another location, those rules will still be recorded but simply not used at the alternate location.

Target Subsidiary

The target subsidiary is listed on the right side of the screen and displays the location to which inventory transfer requests are being sent.

All subsidiaries defined at the given installation are listed, except the default corporate subsidiary (-1). The information in the drop down is displayed in [sbs_no]: [sbs-name] format. When a subsidiary is selected, all active stores assigned to the given subsidiary are displayed.

Target Stores

In the Target Stores area, you can select the target locations to which the rules will be sent. Only active stores are displayed. You can use the Select All option in the 'Include' column to enable or disable all stores in one operation.

Masters Information

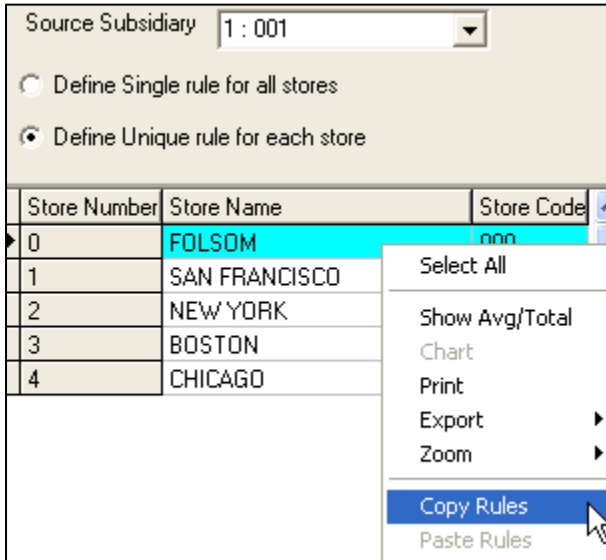
Displays the date of the last update of the transfer rules area of preferences.

Copying and Pasting Rules

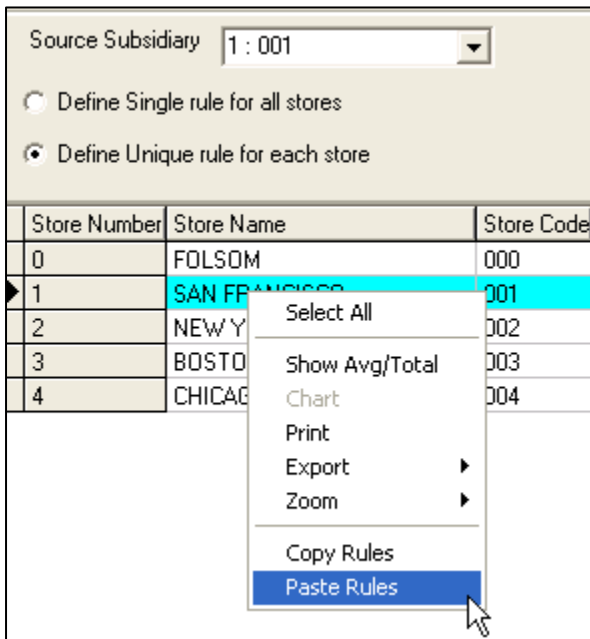
When defining a unique rule for each store, you may have several stores that will use the same rules. To speed up the configuration of transfer rules, you can copy and paste transfer rules from one store to another.

Select Define Unique rule for each store, and then define rules for a store.

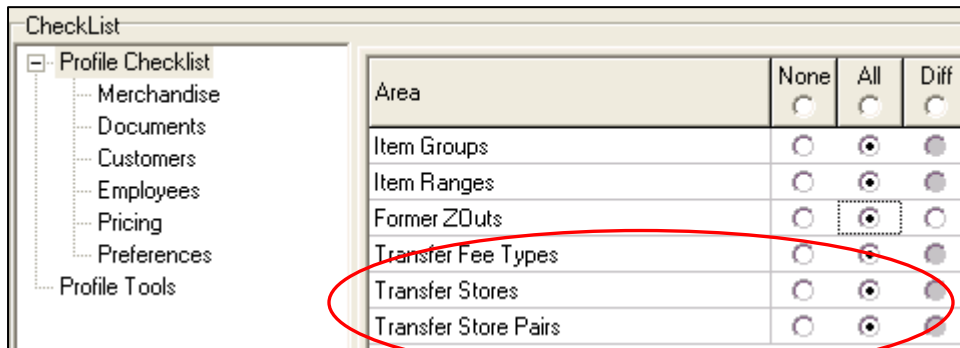
With the store selected, right-click and select Copy Rules.



Select the store to which you want to paste the rules, and then right-click and select Paste Rules.



The extraction of transfer rule pairings and stores is controlled by the Transfer Stores and Transfer Store Pairs areas in the Profile Checklist.



Select All in the Transfer Stores area to extract the list of subs and stores from the table that populates the transfer rules source and target sub and store list.

Select All in the Transfer Store Pairs area to extract the pairing relationships. The data representation of the pairing relationship indicates whether a single rule or unique rule for the source subsidiary is in use.

XML File for Inter-Company Transfer Rules

The resulting XML file is named ICTRule.xml.

Subsidiary\Store Discrepancies

Ideally, multiple installations are configured with the identical subsidiaries and stores, and the identical identifying numbers are assigned to those subs/stores.

If there are differences, the following example outlines current functionality in Retail Pro and recommended course of action.

Installation 1

| | | | |
|--------------|-----------|-----------|-----------|
| SBS 1 | Store 001 | Store 002 | Store 003 |
| North Region | Store A | Store B | Store C |

Installation 2

| | | | | |
|-------------|-----------|-----------|-----------|-----------|
| SBS 1 | Store 001 | Store 002 | Store 003 | Store 004 |
| West Region | Store W | Store X | Store Y | Store Z |

If you communicate store information from the North Region to the West Region, the end result will have the SBS 1 = West Region store 1=A, 2=B, 3=C and 4=Z.

Company information is not changed; however, the store details will be updated. To ensure consistency, it is important for both stores and transfer rules to be shared.

Communication of Employees

Communicating Employees from Retail Pro 8

When you use the ECM to import employees into Retail Pro 9 from a Retail Pro 8 station, the Enabled field for these employees is cleared. In addition, the employees are not assigned a name or password. To allow these employees to access Retail Pro 9, you need to select the Enabled field, at which time you are prompted to give them a unique log-in name and password.

Security Information for New Employees Imported into Retail Pro 9

When you import new employees into Retail Pro 9 via the Employees.xml file, you must import the employees without password or security settings. After the basic information for the employee is added, you must go into Employee Mgmt > Groups to assign passwords, security rights, and privileges.

Security information is stored in the <SECURITY_SETTINGS> area of the XML file. A sample of which is shown below:

```
<SECURITY_SETTINGS sig1="80095CC838C28504CBB5E89A20985A10FFF9187F">
<EMP_SBSS>
<EMP_SBS sbs_no="1" access_all="1" stores="0-1"/>
</EMP_SBSS>
<CMS_USER user_id="97" user_name="USER2" sbs_no="1" active="1" password="C498F7B745"
sysadmin="0" sig2="49E5E008F0B1F5E306701BE393602844A2FFA5B">
<USER_GROUPS>
</USER_GROUPS>
</CMS_USER>
<SIGNATURE sig3="D9FBBA855F6D5BFFB73E2C08134377B9FB11AAFC"/>
</SECURITY_SETTINGS>
```

These are not required fields. If you are importing new employees into Retail Pro 9, do not enter values in these fields for the new employees. When you assign password and security information, the fields will be populated by the system.

Communication of Employee Passwords/Policies

ECM makes it easy for retailers to communicate employee passwords (and password policies) between the Main (headquarters) and remote stations.

ECM's password polling features have the following benefit:

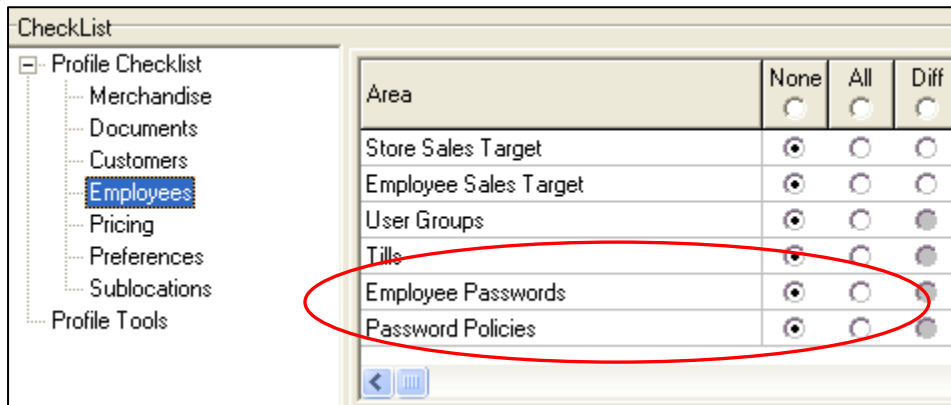
- Decrease amount of polled data, speeding up communication times
- Enable greater flexibility in password polling (Main can receive password updates from remotes while still controlling other employee information)

ECM Checklist Options for Employee Passwords, Password Policies

ECM includes separate checklist options for Employee Passwords and Password Policies. These options enable retailers to send only passwords and/or policies, which are much smaller files than the Employees.xml file and thus can be sent more often.

Please note that password information is still included in the Employees.xml file. The checklist options are designed to give retailers the option of sending only passwords or policies, if desired and apply only to communication between V9 databases.

Employee passwords and password policies can be sent as None, or All. The sending of Differences (updates and new records only) is not currently available.



The XML files that communicate employee password and policy information are, respectively, EmployeePasswords.xml and PasswordPolicies.xml. These files are always produced in compressed form.

Configuration #1 – Main Controls Employees, Passwords Polled once per Day

In this scenario, one polling cycle is performed per day. The Main has the Manage Employee Security and Accept Employee Password flags selected. The checklist options for Employee Details and Password Policies are also selected. This enables the Main to control all employee information, including password policies, yet still receive password updates from remotes.

The Remote is configured to NOT manage security. It is set to process out employee passwords, but not employee details and password policies.

| Setting | At Main | At Remote |
|---------|---------|-----------|
| | | |

| | | |
|---------------------------|---------|--------------------------------|
| Manage Employee Security | Enabled | Disabled |
| Accept Employee Passwords | Enabled | N/A (Manage Security disabled) |
| Employee Details | All | None |
| Employee Passwords | None | All |
| Password Policies | All | None |

Configuration #2 – Main Controls Employees, Passwords Polled Multiple Times per Day

In this scenario, the Main is configured to poll passwords multiple times per day (e.g. every hour) but employee details only once per day. The Main has the Manage Security flag selected, but not the Accept Employee passwords flag.

The Remote is configured to NOT manage security. The remote is set to process out employee passwords every hour and not to process out employee details at all.

| Setting | At Main | At Remote |
|---------------------------|----------|--------------------------------|
| Manage Employee Security | Enabled | Disabled |
| Accept Employee Passwords | Disabled | N/A (Manage Security disabled) |
| Employee Details | All | None |
| Employee Passwords | None | All |
| Password Policies | All | None |

Differences between the Two Scenarios

The difference between these two scenarios is that in the first scenario the only way for an updated employee password to be sent from the Main to the Remote is by sending all employee details (Employees.xml), which involves much more work for ECM. In the second scenario, employee passwords (EmployeePasswords.xml) can be polled at regular intervals (ECM will silently skip the passwords for the employee records that haven't been polled yet), thus shortening the regular polling cycle (because passwords are faster to process alone).

Sending the password file multiple times per day can ensure that employee password changes are propagated in a timely manner, preventing problems with employee log in.

Likewise, if a change is made to group password policies, such as rules for strong passwords, reusing passwords, etc., you can select the Password Policies option to send the PasswordPolicies.xml file only.

Remote Control of Passwords

Accept Employee Passwords Flag

In the Profile Tools area of the ECM checklist is an option called Accept Employee Passwords. The Accept Employee Passwords option enables remotes to control passwords while the Main controls other employee information. This is useful for retailers who find it more convenient and practical to change/update passwords at remotes than at the Main.

The Accept Employee Passwords flag works in conjunction with the Manage Employee Security flag. When receiving the EmployeePasswords.xml file, ECM only looks at the Accept Employee Passwords setting if the Manage Employee Security setting is selected.

If both the Manage Employee Security and Accept Employee Passwords flags are selected, your station WILL process in the EmployeePasswords.xml file.

If the Manage Employee Security flag is selected, but Accept Employee Passwords is NOT selected, the station WILL NOT process in the EmployeePasswords.xml file.

| Rules | Enable |
|---|-------------------------------------|
| Compare Inventory Modified Dates | <input type="checkbox"/> |
| Manage Committed Qty | <input type="checkbox"/> |
| Accept Inventory Cost for items with zero qty | <input checked="" type="checkbox"/> |
| Accept Inventory Price for items with zero qty | <input checked="" type="checkbox"/> |
| Accept Inventory Cost for new items with zero qty | <input checked="" type="checkbox"/> |
| Accept Inventory Price for new items with zero qty | <input checked="" type="checkbox"/> |
| Accept Employee Passwords | <input type="checkbox"/> |

Configuration #3 – Main Controls Employees, Remote Controls Passwords

In this configuration scenario, the Main is configured to Manage Employee Security and is also configured to Accept Employee Passwords. The checklist options for Employee Details and Password Policies are selected, but Employee Passwords is not.

At the remote, Manage Employee Security, Employee Details and Password Policies are not selected, but Employee Passwords is selected.

| Setting | At Main | At Remote |
|---------------------------|---------|--------------------------------|
| Manage Employee Security | Enabled | Disabled |
| Accept Employee Passwords | Enabled | N/A (Manage Security disabled) |
| Employee Details | All | None |
| Employee Passwords | None | All |
| Password Policies | All | None |

About the “Manage Employee Security” Flag

If you select “Manage Employee Security” for a station, you are indicating that the station manages its own security and won’t accept changes (including password changes) from another station. This is why, if you want the station to accept password changes (by processing in the EmployeePasswords.xml file), you also need to select the “Accept Employee Passwords” flag.

If Manage Employee Security is selected for a station, the following information will NOT be imported:

- 1) Group policy settings defined in Groups >Policy from PasswordPolicies.xml. (Not all of those pertain to “passwords”)
- 2) Employee logon credentials from Employee.xml
- 3) Employee group assignment from Employee.xml
- 4) Employee store assignment from Employee.xml
- 5) List of user groups from UserGroup.xml
- 6) User rights assignments for user groups from UserGroup.xml

Notes about Communicating “Employee Passwords”

- All passwords are always processed out always; polling of differences is not allowed.
- Passwords are processed out for the same employees that get processed out in the “Employee Details” area.
- A Primary license server database can only send passwords to a secondary activated against that primary. A secondary can only send passwords back to its own primary.
- If you get an error “Cannot update passwords - no passwords found” it means that there were no employees with any credentials to be polled for a particular station, so turning on polling of password policies was not even needed.

Notes about Communicating “Password Policies”

- The “Manage Employee Security” switch DOES affect processing in of password policies. Password policies will be silently ignored if the receiving system is set to manage security locally.
- IMPORTANT: You can poll the “Enforce Password History” policy in the sense that “the MAXIMUM NUMBER of unique passwords allowed before reusing a password” can be set properly at the receiving side; however, there is no way of polling the actual PASSWORD HISTORY, so if an employee’s password is changed on both sides before synchronization occurs, it is possible to end up with two conflicting histories of actual password values at the Main and remote. Therefore, if the “Enforce password history” policy is enabled, we recommend that you change the password in one location and let ECM send it to other locations during a regular polling cycle. Do not change a password in multiple locations before ECM has a chance to synchronize all the stations.
- Employee password policies can only be communicated from a primary license server to a secondary license server activated against the primary. Do not try to process out employee policies at a secondary license server.

Password Modified Date

Employee records include a “Password Modified Date” field that stores the date of the most recent password change. The Password Modified Date field is updated in the following situations:

- A new user is created
- An existing user’s password is changed
- An existing user is reactivated

When processing in employee records, if an employee’s Password Modified Date field is blank, ECM leaves the Password field alone (unless Oracle logon credentials were changes).

If an employee’s Password Modified Date field is not blank (password modified), ECM update’s the employee’s password is updated, provided that the date in the XML is newer than then date in the CMS_USER table in Oracle.

Sysadmin User Passwords

The password of a SYSADMIN user is NOT updated regardless of the Password Modified Date. This prevents a remote from overriding a password change done at the Main. In other words, a SYSADMIN user’s password is always controlled locally.

Disabling/Enabling Employees

Disabling and enabling an employee does NOT cause the Password Modified Date field to be updated.

Editing XML Files

Every piece of the XML has a digital signature, so don't try to decompress the file, edit it, and then process it in. An error message will be displayed, explaining that the signature could not be verified.

Enforce Password History

The Enforce Password History policy is a special policy. It is used to control employees’ ability to re-use previously used passwords. When communicating passwords and policies, ECM does not send the actual password history, just the setting. Therefore, if the Enforce Password History policy is enabled, we recommend that you change the password at the primary license server and let ECM propagate it to any secondary license servers during a regular polling cycle.

Trial Mode Databases Cannot Send Passwords, Policies

ECM will NOT send passwords or policies out if your station is in trial mode. This is because there is no way to verify the hardware signature (license servers aren’t aware of each other until licensing is activated).

Proc_Status Field on Slips

The Proc_status field is used to identify properties of transfer slips, specifically:

- Whether or not a slip is a reversed slip, or a reversing slip (a reversing slip undoes the effect of the original slip).
- If the slip has been exported to the general ledger (GL Flag selected)
- If the slip resulted in a cost change (Cost Change Flag selected)
- If the slip was exported using Bridge (Bridge Flag selected)

Bits which can be set in slip.proc_status are: 1, 2, 3, 4, 5. 5 bits = 32 combinations

Thus, $\text{proc_status} = B1 * 2 + B2 * 4 + B3 * 8 + B4 * 16 + B5 * 32$ where B1-B5 can be either 0 or 1.

| Bit | Description |
|-----|--------------------|
| B1 | GL Flag |
| B2 | Cost Changed Flag |
| B3 | Bridge Export Flag |
| B4 | Reversed Slip |
| B5 | Reversing Slip |

Since bits B4 and B5 cannot be set simultaneously (a slip cannot be simultaneously a reversed and reversing slip), we end up with only 24 combinations.

| Bits | Proc_status | K |
|----------|-------------|----|
| 00000000 | 0 | +1 |
| 00000010 | 2 | +1 |
| 00000100 | 4 | +1 |
| 00000110 | 6 | +1 |
| 00001000 | 8 | +1 |
| 00001100 | 10 | +1 |
| 00001110 | 14 | +1 |
| 00010000 | 16 | +1 |
| 00010010 | 18 | +1 |
| 00010100 | 20 | +1 |
| 00010110 | 22 | +1 |
| 00011000 | 24 | +1 |
| 00011010 | 26 | +1 |
| 00011100 | 28 | +1 |
| 00011110 | 30 | +1 |

| Bits | Proc_status | K |
|----------|-------------|----|
| 00100000 | 32 | -1 |
| 00100010 | 34 | -1 |
| 00100100 | 36 | -1 |
| 00100110 | 38 | -1 |
| 00101000 | 40 | -1 |
| 00101010 | 42 | -1 |
| 00101100 | 44 | -1 |
| 00101110 | 46 | -1 |

How to Determine if a Slip is Reversed or Reversing

Look at the proc_status, and find the corresponding value of K.

If $K=+1$, the slip is a normal or reversed slip, and it DECREASES quantity in the outgoing store and INCREASES quantity in the incoming store.

If $K=-1$, the slip is a reversing slip and it INCREASES quantity in the outgoing store and DECREASES quantity in the incoming store.

Note: There is no guarantee that the proc_status field will not pick up additional flags. When it does, there will be additional values that would need to be checked. The proper and reliable method is to check for the reverse and reversing flags is to analyze the individual bits.

Communication of Physical Inventory Files

You can send physical inventory files to Retail Pro , where they will be used to confirm or correct current on-hand quantities in inventory.

The available checklist options for PI files are All or None. You cannot send Differences associated with PI Counts.

To send physical inventory counts to Retail Pro:

1. Click Stations on the top menu of the ECM Home Screen.
Result: The list of stations displays.
2. Select the Station to which you want to assign or change a profile.
3. Click **Form View**.
4. Select the Checklist/Rules tabbed page.
5. Click **Edit**.
6. Select **Profile Checklist > Merchandise > Physical Inventory**.
7. Click **Save**.

Pending PI Files

Some retail locations do not have permission to update inventory quantities. These, mstations send a Pending PI file to the Main station, which processes the counts and then updates the source location's inventory via adjustment memos or the inventory data file.

Processing Out of PI Files

Basic Steps

1. Retail Pro BTF creates RproPI.zip.
2. ECM retrieves the zip file and converts the data to XML.
3. ECM Exchange compresses and encrypts the file.
 - If target station (process in station) is a BTF database, the XML file is converted to BTF format.
 - If target station is an Oracle database, the XML file is processed directly into the database.

Retail Pro 9 Series Creates Pending PI Counts

ECM prepares XML files from Pending PI files for the correct locations. ECM Exchange compresses and encrypts the data.

- If the target station (process in station) is a BTF database, the XML file is converted to BTF format.
- If the target station is an Oracle® database, the XML file is processed directly into the database.

Processing Out from 8 Series BTF

The Retail Pro 8-Series PI Tool places the latest PI file (Rpropi.zip) in the **Polling\[store\station]\Out\Upload** folder. When processing out, ECM copies the Rpropi.zip file to the appropriate \Out\Temp folder for the target station. The contents of **Rpropi.zip** are then extracted and converted into XML format. The original RproPI.zip file within the **...\Out\Upload** directory is then deleted.

Process Out Log

The ECM Process Out log records any successful retrieval of an **RproPI.zip** file. The log will display:

“Successful process out of RproPI.zip from “[Path]”” where [Path] is the store stations path to the **...\Out\Upload** folder.

The ECM Process Out log will record any failed attempt to create the needed XML data file for PI files. If a failure occurs, the original zip file will not be deleted. The log file will reflect:

“Unable to prepare RproPI data file from **RproPI.zip** from “[Path]”” where [Path] is the store/station's path to the **...\Out\Upload** folder?

Processing Out from 9 Series Oracle

When processing out from Retail Pro 9, ECM doesn't check for a RproPI.zip file. Pending PI's that should be communicated are stored directly in the database. ECM recognizes the pending status of any PI file that was created in Retail Pro.

When PI count files exist, ECM prepares the appropriate XML file with respect to the PI counts and the store/station for which those counts belong.

Note: ECM will not process out Pending PI information for a given store/station unless that PI originated at Retail Pro or if Retail Pro is set to manage inventory for that given location.

Communication of Oracle Logon Information

ECM can export and import employee details as well as Oracle logon information associated with that employee.

Oracle logon information is stored in the CMS_USER table in the database.

To export Oracle Logon information:

1. In the station checklist for each target station, select the All option for Employees.

If All is selected, all employee group information (including logon name and password) is sent to the target 9 Series station via the Groups.xml file. If None is selected, no group information is sent to the target station.

2. Perform a Process Out and Exchange.

During Process Out, employee information is written to the Employees.xml file. Group information is written to the Groups.xml file.

Note: The Groups.xml file encrypts password information.

Exported Employee Information

During Process Out, ECM exports the following employee information: Employee subsidiary number, employee name, employee code, commission level, drawer, time shift number, max discount percentage, customer sid, active, retail pro full name, description, hire date, exempt status, job name, username, password.

To import Oracle Logon Information:

1. Perform a Process In at each target station.

The logon information in the Employee.xml file is written to the CMS_Users table in the database.

Duplicate Checking

During Process In, ECM checks each employee to see if the employee already exists within the database. ECM uses a combination of [username], [password], [login_name], to identify employees that already exist in the database and writes the duplicate information to a separate file. You can review the file and make corrections.

If the employee is a new employee, all information available in the Groups.xml file is added to the database.

Imported Employee Information

During Process In, ECM imports the following employee information: Employee subsidiary number, employee name, employee code, commission level, drawer, time shift number, max discount percentage, customer sid, active, retail pro full name, description, hire date, exempt status, job name, username, password.

Subsidiary

Exported employees may be assigned to a subsidiary that does not exist at the target location. If an exported employee is not able to be assigned to an existing subsidiary at the target location, the employee will be imported into the same subsidiary as the user performing the import.

Group Assignment

When importing employees, Group information is imported first. Employees information is then imported and employees added to the same groups to which they belonged at the exporting location.

Communication of Externally Created Files

Externally created files can be exchanged and processed provided they are in XML.

To process in an externally created XML file:

Place the file in the `\\n\Rcvd` directory. The next process in the operation attempts to update this file. ECM logs any information related to the success or failure of the given files.

To exchange an externally created XML file:

Place the file in the `\\Out` directory at the source location. ECM Exchange transfers the file to the `\\n\Rcvd` directory at the target station.

Data Encryption

Each time you exchange data, ECM Exchange encrypts each file (on a per file basis) at the source station and decrypts each file at the destination station.

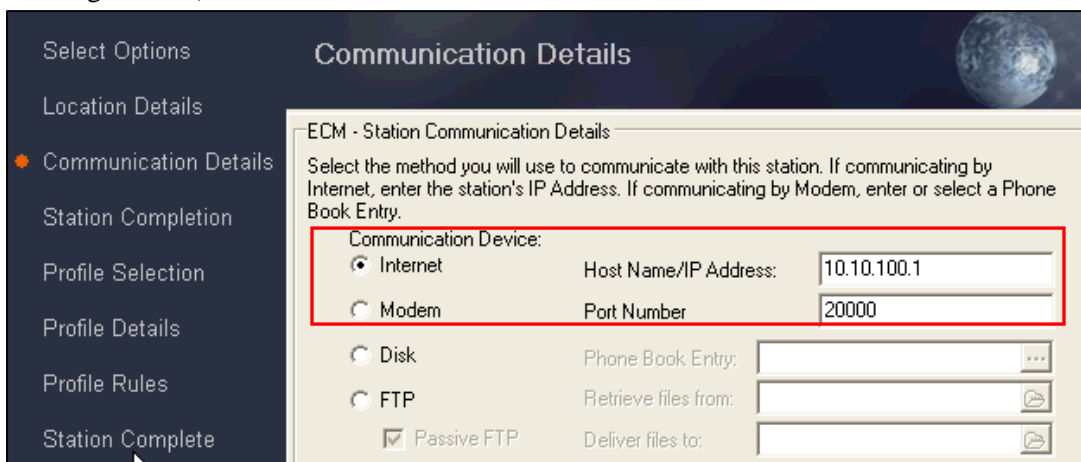
ECM recognizes the current exchange direction and either encrypts or decrypts the data accordingly.

Internet Communication

Internet is the recommended method for communication.

To select Internet as the communication device:

1. In the Station Wizard: On the Station Details screen, select **Internet** as the communication method. If creating a station manually: Select Internet in the **Preferred Device** field.
2. Enter the target station's **IP Address**. This can be a static IP Address, or a DNS (Domain Naming Service) that resolves to an IP Address.



ECM - Station Communication Details

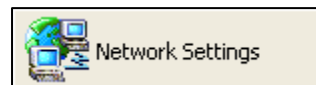
Select the method you will use to communicate with this station. If communicating by Internet, enter the station's IP Address. If communicating by Modem, enter or select a Phone Book Entry.

| | |
|---|-----------------------------------|
| Communication Device: | |
| <input checked="" type="radio"/> Internet | Host Name/IP Address: 10.10.100.1 |
| <input type="radio"/> Modem | Port Number: 20000 |
| <input type="radio"/> Disk | Phone Book Entry: ... |
| <input type="radio"/> FTP | Retrieve files from: ... |
| <input checked="" type="checkbox"/> Passive FTP | Deliver files to: ... |

When necessary, ECM uses the network options within your operating system. Consult your operating system's documentation for configuration information.

To access Network Settings:

1. Select **Options** from the top menu of the ECM Home Screen.
2. Select a station, then select **Network Settings** from the side menu.




Modem Communication


To communicate using a modem, you'll need to:

1. Set up an RAS connection in Windows.
2. Set up a Windows user.

Two levels of authentication are required when communicating by modem. Each station must be in the other station's address book, and have the correct login name and password defined in each computer's Windows modem settings. The second level of authentication is the standard matching login name and password that must be defined in each station's record.

To select Modem as your communication device:

1. In the Station Wizard: On the Station Details screen, select **Modem** as the communication device. If creating a station manually: Select Modem in the **Preferred Device** field.
2. Enter a Phone Book Entry. Select  to display the Polling Phone Book dialog. Select a phone book entry, and then select **OK**. (See Windows documentation for setting up Phone Book entries.)

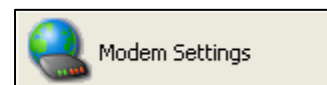


The screenshot shows the 'Communication Details' dialog box in the ECM software. On the left is a navigation pane with 'Communication Details' selected. The main area is titled 'ECM - Station Communication Details' and contains the following text: 'Select the method you will use to communicate with this station. If communicating by Internet, enter the station's IP Address. If communicating by Modem, enter or select a Phone Book Entry.' Below this are radio buttons for 'Internet', 'Modem' (selected), 'Disk', and 'FTP'. There is also a checked checkbox for 'Passive FTP'. To the right of the radio buttons are input fields for 'Host Name/IP Address', 'Port Number', 'Phone Book Entry' (with a dropdown arrow), 'Retrieve files from:' (with a folder icon), and 'Deliver files to:' (with a folder icon).

When necessary, ECM uses the modem and dial-up options within your operating system. Consult your operating system's documentation for configuration information.

To access modem settings:

1. Select **Options** from the top menu of the ECM Home Screen.
2. Select **Modem Settings** from the side menu.



Disk Communication

ECM allows you to transfer data from a Retail Pro 8 installation to a Retail Pro 9 installation located on a local or network drive. The procedures below describe how to set up disk communication, as well as how to initiate a communication cycle.

Note: The procedure below assumes that you already installed ECM as part of your Retail Pro 9 installation. The Retail Pro 9 installation of ECM is referred to as the "original" ECM installation throughout this topic. For more information, see Installing ECM.

Set Up Your System for Disk Communication

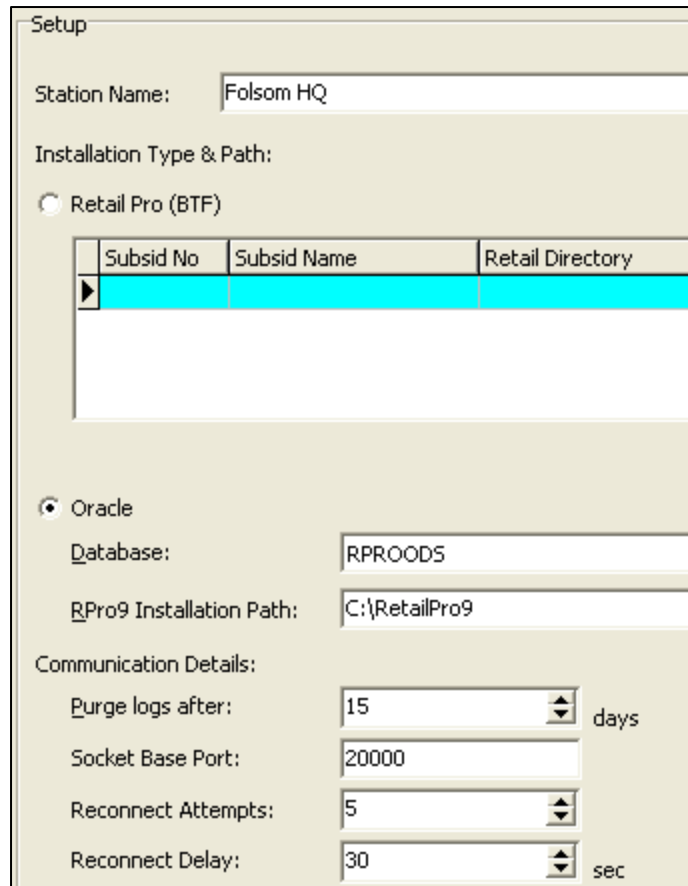
Create a New ECM Installation Folder

1. Create a new folder on your computer called **ECM_Exchange**.
Note: You can give your new folder a different name if you prefer.
2. Copy all the files (except **ECMExchange.exe**) from your original ECM installation and paste them into your new **ECM_Exchange** folder.

Configure Your 9-Series Installation

Set Workstation Preferences

1. Launch your original ECM.
2. Select **Options > WS/Preferences**, then select **General > Setup** on the left menu.
3. Enter the Station Name (host name of the workstation on which Retail Pro is installed).
4. Select Oracle under Installation Type & Path.
5. Select RPROODS as the database.
6. Adjust the Communication Details, as needed.
7. Click **OK** to exit preferences.



| Subsid No | Subsid Name | Retail Directory |
|-----------|-------------|------------------|
| | | |

Create a Station Profile

Reference: See Creating a Station.

1. From the Home Screen, click **Stations** on the top menu.
2. Select a Subsidiary from the drop-down list.
3. Click **New**, then click **Form View** (<Alt+V>).
4. Enter General station information.

| General | |
|------------------------|-------------------------------------|
| Active | <input checked="" type="checkbox"/> |
| Name | MAIN |
| Sbs No | 1 |
| Glob Store Code | aaa |
| Store/Station | 0000 |

5. Enter Communication details.

| | |
|-----------------------------|---|
| Station Type | The type of station with which ECM will be communicating. <i>Example: Main (RPRO 8x)</i> |
| Preferred Device | Disk |
| Deliver Files To | Path to secondary ECM Process Out files: <i>Example: C:\ECM_Exchange\Polling\XXXXXXX\IN\RECV</i> <i>Note: XXXXXXX is the subsidiary number followed by station number. For example, subsidiary 1 that is MAIN would have the folder name 0010000.</i> |
| Pick Up Files From | Path to secondary ECM Process In files: <i>Example: C:\ECM_Exchange\Polling\XXXXXXX\IN</i> <i>Note: XXXXXXX is the subsidiary number followed by station number. For example, subsidiary 1 that is MAIN would have the folder name 0010000.</i> |
| Host Name/IP Address | Leave blank, or enter the host name of the station. |
| Login Name | Retail Pro system login name. |
| Password | Retail Pro system password. |

| Communication | |
|-----------------------------|---|
| Station Type | Main (RPRO 8x) |
| Preferred Device | Disk |
| Deliver Files To | C:\ECM_Exchange\Polling\0010000\IN\RECV |
| Pick Up Files From | C:\ECM_Exchange\Polling\0010000\OUT |
| Host Name/IP Address | |
| Login Name | sysadmin |
| Password | ***** |
| Phone Book Entry | |

6. Adjust the Checklist details, as needed.
7. Click **Save**, then exit ECM.

Configure Your 8-Series Installation

Set Workstation Preferences

1. Launch ECM from your new ECM_Exchange folder.
2. Select **Options > WS/Preferences**, then select **General > Setup** on the left menu.
3. Enter the Station Name (host name of the workstation on which Retail Pro is installed).
4. Select Retail Pro (BTF) under Installation Type & Path.
5. Enter the subsidiary number and name, and specify the Retail Directory.

Note: The Retail Directory is the path to the Retail Pro 8-Series installation.

Installation Type & Path:

Retail Pro (BTF)

| Subsid No | Subsid Name | Retail Directory |
|-----------|-------------|------------------|
| 1 | MAIN | C:\Retail |

6. Adjust the Communication Details, as needed.
7. Click **OK** to exit preferences.

Create a Station Profile

1. From the Home Screen, click **Stations** on the top menu.
2. Select a Subsidiary from the drop-down list.
3. Click **New**, then click **Form View**.
4. Enter General station information.

| General | |
|------------------------|-------------------------------------|
| Active | <input checked="" type="checkbox"/> |
| Name | Host Name |
| Sbs No | 1 |
| Glob Store Code | bbb |
| Store/Station | 0000 |

5. Enter Communication details.

| | |
|-----------------------------|--|
| Station Type | Enterprise (Oracle) |
| Preferred Device | Disk |
| Deliver Files To | Path to the original ECM Process Out files: <i>Example: C:\ECM\Polling\XXXXXXXX\IN\RECVD</i> <i>Note: XXXXXXXX is the subsidiary number followed by station number. For example, subsidiary 1 that is MAIN would have the folder name 0010000.</i> |
| Pick Up Files From | Path to the original ECM Process In files: <i>Example: C:\ECM\Polling\XXXXXXXX\OUT</i> <i>Note: XXXXXXXX is the subsidiary number followed by station number. For example, subsidiary 1 that is MAIN would have the folder name 0010000.</i> |
| Host Name/IP Address | Leave blank, or enter the host name of the station. |
| Login Name | Retail Pro system login name. |
| Password | Retail Pro system password. |

| <i>Communication</i> | |
|-----------------------------|--------------------------------|
| Station Type | Retail Pro 9 (Oracle) |
| Preferred Device | Disk |
| Deliver Files To | C:\Retail\Rpro\POLLING\001A\IN |
| Pick Up Files From | C:\Retail\Rpro\POLLING\001A\O |
| Host Name/IP Address | jsmithxp |
| Login Name | iii |
| Password | **** |
| Phone Book Entry | |

6. Adjust the Checklist details, as needed.

7. Click **Save**, then exit ECM.

Set Network Security Preferences

When communicating data across shared network resources (disk communication), you need to define your network user credentials in ECM Workstation Preferences. Entering this information allows ECM to know the correct mapped network drives to use during disk communication.

To enter network user credentials

1. Select **Options > Workstation Preferences** from the ECM Home Screen.
2. Select **General > Network Security**.
3. Click the Allow ECM Exchange to copy files from a mapped drive checkbox.
4. Enter your Windows Username and Password, and select your network Domain.

Note: The username and password you enter must have access privileges to any mapped drives or folders that ECM may use during disk communication.

5. Click OK on the side menu.

Password Changes

If you change your network password, be sure to also enter the new password in ECM Workstation Preferences, or communication errors may result.

Network Resource Assignment

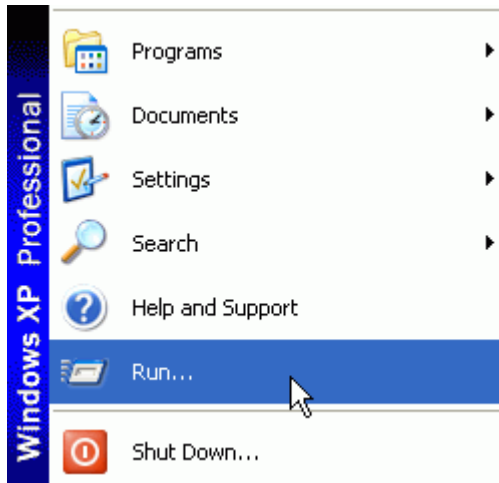
Ensure that the account assigned within ECM is also assigned to all Retail Pro 9-Series resources and folders. In a multi-main server environment, each **\\RetailPro9** folder for each Retail Pro installation must have this account assigned with full access privileges.

Send Data From Retail Pro 8 to Retail Pro 9

To communicate data between your 8-Series and 9-Series installations, follow the three-part procedure below.

Part 1: Process Out From RP8 Command Prompt

1. Launch your Retail Pro 8 ECM installation.
2. From your Windows Task Bar, select **Start > Run**.



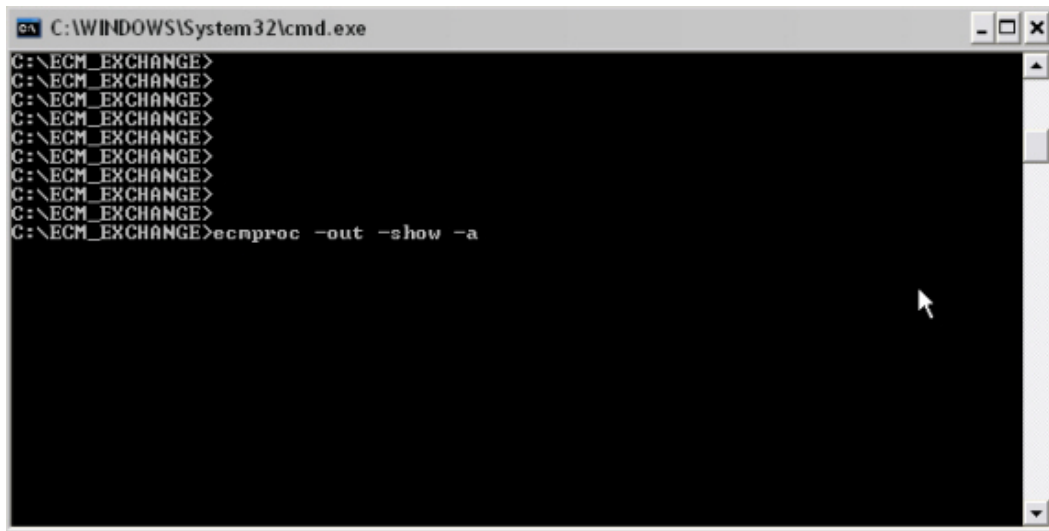
3. Type `cmd`, then click OK to launch a command prompt.
4. Type `cd c:\ecm_exchange`, then press **<Enter>**.

Note: The "c:" in the command line shown above represents the letter assigned to your local drive. If your **ecm_exchange** folder is not located on your local drive, replace the "c" with the appropriate drive location.

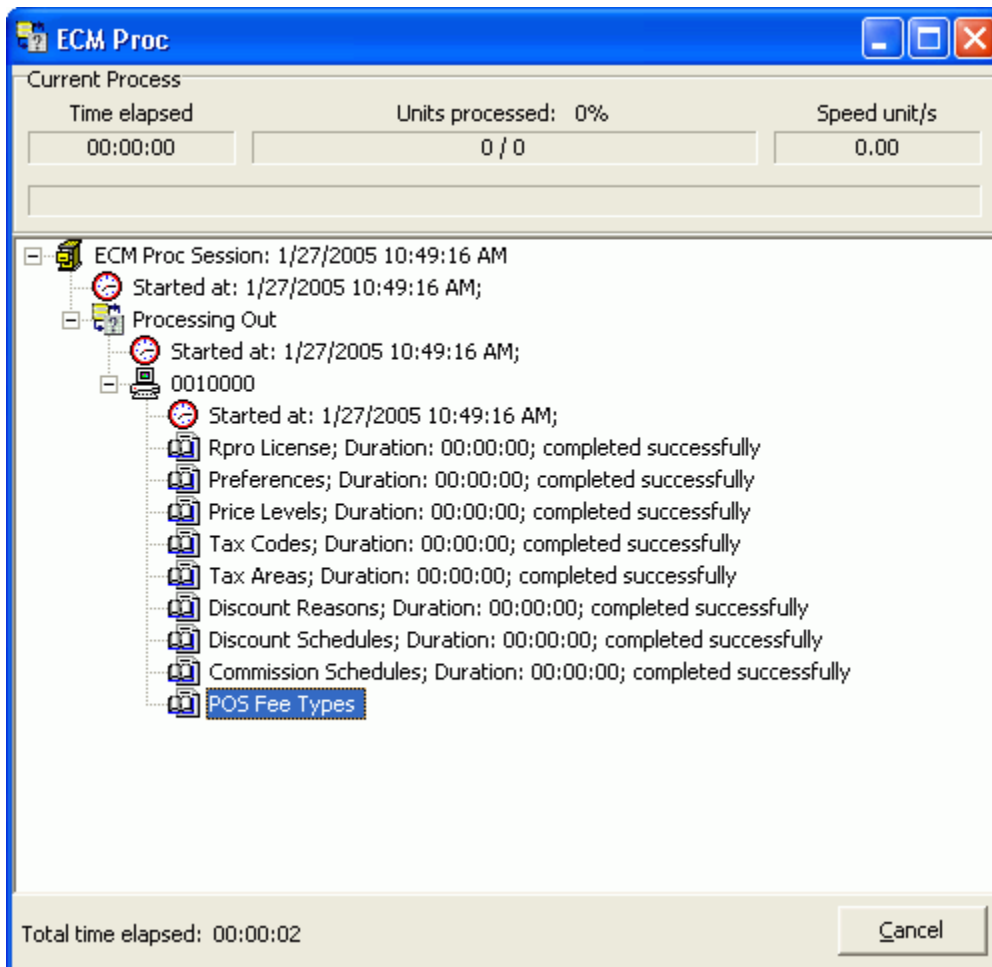
5. Type `ecmproc -out -show -a` and press **<Enter>**.

Note: Leave the command prompt window open; you will return to it in Part 3 of the procedure.

The following screens display.



```
C:\WINDOWS\System32\cmd.exe
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>ecnproc -out -show -a
```



ECM Proc

Current Process

| Time elapsed | Units processed: 0% | Speed unit/s |
|--------------|---------------------|--------------|
| 00:00:00 | 0 / 0 | 0.00 |

- ECM Proc Session: 1/27/2005 10:49:16 AM
 - Started at: 1/27/2005 10:49:16 AM;
 - Processing Out
 - Started at: 1/27/2005 10:49:16 AM;
 - 0010000
 - Started at: 1/27/2005 10:49:16 AM;
 - Rpro License; Duration: 00:00:00; completed successfully
 - Preferences; Duration: 00:00:00; completed successfully
 - Price Levels; Duration: 00:00:00; completed successfully
 - Tax Codes; Duration: 00:00:00; completed successfully
 - Tax Areas; Duration: 00:00:00; completed successfully
 - Discount Reasons; Duration: 00:00:00; completed successfully
 - Discount Schedules; Duration: 00:00:00; completed successfully
 - Commission Schedules; Duration: 00:00:00; completed successfully
 - POS Fee Types

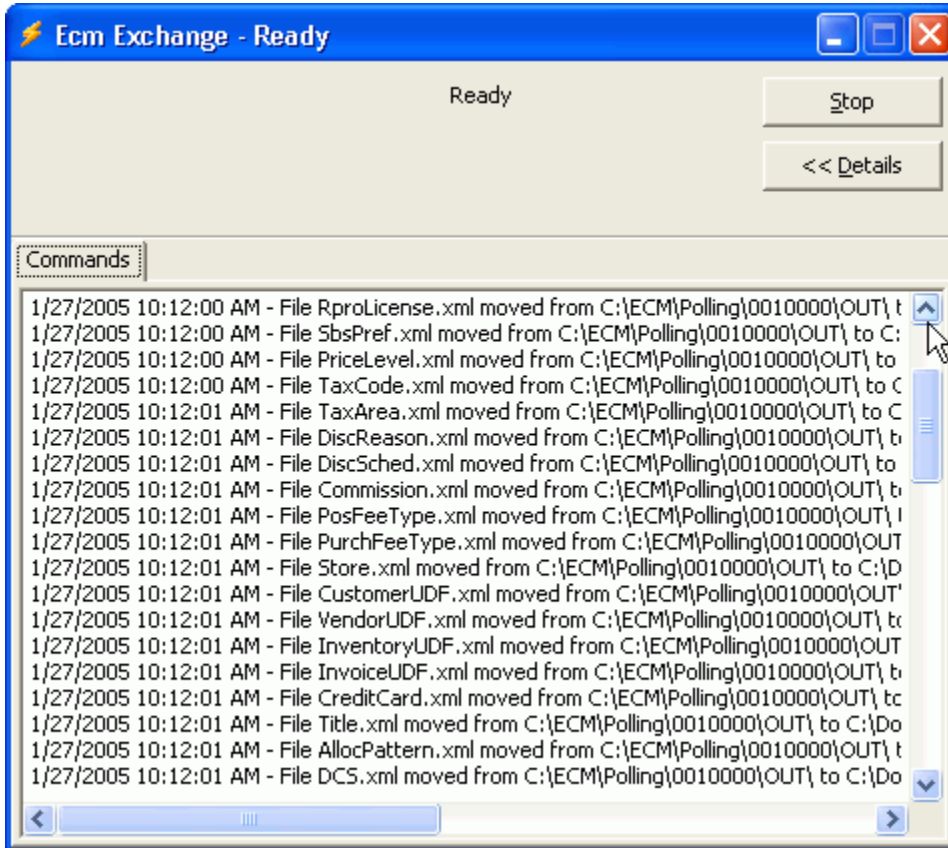
Total time elapsed: 00:00:02

Cancel

Part 2: Process In and Out from RP9 ECM

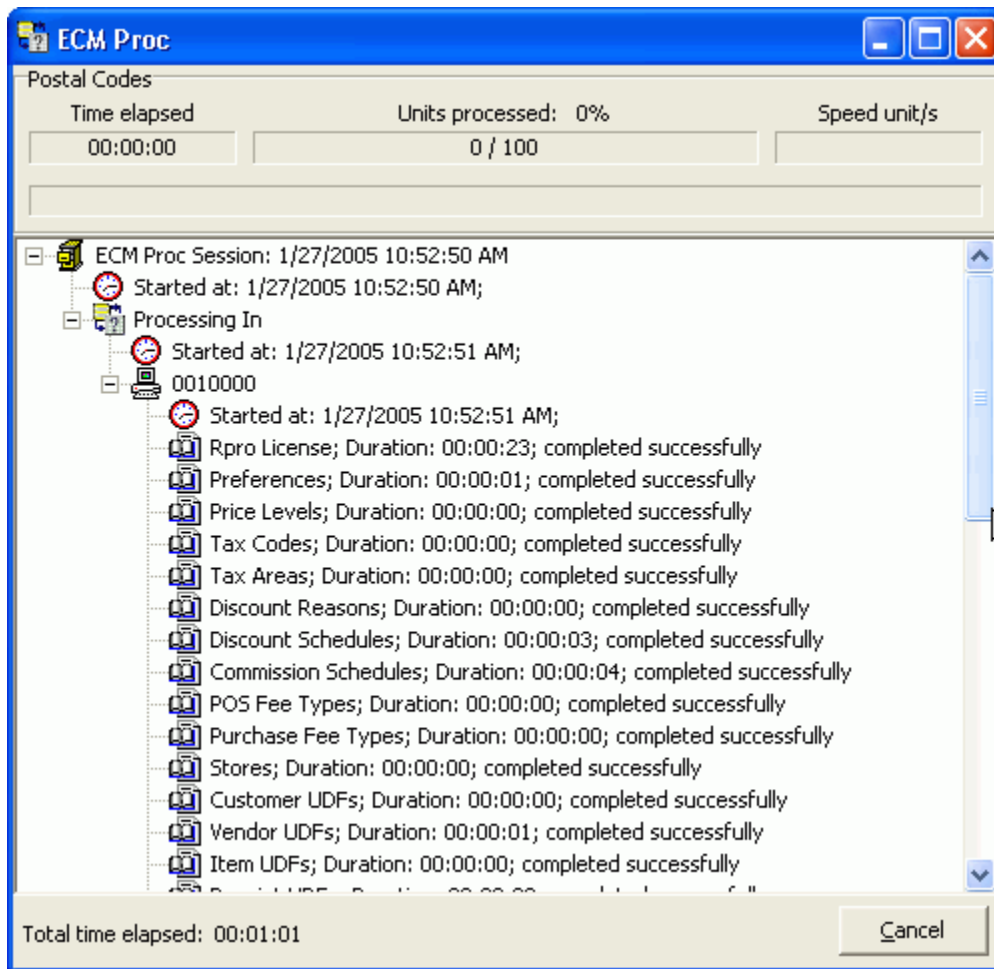
1. Launch your Retail Pro 9 ECM installation.
2. Click **Stations**, then click **Send/Receive**.

Result: The ECM Exchange dialog displays. XML documents are placed into the **Deliver Files To** location you specified in the station record.



- When the send/receive is complete, click **Process In**.

Result: A dialog displays the data being processed in.



- When the process-in is complete, click **Process Out**.
- When process-out is complete, click **Send/Receive**.
- Exit ECM.

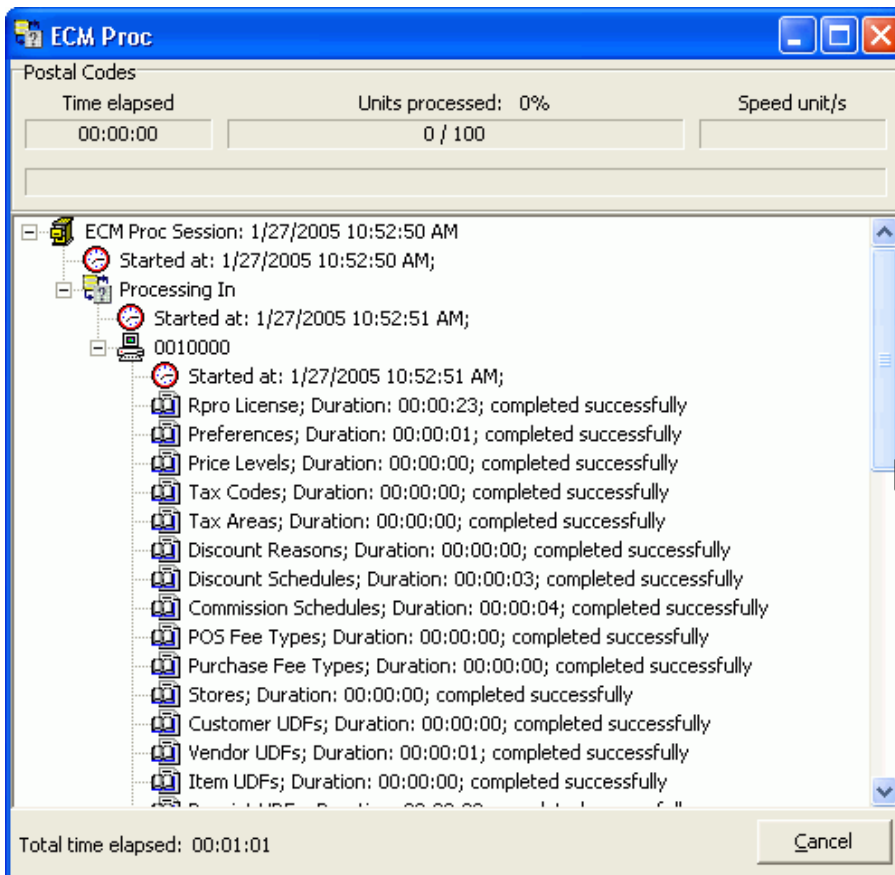
Part 3: Process In from RP8 Command Prompt

1. Return to your command prompt (see Part 1: Step 2).
2. Type `ecmproc -in -show -a` and press **<Enter>**.

The following screens display.



```
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>
C:\ECM_EXCHANGE>ecmproc -in -show -a
```



Suggestion: When all three parts are complete, launch Retail Pro and verify that the data was imported successfully.

Setting Termination Time for Data Streaming

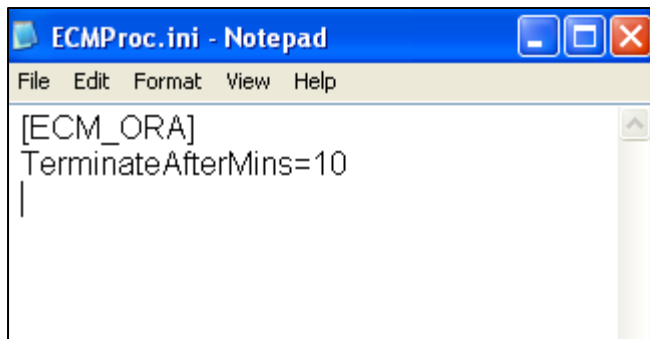
ECM can be used for constant updating of stores and back office locations, a process known as data streaming. When using ECM for constant updating of stores and back office, if ECM becomes hung or frozen, processing does not complete and all subsequent processing sessions fail because the system is handling the station in the hung session.

To avoid this situation, technicians can create an .ini file that includes a hidden switch that will terminate the session after a specified number of minutes. To set a termination time for ECM processing, create a text file called **EcmProc.ini** in the same folder where EcmProc.exe is located, and enter the following lines:

```
[ECM_ORA]
```

```
TerminateAfterMins=
```

After the equals sign, enter a numeric value for the number of minutes, as shown in the illustration below:



The “TerminateAfterMins” indicates how many minutes EcmProc is allowed to run (counted from the moment when EcmProc starts). If after the specified number of minutes ECMProc.exe is still running, it will be terminated. Whatever log information has been accumulated so far will be gathered and the following message will be displayed:

```
"error code -3: Process was terminated by watchdog timer."
```

Notes:

- The option is disabled (off) by default.
- There is no UI interface to set the option; you must create the ECMProc.ini file
- This option is only available for EcmProc running on Oracle 11g, and ONLY if that switch is set in the EcmProc.ini file.
- Removing the TerminateAfterMins switch or setting it to 0 (or negative) will turn off the option.
- The minimum allowed setting is “5” for five minutes; integers only, no fractions or decimal values. Values below 5 default to five minutes. There is no upper limit.

FTP Communication

You can use ECM to communicate Retail Pro data files via an FTP site.

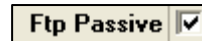
Preferred Device - FTP

To communicate via an FTP site, select FTP in the Preferred Device field for the station.



FTP Passive Mode

FTP can be run in active or passive mode. You can control which mode is used via the FTP Passive checkbox.



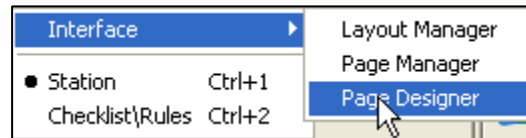
If the FTP Passive checkbox is selected, the client sends a PASV command to the server and receives an IP address and port number in return. This method is used when the client is behind a firewall and unable to accept incoming TCP connections.

If NOT selected, the client sends the server the IP address and port number on which the client will listen, and the server initiates the TCP connection.

Changing Default Port Number

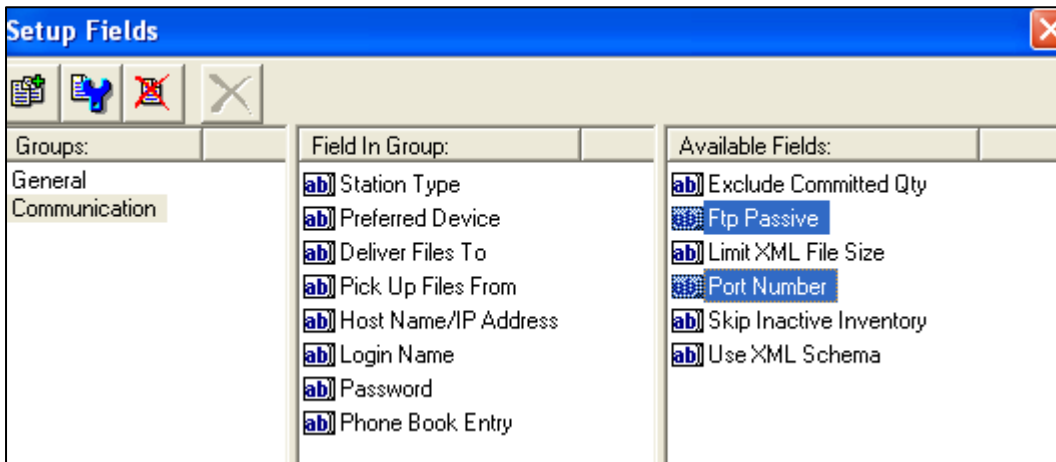
When using ECM to communicate with an FTP site, you will typically need to change the port number. The default port number used by ECM is 2000. For FTP communication, you will typically want to use port 21.

To change the port number, you need to add the Port Number field to the screen layout for the FTP station. To add the Port Number field, right-click in an empty area of the screen and select Interface > Page Designer.



A dialog is displayed with functions for changing the appearance of the user interface.

Click the Fields button. The Setup Fields dialog is displayed. Select the Communication group. Add the Ftp Passive and Port Number fields to the Communication group and save.



Important! Be sure to select appropriate and DIFFERENT folders in the “Deliver Files To” and “Pick Up Files From” fields. These should be folders on the FTP SERVER.

Initialization/Regeneration

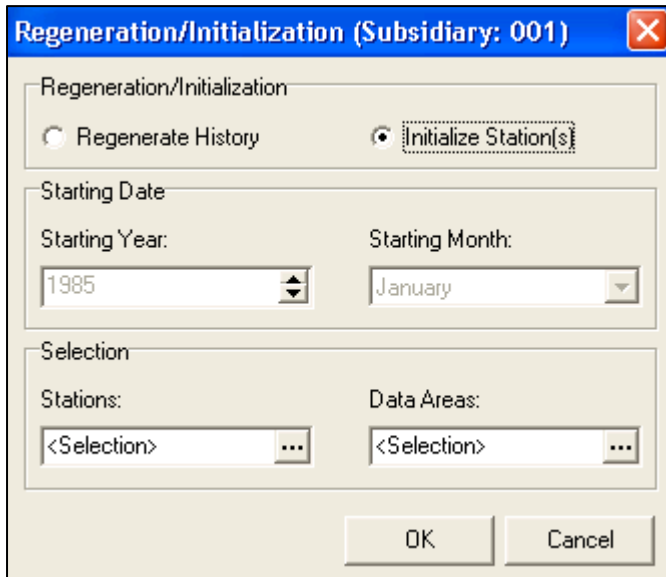
Initializing Stations



Initialization sends all selected data types, including any associated images, to a station for the selected data range. Initialization is useful for helping a station get started or recover from a hard disk failure.

To initialize a station:

1. Click **Stations** on the top menu of the ECM Home Screen.
2. Click **Regenerate** on the side menu.

Result: The Regeneration/Initialization dialog displays.



3. Select **Initialize Station(s)**.
4. In the Stations field, click  to display the Station Selection dialog box. Check the box next to each station that you want to initialize, then click **OK**.
5. Click  to display the Data Area Selection dialog box. Select **All** to include all data types, or check the box next to each individual data type you want to include. Click **OK** to close the dialog box.

Initialization By Sending All Data for Each Data Type

It is possible to initialize a station simply by selecting All for all data types, but using the Initialize feature lets you do it without altering a station's existing Profile Checklist.

Skip Inactive Inventory

During initialization, you can select to skip inactive inventory item. If the Skip Inactive Inventory checkbox is selected, EcmProc will NOT export inactive inventory items, and instead will auto-confirm them inside of the database. You can use this function to prevent inactive items from being processed out during initial proc-out.

Important! For Initialization Only

The Skip Inactive Inventory checkbox should only be selected for initialization. The checkbox should then be cleared and left UNCHECKED during regular polling.

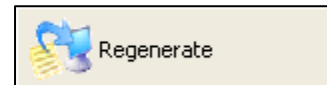
| Subsidiary: 001 - 001 | | | | | |
|-----------------------|-------------------------------------|-----------------|-------------------|---------------|-------------------------------------|
| | Active | Name | Global Store Code | Store/Station | Skip Inactive Inventory |
| | <input checked="" type="checkbox"/> | 9 Series Oracle | 8888 | 001A | <input type="checkbox"/> |
| I | <input checked="" type="checkbox"/> | MAIN | aaa | 0000 | <input checked="" type="checkbox"/> |

Regenerating History

If you have a hard disk or other data problem at a station, you can regenerate history documents and send them to the affected station. For example, if a Remote station's sales history file is damaged, you can regenerate sales history for that station. You can select which history documents to send to a station.

When received at the destination station, the SIDs (system identifiers) of the incoming documents are compared against those already on file. In the case of duplicates, the older copy is automatically discarded.

1. Launch ECM and then select Stations from the ECM Home Screen. The list of stations displays.
2. Select a station from the list and then click **Regenerate**. The Regeneration/Initialization dialog box displays.



Regeneration/Initialization (Subsidiary: 001) ✖

Regeneration/Initialization

Regenerate History
 Initialize Station(s)

Starting Date

Starting Year: Starting Month:

Selection


Stations: ... Data Areas: ...

3. Select a Regeneration Method.

Select **Regenerate only documents made at target station** to send only those documents that were created at the target station.

OR

Select **Regenerate documents made at all stations** to send all documents, regardless of where they were created.

4. Select the document types you want to send: Receipt, Vouchers, Transfer Slips, and/or Adjustment Memos. Any document types that are not selected will not be sent.
5. Select a document date range.
Select a starting year, and then select a starting month.
6. Select  to display the Station Selection dialog box. Select the station(s) to which you want to send history documents, then click **OK**.
7. Click **OK** to close the Regeneration/Initialization dialog and start the regeneration.

Movelists

About Movelist

A movelist is a set of instructions that ECM uses to move a file and/or folder from one location to another. The move occurs during ECM communication.

A movelist is a convenient way to communicate files — such as updated security files or a document listing promotional activities for the week — from one station or store to another within the company.

Note: If you send an application file as part of a movelist, the application cannot be running during the move.

Movelist Files

| File Name | File Path | File Type | Target Type | Target Path | Fi |
|------------------------------|------------------|-----------|-------------|-------------|-------|
| CompanyOrganizationChart.doc | C:\Help Backups\ | .doc | Other | | 19.50 |
| SeasonalHiringGuidelines.doc | C:\Help Backups\ | .doc | Other | | 386.5 |
| UpdatedSafetyCodes.doc | C:\Help Backups\ | .doc | Other | | 386.5 |
| ▶ Corporate Updates | C:\Help Backups\ | Folder | Other | | 171.0 |

Movelist Target Stations

| Enable | Name | Station Type | Subsidiary No | Global Store Code | Store/Station |
|-------------------------------------|----------|------------------|---------------|-------------------|---------------|
| <input type="checkbox"/> | Remote 2 | Remote (RPRO 8x) | 1 002001 | | 002A |
| <input checked="" type="checkbox"/> | Remote | Remote (RPRO 8x) | 1 001001 | | 001A |
| <input checked="" type="checkbox"/> | MAIN | Main (RPRO 8x) | 1 1 | | 0000 |

Target Station Path

Before using movelists, you must define the path to the target station's Retail Pro® 9-Series installation in ECM Workstation Preferences.

If ECM cannot find the target path specified for a movelist, ECM moves the file/folder to an ECM sub-directory and makes an entry in the processing log.

Movelist Files

Each movelist is stored in a separate file. The name of each file is the name you enter when creating the movelist, with an **.mvl** extension added at the end of the file name.

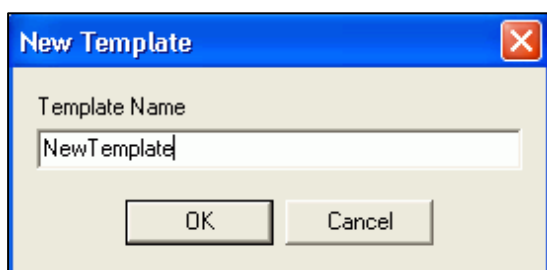
Example: **MyMovelist.mvl**

Movelist Templates

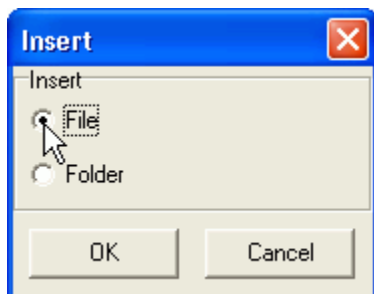
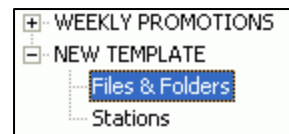
Movelist templates are useful if you need to regularly send certain files from one location to another. You can re-use a template at any time to create additional movelists.

To create a template:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Click **Movelist**. A list of movelist files for the selected station displays. You can select a different station, if necessary.
3. Click **Templates**. The Movelist Template screen displays.
4. Click **New** (<Alt+N>). The New Template dialog is displayed.




5. Enter a **Template Name**, then click **OK**.
6. Select your new template on the side menu, and then select **Files & Folders**.
7. Click **Add** to display the Insert dialog.



8. Select **File** or **Folder**, then click **OK**.

- Browse to and select your file/folder, then click **Open**.

Result: ECM fills in the template files and folders information.

| | |
|--------------------|---|
| File Name | The name of the file or folder. |
| File Path | The current location of the file or folder that you want to send. Click  to browse to the file/folder. |
| File Type | The type of file you are attaching. |
| Target Type | <p>Where you want to send the file or folder. Select from the following options:</p> <ul style="list-style-type: none"> ▪ ECM Directory: Moves the file/folder to the \ECM\ folder. ▪ Retail Pro® 9-Series Directory: Moves the file/folder to the \RetailPro9\ folder. ▪ Retail Directory: Moves the file/folder to the target station's \Retail\ folder. ▪ Retail Pro Directory: Moves the file/folder to the target station's \Retail\Rpro\ folder. ▪ Other: Enter the path to the file/folder. <p><i>Note:</i> All relative paths are based on the ECM installation path.</p> |
| Target Path | <p>The path to the destination folder as defined in Workstation Preferences at the destination location.</p> <p><i>Note:</i> When you create a new movelist or movelist template, you will not see the Target Path. The target path is filled in at the target location when ECM communication is performed.</p> |
| File Size | The size of the file or folder. |

- Change the **Target Type** field, if necessary.
- Click **Save**, then click **OK**.

Creating a Movelist

There are two ways to create a movelist.

- Create a new movelist when you plan to use the movelist only once.
- Create a movelist using a template when you want to move files or folders on a regular basis.

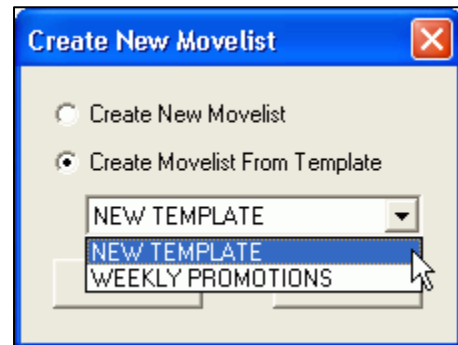
Reference: See Movelist Templates.

To create a movelist:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Select the station for which you want to create a movelist.

Note: If using Retail Pro in a multi-subsidary environment, select a **Subsidiary**.


3. Click **Movelist** on the side menu.
4. Click **New**. A dialog is displayed for selecting the type of movelist you want to create.
 - Select **Create New Movelist** to create a new movelist for one-time use.
 - Select **Create Movelist From Template** to select a template from the drop-down list.



5. Click **Add** to display the Insert dialog.
6. Specify whether you are inserting a **File** or **Folder**, then click **OK**.
7. Browse to and select your file/folder, then click **Open**.

Result: ECM fills in the movelist files and target stations.

8. Edit the movelist fields, as needed.

| Field | Description |
|-------------------------|---|
| File/Folder Name | The name of the file or folder that you want to send. |
| File Path | The current location of the file or folder that you want to send. Click  to browse to the file/folder. |
| File Type | Select the type of file you are sending. |

| Field | Description |
|------------------|---|
| Target Type | <p>Where you want to send the file or folder. Select from the following options:</p> <ul style="list-style-type: none"> ▪ Retail Pro 9-Series Installation: Moves the file/folder to the target station's \RetailPro9\ folder. ▪ Retail Pro 8-Series Installation: Moves the file/folder to the target station's \Retail\ folder. ▪ Retail Pro Installation: Moves the file/folder to the target station's \RetailRpro\ folder. ▪ Other: Enter the path to the file/folder. <p><i>Note:</i> All relative paths are based on the target station's ECM installation path.</p> |
| Target Path | <p>The path to the destination folder as defined in Workstation Preferences at the destination location.</p> <p><i>Note:</i> When you create a new movelist or movelist template, you will not see the Target Path. The target path is filled in at the target location when ECM communication is performed.</p> |
| File/Folder Size | (Read-only) Displays the size of the file or folder that you are sending. |

9. Repeat Steps 5-8 to add additional files/folders to the list.
10. In Movelist Target Stations, select the stations to which you want to send the file(s).
11. Click **Generate Movelist**.

Overwriting or Appending a Movelist

When ECM generates a movelist, it checks the \Polling\Out\ folder for the intended station. If a movelist file is already in the \Out\ folder, ECM shows you the contents of that movelist. You can then select from the following options:

- **Append:** Update the existing movelist with information from the new movelist - for the currently displayed station only.
- **Append All:** Update the existing movelist with information from the new movelist - for all stations that have existing movelist files.
- **Overwrite:** Delete the existing movelist and replace it with the new movelist - for the currently displayed station only.
- **Overwrite All:** Delete the existing movelist and replace it with the new movelist - for all stations that have existing movelist files.
- **Ignore Station:** The currently displayed station will not be included in the movelist (no change made to the movelist for the station).
- **Ignore All Stations:** All stations that have existing movelist files are ignored (no change made to the existing movelist for all stations).

Note: This check is only done against station defined in the new movelist. Any other stations that have movelist files are not affected.

Log Entry Created

Creating a movelist for a given station automatically creates a log entry. An additional log entry is created to note the success or failure of the process in of a movelist file.

Editing a Movelist

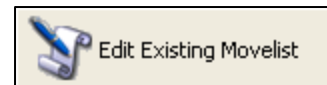
You can edit an existing movelist. For example, you can add/remove files or folders and change the stations that will receive the movelist.

To edit an existing movelist:

1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Select a station.

Note: If using Retail Pro in a multi-subsiary environment, select a **Subsidiary**.

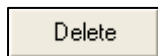
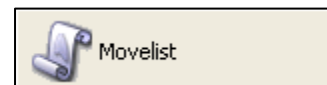
3. Click **Movelist**. A list of movelist files for the selected station displays.
4. Select a station, then highlight the movelist you want to edit.
5. Click **Edit Existing Movelist**.
6. Make your edits.
7. Click **Save**.



Deleting a Movelist

To delete a movelist:

1. Click **Stations** on the top menu of the ECM Home Screen.
2. Select a subsidiary.
3. Click **Movelist** on the side menu.
4. Select a station, then highlight the movelist you want to copy.
5. Click **Delete**.
6. Click **Yes** to confirm the deletion.



Deleting a Station Record

If you delete a station record, movelist templates are automatically updated to remove that station.

Copying a Movelist

A fast, easy way to create a new movelist is to copy an existing movelist that offers the closest match.

To copy a movelist:

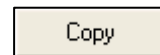
1. Click **Stations** on the top menu of the ECM Home Screen. The list of stations displays.
2. Select a station.

Note: If using Retail Pro in a multi-subsiary environment, select a **Subsidiary**.

3. Click **Movelist**. A list of movelist files for the selected station displays.
4. Select a station, then highlight the movelist you want to copy.



5. Click **Copy**. A new movelist displays with the same information as the original.
6. Edit the movelist fields, as necessary.



Note: Click **Add** to add additional files/folders to the list.

7. Click **Save**.

Logs and Alerts

Processing Log

The Processing Log is stored in `\Polling\Log\EcmProc` and provides the following information about each processing operation that your station performs:

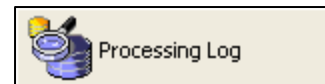
- The date/time the operation began
- Its duration
- Whether it was successful or an error occurred

To view the Processing Log:


1. Select **View/Log** from the ECM Home Screen.
2. Click **Processing Log**.



Result: A list of your processing logs displays.



| | | | Comm |
|-----------------------|----------|-----------------------------|------|
| ECM Proc Session | Duration | Status | |
| 2/22/2006 3:26:48 PM | 00:01:13 | completed successfully | |
| 2/22/2006 11:41:46 AM | 00:01:20 | completed successfully | |
| 2/22/2006 9:53:29 AM | 00:01:45 | completed successfully | |
| 2/21/2006 10:58:25 AM | 00:02:31 | completed successfully | |
| 7/23/2005 5:21:48 AM | 00:02:16 | completed successfully | |
| 7/22/2005 2:55:17 PM | 08:16:45 | oracle.jdbc.driver.OracleS | |
| 4/5/2005 2:04:58 PM | 00:00:02 | completed successfully | |
| 4/5/2005 2:04:24 PM | 00:00:09 | java.util.zip.ZipException: | |
| 4/5/2005 2:01:10 PM | 00:00:38 | completed successfully | |

3. Select a log, then click **View Log**.
Result the Log View dialog displays.
4. Select the  to expand the log. When you are finished, click **Close** to exit the Log View dialog.

Printing the Processing Log

While viewing a log, you can click **Print** in the Log View dialog to print the log.

Purging of Processing Log

ECM automatically purges Processing Logs based on the number of days you specify in ECM workstation preferences.

Exchange Log

The Exchange Log is stored in **\Polling\Log\EcmExchange** and provides the following information about each exchange that your station performs:

- The starting and ending date/time of the exchange
- The files that were sent
- The workstation to which the files were transferred
- Any errors that occurred

To view the Exchange Log:

1. Open the file manually using Notepad® or another word processing program.









Purging of the Exchange Log

1. The Exchange Log is automatically purged based upon the number of days you specify in ECM Workstation Preferences.

Files

ECM Directory Structure

The table below provides descriptions of folders and files contained within the **\ECM** directory.

| ECM Folders | Description |
|---|--|
|  ECM | Root folder |
|  Documents | Contains ECM Help files. |
|  Layouts | Contains ECM List View and Form View layouts. |
|  Movelist | Contains movelist files to be sent. |
|  Templates | Contains movelist template files. |
|  Polling | Polling directory |
|  [Sub#+Store#] | ECM creates a polling folder for each station you define. The folder consists of the subsidiary and the store number (e.g., 0010000 or 001A). |
|  CRC | ECM uses this folder to synchronize during a process out to ensure no files are missing, and to prevent duplicate information when sending differences only. |

| ECM Folders | Description |
|---------------|---|
| ☐ CNF | Contains confirmation files (BTF only). |
| ☐ In | Main folder for files received |
| ☐ Partial | Contains partially received files (if transmission is interrupted). |
| ☐ Recvd | When ECM Exchange successfully moves files from the other computer's \Out directory into the local computer's \In directory, the files are copied to \In\Recvd to await processing. |
| ☐ Out | Contains files ready to be sent. |
| ☐ Sent | When ECM Exchange successfully moves files from the local \Out directory to the other computer's \In directory, the files are copied to the \Sent directory, and then deleted from the \Out folder. |
| ☐ Proc | Contains compressed (Proc\Out) and decompressed (Proc\In) files during communication. The Proc folders are the first and last location of files as they move out of one database and into the other. |
| ☐ Temp | When process in is requested, files in the \In\Recvd directory are moved, one by one, to the \Temp directory for processing. This allows another Exchange to occur and write new or updated XML information to the \In\Recvd directory while processing is taking place. |
| ☐ Log | Contains ECM log files. |
| ☐ ECMProc | Contains Processing Log files. |
| ☐ ECMExchange | Contains Exchange Log files. |
| ☐ Profiles | Contains ECM Profile files (.prf). |
| ☐ SecAdmin | Contains Security Administrator (SecAdmin.exe) program files. |
| ☐ Translat | Contains translation files. |
| ☐ Web | Contains image files used by ECM. |

Confirmation Files

When processing in data, ECM creates confirmation files to ensure that data is successfully received at a given target station. Confirmation files are created for each of the primary data types and list all SIDs for the given data type that were processed in successfully.

Confirmation files are placed in the station's **\Polling\Out** directory so that they can be sent back to (and processed in at) the station from which they were originally sent.

Records are marked transmitted only when confirmation files are processed in at the station that originally sent the records! Therefore, when communicating data from 8 Series to 9 Series, it is important that the final steps be:

- Run Send/Receive at the 9 Series (Oracle) Main or Enterprise (EMS) station. This moves the confirmation files from the 9 Series station's **\Out** folder to the 8 Series station's **\In\Recvd** folder.
- Run **EcmProc.exe** (process in) at the 8 Series (BTF) station. This processes in the confirmation files and marks the appropriate records as transmitted.

If you don't send the confirmation files back to the 8 Series (BTF) station and process them in, then the next time that you send data from 8 Series to 9 Series, ECM will resend those records because they have not yet been marked transmitted. In other words, you will keep sending those data records again and again, and will be unable to send differences only.

Data Types Requiring Confirmation

The only data types that require confirmation are those that can be sent as differences, i.e., if the AllowedTransOptions field in the XML includes [ToDiff] as one of the options. The following table lists those data types and related information.

Reference: For a full list of DOC_TYPE values used in the DOC_SYNC tables, see Appendix B.

| Data Type | DOC_TYPE Value | Confirmation File | Comments |
|-----------------------|-----------------------|--------------------------|---|
| Customer | 36 | Customer.cnf | |
| Inventory | 49 | Inventory.cnf | |
| Invoice | 50 | Invoice.cnf | |
| Adjustment memo | 51 | Adjustment.cnf | |
| Slip | 52 | Slip.cnf | Verified/Unverified |
| Vendor Invoice | 53 | VendInvoice.cnf | |
| Vouchers | 54 | Voucher.cnf | Regular/Pending ASN |
| TOs | 55 | TO.cnf | |
| SO | 56 | SO.cnf | |
| PO | 57 | PO.cnf | Pending POs do not require confirmation |
| MO | 58 | MO.cnf | |
| MN | 59 | MN.cnf | |
| Markdown | 60 | Markdown.cnf | |
| Store Sales Target | 62 | StoreSalesTarget.cnf | |
| Employee Sales Target | 63 | EmployeeSalesTarget.cnf | |
| DCS Sales Target | 74 | DCSSalesTarget.cnf | |
| ZOut | 75 | Zout.cnf | |
| Pending APR | 80 | PendingAPR.cnf | |
| Sub Location Qty | 84 | SubLocQty.cnf | |

Appendix A: Preferences by PREF_ID and PREF_TYPE

The following table lists each preference communicated by ECM, along with the PREF_ID and the PREF_TYPE assigned.

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 0 | Use Clerk Codes | 252 |
| 1 | Encrypted passwords for levels 1 | 5 |
| 2 | Encrypted passwords for levels 2 | 5 |
| 3 | Encrypted passwords for levels 3 | 5 |
| 4 | Encryption coding scheme for use on price tags | 5 |
| 5 | ID number on/off | 252 |
| 6 | Allow items in PO regardless of supplier code | 252 |
| 7 | GM is modified it affect cost instead of price | 252 |
| 8 | On how many rows extend inventory file | 3 |
| 9 | Number of inventory rows used (may be smaller than file size) | 3 |
| 10 | TRUE=>average the cost using the entire family | 252 |
| 11 | TRUE=>default is the received date of inventory | 252 |
| 12 | Number of stores in company (excluding StoreBR) | 3 |
| 13 | Number of price decimals for viewing purposes | 3 |
| 14 | Ask for password when creating slip | 252 |
| 15 | Monitors changes in vendor to transmit it | 252 |
| 16 | Monitors changes in dept to transmit it | 252 |
| 17 | PO and Voucher Fee names | 110 |
| 18 | Default PO Instruction1 | 5 |
| 19 | Default PO Instruction2 | 5 |
| 20 | Default PO Instruction3 | 5 |
| 21 | Default PO Instruction4 | 5 |
| 22 | Default PO Instruction5 | 5 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 23 | Use last cost in creating PO | 252 |
| 24 | Number of price decimals used in reports | 3 |
| 25 | Automatic Customer Discounting | 252 |
| 26 | Credit Card names | 110 |
| 27 | Invoice Fee names | 110 |
| 28 | Discount Reason names | 110 |
| 29 | True <=> at POS qty defines the price to use | 252 |
| 30 | Price levels descriptions | 110 |
| 31 | Use decimal places for qty values throughout Rpro | 252 |
| 32 | Use decimal places for qty values in reports | 252 |
| 33 | AutoSlip generation (0 = send o/h, 1 = send ordered, 2 = optimize) | 3 |
| 34 | Use price levels set in stores setup | 252 |
| 35 | Clerk code must be entered for each invoice | 252 |
| 36 | Clerk code must be entered for each voucher | 252 |
| 37 | Clerk code must be entered for each slip | 252 |
| 38 | Style Definition | 3 |
| 39 | Define how to set cost and price to new item in UI | 3 |
| 40 | How to generate style line | 3 |
| 41 | Markdowns: keep original price in mkdn | 252 |
| 42 | Auto update vouchers for EE documents | 252 |
| 43 | Currency symbol. defaults to \$ | 5 |
| 44 | TRUE=>currency_sym before amount | 252 |
| 45 | Price Adjusting | 110 |
| 46 | Precision for VAT | 3 |
| 47 | Invoice UDFs | 110 |
| 48 | Price levels Rounding | 110 |
| 49 | Tax Codes | 110 |
| 50 | Use Value Added Tax | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 51 | How to calculate ExtPrice and tax in case of VAT | 3 |
| 52 | Use InTransit | 252 |
| 53 | Location of zip code in address | 3 |
| 54 | Base Currency name | 5 |
| 55 | Send out slips thru EE | 252 |
| 56 | Update Inventory cost based on receiving document cost | 252 |
| 57 | Requirement to record sale | 3 |
| 58 | Order using cases only | 252 |
| 59 | Use promotion prices | 252 |
| 60 | Inventory UDFs | 110 |
| 61 | Precision for taxes | 3 |
| 62 | Tax Area Names | 110 |
| 63 | Store Codes | 110 |
| 64 | Allow input invoice total manually | 252 |
| 65 | Coefficient type for margin calculation | 3 |
| 66 | Send new customer thru EE | 252 |
| 67 | Customer UDFs | 110 |
| 68 | Vendor UDFs | 110 |
| 69 | Default stores for documents | 110 |
| 70 | Defines what actions create adjustment memos | 3 |
| 71 | Comments are required on Adj | 252 |
| 72 | Whether to Use 4 Digit Year - TRUE Means Use 4 Digit Year | 252 |
| 73 | Clerk code must be entered for each Adj Memo | 252 |
| 74 | Adjustment reasons | 110 |
| 75 | After how many days purge ASNs | 3 |
| 76 | Save store qtys in Adj | 252 |
| 77 | TRUE: Margin% formula includes tax | 252 |
| 78 | TRUE: Markup% formula includes tax | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 79 | TRUE: Coefficient formula include tax | 252 |
| 80 | Convert all data to uppercase in reports | 252 |
| 81 | Inventory costing method | 3 |
| 82 | Allow edit Cust IDs | 252 |
| 83 | Display field Note in SO | 252 |
| 84 | Show Note field in some documents | 3 |
| 85 | What Invoice/SO flags (UDFs) are required | 3 |
| 86 | Allow spread global discount in SO and Invoice | 3 |
| 87 | Use EURO currency symbol | 252 |
| 88 | Display DCS segmented | 252 |
| 89 | Store Regions | 110 |
| 90 | Use allocation patterns in multi store PO | 252 |
| 91 | Allow to create voucher after PO cancel date | 252 |
| 92 | What use as as base for Voucher reporting - Create or Post date | 3 |
| 93 | Allow duplicate Cust IDs | 252 |
| 94 | Use Trade disc for Order Cost | 252 |
| 95 | Decimals for Invn Cost | 3 |
| 96 | Decimals for Report Cost | 3 |
| 97 | Allow Intransit complete XFer | 252 |
| 98 | Fill reversed doc by former date | 252 |
| 99 | Poll Proc Del Mrkd ASN | 252 |
| 100 | Field Length | 110 |
| 101 | Sub/Store combinations for InterCompany Slips | 110 |
| 102 | Main store | 3 |
| 103 | Main station (A Remote's Station char) | 5 |
| 104 | Field Location after each invc: 0=Menu 1=BillCust 5=Cashier 6=Body | 3 |
| 105 | Is store POS or not | 252 |
| 106 | Use the last shipping percent again | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 107 | Allow foreign currency to be used | 252 |
| 108 | Whether shipping percent includes tax | 252 |
| 109 | Credit card is a default tender | 252 |
| 110 | Only sell an item if it's inven qty > 0 | 252 |
| 111 | Defines remote capability | 252 |
| 112 | Is Rpro being run on a 4694 | 252 |
| 113 | Right to use network | 252 |
| 114 | Allow customer pooling | 252 |
| 115 | Adopt a default price after polling | 252 |
| 116 | Price to be adopted as default after polling | 3 |
| 117 | Number of days for shipping by default | 3 |
| 118 | Number of days before order is cancelled by default | 3 |
| 119 | Process POs from remotes | 252 |
| 120 | Process SOs from remote | 252 |
| 121 | Whether EDI is used | 252 |
| 122 | Accumulate discount | 252 |
| 123 | Source of orig price | 3 |
| 124 | Shipping % by default | 4 |
| 125 | Invoice comments | 110 |
| 126 | Show store credit to customer | 252 |
| 127 | Accept checks | 252 |
| 128 | Shipping methods | 110 |
| 129 | Show backorder message | 252 |
| 130 | Backorder message | 5 |
| 131 | Default shipfrom store (duplicate default stores???) | 3 |
| 132 | Default ShipFrom station | 5 |
| 133 | Default ship method | 5 |
| 134 | Price rounding method | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 135 | Use price rounding | 252 |
| 136 | Rounding method for Price Markdown | 3 |
| 137 | Use Markdown price rounding | 252 |
| 138 | Target store for SO | 3 |
| 139 | Target Station for SO | 5 |
| 140 | Do Not Allow Deleting Invoice Items | 252 |
| 141 | Require Customer on Return Invoice | 252 |
| 142 | Circumstances when create special documents | 3 |
| 143 | Purge SO delay | 3 |
| 144 | Suggest Store Credit | 252 |
| 145 | Require comments on Slips | 252 |
| 146 | Allow edit Tax Code on POS document | 252 |
| 147 | Check Available Store Credit | 252 |
| 148 | Round foreign currency to | 4 |
| 149 | Allow update Inventory price from Voucher price | 252 |
| 150 | Accept checks in documents | 3 |
| 151 | Do not accept negative qty in POS documents | 252 |
| 152 | Allow tax rebate | 252 |
| 153 | Tax Rebate percent | 4 |
| 154 | Minimum tax rebate | 4 |
| 155 | Default SO Instructions | 110 |
| 156 | Default SO comments | 110 |
| 157 | PO purge delay | 3 |
| 158 | Ignore Min/Max Locking in Inventory | 252 |
| 159 | Use Invoice term by default | 252 |
| 160 | XZ out report is required manual enter of bills count | 3 |
| 161 | XZ report purge delay | 3 |
| 162 | Whether UpdateOnly options is availabel for Invoices | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 163 | Default Process at Stations for SO | 110 |
| 164 | Limit items in document created from SO only by SO items | 252 |
| 165 | COD tender name | 110 |
| 166 | Rounding level for base currency | 3 |
| 167 | Rounding method for base currency | 3 |
| 168 | How to share customers | 3 |
| 169 | Default Commission Code | 3 |
| 170 | Use zip lookup for customers | 252 |
| 171 | Zip lookup mask | 5 |
| 172 | Auto polling end POS inventory | 252 |
| 173 | Min perc of SO deposit for Customer Order | 3 |
| 174 | Min perc of SO deposit for Special Order | 3 |
| 175 | Min perc of SO deposit for Layaway | 3 |
| 176 | Comments are required on Voucher | 252 |
| 177 | Allow duplicate ALU | 252 |
| 178 | Item Sid source | 3 |
| 179 | Number of symbols from ALU or UPC for Style Sid generation | 3 |
| 180 | Where ALU is copied (Desc1, Desc2) | 3 |
| 181 | Use WS sequence for invoices | 252 |
| 182 | Use WS sequence for Vouchers | 252 |
| 183 | Use global sequence for Invoices | 252 |
| 184 | Use global sequence for Vouchers | 252 |
| 185 | Voucher comments | 110 |
| 186 | Slip comments | 110 |
| 187 | Info field is required for Adj | 252 |
| 188 | Poll new customers | 252 |
| 189 | Use sequence for store credit | 252 |
| 190 | Hide store credit in documents | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|-------------------------------------|-----------|
| 191 | Use sequence for gift certificates | 252 |
| 192 | Style Sid source | 3 |
| 193 | Check Credit card refund | 3 |
| 194 | Chars ignored during Item Sid gen | 3 |
| 195 | Check PO for Voucher items | 252 |
| 196 | Check TO for Slip items | 252 |
| 197 | Check Out Slip for In Slip items | 252 |
| 198 | Check SO for Invoice items | 3 |
| 199 | Currencies and Rates | 110 |
| 200 | Customer and Vendor Titles | 110 |
| 201 | Discount Schedule | 110 |
| 202 | Commission Schedule | 110 |
| 203 | Time Shifts | 110 |
| 204 | Employees | 110 |
| 205 | Inventory Scales | 110 |
| 206 | Default Foreign Currency | 5 |
| 207 | Use Thousand Separator For Quantity | 252 |
| 208 | Use Thousand Separator For Currency | 252 |
| 209 | Use Currency Symbol | 252 |
| 210 | Import new Inventory Items | 252 |
| 211 | Import Inventory Images | 252 |
| 212 | Import Vendors | 252 |
| 213 | Import Departments | 252 |
| 214 | Import Min/Max | 252 |
| 215 | Import Prices | 252 |
| 216 | Import Allocation Patterns | 252 |
| 217 | Import Customers | 252 |
| 218 | Import Customer Images | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|------------------------------------|-----------|
| 219 | Import Zip Codes | 252 |
| 220 | Import History Documents | 252 |
| 221 | Import ASN | 252 |
| 222 | Import SO | 252 |
| 223 | Import TO | 252 |
| 224 | Import PO | 252 |
| 225 | Import MO/MN | 252 |
| 226 | Import Archived Orders | 252 |
| 227 | Update Global Customers | 252 |
| 228 | Update Global Inventory Items | 252 |
| 229 | Synchronize Vendors | 252 |
| 230 | Synchronize Departments | 252 |
| 231 | Synchronize Inventory Images | 252 |
| 232 | Synchronize Inventory Qty and Cost | 252 |
| 233 | Synchronize Audited Documents | 252 |
| 234 | Synchronize Min/Max | 252 |
| 235 | Synchronize Inventory Prices | 252 |
| 236 | Synchronize Allocation Patterns | 252 |
| 237 | Synchronize Customers | 252 |
| 238 | Synchronize Customer Images | 252 |
| 239 | Synchronize Vouchers | 252 |
| 240 | Synchronize ASN | 252 |
| 241 | Synchronize SO | 252 |
| 242 | Synchronize TO | 252 |
| 243 | Synchronize PO | 252 |
| 244 | Synchronize Adjustments Qty | 252 |
| 245 | Synchronize Adjustments Price | 252 |
| 246 | Synchronize Adjustments Cost | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 247 | Synchronize Slips | 252 |
| 248 | Document date mode for Delta | 3 |
| 249 | Encrypt Price for Tag printing | 252 |
| 250 | Encrypt Cost for Tag printing | 252 |
| 251 | Encrypt Last Received Date for Tag printing | 252 |
| 252 | Sort Options / Case Sensitive | 252 |
| 253 | Sort Options / Use Locale | 252 |
| 254 | Insert a blank line after each subtotal line | 252 |
| 255 | Custom Labels / Names in Report | 3 |
| 256 | Use decimals quantities in Report | 252 |
| 257 | Number of price decimals to use in reports | 3 |
| 258 | Number of cost decimals to use in reports | 3 |
| 259 | Report Field Lengths / Department | 3 |
| 260 | Report Field Lengths / Class | 3 |
| 261 | Report Field Lengths / Subclass | 3 |
| 262 | Report Field Lengths / Department Name | 3 |
| 263 | Report Field Lengths / Vendor Code | 3 |
| 264 | Report Field Lengths / Vendor Name | 3 |
| 265 | Report Field Lengths / Description 1 | 3 |
| 266 | Report Field Lengths / Description 2 | 3 |
| 267 | Report Field Lengths / Description 3 | 3 |
| 268 | Report Field Lengths / Description 4 | 3 |
| 269 | Report Field Lengths / Attr | 3 |
| 270 | Report Field Lengths / Size | 3 |
| 271 | Report Field Lengths / UPC | 3 |
| 272 | Report Field Lengths / ALU | 3 |
| 273 | Report Field Lengths / Aux 1 | 3 |
| 274 | Report Field Lengths / Aux 2 | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 275 | Report Field Lengths / Aux 3 | 3 |
| 276 | Report Field Lengths / Aux 4 | 3 |
| 277 | Report Field Lengths / Aux 5 | 3 |
| 278 | Report Field Lengths / Aux 6 | 3 |
| 279 | Report Field Lengths / Aux 7 | 3 |
| 280 | Report Field Lengths / Aux 8 | 3 |
| 281 | Report Field Lengths / Qty Fields | 3 |
| 282 | Report Field Lengths / Price/Cost Fields | 3 |
| 283 | Report Field Lengths / Ext Price/Cost Fields | 3 |
| 284 | Report Field Lengths / Discount Fields | 3 |
| 285 | Report Header Font Name | 5 |
| 286 | Report Header Font Size | 3 |
| 287 | Report Header Font Style | 3 |
| 288 | Report Header Font Color | 3 |
| 289 | Report Header Font Charset | 3 |
| 290 | Page Header Font Name | 5 |
| 291 | Page Header Font Size | 3 |
| 292 | Page Header Font Style | 3 |
| 293 | Page Header Font Color | 3 |
| 294 | Page Header Font Charset | 3 |
| 295 | Column Headings Font Name | 5 |
| 296 | Column Headings Font Size | 3 |
| 297 | Column Headings Font Style | 3 |
| 298 | Column Headings Font Color | 3 |
| 299 | Column Headings Font Charset | 3 |
| 300 | Details Font Name | 5 |
| 301 | Details Headings Font Size | 3 |
| 302 | Details Headings Font Style | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 303 | Details Headings Font Color | 3 |
| 304 | Details Headings Font Charset | 3 |
| 305 | Totals Font Name | 5 |
| 306 | Details Headings Font Size | 3 |
| 307 | Details Headings Font Style | 3 |
| 308 | Details Headings Font Color | 3 |
| 309 | Details Headings Font Charset | 3 |
| 310 | Fit To Preview | 252 |
| 311 | WS Specific Voucher sequence | 252 |
| 312 | WS Specific Invoice sequence | 252 |
| 313 | Log of changes to Track Adjustments | 110 |
| 314 | Backup Directory | 5 |
| 315 | Use Vendor Invoices | 252 |
| 316 | Use Two Step Approval | 252 |
| 317 | Cost Variation Threshold | 4 |
| 318 | Auto Retrieve Ledger | 252 |
| 319 | Taxable Threshold for Tax Area1 | 4 |
| 320 | Taxable Threshold for Tax Area2 | 4 |
| 321 | Eight Tax Codes Compatibility Mode | 252 |
| 322 | Include 1st Tax When Calculating 2nd | 252 |
| 323 | Tax Area Specific Tax Codes | 252 |
| 324 | Use Multi Tax | 252 |
| 325 | Audit Calendar | 5 |
| 326 | Restrict EOP to Audit Calendar | 252 |
| 327 | Show Item Number In Ledger Tree | 252 |
| 328 | Show UPC In Ledger Tree | 252 |
| 329 | Show ALU In Ledger Tree | 252 |
| 330 | Use Thousand Separator for Quantities (Analytics) | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 331 | Use Thousand Separator for Currency (Analytics) | 252 |
| 332 | Use Currency Symbol (Analytics) | 252 |
| 333 | Use 2 decimal places for qty values throughout Analytics | 252 |
| 334 | Number of price decimals for viewing purposes (Analytics) | 3 |
| 335 | Number of cost decimals for viewing purposes (Analytics) | 3 |
| 336 | Synchronize Inventory Items and Kits | 252 |
| 337 | Number of percentage decimals for viewing purposes (Analytics) | 3 |
| 338 | Number of ratio decimals for viewing purposes (Analytics) | 3 |
| 339 | When displaying week, show it as... (Analytics) | 3 |
| 340 | How many days to store reports | 3 |
| 341 | Spread Global Discount | 252 |
| 342 | Number of last days to calculate DOS using DSR (0 means fixed periods) | 3 |
| 343 | Ignore days when the Merchandise was out of stock | 252 |
| 344 | Number of days back to detect changes for datamart refresh | 3 |
| 345 | Maximum days to keep refresh logs | 3 |
| 346 | Import Vendor Images | 252 |
| 347 | Import Department Images | 252 |
| 348 | Synchronize Vendor Images | 252 |
| 349 | Synchronize Department Images | 252 |
| 350 | Use database jobs for Delta build and post synchronization task | 252 |
| 351 | Round Tax at Receipt and SO Level | 252 |
| 352 | Tax rounding method for Receipts and SO | 3 |
| 353 | Warning when new cost is greater than old | 252 |
| 354 | New cost warning threshold percent | 4 |
| 355 | Allow negative qty on Vouchers | 252 |
| 356 | Case qty rounding method | 3 |
| 357 | Lookup mode for listing items on documents | 5 |
| 358 | Prevent Duplicate Customers Names | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 359 | Document sequences | 110 |
| 360 | Prompt for serial number when adding full control items on SO | 252 |
| 361 | Prompt for serial number when adding partial control items on SO | 252 |
| 362 | Prompt for serial number when adding partial control items on Receipts | 252 |
| 363 | Prompt for serial number when adding partial control items on Vouchers | 252 |
| 364 | Prompt for serial number when adding partial control items on Slips | 252 |
| 365 | Prompt for serial number when adding partial control items on Adjustments | 252 |
| 366 | Prompt for serial number when adding partial control items on Inventory | 252 |
| 367 | Prompt for serial number when adding full control items on ASNs | 252 |
| 368 | Default Serial Numbers Tracking Level | 3 |
| 369 | PO Prefix | 5 |
| 370 | Ledger Item Info | 5 |
| 371 | Allow Overwrite Cust Title | 252 |
| 372 | Allow Overwrite Vendor Title | 252 |
| 373 | Tax Code Subtotal Calculation | 252 |
| 374 | Default Inventory Store | 3 |
| 375 | Default ASN Store | 3 |
| 376 | Availability Checking for Return Vouchers | 252 |
| 377 | Use Separate Sequences for Vouchers | 252 |
| 378 | Require voucher to reference a PO | 252 |
| 379 | Prompt for serial number when adding partial control items on ASNs | 252 |
| 380 | Print Tags for Broken Kit Items | 252 |
| 381 | Allow copying of prices and costs when copying items between subsidiaries | 252 |
| 382 | Print Package Components on Receipts and SOs | 252 |
| 383 | Print Package Components Prices on Receipts and SOs | 252 |
| 384 | Print Kit Item on Receipts and SOs | 252 |
| 385 | Print Kit Item Prices on Receipts and SOs | 252 |
| 386 | Alert user when price differs from other style members | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 387 | After voucher is updated go to | 3 |
| 388 | Prevent negative cost entry | 252 |
| 389 | Auto generate UPC | 5 |
| 390 | Auto generate ALU | 3 |
| 391 | Auto generate PO number | 252 |
| 392 | PO Mask | 5 |
| 393 | Enable UPC sequence | 252 |
| 394 | Merchandise sequence rule type | 5 |
| 395 | Enable ALU sequence | 252 |
| 396 | Use Separate Sequences for Invoices | 252 |
| 397 | Used PI type (Simple, Multizone, Multiztore) | 3 |
| 398 | PI initialized by (UPC, or Item#, or ALU) | 3 |
| 399 | Threshold cost for multizone report | 4 |
| 400 | Use filters when start | 252 |
| 401 | Strip lead zeroes when download | 252 |
| 402 | Max. variance when autoupdate (%%) | 3 |
| 403 | Use Smart smartscan mode | 252 |
| 404 | Smart scan group 1 | 3 |
| 405 | Smart scan group 2 | 3 |
| 406 | Smart scan group 2 | 3 |
| 407 | Prompt to spread when going to tender | 252 |
| 408 | Prompt to spread when saving SO | 252 |
| 409 | Default value for POS flag menu 1 | 3 |
| 410 | Default value for POS flag menu 2 | 3 |
| 411 | Default value for POS flag menu 3 | 3 |
| 412 | Print Package Item on receipts and SOs | 252 |
| 413 | Print Package Item price on receipts and SOs | 252 |
| 414 | Print Kit Item on receipts and SOs | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 415 | Print Kit Item price on receipts and SOs | 252 |
| 416 | Tender Types used in rounding | 3 |
| 417 | After update invoice go to | 3 |
| 418 | Check charge balance | 252 |
| 419 | Generate new system ID | 252 |
| 420 | Tender display change window for | 3 |
| 421 | Tender allow on return Receipt | 3 |
| 422 | Default Comment 1 | 3 |
| 423 | Default Comment 2 | 3 |
| 424 | Require Min Percentage Customer Order | 252 |
| 425 | Require Min Percentage Special Order | 252 |
| 426 | Require Min Percentage Layaway Order | 252 |
| 427 | Allow lost sale receipt when deleting unfilled SOs | 252 |
| 428 | Append selected UDF/AUX fields to Inventory Description 2 field | 252 |
| 429 | New inventory items enabled as Regional Inventory Items | 252 |
| 430 | Regional Inventory Items | 3 |
| 431 | Append blank spaces for field length if no value entered for UDF/AUX | 252 |
| 432 | Allow negative quantities on POs | 252 |
| 433 | Require Entry of Open and Close Amounts | 252 |
| 434 | Allow Zero for Open Amount | 252 |
| 435 | Register is Opened and Register is Closed | 252 |
| 436 | Auto-Create Next Open | 252 |
| 437 | Combine sales and tax for VAT | 252 |
| 438 | X/Z-Out Reports Sort by | 3 |
| 439 | Issue Gift Card when return amount exceeds | 252 |
| 440 | Issue Gift Certificate when return amount exceeds | 252 |
| 441 | Issue Store Credit when return amount exceeds | 252 |
| 442 | Gift Card Exceed Amount | 5 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 443 | Gift Certificate Exceed Amount | 5 |
| 444 | Store Credit Exceed Amount | 5 |
| 445 | Expire Store Credit after Value | 3 |
| 446 | Expire Store Credit after | 252 |
| 447 | Expire Store Credit after Option | 3 |
| 448 | Store Credit Offline floor limit | 5 |
| 449 | Allow customer to reuse a Store Credit if a partial balance is available | 252 |
| 450 | Store Credit Maximum Exceed by Amount | 5 |
| 451 | Always issue Store Credit change on a new Store Credit | 252 |
| 452 | Issue change on a Store Credit only if change amount exceeds | 252 |
| 453 | Issue change on a Store Credit only if change amount exceeds value | 5 |
| 454 | Suggest Store Credit ID numbers | 5 |
| 455 | Expire Gift Card after Value | 3 |
| 456 | Expire Gift Card after | 252 |
| 457 | Expire Gift Card after Option | 3 |
| 458 | Gift Card Offline floor limit | 5 |
| 459 | Allow customer to reuse a Gift Card if a partial balance is available | 252 |
| 460 | Gift Card Maximum Exceed by Amount | 5 |
| 461 | Always issue Gift Card change on a new Gift Card | 252 |
| 462 | Issue change on a Gift Card only if change amount exceeds | 252 |
| 463 | Issue change on a Gift Card only if change amount exceeds value | 5 |
| 464 | Suggest Gift Card ID numbers | 5 |
| 465 | Use sequence for Gift Card | 252 |
| 466 | Suggest Gift Card as a tender when available | 252 |
| 467 | Allow Gift Card tender amount to exceed available credit | 252 |
| 468 | Expire Gift Certificate after Value | 3 |
| 469 | Expire Gift Certificate after | 252 |
| 470 | Expire Gift Certificate after Option | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 471 | Gift Certificate Offline floor limit | 5 |
| 472 | Allow customer to reuse a Gift Certificate if a partial balance is available | 252 |
| 473 | Gift Certificate Maximum Exceed by Amount | 5 |
| 474 | Always issue Gift Certificate change on a new Gift Certificate | 252 |
| 475 | Issue change on a Gift Certificate only if change amount exceeds | 252 |
| 476 | Issue change on a Gift Certificate only if change amount exceeds value | 5 |
| 477 | Suggest Gift Certificate ID numbers | 5 |
| 478 | Suggest Gift Certificate as a tender when available | 252 |
| 479 | Allow Gift Certificate tender amount to exceed available credit | 252 |
| 480 | Use the Credit Card Gateway for all types | 252 |
| 481 | Credit Card Gateway | 5 |
| 482 | Debit Card Gateway | 5 |
| 483 | Check Verification Gateway | 5 |
| 484 | Gift Card Gateway | 5 |
| 485 | Credit Card Workstation ID | 5 |
| 486 | Debit Card Workstation ID | 5 |
| 487 | Check Verification Workstation ID | 5 |
| 488 | Gift Card Workstation ID | 5 |
| 489 | Use POS Resiliency? (Credit Card only) | 252 |
| 490 | Server to check | 5 |
| 491 | POS Resiliency Floor Limit | 4 |
| 492 | POS Resiliency Check Every | 3 |
| 493 | POS Resiliency Check Every Option | 3 |
| 494 | EFT Credit Card CVV2 / CVC2 / CID Verification Options | 3 |
| 495 | EFT Credit Card AVS Verification Options | 3 |
| 496 | EFT Credit Card Require Card Verification | 252 |
| 497 | EFT Credit Card Verification Method | 3 |
| 498 | EFT Credit Card Allow card information to be keyed in | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 499 | EFT Credit Card Close Credit Card dialog on approval | 252 |
| 500 | EFT Credit Card Automatically Update/Print after card approval | 252 |
| 501 | EFT Credit Card Automatically start authorization after card swipe | 252 |
| 502 | EFT Credit Card Allow clerk to force duplicate transactions | 252 |
| 503 | EFT Credit Card Print EFT Receipt During Authorization | 252 |
| 504 | EFT Credit Card Print EFT Receipt On Print/Update | 252 |
| 505 | EFT Debit Card Allow Cashback | 252 |
| 506 | EFT Debit Card Maximum Cashback Amount | 4 |
| 507 | EFT Check Allow Cashback | 252 |
| 508 | EFT Check Maximum Cashback Amount | 4 |
| 509 | EFT Check Identification Verification | 3 |
| 510 | XZ Out Report Script Language | 3 |
| 511 | XZ Out Report Use Script | 252 |
| 512 | XZ Out Report Script File | 5 |
| 513 | XZ Out Require Register Level | 252 |
| 514 | Use separate sequence for Multi/Single subsidiary PO | 252 |
| 515 | Allow spreading of document fee across POs | 252 |
| 516 | Require adjustment reason on inventory Price, Cost and Qty change | 252 |
| 517 | Default adjustment reason on inventory Price, Cost and Qty change | 3 |
| 518 | Default SO Comment 1 | 3 |
| 519 | Default SO Comment 2 | 3 |
| 520 | Default Instruction 1 | 3 |
| 521 | Default Instruction 2 | 3 |
| 522 | Use Seperate SO Sequence Numbers | 252 |
| 523 | Default ASNs Lot Numbers Tracking Level | 3 |
| 524 | Default Vouchers Lot Numbers Tracking Level | 3 |
| 525 | Default Slips Lot Numbers Tracking Level | 3 |
| 526 | Default Receipts Lot Numbers Tracking Level | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 527 | Default Sales Order Lot Numbers Tracking Level | 3 |
| 528 | Default Adjustments Lot Numbers Tracking Level | 3 |
| 529 | Deactivate Lot Number once items have been depleted | 252 |
| 530 | Print zero quantity items on receipts and SO | 252 |
| 531 | Alert user when an item's lot number expiration date has passed | 252 |
| 532 | Block the sale of an item past its expiration date | 252 |
| 533 | Audit Mode | 3 |
| 534 | Audit Subclass | 3 |
| 535 | Use Forward-Based Quantity Pricing | 252 |
| 536 | Update PI counts on remote workstation | 252 |
| 537 | XZ Require Blind Close | 252 |
| 538 | XZ Allowable Number of Attempts | 3 |
| 539 | XZ Allowable Reconcile Variance Amount | 3 |
| 540 | Use workstation specific Receipt sequence numbers | 252 |
| 541 | Use workstation specific SO sequence numbers | 252 |
| 542 | Use workstation specific Voucher sequence numbers | 252 |
| 543 | Use workstation specific Slip sequence numbers | 252 |
| 544 | Use workstation specific Adjustment Memo sequence numbers | 252 |
| 545 | Provide No Flag on Documents | 252 |
| 546 | Use the last Flag on documents | 252 |
| 547 | Target sbs_no for currency conversion in Planning Link | 3 |
| 548 | Desc1 length for Planning Link | 3 |
| 549 | Desc2 length for Planning Link | 3 |
| 550 | Calendar Level for Planning Link | 3 |
| 551 | Time Level for Planning Link | 5 |
| 552 | Filter Level for Planning Link | 3 |
| 553 | Default filter for Planning Link | 3 |
| 554 | Update delta table flag for Planning Link | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 555 | Location Level for Planning Link | 5 |
| 556 | Product Level for Planning Link | 5 |
| 557 | Use Workstation Specific Store Credit Sequence Numbers | 252 |
| 558 | Use Workstation Specific Gift Certificate Sequence Numbers | 252 |
| 560 | PI flag - Include Lot/Serial number entry in count | 252 |
| 561 | PI flag - allow PI update with discrepancies | 252 |
| 562 | Use Style AUX/UDF values | 3 |
| 563 | Planning Link use PO Dates | 3 |
| 564 | Planning Link Archive to the Log file flag | 252 |
| 565 | Planning Link Purge Period | 3 |
| 566 | Planning Link Log File path | 5 |
| 567 | Copy Description to ALU | 3 |
| 568 | Default maximum discount allowed for new items | 3 |
| 569 | Default maximum accumulated discount allowed for new items | 3 |
| 570 | Item Note Map Assigned To 1 | 5 |
| 571 | Item Note Map Assigned To 2 | 5 |
| 572 | Item Note Map Assigned To 3 | 5 |
| 573 | Item Note Map Assigned To 4 | 5 |
| 574 | Item Note Map Assigned To 5 | 5 |
| 575 | Item Note Map Assigned To 6 | 5 |
| 576 | Item Note Map Assigned To 7 | 5 |
| 577 | Item Note Map Assigned To 8 | 5 |
| 578 | Item Note Map Assigned To 9 | 5 |
| 579 | Item Note Map Assigned To 10 | 5 |
| 580 | Force User to select Associate on new receipt | 252 |
| 581 | Force User to select Associate on new Sales Order | 252 |
| 582 | High security on Receipts | 252 |
| 583 | High security on Vouchers | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 584 | High security on Transfer Slips | 252 |
| 585 | High security on Adjustments Memos | 252 |
| 586 | Default associate for new receipts | 3 |
| 587 | Default associate for new SO | 3 |
| 588 | Customer Security Level 1 | 5 |
| 589 | Customer Security Level 2 | 5 |
| 590 | Customer Security Level 3 | 5 |
| 591 | Customer Security Level 4 | 5 |
| 592 | Default Customer Security Level | 3 |
| 593 | Default Price Level | 3 |
| 594 | Flag incoming voucher as pending | 252 |
| 595 | Transfer Order Number | 252 |
| 596 | Require Item void reasons | 252 |
| 597 | Default Item void reasons | 3 |
| 598 | Require Item return reasons | 252 |
| 599 | Default Item return reasons | 3 |
| 600 | Regional Dept Unique Ident | 3 |
| 601 | Regional Vendor Unique Ident | 3 |
| 602 | New department enabled as Regional Departments | 252 |
| 603 | New vendors enabled as Regional Vendors | 252 |
| 604 | Regional Vendor Fields | 3 |
| 605 | Disbursement Options | 110 |
| 606 | Use Document Sequences on Security Receipts | 252 |
| 607 | Default Customer Type | 3 |
| 608 | Limit items in document created from PO only by PO items | 252 |
| 609 | First Column for Item Allocation Grid in TOs | 3 |
| 610 | Copy DOC Price to new inventory items | 252 |
| 611 | Copy DOC Cost to new inventory items | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 612 | Mark all new inventory Items as Proposed | 252 |
| 613 | Mark new PO Items as Proposed | 252 |
| 614 | Use Exchange Rate when propagating Price to child subsidiaries | 252 |
| 615 | Round Price conversion | 252 |
| 616 | Round Price | 3 |
| 617 | Use Exchange Rate when propagating Cost to child subsidiaries | 252 |
| 618 | Round Cost conversion | 252 |
| 619 | Round Cost | 3 |
| 620 | Include Inactive Stores in Planning | 252 |
| 621 | Auto Promotions | 252 |
| 622 | Require original receipt entry for return receipts | 252 |
| 623 | Customer Lookup By | 5 |
| 624 | Calculate Check Digit | 252 |
| 625 | Display Check Digit | 252 |
| 626 | Centrals Active Flag | 252 |
| 627 | Address of Centrals Server | 5 |
| 628 | Port for Centrals Server | 3 |
| 629 | Lookup Mode | 252 |
| 630 | Centrals Timeout | 3 |
| 631 | Centrals Max Records | 3 |
| 632 | Copy received quantity from original quantity on ASN voucher | 252 |
| 633 | Use Seasonal Pricing | 252 |
| 634 | Allow Level 2 Credit Card Processing | 252 |
| 635 | Prompt for price on zero price items | 252 |
| 636 | Quickbooks Company File Path | 5 |
| 637 | Quickbooks Company | 5 |
| 638 | AL Subsidiary Number | 3 |
| 639 | Use Stock Audit | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 640 | Use sales transaction information | 252 |
| 641 | Sales Method | 3 |
| 642 | Sales Retail Pro Address 1 | 3 |
| 643 | Sales Retail Pro Address 2 | 3 |
| 644 | Sales Retail Pro Address 3 | 3 |
| 645 | Split Customer City/State | 252 |
| 646 | Customer and Contact Names | 3 |
| 647 | Order to Send Customer Name to Quickbooks | 3 |
| 648 | Include information in receipt comment | 3 |
| 649 | Use external default terms | 252 |
| 650 | Invoice due date | 3 |
| 651 | Auto export customers | 252 |
| 652 | Credit limit | 4 |
| 653 | Update customer balances | 252 |
| 654 | Write aging code to past due days field | 252 |
| 655 | Discounted transactions | 3 |
| 656 | Use receiving transaction information | 252 |
| 657 | Receiving Method | 3 |
| 658 | Receiving Retail Pro Address 1 | 3 |
| 659 | Receiving Retail Pro Address 2 | 3 |
| 660 | Receiving Retail Pro Address 3 | 3 |
| 661 | Vendor and Contact Names | 5 |
| 662 | Order to Send Vendor Name to Quickbooks | 3 |
| 663 | Include what information in voucher comment | 3 |
| 664 | Auto-Update Vendors | 252 |
| 665 | Send Retail Pro terms to QuickBooks | 252 |
| 666 | Advance End Of Month to the next month | 3 |
| 667 | Purchase Clearing | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 668 | Use adj/trans information | 252 |
| 669 | Adj/transfer Method | 3 |
| 670 | Consolidate General Ledger accounts by | 3 |
| 671 | Main account length | 3 |
| 672 | Using account #s on COA | 252 |
| 673 | Map store # to QB class | 252 |
| 674 | Length for Sub-Account 1 | 3 |
| 675 | Sub-account 1 based on | 3 |
| 676 | Merch Sales for Sub-Account 1 | 252 |
| 677 | Merch Disc for Sub-Account 1 | 252 |
| 678 | Inventory for Sub-Account 1 | 252 |
| 679 | Cogs for Sub-Account 1 | 252 |
| 680 | Primary Account (Department) | 5 |
| 681 | Choose Store Sales Account Mapping | 3 |
| 682 | Primary Account (Vendor) | 5 |
| 683 | Choose Store All Receiving Account Mappings | 3 |
| 684 | Primary Account (Discounts) | 5 |
| 685 | Choose Store All Adj Transfer Account Mappings | 3 |
| 686 | Primary Account (Inventory UDF1) | 5 |
| 687 | Choose Store Suspense | 3 |
| 688 | Primary Account (Inventory UDF2) | 5 |
| 689 | Do Not Consolidate Like Items on Documents | 252 |
| 690 | Include Inactive DCS in Planning | 252 |
| 691 | Include Inactive Vendor in Planning | 252 |
| 692 | Include Inactive Items in Planning | 252 |
| 693 | Ecommerce default price level | 3 |
| 694 | Ecommerce default sale price level | 3 |
| 695 | Viewable Custom Files | 5 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 696 | Fill Formulas for Web Product Name | 5 |
| 697 | Fill Formulas for Web Short Description | 5 |
| 698 | Fill Formulas for Web Long Description | 5 |
| 699 | Overwrite Existing Web Product Name | 252 |
| 700 | Overwrite Existing Web Short Description | 252 |
| 701 | Overwrite Existing Web Long Description | 252 |
| 702 | Use Filter for Start | 252 |
| 703 | Allow Creation of free form Attributes | 252 |
| 704 | Allow Creation of free form Sizes | 252 |
| 705 | Default Product Availability | 3 |
| 706 | Default Product Availability Threshold | 3 |
| 707 | Use Sub-Account 1 based on | 252 |
| 708 | Length for Sub-Account 2 | 3 |
| 709 | Use Sub-Account 2 based on | 252 |
| 710 | Sub-account 2 based on | 3 |
| 711 | Merch Sales for Sub-Account 2 | 252 |
| 712 | Merch Disc for Sub-Account 2 | 252 |
| 713 | Inventory for Sub-Account 2 | 252 |
| 714 | Cogs for Sub-Account 2 | 252 |
| 715 | Length for Sub-Account 3 | 3 |
| 716 | Use Sub-Account 3 based on | 252 |
| 717 | Sub-account 3 based on | 3 |
| 718 | Merch Sales for Sub-Account 3 | 252 |
| 719 | Merch Disc for Sub-Account 3 | 252 |
| 720 | Inventory for Sub-Account 3 | 252 |
| 721 | Cogs for Sub-Account 3 | 252 |
| 722 | Length for Sub-Account 4 | 3 |
| 723 | Use Sub-Account 4 based on | 252 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 724 | Sub-account 4 based on | 3 |
| 725 | Merch Sales for Sub-Account 4 | 252 |
| 726 | Merch Disc for Sub-Account 4 | 252 |
| 727 | Inventory for Sub-Account 4 | 252 |
| 728 | Cogs for Sub-Account 4 | 252 |
| 729 | XZ Default Leave Amount | 4 |
| 730 | Split Vendor City/State | 252 |
| 731 | Primary Account (Inventory UDF3) | 5 |
| 732 | Primary Account (Inventory UDF4) | 5 |
| 733 | Primary Account (Customer 3) | 5 |
| 734 | Primary Account (Customer 4) | 5 |
| 735 | Primary Account (Customer 5) | 5 |
| 736 | Primary Account (Customer 6) | 5 |
| 737 | Primary Account (Customer 7) | 5 |
| 738 | Primary Account (Customer 8) | 5 |
| 739 | Primary Account (Tax Areas) | 5 |
| 740 | After Memo is updated go to | 3 |
| 741 | After Slip is updated go to | 3 |
| 742 | High security on Sales Orders | 252 |
| 743 | Connection with QuickBooks is already set or not | 3 |
| 744 | Choose Purchase Order Type | 3 |
| 745 | Prompt & perform Central Processing if customer not found locally | 252 |
| 746 | New Customer Required Fields | 5 |
| 747 | Allow printing of EFT receipts even when EFT is disabled. | 252 |
| 748 | Count Open Currency | 252 |
| 749 | Availability Quantity Source | 3 |
| 750 | Show Inactive Stores | 252 |
| 751 | X/Z Out Register Definition | 5 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 752 | Use Workstation Specific Settings In X/Z Out | 252 |
| 753 | Store encrypted card numbers | 252 |
| 754 | Include non-inventory items in plan data | 3 |
| 755 | Show Inactive Tax Areas | 252 |
| 756 | Master Subsidiary for Product attributes | 3 |
| 757 | Use Pending Purchase Order | 252 |
| 758 | Multi Level Approval Required | 252 |
| 759 | Purchase Order Approval Level 1 | 252 |
| 760 | Purchase Order Approval Level 2 | 252 |
| 761 | Purchase Order Approval Level 3 | 252 |
| 762 | Purchase Order Approval Level 4 | 252 |
| 763 | Purchase Order Approval Level 1 Amount From | 4 |
| 764 | Purchase Order Approval Level 2 Amount From | 4 |
| 765 | Purchase Order Approval Level 3 Amount From | 4 |
| 766 | Purchase Order Approval Level 4 Amount From | 4 |
| 767 | Purchase Order Approval Level 1 Amount To | 4 |
| 768 | Purchase Order Approval Level 2 Amount To | 4 |
| 769 | Purchase Order Approval Level 3 Amount To | 4 |
| 770 | Purchase Order Approval Level 4 Amount To | 4 |
| 771 | Use Pending Vouchers | 252 |
| 772 | Multi Level Approval Required | 252 |
| 773 | Allow Overages | 252 |
| 774 | Approval Level 1 | 252 |
| 775 | Approval Level 2 | 252 |
| 776 | Approval Level 3 | 252 |
| 777 | Approval Level 4 | 252 |
| 778 | Approval Level 1 Amount From | 4 |
| 779 | Approval Level 2 Amount From | 4 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|--|-----------|
| 780 | Approval Level 3 Amount From | 4 |
| 781 | Approval Level 4 Amount From | 4 |
| 782 | Approval Level 1 Amount To | 4 |
| 783 | Approval Level 2 Amount To | 4 |
| 784 | Approval Level 3 Amount To | 4 |
| 785 | Approval Level 4 Amount To | 4 |
| 786 | Approval Level 1 Difference | 4 |
| 787 | Approval Level 2 Difference | 4 |
| 788 | Approval Level 3 Difference | 4 |
| 789 | Approval Level 4 Difference | 4 |
| 790 | Allow PI reactivate inactive items in Inventory | 252 |
| 791 | Choose Transfer Order Type | 3 |
| 792 | Spread as Global Discount | 252 |
| 793 | Default Discount Type | 3 |
| 794 | Create price adjustments for items with zero O/H qty | 252 |
| 795 | XZ Maximum Cash Amount | 5 |
| 796 | Intra Company Transfer Option for Slips | 3 |
| 797 | Inter Company Transfer Option for Slips | 3 |
| 798 | Use ZOut Sequencing | 252 |
| 799 | Next ZOut Sequence Number | 4 |
| 800 | Customer Address Location Type Requires | 252 |
| 801 | Default Address Location Type | 3 |
| 802 | Default Customer Store | 3 |
| 803 | Tax Method Name | 3 |
| 804 | Use Two-Step Approval For Vouchers | 252 |
| 805 | Audit - Close matching periods for multi SBS | 252 |
| 806 | Sales Order Default Shipping Address Selection | 3 |
| 807 | Receipt Default Shipping Address Selection | 3 |

| PREF_ID | PREF_NAME | PREF_TYPE |
|---------|---|-----------|
| 808 | Use Central for Returns | 252 |
| 809 | Zero out Tax% for export customers | 252 |
| 810 | Restrict item discounts to not exceed spreadable global discount percentage | 252 |
| 811 | Transfers - Do not check rule for Local Transfer | 252 |
| 812 | Transfers - Do not check rule for Inter-Company Transfer | 252 |
| 813 | Alert cashier when receipt price is less than cost | 252 |
| 814 | XZ Minimum Cash Amount | 5 |
| 815 | Automatically "Record Sale" after final deposit | 252 |
| 816 | Region Sales Target - Optional Level | 252 |
| 817 | District Sales Target- Optional Level | 252 |
| 818 | Department Sales Target - Optional Level | 252 |
| 819 | Limit Slip Items against referenced TO Items | 252 |
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Appendix B: Doc Type Field Values

Background

When processing records for the Doc Sync files and DOC_SYNC tables, ECM looks at the DOC_TYPE field value. The following table lists all the possible DOC_TYPE values.

| Doc Type | Value |
|-----------------|--------------|
| None | 0 |
| DocSync | 1 |
| SbsPref | 2 |
| PriceLevel | 3 |
| TaxCode | 4 |
| TaxArea | 5 |
| DiscReason | 6 |
| DiscSched | 7 |
| Commission | 8 |
| PosFeeType | 9 |
| PurchFeeType | 10 |
| Store | 11 |
| CustomerUDF | 12 |
| VendorUDF | 13 |
| InventoryUDF | 14 |
| InvoiceUDF | 15 |
| MNUDF | 16 |
| CreditCard | 17 |
| Title | 18 |
| AllocPattern | 19 |
| DCS | 20 |
| Scale | 21 |
| Region | 22 |

| Doc Type | Value |
|-----------------|--------------|
| InvoiceComment | 23 |
| SOCComment | 24 |
| SlipComment | 25 |
| VoucherComment | 26 |
| Currency | 27 |
| Rate | 28 |
| POSTender | 29 |
| PurchTerm | 30 |
| ShipMethod | 31 |
| ShipInstruct | 32 |
| AdjReason | 33 |
| TimeShift | 34 |
| Employee | 35 |
| Customer | 36 |
| Vendor | 37 |
| PriceRounding | 38 |
| PriceAdjusting | 39 |
| ZipCode | 40 |
| SubLoc | 41 |
| KitComponent | 42 |
| StoreStation | 43 |
| TransRule | 44 |
| DefaultStore | 45 |
| SbsFidLen | 46 |
| TrackAdjLog | 47 |
| DocSequence | 48 |
| Inventory | 49 |
| Invoice | 50 |
| Adjustment | 51 |

| Doc Type | Value |
|---------------------|-------|
| Slip | 52 |
| VendInvoice | 53 |
| Voucher | 54 |
| TO | 55 |
| SO | 56 |
| PO | 57 |
| MO | 58 |
| MN | 59 |
| MarkDown | 60 |
| RproLicense | 61 |
| StoreSalesTarget | 62 |
| EmployeeSalesTarget | 63 |
| PICounts | 64 |
| UserGroup | 65 |
| Season | 66 |
| Till | 67 |
| DisburReason | 68 |
| Country | 69 |
| Lang | 70 |
| TransReasonCode | 71 |
| ItemGroup | 72 |
| ItemRange | 73 |
| DcsSalesTarget | 74 |
| ZOut | 75 |
| TranFeeType | 76 |
| SbsStoreList | 77 |
| SbsStorePairs | 78 |
| SbsStoreOptions | 79 |
| PendingAPR | 80 |

| Doc Type | Value |
|-----------------|--------------|
| SubLocSegment | 81 |
| SubLocation | 82 |
| DefaultSubLoc | 83 |
| SubLocQty | 84 |
| AddrType | 85 |
| PIMap | 86 |
| InvcltemReason | 87 |
| StoreClass | 88 |
| StorePhysType | 89 |
| Job | 90 |

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