User Guide

RetailEnterprise Central v4

Serial number

Technical support

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Note

This *User Guide* is a combined guide for Australia, New Zealand, Hong Kong, Malaysia and Singapore. Tax codes and fields shown in some screenshots will vary according to whether you installed the Australia, New Zealand, Hong Kong, Malaysia or Singapore version of RetailEnterprise.

Part number: RME12001/v4

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Contents

1 Getting Started

MYOB RetailEnterprise streamlines management across multiple retail stores by giving you a global view of your retail operations.

RetailEnterprise consists of two components:

- the *Central* module, through which head office communicates with each store
- the *Shop* module, through which each store communicates with head office. (The Shop module is described in the MYOB RetailEnterprise Shop *User Guide*.)

About this manual

This user guide provides detailed information about the features and benefits of RetailEnterprise Central in your central office. It is designed to be used as a reference for everyday tasks as well as tasks that you may only perform periodically, such as importing and archiving data and collecting information from each retail outlet.

- Chapter 1 (this chapter) explains how to install and register RetailEnterprise Central and how to apply for extra licences if you need them.
- Chapter 2, Setting Up, on page 23 describes how to set up the RetailEnterprise Central database for your shops, suppliers and products. It also contains important information on setting up your computer to enable key functions of RetailEnterprise Central to occur.
- Chapter 3, Using RetailEnterprise Central, on page 53 details how to set up and maintain information about products, shops and suppliers. It also explains how to collect summary information and generate reports on the daily point-of-sale processing in RetailManager on your shop terminals.
- Chapter 4, Administration, on page 85 explains how to manage your database and archive your data.
- Appendix A:, 'Troubleshooting', on page 97 describes common problems with RetailEnterprise Central and how to deal with them.
- Appendix B:, 'MYOB technical support', on page 99 details your MYOB technical support options.

NOTE: MYOB RetailEnterprise or MYOB RetailManager Enterprise? MYOB RetailManager Enterprise is now referred to as MYOB RetailEnterprise.

Overview of MYOB RetailEnterprise

The main feature of MYOB RetailEnterprise is the capacity to establish electronic communication between your central office and each of your shops. This enables you to send information such as product and pricing updates to shops, and also collect a daily summary of sales and stock levels from RetailManager in the shops.

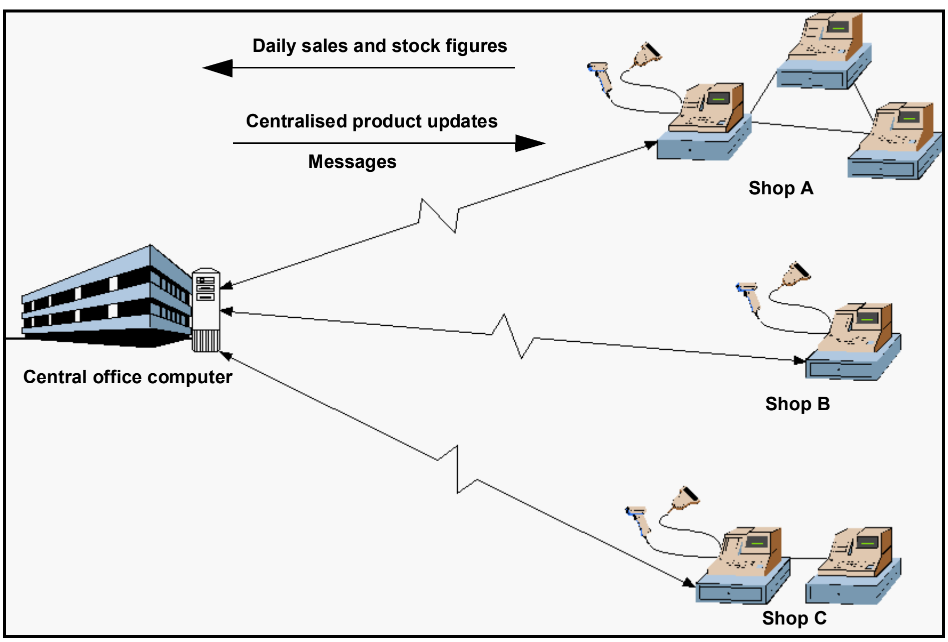
The major benefit to your central office is that RetailEnterprise Central enables you to:

- manage and share a central inventory database between your shops and central office
- distribute centralised product updates if you have a central pricing policy
- distribute information about stock holdings in other shops to each shop in your network
- choose which shops to collect a daily summary from, and whether the summary should include daily sales, stock figures or both
- produce sales reports such as **What's Selling** in the shops, and product reports such as **What's in Stock** in the shops.

The major benefit to your shops is that MYOB RetailEnterprise interfaces with RetailManager. This is because RetailEnterprise works behind the scenes and involves minimal extra effort in the shops. For example, the collection of sales and stock figures can be scheduled to occur at the quiet times for your shops, typically at night.

Typical RetailEnterprise Central model

The illustration below shows a typical model of how RetailEnterprise Central works in a retail business like yours.



As the illustration shows, RetailEnterprise Central enables your central office to send and receive information from the shops.

MYOB RetailEnterprise modules

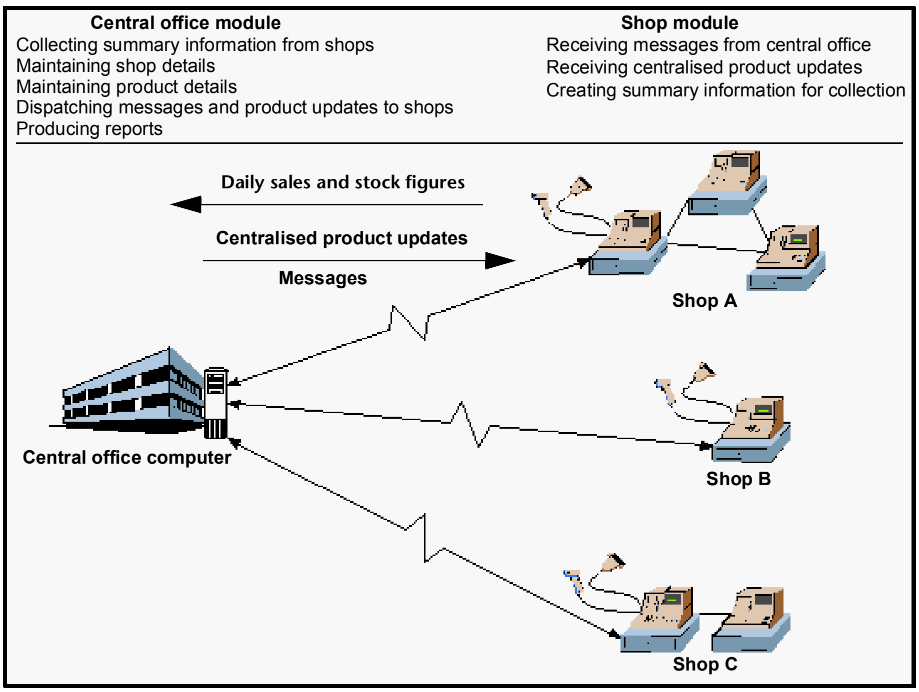
This section outlines how MYOB RetailEnterprise works for your organisation generally, and specifically in your central office.

The MYOB RetailEnterprise software is made up of two distinct modules:

- the Central module for your central office—for example, the head office.
- the Shop module for each shop—for example, a retail outlet or branch office.

Each module is designed to perform the different activities that are specific to the two types of locations. For example, the Central module enables you to make the product updates at your central office, while the Shop module enables shops to receive centralised product updates.

The illustration below shows the functions of each of these modules within MYOB RetailEnterprise:



Central module

This module of MYOB RetailEnterprise enables your central office staff to:

- monitor the collection process that collects daily sales and stock data from shop
- maintain details of every shop
- maintain details of products
- broadcast messages to shops
- create and broadcast product updates
- broadcast stock holding information to shops
- generate reports based on the sales and stock data collected from shops.

Shop module

This module of MYOB RetailEnterprise runs on a computer terminal in the shops. Occasionally, shops may need to respond to events or messages initiated by staff in your central office. This module enables the shop to:

- receive product updates from your central office
- receive information about stock holdings at other shops in your network
- create summary information for the collection process that is launched in your central office.

Checklist for implementation

This section contains a checklist for implementing RetailEnterprise Central in your business. The checklist is included especially for first-time users of RetailEnterprise Central. We recommend that you follow the sequence of steps in the checklist to implement RetailEnterprise Central.

Implementation checklist—Central

Step	Action	By who
1	Ensure you have the appropriate hardware and software to establish communications between your central office and shops. • For a direct dial-up connection—a data/fax modem, cables and a dedicated phone line • For a LAN/WAN connection—LAN connection cabling and software • For email communication—a POP or IMAP email account and an Internet connection.	Hardware supplier, Telecomms provider
2	Coordinate and manage the rollout of RetailEnterprise to each shop.	Central office staff
3	Arrange for each shop to: • set up MYOB RetailEnterprise Shop using the Shop implementation checklist (see the *MYOB RetailEnterprise Shop User Guide*) • forward connection details to your central office when finished.	Shop manager
4	Install RetailEnterprise Central in your central office. See 'Installing MYOB RetailEnterprise Central' on page 13.	Central office staff
5	Register RetailEnterprise Central. See 'Registering MYOB RetailEnterprise Central' on page 16.	Central office staff
6	Determine if you need additional shop licences. See 'Do you need additional shop licences?' on page 21.	Central office staff
7	Understand your technical support options. See 'MYOB technical support' on page 99.	Central office staff
8	Set up communications between central and shop, depending on your chosen communications method. See 'Setting up dial-up networking between central office and shops' on page 45, 'Setting up email communication between central office and shops' on page 49, and the separate *Communications Setup Guide* which you can access from the **Help** menu.	Central office staff or RetailManager Professional
9	Set up your computer's regional settings, and general settings for RetailEnterprise Central. See 'Specifying regional settings' on page 27 and 'Specifying RetailEnterprise Central settings' on page 30.	Central office staff
10	Identify the geographic regions of your business (for shops) for RetailEnterprise Central. This is necessary to set up your regions in the next step.	Central office staff
11	Set up your central database of regions and shops, suppliers and products in RetailEnterprise Central. You will need the connection details unique to each of your shops. See 'Setting up your Central database' on page 32.	Central office staff
12	Test the connection to each shop.	Central office staff
13	Carry out a pilot collection of *Summary Information* from your shops.	Central office staff

Additional notes on the checklist

This section contains additional notes about some checklist steps.

Purchase and install modem, phone connections If your business needs advice on how to go about this, contact an MYOB RetailManager Professional. For more information, see 'MYOB RetailManager Professionals' on page 106.

Coordinate rollout of MYOB RetailEnterprise to shops This is a critical phase of the whole implementation. You need to pay particular attention to ensuring the shops successfully install and set up the hardware and software needed to fully implement MYOB RetailEnterprise. Depending on the size of your business, it may be worth preparing a plan for the rollout by shop or by region. The MYOB RetailEnterprise Shop installation disk supplied is to be used for each additional shop.

Shop-by-shop rollout In the shops, the relevant person must implement MYOB RetailEnterprise using the checklist provided in the separate *MYOB RetailEnterprise Shop User Guide*. Ensure that the shops record and send you their unique connection details—such as the dedicated phone number for their modem.

Identify the geographic regions for your shops In RetailEnterprise Central, you need to identify regions for grouping your shops geographically. For example, by State for national organisations, or suburb for metropolitan organisations. You will need to enter the regions when you set up your central database in the step below.

Set up your RetailEnterprise Central database See 'Setting up your Central database' on page 32. This includes setting up:

- regions—as identified in the previous step
- shops—including the connection details unique to each shop
- suppliers
- products.

TIP: To use an existing RetailManager database If you have an existing RetailManager database in your shops, you can import your existing supplier and stock details into RetailEnterprise Central. For more information, contact one of our MYOB RetailManager Professionals. See 'MYOB RetailManager Professionals' on page 106 for more information about MYOB RetailManager Professionals.

Test shop connections Having set up your shop details in MYOB RetailEnterprise, you should now test the connection to each shop. See 'Maintaining shop details' on page 57. If you have problems with this step, you may need to contact technical support. For more information see 'MYOB technical support' on page 99.

Trigger a pilot collection Again, having successfully tested all your shop connections, you should now manually trigger a pilot collection of summary information from a small group of shops. See 'Collecting summary information from shops' on page 67. If you have problems with this step, you may need to contact technical support. For more information see 'MYOB technical support' on page 99.

Installing MYOB RetailEnterprise Central

System requirements

Check that your computer meets the following requirements. We strongly advise that you use computers that meet the *recommended* requirements.

Operating system	Recommended: Windows® Vista Ultimate (Service Pack 1), Windows Vista Business (Service Pack 1), Windows XP Professional (Service Pack 3) Minimum: Windows XP Professional (Service Pack 1) or Windows 2000 (Service Pack 4)
Processor	Recommended: Pentium® 4 processor (or equivalent) at 1.5GHz or faster Minimum: Pentium III processor (or equivalent) at 500MHz
Memory	Recommended: 512MB RAM or more Minimum: 256MB RAM
Hard disk	Recommended: 10GB or more of free disk space Minimum: 1GB of free disk space
Display	Recommended: 1024x768 dpi resolution Minimum: 640x480 dpi resolution
Communications	Appropriate hardware and software to set up communications between your central office and shops. • For a dial-up connection between your central office and shops—a data/fax modem, cables and a dedicated phone line • For a LAN/WAN connection—LAN connection cabling and software • For email communication—a POP or IMAP email account and an Internet connection.
Printer	A local or network printer to print reports.
Mouse and keyboard	Windows-compatible mouse and keyboard
Backup solution	We strongly recommend a backup solution such as a CD/DVD writer or a USB storage device.

Before you install RetailEnterprise Central

- **Do you need additional shop licences?** When you purchase MYOB RetailEnterprise you are licensed for up to five shops. You can purchase additional shop licences when you register RetailEnterprise. See 'Do you need additional shop licences?' on page 21.
- **Check that you have at least one printer installed.** RetailEnterprise Central will need a printer installed and set as the default printer so you can view and print reports.
- **Disable your anti-virus program.** If you use an anti-virus program, disable it before you install this version.

To install RetailEnterprise Central

1 Before you start, close all open applications. This is very important for correct installation. You will need to restart your computer when the installation is complete.

2 Log in as an Administrator (for Windows Vista users), or as an Administrator or Power User (for Windows XP or 2000 users whose computers only allow people with administrator privileges to install programs).

NOTE: Logging into Windows Vista as a Standard user If you have the Administrator password, you may be able to log into Windows Vista as a Standard user. You can then install RetailEnterprise Central.

3 Insert the MYOB RetailEnterprise Central CD and wait a few moments. A welcome window appears.

If a welcome window does *not* appear automatically:

If you are using...	do this...
Windows Vista	1 Go to the **Start** menu and click **Computer**. 2 Click your CD or DVD drive icon (usually labelled `D:\` or `E:\`) in the right pane of the **Computer** window.
Windows XP or 2000	1 Go to the **Desktop** and double-click **My Computer**. 2 Double-click your CD or DVD drive icon (usually labelled `D:\` or `E:\`) in the right pane of the **Computer** window.

The welcome window appears. If the welcome window still does not appear, double-click the `autorun.exe` file.

4 Select the installer:

- [Australia and New Zealand] Click **Install RetailEnterprise Central**.
- [Hong Kong, Malaysia and Singapore] Click **Select RetailEnterprise Central installer**, and then select the installer for your country.

The **Welcome to MYOB RetailEnterprise Central v4 Setup** window appears.

5 Follow the onscreen instructions.

NOTE: Warnings If any warnings appear during installation, see 'Troubleshooting your installation' on page 15.

6 When the **Installation Complete** window appears, click **Finish**.

Your computer will restart automatically. If your computer does not restart automatically, you should restart it manually.

Your desktop will now have a shortcut to MYOB RetailEnterprise Central.

NOTE: Install Adobe Reader to view PDF versions of the user guides You will need to install Adobe Reader to view the PDF versions of the user guides provided with your software.

To install Adobe Reader, click **Resources** in the welcome window of the MYOB RetailEnterprise Central v4 CD.

Troubleshooting your installation

During the installation of RetailEnterprise Central, it is possible that you may get the following warnings or error messages.

If the following warning message appears...	do this...
Read Only File Detected	Select the **Don't display this message again** option and click **Yes**. The application will continue to install.
Locked File Detected	Select the **Don't display this message again** option and click **Reboot**. The application will continue to install.
Files Failing to Self-Register	Click **OK**. This warning does not affect the installation of the software.

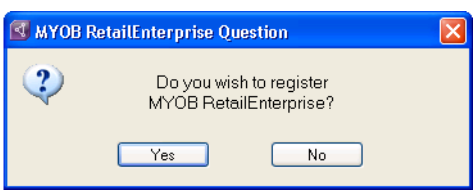
For help with resolving other installation issues, contact technical support. For more information see 'MYOB technical support' on page 99.

Starting MYOB RetailEnterprise Central

NOTE: Evaluation copy limitations You can access MYOB RetailEnterprise Central 25 times or for 30 days after which you will need to register the software to continue using it.

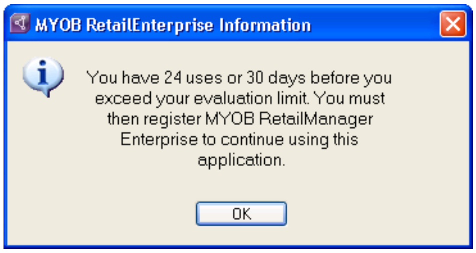
To start using RetailEnterprise Central

1 Double-click the MYOB RetailEnterprise Central v4 icon on your desktop. The following window appears.



2 If you want:
- to register MYOB RetailEnterprise now, click **Yes**. See 'Registering MYOB RetailEnterprise Central' on page 16.

- to register MYOB RetailEnterprise later, click **No**. Go to step 3. The following information window appears.



  This window tells you how many times you can use MYOB RetailEnterprise until you exceed your evaluation limit of 25 uses or 30 days.

3 Click **OK**.

4 If the About MYOB RetailEnterprise window appears, click **OK**.

You are now ready to start using RetailEnterprise Central in evaluation mode.

Registering MYOB RetailEnterprise Central

You need to register in order to:

- continue using MYOB RetailEnterprise. RetailEnterprise allows you to open your shopfront 25 times or for 30 days, before you must register it. If you still haven't registered, you will not be able to start the program until you enter your registration unlock code.
- purchase additional shop licences for RetailEnterprise. See 'Do you need additional shop licences?' on page 21 for more information.
- receive information about RetailEnterprise upgrades, new products, special offers and other services.
- upgrade RetailEnterprise.
- be eligible for support.

How to register

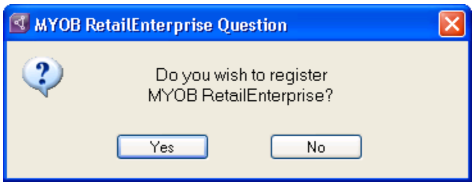
You should have received a registration form with your software. The registration form contains complete instructions on how to register.

Locate the serial number printed on the CD sleeve or on the registration form. You will need this number when you register. The registration process comprises three steps.

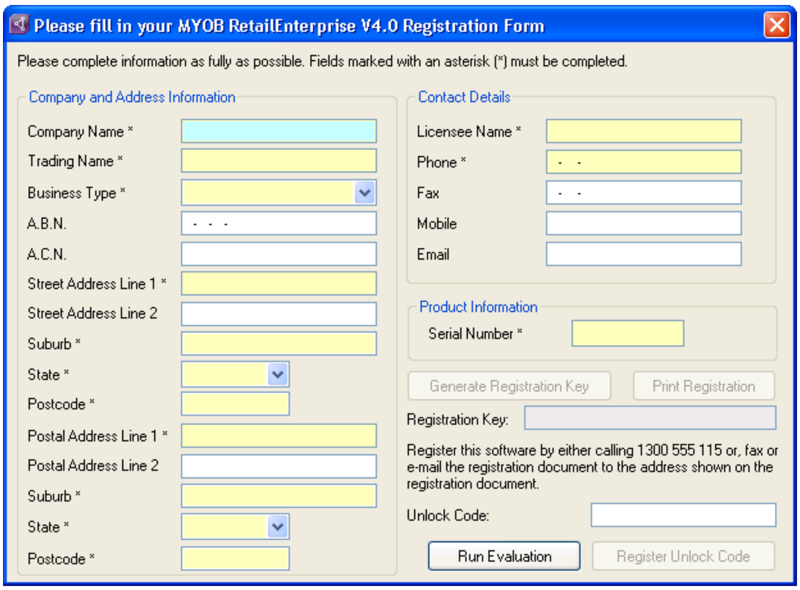
Step	Task	See
1	Enter your registration details in RetailEnterprise Central	page 17
2	Contact MYOB to receive your unlock code	page 18
3	Enter the unlock code in RetailEnterprise Central	page 20

Step 1: Enter your registration details in RetailEnterprise Central

1 Start **MYOB RetailEnterprise Central v4**. The following message appears.



2 Click **Yes**. An MYOB RetailEnterprise registration form similar to the one shown below appears.



NOTE: Telephone number The telephone number displayed above is only an example.

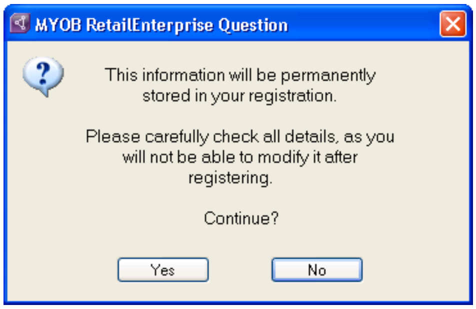
3 Complete the fields in this form.

[Australia only] It's important for you to enter your email address so you can receive product updates and our regular e-newsletter.

CAUTION: Ensure that your registration details are accurate The trading name, street address and telephone number you enter in the registration form are printed on all your sales dockets. Therefore, you should ensure that these details are accurate. If you need to change any details at a later stage, you will need to reregister through MYOB.

If you decide not to register now, you can run RetailEnterprise Central in evaluation mode. To do this, click **Run Evaluation**. Note that any details you enter will be saved. When you are ready to register later, simply repeat this procedure starting from step 1 above.

4. In the **Serial Number** field, enter the serial number printed on your RetailEnterprise Central v4 CD sleeve or registration form.
5. Click **Generate Registration Key**. A message appears.



6. Click **Yes** to continue. The registration key appears below the **Generate Registration Key** button.
7. **[Australia, New Zealand, Malaysia and Singapore]** Click **Print Registration** to print the registration details.

   [Hong Kong] Write the registration key on the printed registration form supplied in the product box. Complete the remaining fields in the printed registration form.
8. Go to 'Step 2: Contact MYOB to receive your unlock code' below.

Step 2: Contact MYOB to receive your unlock code

Now that you have entered your registration details into RetailEnterprise Central, and have generated the registration key, you need to register these details with MYOB to receive an unlock code.

If you're in...	See...
Australia	below
New Zealand	page 19
Hong Kong	page 19
Malaysia	page 20
Singapore	page 20

Australia

To receive the unlock code by fax Fax the registration form that you printed using RetailEnterprise Central to **03 9222 9898**.

We will fax you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

To receive the unlock code by mail Mail the registration form that you printed using RetailEnterprise Central to:

MYOB Australia Pty Ltd
Reply Paid 371
Blackburn VIC 3130

We will mail you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

To receive the unlock code online Visit my.myob.com, click **Register your MYOB software** and enter your registration information.

We will email you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

To receive the unlock code by telephone Call **1300 555 115** between these times:

- 9.00am to 7.00pm EST Monday to Wednesday
- 9.00am to 9.00pm EST Thursday to Friday
- 9.00am to 5.00pm EST Saturday to Sunday

You will need to quote the registration details that you entered in RetailEnterprise Central. We will read out your unlock code, which you will need to enter in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

New Zealand

To receive the unlock code by fax Fax the registration form that you printed using RetailEnterprise Central to **03 983 2610**.

We will fax you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

To receive the unlock code by mail Mail the registration form that you printed using RetailEnterprise Central to:

MYOB New Zealand Pty Ltd
PO Box 2864
Christchurch

We will mail you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

Hong Kong

To receive the unlock code by fax You must complete the printed registration form supplied in the RetailEnterprise Central box or download a registration form from myob.com.hk. Fax the completed registration form to **(852) 3402 9848**.

We will fax you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' on page 20.

Malaysia

To receive the unlock code by fax Fax the registration form that you printed using RetailEnterprise Central to **(603) 8991 0177**.

We will fax you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' below.

Singapore

To receive the unlock code by fax Fax the registration form that you printed using RetailEnterprise Central to **(65) 6505 6577**.

We will fax you confirmation of your registration, including your unlock code. When you receive your unlock code, enter it in RetailEnterprise Central. See 'Step 3: Enter the unlock code in RetailEnterprise Central' below.

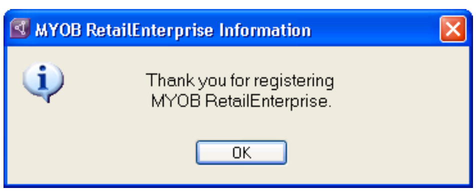
Step 3: Enter the unlock code in RetailEnterprise Central

When you have received your unique unlock code from MYOB, you need to enter it in RetailEnterprise Central. The RetailEnterprise Central registration reminder appears every time you open RetailEnterprise Central while unregistered.

1 Start MYOB RetailEnterprise Central and choose to register. The registration form appears.

2 Enter your unlock code in the **Unlock Code** field.

3 Click **Register Unlock Code**. The following window appears.



4 Click **OK**. You have now registered your copy of MYOB RetailEnterprise Central.

Do you need additional shop licences?

When your business first installs and registers MYOB RetailEnterprise Central, you are supplied with five shop licences. If your business needs to bring more shops online after you have registered RetailEnterprise Central, you must purchase and register additional shop licences.

NOTE: Additional licences are only available for current versions of RetailEnterprise

How do I purchase additional shop licences?

You can purchase additional shop licences when you register RetailEnterprise Central for the first time, or at a later stage.

You can purchase additional shop licences by calling MYOB.

If you are in...	call...
Australia	1300 555 115
New Zealand	0508 123 123
Malaysia	1300 88 0883 or (603) 8991 0166
Singapore	(65) 6505 6582
Hong Kong	(852) 3402 9882

After MYOB processes your request, you will receive confirmation that you have purchased additional shop licences. At the same time you will be given an unlock code that entitles you to start using the additional shop connections. You must use this unlock code in the procedure below to register an additional shop licence.

NOTE: You must register RetailEnterprise Central You must have registered RetailEnterprise Central before you can purchase an additional shop licence. You can purchase additional shop licences at the same time as you register MYOB RetailEnterprise Central v4.

How do I register an additional shop licence?

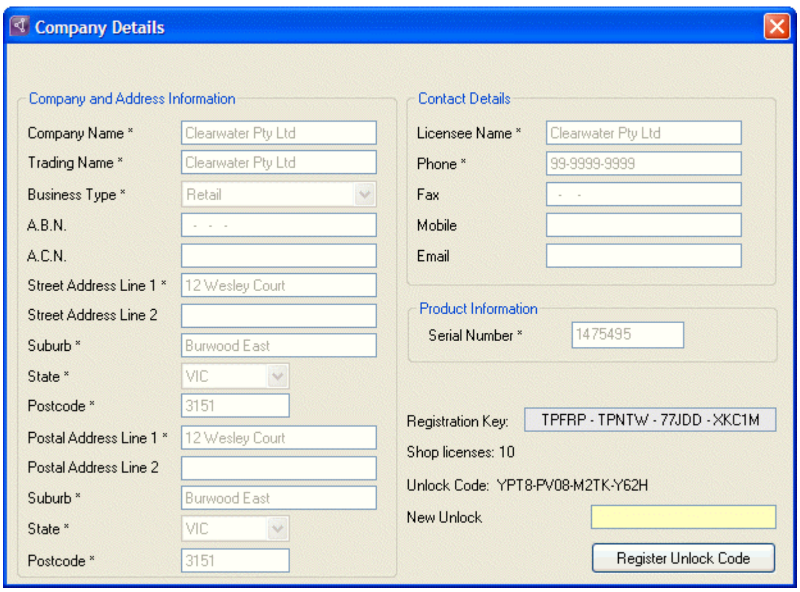
You need to register your additional shop licences before you can bring the shops online and start sending or collecting information from them.

TIP: Still using an evaluation copy of RetailEnterprise Central? If you have not yet registered your copy of MYOB RetailEnterprise Central v4, do so now as described in 'Registering MYOB RetailEnterprise Central' on page 16.

1 Do you have the unlock code supplied by MYOB for your additional shop licences?
   - If yes, go to step 2 below.
   - If no, see 'How do I purchase additional shop licences?' on page 21.

2 Double-click the MYOB RetailEnterprise Central v4 icon on your desktop. The **MYOB RetailEnterprise - Central** window appears.

3 Go to the **Help** menu and choose **Company Details**. The **Company Details** window appears.



4 Enter the unlock code supplied by MYOB in the **New Unlock Code** field.

5 Click **Register Unlock Code**.

You can now try out your additional shop licences by sending or receiving information from the shops. For more information about this, see 'Sending messages to shops' on page 61 and 'Collecting summary information from shops' on page 67.

2 Setting Up

This chapter describes how to set up MYOB RetailEnterprise Central for your business. It explains how to:

- set regional options for your computer
- set RetailEnterprise Central options
- set up dial-up networking and email communication between your central office and shops for Windows Vista Ultimate, Windows XP Professional and Windows 2000.

The first part of the chapter describes some basic navigation techniques you'll need for using RetailEnterprise Central.

Use this information after you have installed and registered the software as described in the Getting Started chapter.

Starting MYOB RetailEnterprise Central

To start RetailEnterprise Central

Do one of the following:

- Double-click the MYOB RetailEnterprise Central v4 icon on your desktop.
- Go to **Start**, choose **Programs**, **MYOB RetailEnterprise - Central v4**, and then **MYOB RetailEnterprise - Central v4**.

You are now ready to start using RetailEnterprise Central.

Navigating

This section describes the basics of navigating your way around MYOB RetailEnterprise Central in your central office. The basics of navigation include the use of:

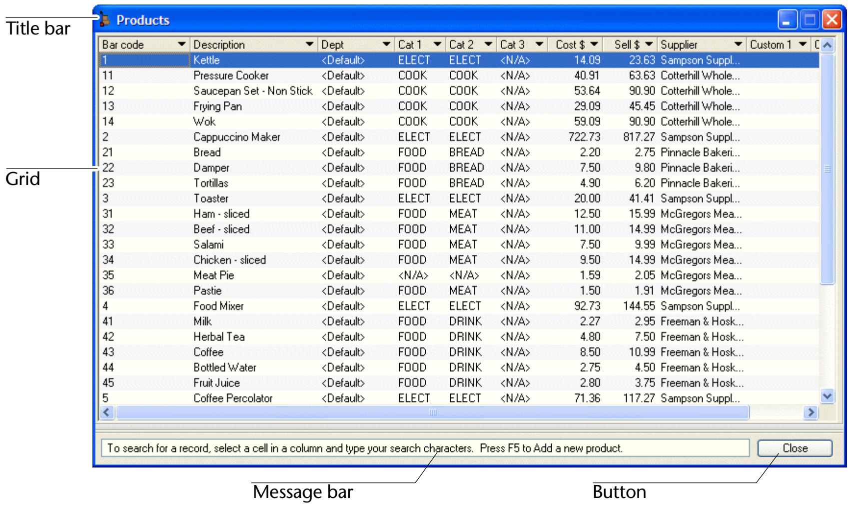
- common Windows® features such as grids, buttons, and checkboxes – that mainly involve using the mouse
- fields for data entry and display
- keyboard features such as shortcut keys.

If you've used Windows before, you will already be familiar with most of the techniques you need to get around in RetailEnterprise Central.

Common Windows features

RetailEnterprise Central window example

The illustration below shows the title bar, a grid, button and the message bar:



NOTE: To display the example window (Products window) To display the example window above, go to the **Information** menu and choose **Products**.

Title bar

The title bar identifies the product and function of the current window.

Grids

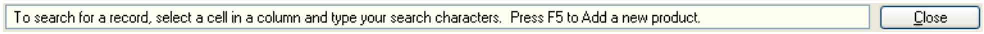
A grid is an arrangement of data with two or more columns in which the information in the first column relates specifically to the information in the other column or columns.

Buttons

Buttons are provided for different functions. For example, clicking the **Commit** button (shown below) saves data to the database.

Message bar

The message bar displays information relevant to the current field. In RetailEnterprise Central, most windows have a message bar at the bottom of the window as shown below.



The field information in the message bar changes as you move from field to field.

Checkboxes

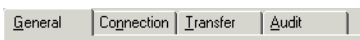
Checkboxes let you select or deselect options. You can either:

- select to turn on an option or
- deselect to turn off an option.

You can select more than one checkbox when there are multiple checkboxes, if applicable.

Tabs

Tabs enable you to access many different options or functions from the same window.



Types of fields

There are various types of fields in RetailEnterprise Central which are used for either entering data or displaying information. Fields that are used to enter data are usually referred to as input fields, while fields that are filled by the system are referred to as display fields.

Text fields A text field enables you to enter a combination of letters, numbers or special characters. If the field already contains text, you can delete the text, change it or overwrite it completely.

List fields A list field enables you to select a valid entry from a list of available options or entries. The list is displayed in either a small, fixed window that you can scroll to select the option you need, or from a drop-down list you have to activate.

Drop-down lists show a list of available options for a field. To display a drop-down list, click the arrow to the right of the field as shown below:

While in some list fields you can only select from the list of available options, in other fields you can either select from the list or type a new entry that is not in the list.

Keyboard shortcuts

Some RetailEnterprise Central functions can be performed using standard keyboard shortcuts; others are specific to RetailEnterprise Central.

STANDARD NAVIGATION KEYS

Press ...	To ...
Tab	Move to the next step
Enter	Move to the next step
Shift+Tab	Move back one step
Esc	Close the current window
Spacebar	Select an option in a window
¦	(Up arrow) Move up in a list or grid
Ø	(Down arrow) Move down in a list or grid

FUNCTION KEYS

Press ...	To ...
F1	Open the Help (from any window)
F2	Open the **Search for Shops** window (from **Transfer Audit** window and **Connection Event Logs** window)
F5	Create a new item (for Products, Shops, Suppliers, Regions)

FILE MENU COMMANDS

Press ...	To ...
Ctrl+N	Create a new item (for Products, Shops, Suppliers, Regions, Tax Codes, Messages)
Ctrl+O	Open the item you have selected (for Products, Shops, Suppliers, Regions, Tax Codes, Messages)

INFORMATION MENU COMMANDS

Press ...	To ...
Ctrl+R	Open the **Products** window
Ctrl+S	Open the **Shops** window
Ctrl+U	Open the **Suppliers** window
Ctrl+G	Open the **Regions** window
Ctrl+X	Open the **Tax Codes** window

CREATE MENU COMMANDS

Press …	To …
CTRL+M	Open the **Messages** window
CTRL+D	Open the **Product Update Transfers** window

TRANSFERS MENU COMMANDS

Press …	To …
CTRL+T	Open the **Manual Transfer** window

Closing a window

In RetailEnterprise Central there are three ways to close a window:

- Click **Close**
- Press ESC
- Click the close icon () in the top right corner of the window.

Specifying regional settings

To get the best results from RetailEnterprise Central, you need to specify the correct regional settings on your computer.

In Windows, make sure your system settings reflect the following:

Numbers tab	• Decimal symbol is set to a decimal point • No. of digits after decimal is set to 2 • Digit grouping symbol is set to a comma • Negative number format is set to -1.1 • Measurement system is set to Metric
Currency tab	• **[Australia, New Zealand, Hong Kong and Singapore]** Currency symbol is set to $ **[Malaysia]** Currency symbol is set to RM • Decimal symbol is set to a decimal point • No. of digits after decimal is set to 2 • Digit grouping symbol is set to a comma
Date tab	• **[Australia, New Zealand, Malaysia and Singapore]** Short date style is set to dd/MM/yyyy **[Hong Kong]** Short date style is set to yyyy/MM/dd

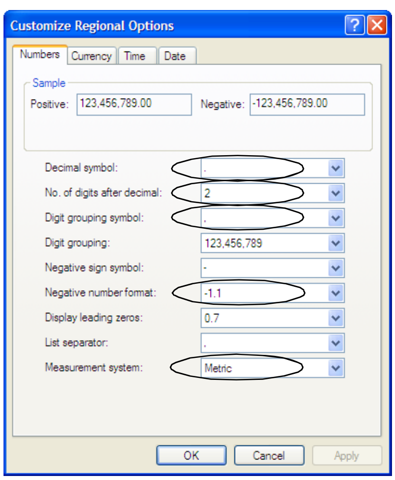
To set your regional settings

1 Open your regional settings window:

If you are using...	do this...
Windows Vista	1 Go to the **Start** menu and choose **Control Panel**. 2 Click **Clock, Language, and Region** and then click **Change the date, time, or number format**. 3 In the **Formats** tab, select your language and region from the **Current format** drop-down list (for example **English (Australia)**). 4 click **Customize this format**.
Windows XP	1 Go to the **Start** menu and choose **Control Panel**. 2 Click **Regional and Language Options**. 3 In the **Regional Options** tab, select your language and region from the **Standards and formats** drop-down list (for example **English (Australia)**). 4 Click **Customize**.
Windows 2000	1 Go to the **Start** menu, choose **Settings** and then choose **Control Panel**. 2 Double-click **Regional Options**. 3 In the **General** tab, select your language and region from the **Your locale (location)** drop-down list (for example **English (Australia)**).

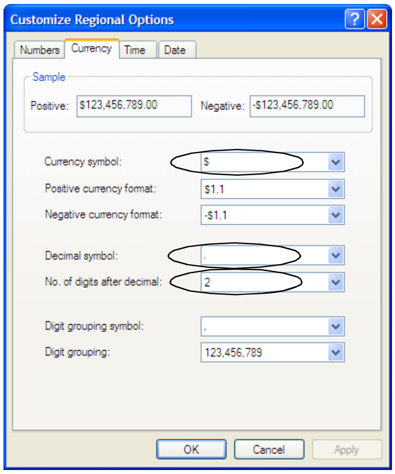
2 Click the **Numbers** tab and set the following:

- Decimal symbol to a decimal point
- No. of digits after decimal to 2
- Digit grouping symbol to a comma
- Negative number format to -1.1
- Measurement system to Metric.



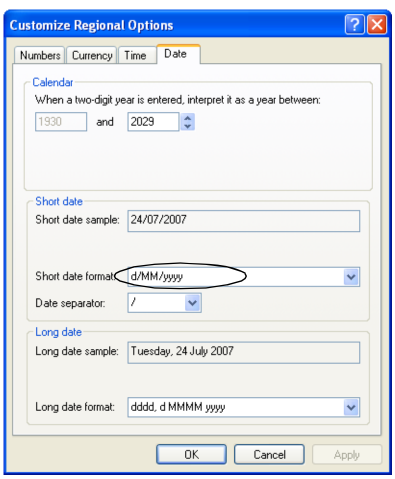
3 Click the **Currency** tab and set the following:

- **[Australia, New Zealand, Hong Kong and Singapore]** Currency symbol to $
  [Malaysia] Currency symbol to RM (you will have to enter this manually)
- Decimal symbol to a decimal point
- No. of digits after decimal to 2
- Digit grouping symbol to a comma



4 Click the **Date** tab and set the short date format to:

- **[Australia, New Zealand, Malaysia and Singapore]** **dd/MM/yyyy**
  [Hong Kong] **yyyy/MM/dd**



5 Click **Apply** and then click **OK**.

Specifying RetailEnterprise Central settings

These settings are fundamental to the correct operation of MYOB RetailEnterprise Central in your central office.

The settings include:

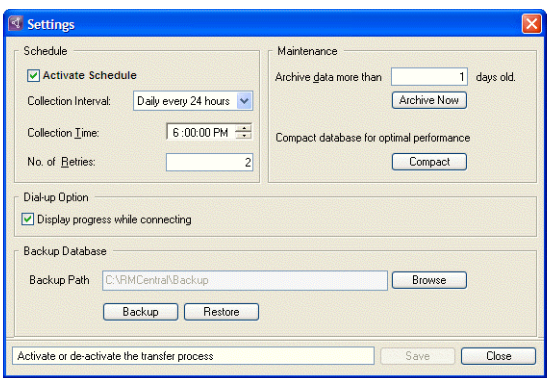
- schedule time for the collection process
- archive options
- backup options.

Although you need to set up these options when you first start using RetailEnterprise Central, you can change these settings at a later stage if required. For example, if you initially set up a start time for the collection process that is too early for some shops, you can change the start time later.

For more information on the collection process, see 'Collecting summary information from shops' on page 67.

To specify your RetailEnterprise Central settings

1 Go to the **File** menu and choose **Settings**. The **Settings** window appears.



2 If you want to automate the collection process, select the **Activate Schedule** option.

3 In the **Collection Interval** field, specify how often you want to collect summary information from your shops.
   - If you select the **Daily every 24 hours** option, enter the time you want RetailEnterprise Central to start collecting information in the **Collection Time** field. For example, if you want RetailEnterprise Central to collect information every day at 6.00pm, enter that time in the **Collection Time** field.
   - If you select one of the other available options, such as **Every hour**, RetailEnterprise Central will automatically collect information at the next interval, on the hour. For example, if the time is currently 10.48am, and you select the **Every hour** option, RetailEnterprise Central will start collecting information at 11.00am, and every hour after that.

4 In the **No. of Retries** field, type the number of retries the collection process should attempt when dialling up a shop or contacting a shop on a LAN/WAN.

For example, if this field is set to '3' and the first dial-up attempt fails, the collection process will make three more attempts to dial up a shop.

NOTE: Unsuccessful collection If the connection attempt is unsuccessful, the summary information for that shop cannot be collected. This failure is recorded in the Event Log for you to review and resolve the problem. See 'To view the connection event log' on page 82.

5 In the **Archive data more than x days old** field, enter the maximum number of days you want to keep current data for.

NOTE: Archiving non-current data Non-current data is retained in a separate archive database. Non-current data is any shop or event log data older than the number of days entered in the **Archive data more than x days old** field. This means that your reports will not include non-current data that has been archived.

6 To compact the database, click **Compact**. Click **Yes** to close any open RetailEnterprise Central windows and begin database maintenance. This is a useful procedure if your database is large as it can improve the speed of data retrieval.

7 If you want to see a connection progress window when you connect through a dial-up connection, select the **Display progress while connecting** option.

If you do not select this option, RetailEnterprise Central will connect in the background and only display the result of the connection attempt.

8 To change the path of the backup file to be created:

a Click **Browse** to display the **Open** window.

b Browse for the required location and then click **Open**.

9 Click **Save** to save your changes to the settings options.

For more information about archiving, see 'To archive non-current data' on page 86.

For more information about backing up, see 'To back up your Central database' on page 85.

10 Click **Close** to close the **Settings** window.

To change your settings

Changes to the **Schedule** settings in the **Settings** window will only take effect at the time you enter as the start time (if you chose the **Daily every 24 hours** option), or at the next interval (if you chose one of the other collection interval options).

Changes to the **Maintenance** settings normally take effect when the automatic archive process happens, unless you click **Archive Now** to archive immediately.

Changes to the **Backup Database** settings only take effect when you click **Backup** to back up immediately.

To make changes to your RetailEnterprise Central settings, see 'To specify your RetailEnterprise Central settings' on page 30.

Setting up your Central database

When you first install MYOB RetailEnterprise at your central office, you will need to set up your Central database of:

- suppliers and products
- regions and shops.

You have to set up the suppliers before setting up products because each product must be assigned to a supplier. Similarly, you have to set up your regions before setting up shops so each shop can be assigned to a region.

Setting up tax codes

When you create a stock item, you need to assign a tax code.

Basic tax codes have been set up in RetailEnterprise Central, and are described in the following table. In addition to the tax codes listed, you have the option to add new tax codes depending on the needs of your business. See 'To create a new tax code' on page 33 for more information.

Region	Tax Code	Description
Australia	FRE (GST-Free)	This tax code is used if you are operating under the GST system, for items that are GST-free such as some types of food, medical supplies, educational material, etc.
	GNR (GST Non-Registered)	This tax code is used if you are not registered for GST (i.e. if your annual turnover is less than $50,000 or if you are a non-profit organisation).
	GST (Goods & Services Tax)	This tax code is used if you are operating under the GST system, for items that attract GST.
	INP (Input Taxed)	This tax code is used if you are operating under the GST system, for input taxed supplies such as finance charges and residential rents.
New Zealand	E (Exempt)	This tax code is used for items that are exempt from or not subject to GST such as financial services, and donated goods and services that are sold by non-profit bodies.
	S (Standard 12.5% GST)	This tax code is used if you are operating under the GST system, for items that attract GST. This tax code is set up for a rate of 12.5%.
	Z (Zero Rated)	This tax code is used for zero-rated supplies. Zero-rated supplies are covered by GST laws, but GST is charged at a rate of 0%.
Malaysia	GVT (Government Tax)	Use this code for stock items that attract Government Tax.

Region	Tax Code	Description
Singapore	GST (Goods & Services Tax)	Use this code for stock items that attract GST.
All regions	N-T (No tax)	**[Australia and New Zealand]** This tax code is used for items that are out of scope of GST (for example, in Australia, salaries and wages and security deposits). **[Hong Kong, Malaysia and Singapore]** Use this code for stock items that do not attract tax.

NOTE: Using tax codes If you are unsure about the tax applicable for an item, check with your tax consultant or your local taxation office. You can change the default tax code for sales and purchases.

Setting up default tax codes Default tax codes can be set for sales and purchases.

When you set up default sale and purchase tax codes, any new stock item you create in RetailEnterprise Central will be assigned these default tax codes.

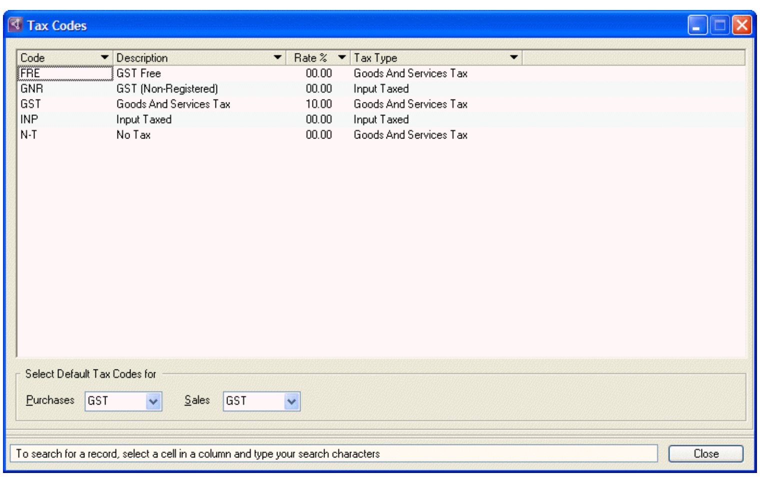
Make sure the default tax codes you enter reflect the tax code of the majority of your stock items.

[Australia] For example, the majority of items that a gift shop purchases and sells will attract GST, therefore, the default purchase and sale tax codes should be set to GST. On the other hand, a fruit shop should probably set the purchase tax code to FRE (as fruit is GST-free), and default sale tax code to FRE, as fresh food does not attract GST.

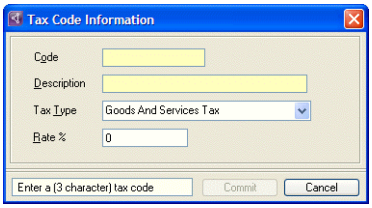
You can change an item's default tax codes in the **Product Information** window (see 'To set up a product' on page 35).

To create a new tax code

1 Go to the **Information** menu and choose **Tax Codes**. The **Tax Codes** window appears.



2. Go to the **File** menu and choose **New** (or press CTRL+N). The **Tax Code Information** window appears.



3. Enter the tax code you want to create in the **Tax Code** field. This code can be up to three alphanumeric characters.
4. Enter a description for the tax code in the **Description** field.
5. Select the tax type by clicking in the **Tax Type** field and choosing from **Goods and Services Tax**, **Input Taxed**, and **Sales Tax**.
6. Enter the tax rate in the **Rate** field.
7. Click **Commit** to commit the information.
8. Click **Close** to close the **Tax Codes** window.

Setting up suppliers and products

Before you start to set up suppliers, ensure that you have a complete list of all the suppliers used by the shops.

To set up a supplier

CAUTION: Keep data consistent with RetailManager It is important to keep supplier details consistent with RetailManager. You cannot send supplier updates to shops through RetailEnterprise.

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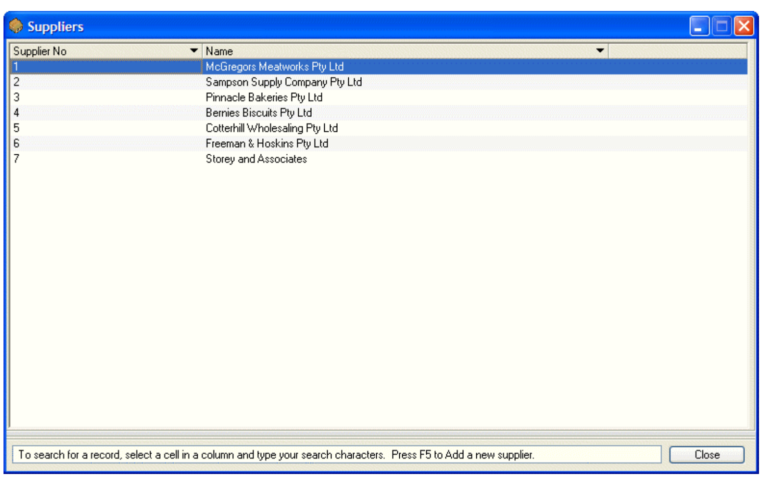
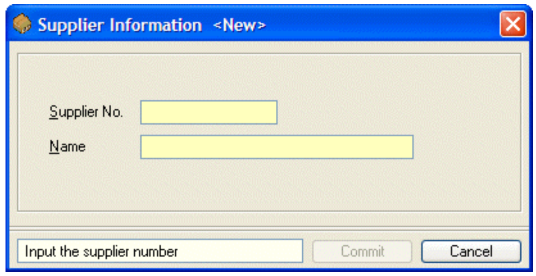
1. Go to the **Information** menu and choose **Suppliers**. The **Suppliers** window appears.



2 Go to the **File** menu and choose **New** (or press F5 or CTRL+N). The **Supplier Information <New >** window appears.



Supplier No.	Enter a supplier number of your choice. You can enter a supplier number that contains letters or numbers or a combination of both.This can be up to six characters long, for example, 'ABC100'.
Name	Enter the name of the supplier. This name can be up to 15 characters long.

If the `Supplier No./description already exists!` message appears, you have entered a supplier number or description that already exists in the supplier database. In this case, you must assign a unique supplier number or description, or you can modify the existing supplier.

3 Click **Commit** to save the supplier details.

4 If you want to set up another supplier, go to step 2 above.

5 Click **Close** to close the **Suppliers** window.

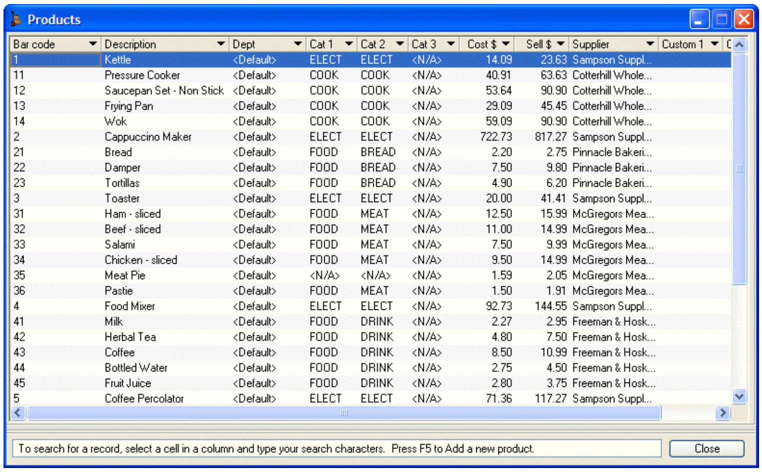
To set up a product

In the RetailEnterprise Central product database, each product must have a unique identity based on the bar code. For example, it is possible to have two or more products with the same department, categories and description, as long as they have a different bar code.

CAUTION: Keep data consistent with RetailManager When you are setting up products, it is important to use existing suppliers and tax codes that you have defined in RetailManager for the shops. If you don't, the product data may be rejected when you load Centralised Updates.

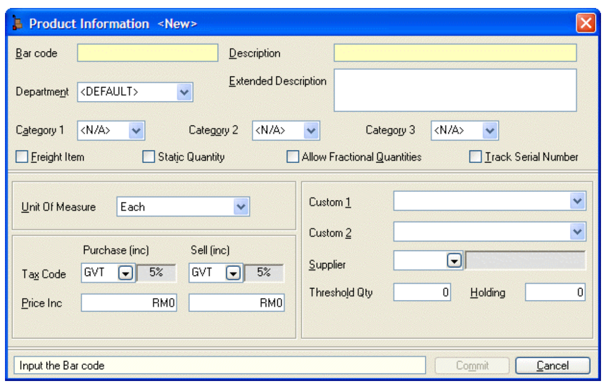
NOTE: Creating departments and categories In RetailManager, you can use the **Departments & Categories Assistant** to create departments and categories. This assistant is not available in RetailEnterprise. If you want to use the departments and categories you have defined in RetailManager in RetailEnterprise, you will need to either enter them into RetailEnterprise Central manually, or import them from RetailManager. For more information on exporting stock information from your RetailManager shopfront, see 'To export data from a RetailManager shopfront' on page 87. For more information on importing stock information into RetailEnterprise Central, see 'To import data into RetailEnterprise Central' on page 91.

1 Go to the **Information** menu and choose **Products**. The **Products** window appears.

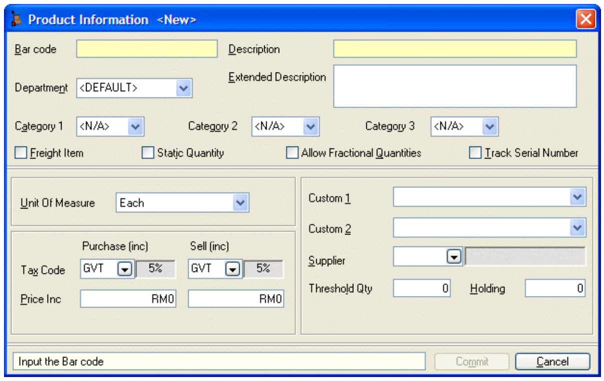


2 Go to the **File** menu and choose **New** (or press F5 or CTRL+N).

The **Product Information <New>** window appears.



Bar code	Enter a unique product code of your choice. You can enter product codes that contain letters or numbers or a combination of letters and numbers. For example, you can enter a product code of 'CD0120'.
Department	Select the relevant department for the product. If the department doesn't exist, type a new department.
Category 1, 2 and 3	Select the relevant categories for the product. If a category doesn't exist, type a new category.
Description	Enter the description of the product. This description can be up to 40 characters long and must be unique for the bar code entered above.
Extended Description	Enter a longer description of the product, if required.
Freight Item	If the product is a freight item, select this option.
Static Quantity	If sales of the product should not reduce the stock level in the shops, select this option.



Allow Fractional Quantities	If your shops can buy or sell partial quantities of the product, select this option.
Track Serial Number	If you want the shops to track the serial number of the product, select this option.
Unit of Measure	Select the relevant unit of measure for the product.
Tax code – Purchase	Select the tax type charged when purchasing this product from the supplier.
Price Inc – Purchase	Enter the purchase price of the product, inclusive of tax if applicable.
Tax code – Sell	Select the tax type charged when selling this product.
Price Inc – Sell	Enter the selling price of the product, inclusive of tax if applicable.
Custom 1	Enter or select an additional method of grouping the product that is specific to your business, if required.
Custom 2	Enter or select an additional method of grouping the product that is specific to your business, if required.
Supplier	Select the supplier for the product.
Threshold Qty	Enter the minimum stock level below which the product should be reordered.
Holding	Enter the standard quantity to reorder for this product.

If the `This bar code already exists!` message appears, you have entered a product with a bar code that already exists in the product database. In this case, you must assign a unique bar code, or you can modify the existing product.

3. Click **Commit** to save the product details.
4. If you want to set up another product, go to step 2 on page 36.
5. Click **Close** to close the **Products** window.

Setting up regions and shops

Before setting up your shops you must set up the regions to group the shops by. This is a geographical grouping, so before starting you need to consider the areas of your business and plan how to group your shops. If you are a small retail business, you can create a single region and assign all your shops to it.

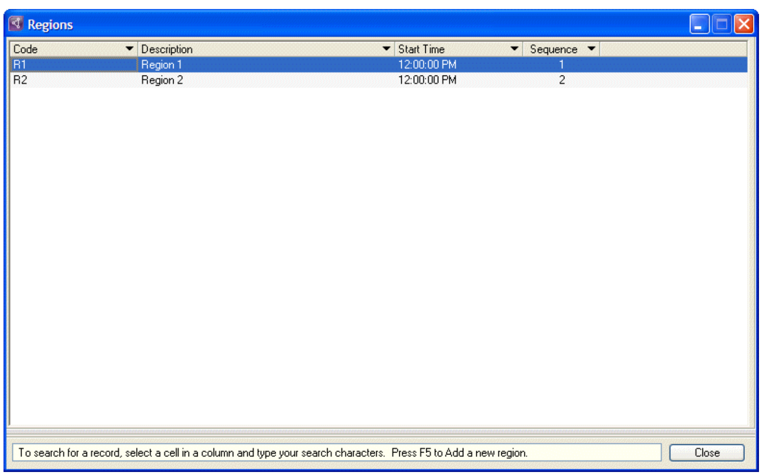
The table below provides some different examples of how regions can be set up.

If you operate in...	you might set up a region for each...	for example
More than one state/island	State/island you operate in	**[Australia]** NSW, QLD, ACT **[New Zealand]** North, South
Different areas or towns of the same state/island	Area or town of the state/island you operate in	**[Australia]** Gold Coast, Sunshine Coast, Rockhampton **[New Zealand]** Otago, Marlborough, Auckland, Taranaki
Only one area	Metropolitan area or suburb/city you operate in	**[Hong Kong, Malaysia and Singapore]** North western, Central, Eastern

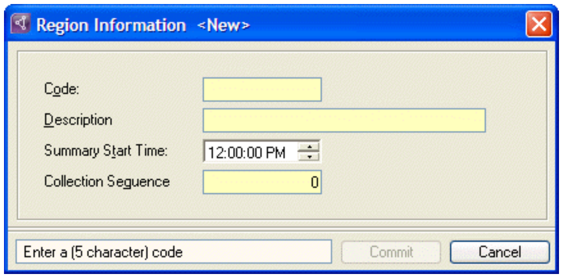
To set up a region

To create details of a region in RetailEnterprise Central, perform the following steps:

1 Go to the **Information** menu and choose **Regions**. The **Regions** window appears.



2 Go to the **File** menu and choose **New** (or press F5 or CTRL+N). The **Region Information <New>** window appears.



Code	Enter a region code of your choice. You can enter a region code (up to six characters) that contains letters or numbers or a combination of both.
Description	Enter the description or name of the region.
Summary Start Time	Enter or select the start time for each shop in this region to create the summary information file for later collection. To ensure that this time is actually set in the shops, you have to dispatch the instruction to the shops for this region (see 'Manually transferring messages and updates' on page 65). Specify a time before the **Collection Time** set up in the **Settings** window (see 'To specify your RetailEnterprise Central settings' on page 30).
Collection Sequence	Enter the sequence number of the region. This is the sequence in which regions are processed when collecting summary information.

If the `Code/Description/Collection Sequence already exists!` message appears, you have entered a region code, description or collection sequence that already exists in the region database. In this case, you must assign a unique region code, description or collection sequence, or you can modify an existing region.

3 Click **Commit** to save the region details.

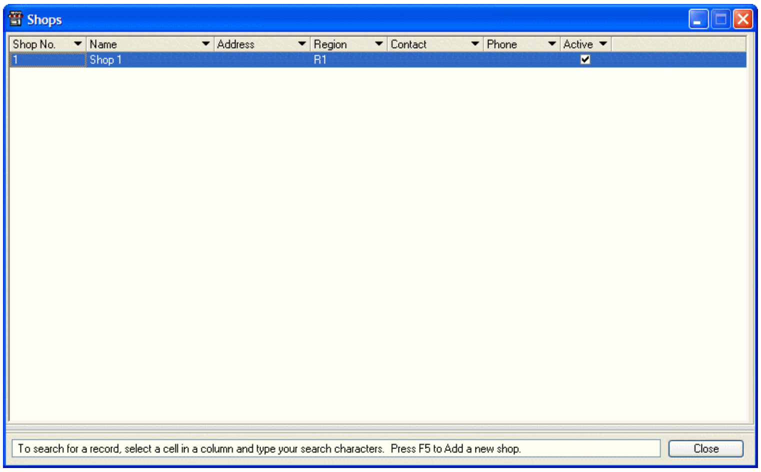
4 If you want to set up another region, go to step 2 above.

5 Click **Close** to close the **Regions** window.

To set up a shop

NOTE: Set up regions first A shop exists in a region, therefore, you must set up a region before you can add a shop to it.

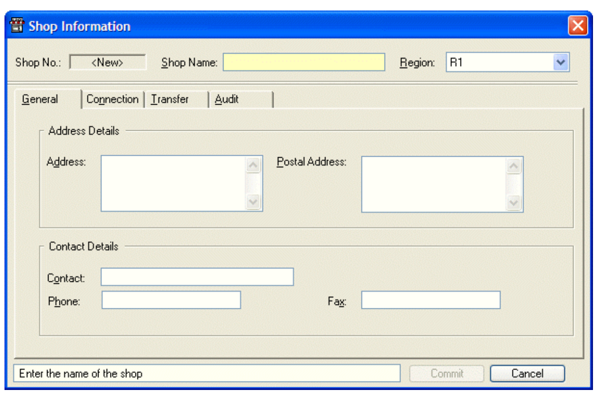
1 Go to the **Information** menu and choose **Shops**. The **Shops** window appears.



2 Go to the **File** menu and choose **New** (or press F5 or CTRL+N). The **Shop Information** window appears.

If you have not created any regions an error message appears. You will need to go back and create a region before you create a shop (see 'To set up a region' on page 38).

The **Shop Information** window has a header area which displays the number, name and region of the shop you have selected or are creating.



Shop No	The shop number is allocated automatically.
Shop Name	Enter the name of the shop.
Region	Select the required region from the list.

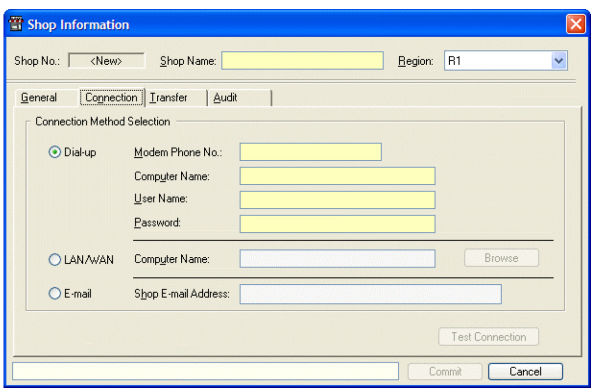
The four tabs contain information about the shop:

- **General**—the address and contact details of the shop
- **Connection**—how you communicate with the shop (modem, email, etc.).
- **Transfer**—what data you send to and collect from the shop
- **Audit**—the history of transfers between the shop and your central office (generated automatically by RetailEnterprise Central).

General tab The **General** tab contains the contact details for the shop and is divided into two areas: **Address Details** and **Contact Details**.

Address Details	
• Address	Enter the street address of the shop. To enter a new line, press SHIFT+ENTER.
• Postal Address	Enter the postal address of the shop.
Contact Details	
• Contact	Enter the name of the primary contact for the shop.
• Phone	Enter the area code and phone number for the shop.
• Fax	Enter the area code and fax number for the shop.

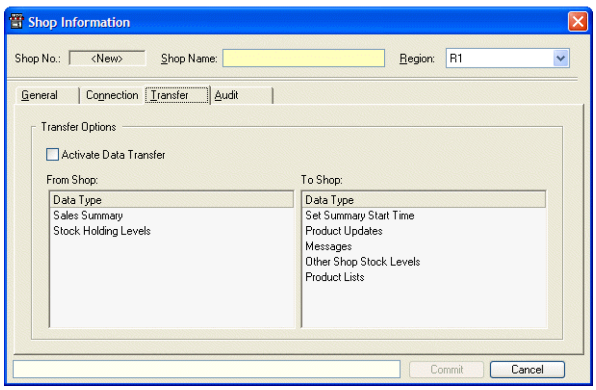
Connection tab The **Connection** tab allows you to nominate the method of communicating with the shop. You cannot communicate with a shop or test its connection without this information.



Dial-up	
• Modem Phone No.	Enter the area code and phone number for the modem connected to your shop computer containing the RetailManager database.
• Computer Name	Enter the computer name for the shop. If there is more than one RetailManager computer at the shop, enter the name of the computer where RetailEnterprise Shop is installed.
• User Name	Enter the user name used for logging on.
• Password	Enter the password used for logging on. This is displayed as a string of asterisks.
LAN/WAN	

• Computer Name	Enter the computer name for the shop. If there is more than one computer at the shop, enter the name of the computer where MYOB RetailEnterprise Shop is installed. Click **Browse** to locate the computer on the network.
E-mail	
• Shop E-mail Address	Enter the email address of the shop. If you have entered your email account settings in MYOB RetailEnterprise, the shop summary file is automatically sent when the computer goes online. If third-party email software will be used, the shop summary file is automatically placed in the Outbox of the software and will be sent when the email client is online.

Transfer tab The **Transfer** tab allows you to specify the inbound and outbound data required for the transfer and collection processes. The selections in the left panel determine the data to be collected; the right, the data to be transferred.



Transfer Options	
Activate Data Transfer	If you want to activate the shop's data transfer and collection, select this option. **NOTE:** There is a limit to the number of shops you can create when this option is selected (see page 43).
From Shop	
• Sales Summary	If you want to collect sales summary data from the shop, select this option.
• Stock Holding	If you want to collect stock holding data from the shop, select this option.
To Shop	
• Set Summary Start Time	If you want to synchronise the summary start time at the shop to the region, select this option.
• Product Updates	If you want to send product updates to the shop, select this option.
• Messages	If you want to send messages to the shop, select this option.
• Other Shops Stock Holdings	If you want this shop to receive stock holding information from other shops in your RetailEnterprise network, select this option.

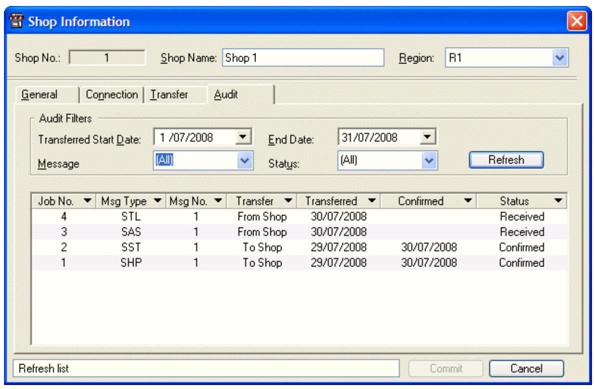
If you receive an error message during the collection process, you may be trying to collect summary information from more shops than are licensed.

You can create as many shops as you want with the **Activate Data Transfer** option deselected. However, there is a limit on the number of shops from which you can collect information with the option selected. This limit is the number of shop licences you have purchased.

When you first purchase MYOB RetailEnterprise your registration includes up to five shop licences—unless you purchase additional licences. In this scenario, if you later tried to collect information from a sixth shop with the **Activate Data Transfer** option selected, the above message appears. For more information about arranging additional shop licences, see 'How do I purchase additional shop licences?' on page 21.

Audit tab The **Audit** tab displays the history of transfers for the shop. You can sort the data in its column by clicking the small arrow at the top of the column.

By using the audit filters, you can search for information between certain dates and of a certain type and status. When you have set up the search, click **Refresh** to run the search and display the results.



Audit Filters

• Transferred Start Date	Click the drop-down arrow to display a calendar. Select the start date for the search.
• End Date	Click the drop-down arrow to display a calendar. Select the end date for the search.
• Status	Click the drop-down arrow and nominate the status of the transfers you are searching for, for example, Pending, Confirmed, etc.
• Transfer	Click the drop-down arrow to select whether the messages were sent to or from the shop.

3 When you have completed the information in each tab, click **OK** to continue.

4 If you want to set up another shop, go to step 2 on page 40.

5 Click **Close** to close the **Shops** window.

Testing the connection to a shop

You should test the connection to a shop when:

- you create a new shop
- you change the computer connection details of an existing shop
- there are problems connecting to a shop.

NOTE: Has the shop been set up for communications? You cannot successfully test the connection until the shop has been set up for communications as described in the *MYOB RetailEnterprise Shop User Guide*. The guide is supplied on the RetailEnterprise Central and RetailEnterprise Shop installation CDs.

To test the connection to a shop

1 Go to the **Information** menu, choose **Shops**, click the **Connection** tab and then click **Test Connection**.
   - If you have chosen the *dial-up* option, RetailEnterprise Central:
     - activates your modem
     - dials up the number of the modem in the shop
     - tries to establish a connection.
   - If you are connected to a *LAN/WAN*, the process occurs automatically.
   - If you have chosen the *e-mail* option, a test message is sent to the selected shop when you go online. You will need to check that the shop received the test message.

2 If the test connection is successful and the message 'Test connection to shop xxx was successful' appears:
   a Click **OK** to acknowledge the message.
   b Go to step 4 below.

3 If the test connection is unsuccessful and a failure message appears, click **OK** to acknowledge the message. Take appropriate follow-up action including:
   - viewing the Event Log to view the sequence of events involved in the test connection as described in 'To view the connection event log' on page 82
   - contacting an individual shop to determine if the computer and modem are correctly connected.

4 Click **Close** to close the **Shops** window.

Setting up dial-up networking between central office and shops

CAUTION: Dial-up networking These procedures, such as setting up user accounts and assigning security levels, assume a knowledge of Windows communications protocols and administrative functions.
It is essential that these procedures are performed correctly, so if you do not feel confident in this **we strongly recommend that you consult an MYOB RetailManager Professional**.

However, complete information and instructions are provided in the *RetailEnterprise Communications Setup Guide* which you can access from the **Help** menu.

This section provides brief guidelines for setting up the communications options for RetailEnterprise Central in the following operating systems:

- Windows Vista Ultimate
- Windows XP Professional
- Windows 2000.

Before you can set up communications options you must first install RetailEnterprise in your central office and shops.

When you choose to use dial-up as your method of connecting between RetailEnterprise Central and RetailEnterprise Shop, you must set up and configure a dial-up network connection at your Central location, and then set up and configure a dial-up network connection at each of your shops.

It is essential that you complete the procedures to ensure that you benefit from the additional features provided by RetailEnterprise. These additional features involve connecting your central office to your shops using dial-up networking.

The procedures for setting up dial-up network connections vary with each version of the Windows operating system.

Before you start

Make sure that:

- your modem has been installed and configured according to the modem manufacturer's instructions
- you have installed and registered MYOB RetailEnterprise Central
- you are logged in to your computer as an Administrator (for Windows Vista users), or as an Administrator or Power User (for Windows XP or 2000 users whose computers only allow people with administrator privileges to install programs)

> **NOTE: Logging into Windows Vista as a Standard user** If you have the Administrator password, you may be able to log into Windows Vista as a Standard user. You can then set up dial-up networking.

- you have the appropriate Windows operating system installation CD available (You might need your Windows installation CD to install Windows networking components.)

Setting up in Windows Vista Ultimate

> **NOTE: Windows Vista** The steps for setting up dial-up communications may vary according to the edition of Windows Vista you are using. The method described here is for Windows Vista Ultimate, using the Classic View of the **Control Panel**.

Step	Action	Comments
1	Add RetailEnterprise Central as a Windows firewall exception	• Go to the **Control Panel** and double-click **Security Center** • Click **Windows Firewall** in the left pane • Click **Allow a program through Windows Firewall** • Add RetailEnterprise Central as an exception to the firewall.
2	Create dial-up connection	• Go to the **Control Panel** and double-click **Network and Sharing Center** • Click **Set up a connection or network** • Select **Connect to a workplace** • Select **Dial directly** • Enter `0` as the telephone number • Enter `RMShop` as the destination name • Select the **Don't connect now; just set it up so I can connect later** option • Leave the user name and password blank.
3	Configure dial-up connection	• Go to the **Control Panel** and double-click **Network and Sharing Center** • Click **Manage network connections** • Right-click the **RMShop** network connection and click **Properties** • In the **General** tab, delete the `0` from the phone number field.

Setting up in Windows XP Professional

NOTE: Windows XP The steps for setting up dial-up communications may vary according to the edition of Windows XP you are using. The method described here is for Windows XP Professional, using the Classic View of the **Control Panel**.

Step	Action	Comments
1	**[If you use Service Pack 2 or 3]** Add RetailEnterprise Central as a Windows firewall exception	• Go to the **Control Panel** and double-click **Security Center** • Click **Windows Firewall** • Add RetailEnterprise Central as an exception to the firewall.
2	Create dial-up connection	• Go to the **Control Panel** and double-click **Network Connections** • Select **Connect to the network at my workplace** • Select **Dial-up connection** • Name the connection `RMShop` • Leave the phone number blank—actual information is retrieved from the Central database.
3	Configure dial-up connection	• Go to the **Control Panel** and double-click **Network Connections** • Right-click the **RMShop** dial-up connection and click **Properties** • Set the **RMShop Properties** to: - Leave phone number blank - **Show icon in taskbar when connected** - Accept **Dialing options** defaults • Set **Security** to **Advanced (custom settings)** - Select **Allow these protocols** - Select **Allow older MS-CHAP version for Windows 95 servers** - Deselect **For MS-CHAP based protocols...** • Set **Networking** to: - **PPP: Windows 95/98/NT 4/2000, Internet** - **Internet Protocol (TCP/IP)** • Set **Internet Protocol (TCP/IP)** properties to: - **Obtain IP address automatically** - **Obtain DNS server address automatically**.

Setting up in Windows 2000

Step	Action	Comments
1	Specify dial-up networking	• Set location information: - Enter the country code - Enter area code and outside line number (if necessary) - Set dialling type • Set **Network Connection Type** to **Dial-up to private network** • Leave phone number blank—actual information is retrieved from the Central database • Set **Connection Availability** to **For all users** • Name the connection `RMShop`.
2	Configure dial-up connection	• Set the **RMShop Properties** to: - Leave phone number blank - **Show icon in taskbar when connected** - Accept **Dialing options** defaults • Set **Security** to **Advanced (custom settings)** - Select **Allow these protocols** - Select **Allow older MS-CHAP version for Windows 95 servers** - Deselect **For MS-CHAP based protocols...** • Set **Networking** to: - **PPP: Windows 95/98/NT 4/2000, Internet** - **Internet Protocol (TCP/IP)** • Set **Internet Protocol (TCP/IP)** properties to: - **Obtain IP address automatically** - **Obtain DNS server address automatically**.

Setting up email communication between central office and shops

NOTE: MYOB RetailEnterprise emails In this section, the term 'email communication' refers to sending and receiving MYOB RetailEnterprise messages and updates using your email account. MYOB RetailEnterprise does not handle other email messages.

You can set up email communication between your central office and shops in two ways:

- **Using MYOB RetailEnterprise's in-built email functionality**—if you have an email account, you can enter your account settings directly into MYOB RetailEnterprise. MYOB RetailEnterprise Central will then be able to send and receive messages and updates using your email server.

  To use this method, you will need an email account that uses either *POP* or *IMAP* protocols. You will also need to find out settings such as the incoming and outgoing server addresses. Contact your Internet or email service provider to find out these details.

- **Using third-party email software**—if you already have separate email software set up and configured, you can specify that MYOB RetailEnterprise use this software for communication. Your email software will need to be running and your computer online for RetailEnterprise to be able to send and receive messages and updates.

  To use this method, you will need email software that is *MAPI-compliant*. For example, software such as Microsoft Outlook, Microsoft Outlook Express, Eudora and Lotus Notes are MAPI-compliant. To find out whether your software is compliant, contact your software supplier.

To set up email communication

Step	Task	See
1	In RetailEnterprise Central, specify email settings	'To specify email settings in RetailEnterprise Central' on page 50
2	In RetailEnterprise Central, enter the email addresses of every shop that uses email as the communication method	If you have not yet set up the shop, see 'To set up a shop' on page 40 If you have already set up the shop, see 'To change an existing shop' on page 58
3	At every shop that uses email, open RetailEnterprise Shop and: • enter the email address of the Central Office • specify email settings for the shop • test the connection	The *MYOB RetailEnterprise Shop User Guide*

To specify email settings in RetailEnterprise Central

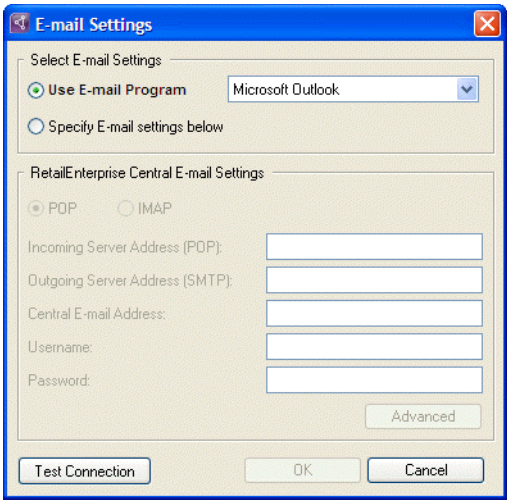
Before you start

For this method...	Check this...
[If you use Vista, or XP Service Pack 2 or 3] Add RetailEnterprise Central as a Windows firewall exception	• Go to the **Control Panel** and double-click **Security Center** • Click **Windows Firewall** • [Vista users only] Click **Allow a program through Windows Firewall** • Add RetailEnterprise Central as an exception to the firewall.
Entering your email account settings directly into MYOB RetailEnterprise	Check that you have all the information required to set up your account. Contact your Internet or email service provider to find out the following information: • incoming server address • outgoing server address • your account user name and password You should also check if any advanced settings are required. For example, there may be a specific port number you need to specify. Further, if you use a dial-up connection to connect to the Internet, check that you have configured your connection.
Specifying third-party email software	Check that your software has been set up correctly and that you are able to send and receive emails.

1 Ensure that your computer is online (that is, connected to the Internet).

2 Start MYOB RetailEnterprise Central.

3 Go to the **File** menu and choose **E-mail Settings**. The **E-mail Settings** window appears.



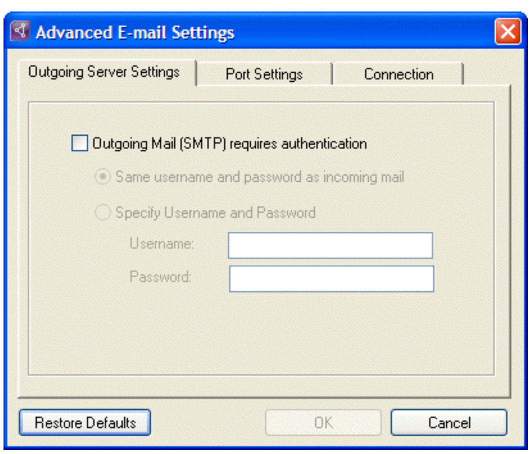
4 Choose how you want to send and receive RetailEnterprise messages and updates:

- If you want to enter your email settings directly into RetailEnterprise, select the **Specify E-mail settings below** option. Continue with step 5 below.
- If you want to use third-party email software, select the software from the **Use E-mail Program** drop-down list. Continue with step 11 on page 51.

5 Choose whether your email account is a **POP** account or an **IMAP** account.

6 In the **RetailEnterprise Central E-mail Settings** section, enter your email server addresses (incoming and outgoing), your email address, and your account's username and password. Contact your Internet or email service provider if you do not have this information.

7 Click **Advanced**. The **Advanced E-mail Settings** window appears.



8 Check if the settings in the **Outgoing Server Settings** and **Port Settings** tab need to be changed for your email account and make any necessary changes.

Contact your Internet or e-mail service provider if you are unsure whether you need to change the default options.

9 Click the **Connection** tab. Choose one of the following options:

- **Never dial a connection**—choose this option if you are online all the time (such as in a broadband connection) or if you are on a LAN or WAN network. You can also choose this option if you do **not** want RetailEnterprise to automatically connect to the Internet.
- **Dial whenever a network connection is not present**—choose this option if you use a dial-up connection to connect to the Internet **and** you would like RetailEnterprise to automatically dial this connection. You will need to select the dial-up networking connection you want to use.

NOTE: IMPORTANT: Remember to configure your dial-up connection You will need to configure the properties of your dial-up networking connection in Windows:
- if you want RetailEnterprise to automatically dial up, ensure that you have saved your username and password and have set up the connection to connect automatically.
- if you want the dial-up connection to disconnect automatically after RetailEnterprise has finished sending the updates and messages, you will need to specify an appropriate idle time.

For more details about configuring dial-up networking connections, consult Windows Help.

10 Click **OK**. The **E-mail Settings** window reappears.

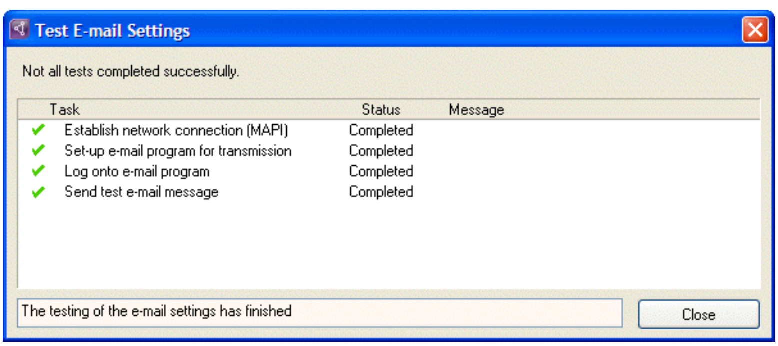
11 Test your connection:

a Ensure that your computer is online.

b If you chose to use third-party email software in step 4 on page 50, ensure that it is running.

c Click **Test Connection**.

A **Test E-mail Settings** window, similar to the one below, appears.



12 The **Test E-mail Settings** window shows the status of each task:

- If all the tasks appear with a ‘Completed’ status, the test was successful. Click **Close** to close the **Test E-mail Settings** window. Continue with step 13 on page 52.
- If one or more of the tasks have a ‘Fail’ status, the test was not successful. Click **Close** to close the **Test E-mail Settings** window and check that you have entered the correct settings in the **E-mail Settings** window. Or, if you’re using third-party email software, ensure that your email software is configured correctly and is running.
  Then, repeat the test (step 11 above) until you achieve a successful connection.

NOTE: Anti-virus software may block the connection If you are using anti-virus software, the test connection may fail because it is blocking the connection. You will need to change the anti-virus software settings to allow connections by RetailEnterprise.

13 In the **E-mail Settings** window, click **OK**.

Where to from here? Now that you have entered your email settings in RetailEnterprise Central, you will also need to complete the following steps:

- In RetailEnterprise Central, enter the email addresses for every shop that uses email as the communication method. If you have not yet set up the shop, see 'To set up a shop' on page 40. Or, if you have already set up the shop, see 'To change an existing shop' on page 58.
- At every shop that uses email, open RetailEnterprise Shop and enter the email address of the Central Office. You will also need to specify the email settings for the shop and test the connection. For more details, see your *MYOB RetailEnterprise Shop User Guide*.

3 Using RetailEnterprise Central

This chapter describes how you use MYOB RetailEnterprise Central on the computer installed in your central office, typically the head office of your organisation.

You can use RetailEnterprise Central to monitor, manage and report on the daily point-of-sale processing in RetailManager on your shop terminals.

Maintaining product details

This section describes how you maintain details of products used at the shops, using MYOB RetailEnterprise Central.

It is important to understand that the RetailEnterprise Central product database may not be an exact mirror of the RetailManager stock database in each shop. This may be so for a number of reasons including:

- whether it is your company's policy to maintain prices centrally, or allow shops to set their own prices and margins
- the functionality that allows each shop to either accept or reject your centralised updates
- the possibility that each shop will have stock items that are specific to the shop.

> **NOTE: Maintaining consistent databases** We recommend that, as far as possible, you try to keep your product database consistent with the stock items in your shops. Otherwise, the data you collect from the shops may become difficult to reconcile.

Product updates RetailEnterprise Central generates *automatic* product updates whenever you make changes to product details.You can also create a *manual* product update by specifying a list of products that you want to send to shops (see 'To manually create a product update' on page 55).

Once the updates are created or generated, RetailEnterprise Central assigns them to be transferred as part of the scheduled collection process (see 'Collection process' on page 68). You can also transfer the updates manually (see 'Manually transferring messages and updates' on page 65).

To change product details

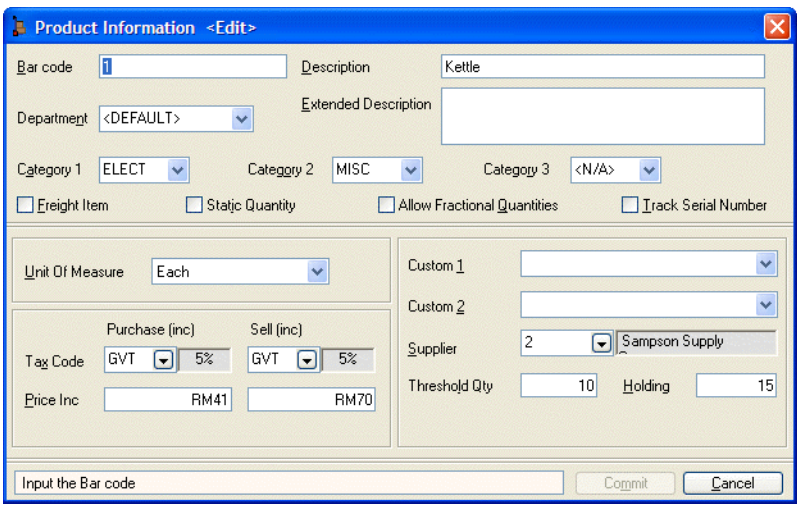
NOTE: Creating a product For instructions on how to create a product in RetailEnterprise Central, see 'To set up a product' on page 35.

1 Go to the **Information** menu and choose **Products**. The **Products** window appears. If there are many products displayed, scroll until you see the required product.

TIP: Searching for a product To quickly find the product you are looking for in a long list, click the column heading to sort that column alphabetically. Click in the column and then type the first letter of the item you are looking for, for example, 'C'. The first item beginning with 'C' is highlighted. Continue to scroll until you find the required product.

2 Select the product you want to change.

3 Go to the **File** menu and choose **Open** (or double-click the product). The **Product Information <Edit>** window appears.



4 Make the necessary changes to the product details.

5 Click **Commit** to save the changed product details. The **Products** window reappears.

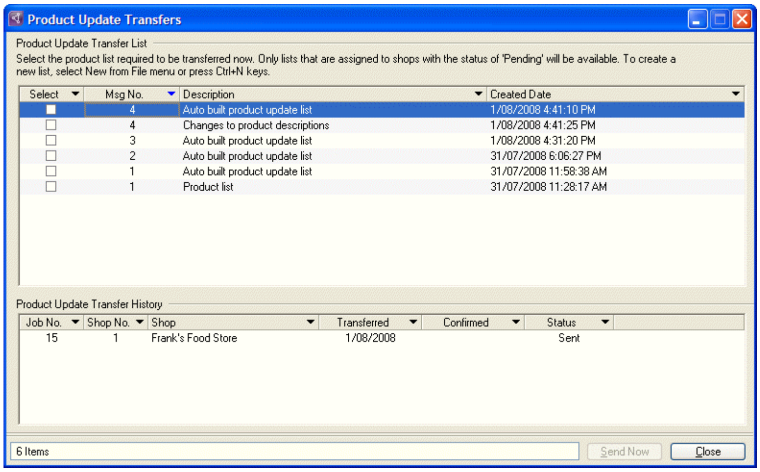
6 If you need to change another product, repeat step 2 to step 5.

7 When you have finished changing product details, click **Close** to close the **Products** window.

NOTE: Sending product updates to shops RetailEnterprise Central will generate a product update and send it to the shop as part of the collection process. If you want to create an update and transfer it manually, see 'To manually create a product update' on page 55.

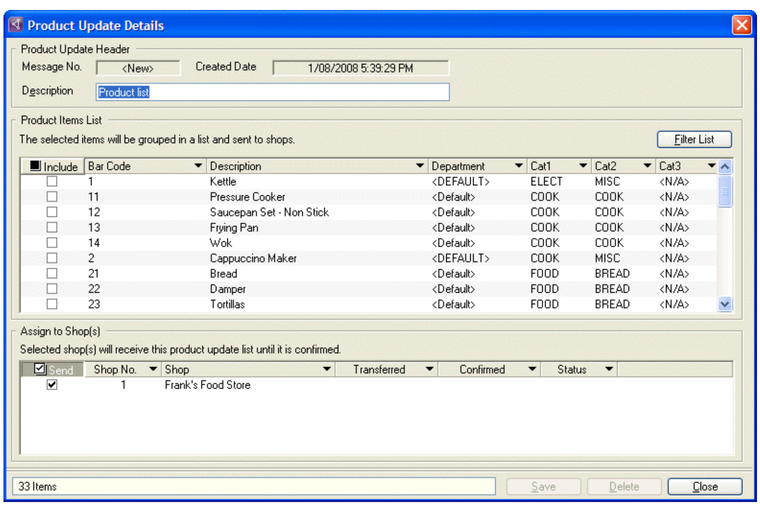
To manually create a product update

1 Go to the **Create** menu and choose **Product Update Transfers**. The **Product Update Transfers** window appears.



The **Product Update Transfer List** area shows the list of updates, both the updates generated automatically and those created manually. The **Product Update Transfer History** area shows the shops that this update has been assigned to, along with the transfer status of the update.

2 Go to the **File** menu and choose **New** (or press CTRL+N). The **Product Update Details** window appears.

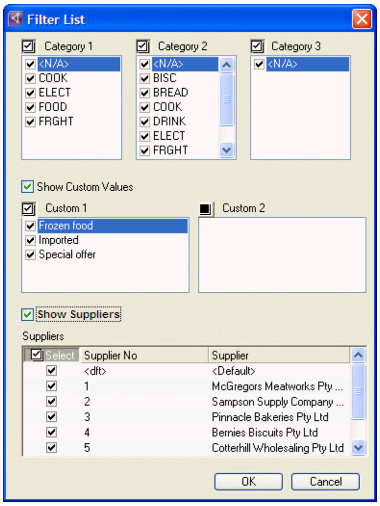


3 If required, change the **Description** of the update from the default ('Product list').

4 In the **Product Items List** area, select the products that you want to include in this update. If you want to include all the listed products, click the **Include** column heading.

5 To filter the list of products by department, categories, custom fields or supplier:

a Click **Filter List**. The **Filter List** window appears.



If you want to filter by custom fields, select the **Show Custom Values** option. If you want to filter by supplier, select the **Show Suppliers** option.

b By default, all the departments, categories, custom fields and suppliers are selected. Clear the checkbox next to any criteria that you do **not** want to filter by.

c When you have specified your criteria, click **OK**. The **Message Details** window reappears with the list of products that match the criteria.

6 In the **Assign to Shop(s)** area, select the shops that you want to send this message to.

7 Click **Save**. The update is saved and the **Product Update Transfers** window reappears.

A message number is allocated to the update and the update status is set to **Pending** for each of the shops.

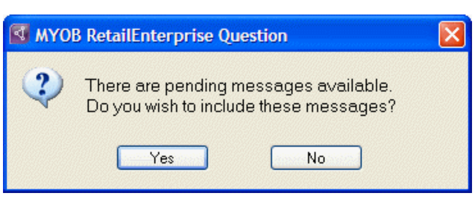
8 To create another message, repeat step 2 to step 7.

9 To transfer the update:

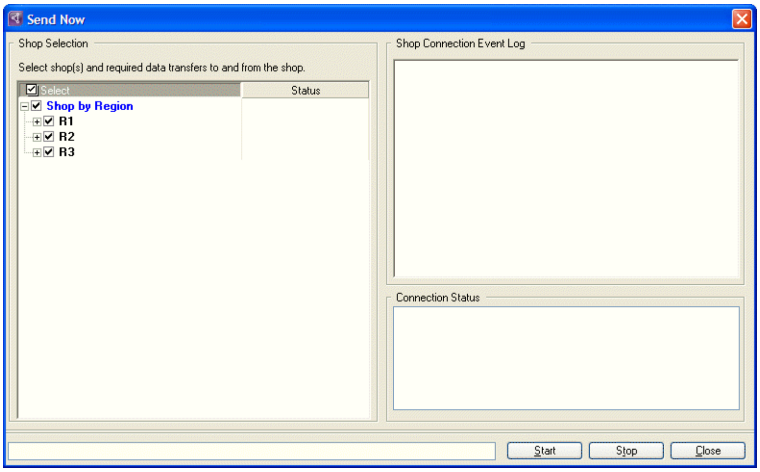
a In the **Product Update Transfers** window, select the updates you want to transfer and click **Send Now**.

NOTE: Unable to select updates? You cannot select automatically generated updates or updates that have a status of **Sent** or **Confirmed**.

If there are messages waiting to be transferred, a message appears asking if you want to include them in the transfer. To include the messages in the transfer, click **Yes**. Or, if you only want to transfer the product updates, click **No**.



The **Send Now** window appears, with the shops for this transfer grouped by region. You can click the plus sign next to the region name to see the list of shops. If you want to exclude a shop from the transfer, clear the checkbox next to it.



b Click **Start** to begin the transfer. The progress of the transfer is displayed in the **Shop Connection Event Log** area.

If you need to halt the process at any time, click **Stop**.

c When the transfer is complete, click **Close** to close the **Send Now** window.

Maintaining shop details

You must create and maintain details of every shop from which you want to collect summary information of sales and stock data. Apart from the shop name and address, the key details you must specify are the computer connection details and summary collection information options.

Unless the computer connection details are complete and correct for a shop, the collection process will not work and you will not collect information from the shop.

You need to specify summary collection information options to indicate whether to collect from a shop, what to collect—sales summary or stock holding or both—and whether a shop can receive stock holding information from other shops.

For instructions on how to create a new shop in RetailEnterprise Central, see 'To set up a shop' on page 40.

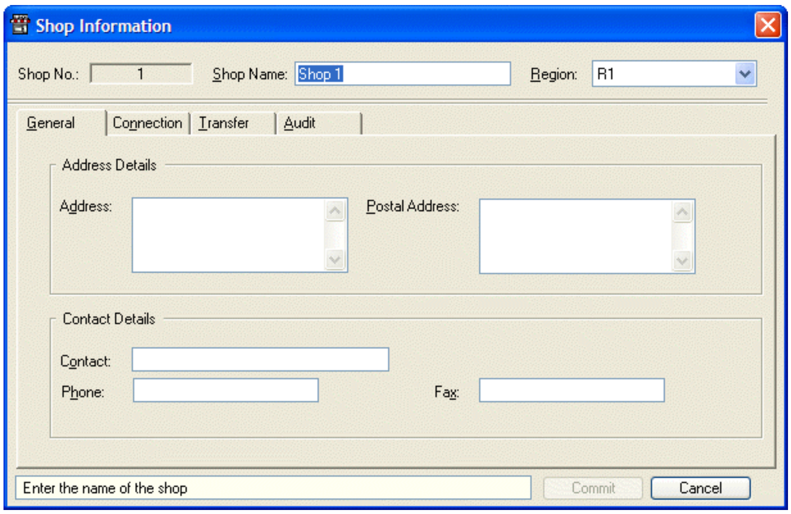
To change an existing shop

To change details of an existing shop, perform the following steps:

1 Go to the **Information** menu and choose **Shops**. The **Shops** window appears.

2 Select the shop you want to edit. If there are many shops displayed, scroll until you can see the required shop.

3 Go to the **File** menu and choose **Open** (or double-click the shop). The **Shop Information** window appears.



4 Make the necessary changes to the shop details. See 'To set up a shop' on page 40 for more information about shop details.

5 Click **Commit** to save the changed shop details.

6 If you need to change another shop, repeat step 2 to step 5.

7 Click **Close** to close the **Shops** window.

Maintaining supplier details

You must create and maintain details of a supplier for every product in the product database of RetailEnterprise Central. For instructions on how to create a new supplier in RetailEnterprise Central, see 'To set up a supplier' on page 34.

CAUTION: Keep data consistent with RetailManager It is important to keep supplier details consistent with RetailManager. You cannot send supplier updates to shops through RetailEnterprise.

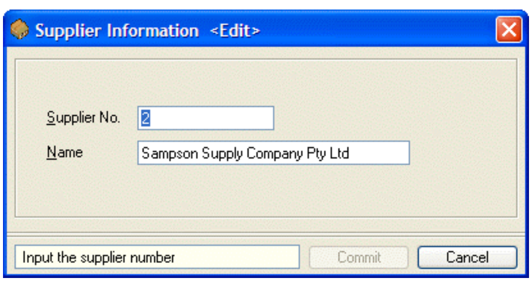
To change an existing supplier

To change details of an existing suppler in RetailEnterprise Central, perform the following steps:

1. Go to the **Information** menu and choose **Suppliers**. The **Suppliers** window appears.
2. Select the supplier you want to edit. If there are many suppliers displayed, scroll until you can see the required supplier.

   TIP: Searching for a supplier To quickly find the supplier you are looking for in a long list, click the column heading to sort that column alphabetically. Click in the column and then type the first letter of the supplier you are looking for, for example, 'C'. The first item beginning with 'C' is highlighted. Continue to scroll to the required supplier.

3. Go to the **File** menu and choose **Open** (or double-click the supplier you want to edit). The **Supplier Information <Edit>** window appears.

4. Make the necessary changes to the supplier details.
5. Click **Commit** to save the changed supplier details.
6. If you need to change another supplier, repeat step 3 to step 5.
7. Click **Close** to close the **Suppliers** window.

Maintaining region details

You can define regions to group your shops by area or location. For example, you may choose to define a region for each State.

When you create a region you can specify a collection sequence for the region. The collection sequence is used by the collection process to determine the order for dialling into the shops in that region. For more information, see 'Collecting summary information from shops' on page 67.

For instructions on how to create a new region in RetailEnterprise Central, see 'To set up a region' on page 38.

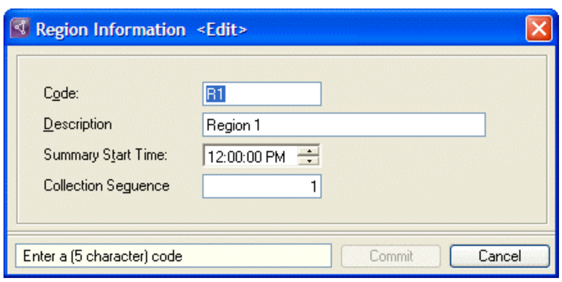
To change an existing region

To change details of an existing region in RetailEnterprise Central, perform the following steps:

1 Go to the **Information** menu and choose **Regions**. The **Regions** window appears.

2 Select the region you want to edit. If there are many regions displayed, scroll until you can see the required region.

3 Go to the **File** menu and choose **Open** (or double-click the region). The **Region Information <Edit>** window appears.



4 Make the necessary changes to the region details.

NOTE: Summary Start Time This is the time when MYOB RetailEnterprise Shop creates the summary information file of sales and stock data for each shop in the region.

5 Click **Commit** to save the changed region details.

6 If you need to change another region, go to step 2 above.

7 Click **Close** to close the **Regions** window.

Sending messages to shops

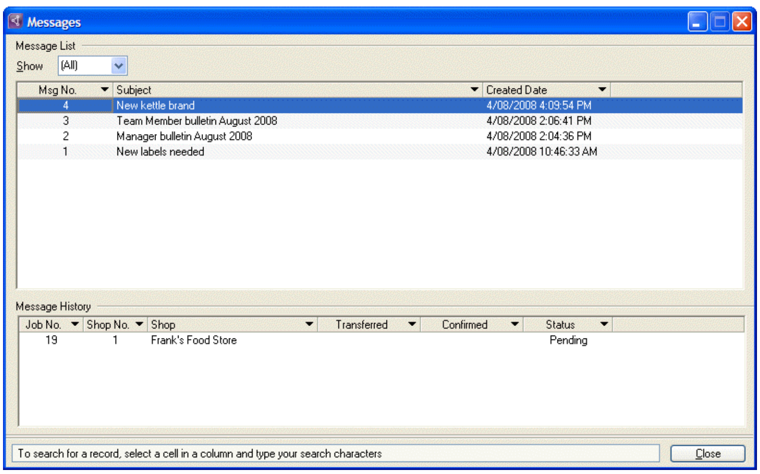
This section describes how to create and send new messages to shops from the central office using MYOB RetailEnterprise Central. After creating messages, RetailEnterprise Central provides the flexibility for you to choose which messages to send to which shops.

In addition to the messages you create, there are some standard instructions which you need to send to the shops regularly. You use these standard instructions to set the start time for the collection process and to forward product updates to the shops.

When you are dispatching these combined bulletins of messages and instructions, you have the option to select which instructions and messages to dispatch to which shops.

To create a new message

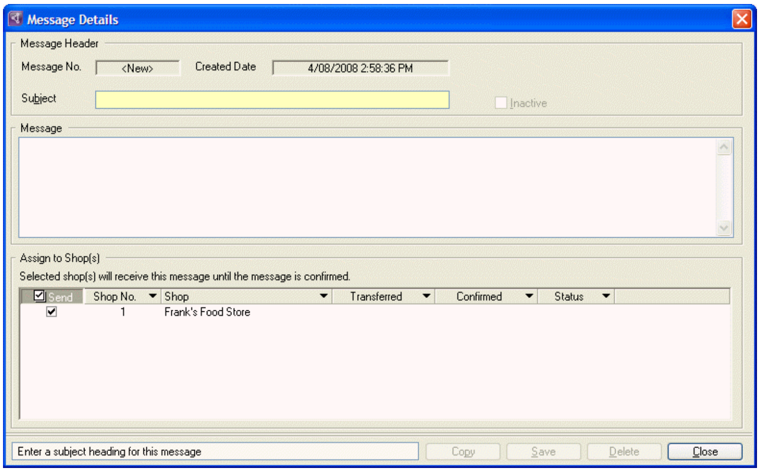
1 Go to the **Create** menu and choose **Messages**. The **Messages** window appears.



The window is divided into two areas: Message List and Message History. It shows the list of messages and for each message, the related job and the shops it was sent to.

TIP: Reading a message You can double-click a message to display it.

2 Go to the **File** menu and choose **New** (or press CTRL+N). The **Message Details** window appears.



Message Header	
• Message No.	This is set by RetailEnterprise Central.
• Created Date	This is set by RetailEnterprise Central.
• Subject	Enter the subject line of the new message. For example, 'Price increase for packaged products'.
• Inactive	If you do not want to send the message now, select this option. Selecting this will hide the message in the message list.
Message	Enter the body of the message. To enter text on a new line, press ENTER.
Assign to Shop(s)	Select the shops that you want to send this message to.

3 Click **Save**. A message number is allocated to the message.

After saving, the message status is set to **Pending** and the **Inactive** option and **Delete** button are enabled.

4 Click **Close** to close the **Message Details** window. The new message is added to the **Message List** area of the **Messages** window.

5 To create another message, go to step 2 above.

6 Click **Close** to close the **Messages** window. The messages (except those that are inactive) are sent during the next collection process. If you want to manually transfer the messages, see 'Manually transferring messages and updates' on page 65.

Making copies of messages

You can make a copy of a message. Copies are useful if you need to send a message again, or if you want to use an existing message as the basis for a new one.

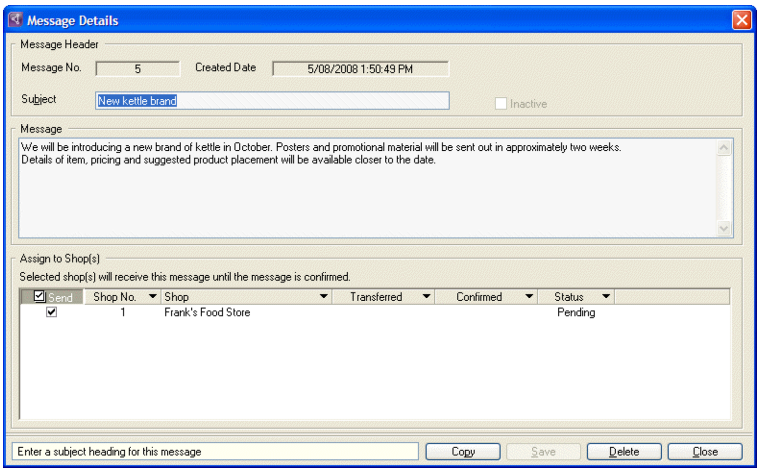
To make a copy of an existing message

1 Go to the **Create** menu and choose **Messages**. The **Messages** window appears.

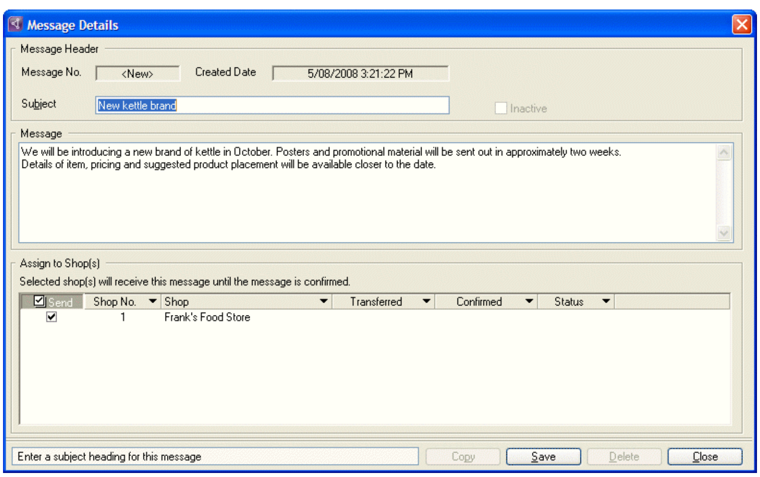
The **Message List** area shows all the messages that have been created; the **Message History** area shows the job number of the highlighted message and the shops it was sent to or is waiting to be sent to.

2 From the **Message List**, select the message you want to copy.

3 Double-click the message or go to the **File** menu and choose **Open**. The **Message Details** window appears.



4 Click **Copy**. A copy of the message appears. The subject and the message content are the same as in the original message.



5 If required, change the subject or message content.

6 In the **Assign to Shop(s)** area, select the shops that you want to send this message to.

7 Click **Save**. A message number is allocated to the message. After saving, the message status is set to **Pending** and the **Inactive** option and **Delete** button are enabled.

8 Click **Close** to close the **Message Details** window. The new message is added to the **Message List** area.

9 Click **Close** to close the **Messages** window. The messages are sent during the next collection process (unless the message is inactive). If you want to manually transfer the messages, see 'Manually transferring messages and updates' on page 65.

To delete a message

The **Messages Details** window enables you to delete pending messages.

NOTE: No deletion of Confirmed or Sent messages You cannot delete a message that has the status **Confirmed** or **Sent**.

1 Go to the **Create** menu and choose **Messages**. The **Messages** window appears.

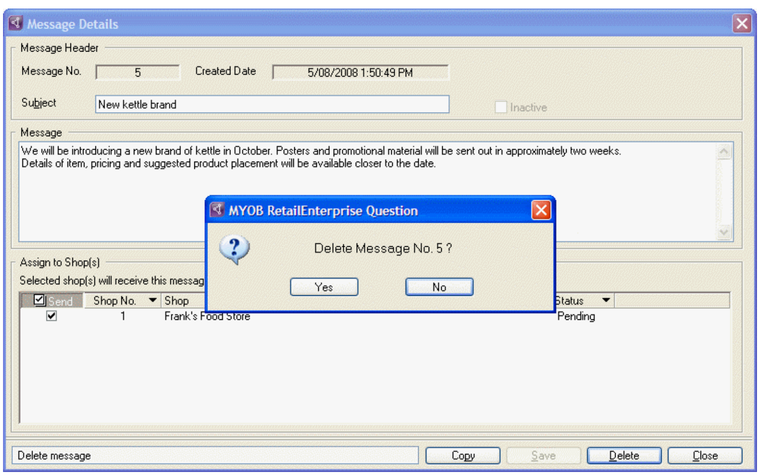
The **Message List** area shows all the messages that have been created; the **Message History** area shows the job number of the highlighted message and the shops it was sent to or is waiting to be sent to.

2 To delete a message:

a From the message list, select the message you want to delete.

b Double-click the message or go to the **File** menu and choose **Open**. The **Message Details** window appears.

c Click **Delete**. A confirmation message appears.



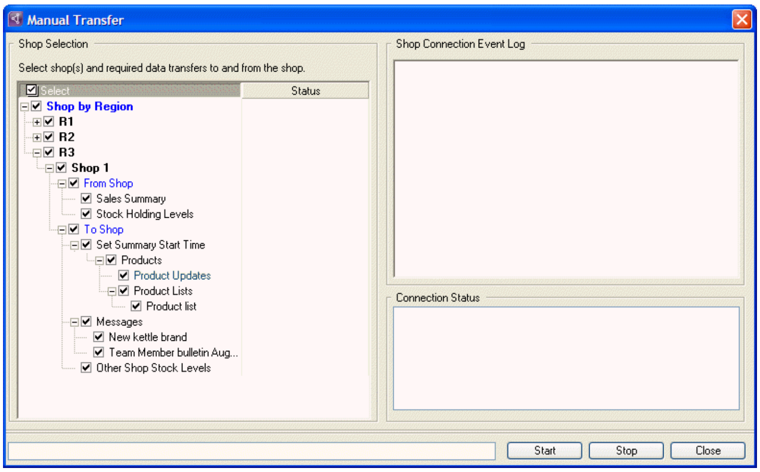
d Click **Yes** to confirm.

3 Click **Close** to close the **Messages** window.

Manually transferring messages and updates

There may be times when you need to send a message or an update to a shop other than at the appointed transfer and collection time. You can use the **Manual Transfer** window to do this.

Manual Transfer window



Shop Selection	This area displays a list of shops organised by region. You can use the list to specify the regions, shops and data that will form part of the transfer.

Viewing items

You can click the plus signs to expand the list and click the minus signs to collapse the list.

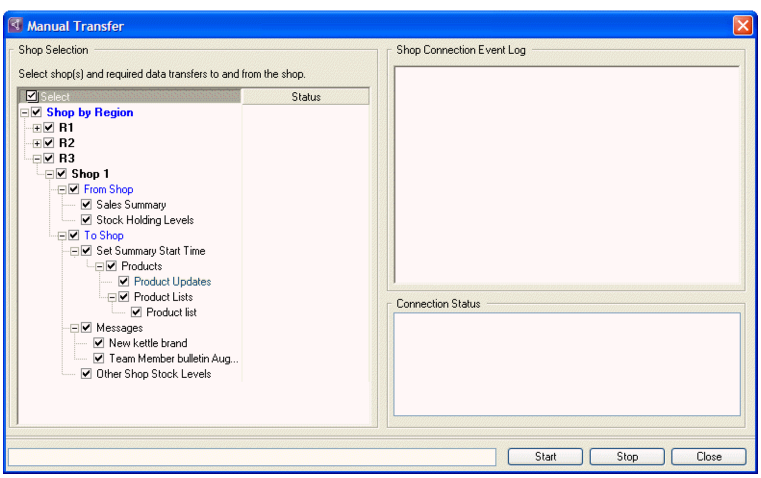
- **To view a list of shops**—click the plus sign next to a region to see the list of shops in the region.
- **To view the kinds of transfers**—click on the plus sign next to a shop to see the transfers grouped in *From Shop* (from shops to the central office) or *To Shop* (from the central office to the shop).
- **To see the data included in the transfer**—click on the plus sign next to *From Shop* or *To Shop* to see the types of information in the transfer. For example, you may be collecting *Sales Summary* and *Stock Holding Levels* **from** the shop, and you may be sending *Messages* and *Products* **to** the shop.

	Including or excluding items A tick next to an item (whether it is a shop, a region or specific data) indicates that it is included in the transfer. By default, all items will be ticked when you first open the window. • **To include an item**—expand the list so you can see the item and then tick the checkbox next to it (if it isn't ticked already). Any items grouped under this item are also ticked. So, if you tick the checkbox next to a region, all the shops in the region will also be included. • **To exclude an item**—expand the list so you can see the item and then clear the checkbox next to it. Any items grouped under it are also cleared. So, if you clear the checkbox next to a region, all the shops in the region will be excluded.
Shop Connection Event Log	Displays the progress of the transfer.
Connection Status	Displays the summary of the transfer.
Start button	Click this button to start the transfer.
Stop button	Click this button to stop the transfer.
Close button	Click this button to close the window.

Transferring messages and updates

To transfer messages and updates

1 Go to the **Transfers** menu and choose **Manual Transfer**. The **Manual Transfer** window appears.



2 In the **Shop Selection** list, specify the following:
- The regions or shops that will receive the information—tick the checkbox next to the region or shop that you want to include in the transfer, and clear the checkbox next to those you want to exclude.
- For each selected shop, the kind of data transfer (**From Shop** or **To Shop**)—for example, if you only want to send data, you can clear the checkbox next to **From Shop**.
- For each selected shop, the specific data you want to transfer—expand the **To shop** list and clear the checkboxes next to the data you want to exclude. For example, if you do not want to send **Messages**, you can clear the checkbox next to it.

For instructions about how to select items in this window, see 'Manual Transfer window' on page 65.

3 Click **Start** (located below the **Connection Status** area) to begin the transfer and collection process. The progress of the transfer is displayed in the **Shop Connection Event Log** area.

If you need to halt the process at any time, click **Stop**.

4 When the transfer is complete, click **Close** to close the **Manual Transfer** window.

Collecting summary information from shops

One of the key functions of MYOB RetailEnterprise Central is to enable your business to collect summary information from your shops.

In order to do this, you must first specify the unique communication details of the RetailManager computer at each shop. You then have to set up these details in RetailEnterprise Central on the central computer—see 'Setting up your Central database' on page 32.

During the collection process, the central office computer uses these communication details to connect to each shop in sequence. After establishing a connection between the central computer and the RetailManager computer in the shop, the process collects the summarised sales and stock data. The process stores the sales and stock data in the RetailEnterprise Central database on the central computer for further processing.

If you are using Stock At Other Shops to pass information to the shops in your RetailEnterprise network, Central recontacts your shops and passes this information when the collection process is complete.

About Central–Shop communications

MYOB RetailEnterprise Central provides three methods of communication:

Dial-up The dial-up method is explained in detail in this manual. At a preset time, central office dials up each shop in turn and collects the summary information file. Central can also send messages and other information such as sales summaries, price updates and administrative information.

For information on setting up dial-up communications, see 'Setting up dial-up networking between central office and shops' on page 45.

LAN/WAN The local or wide area network (LAN/WAN) method may be used by large enterprises with a distributed computer network that, typically, would have a computer administrator or other professional to oversee the system. In this case, information is gathered automatically with little or no intervention by the staff at your central office or shops. At a preset time, your central office collects the summary information file from each shop in turn but this happens automatically through the network communications of the LAN or WAN, rather than dialling up each shop. Central and shop can also send sales summaries, price updates and administrative information to each other.

Contact your system administrator for information about setting up or using your network.

Email The email method is useful for smaller enterprises. To enable your central office and each shop to communicate directly, you can enter your e-mail account settings into MYOB RetailEnterprise. Messages between the central office and shop will be sent when these offices are online using their POP or IMAP email account.

Alternatively, if you already have separate email software set up and configured, you can specify that MYOB RetailEnterprise use this software for communication. Your email software will need to be running and your computer online for RetailEnterprise to be able to send and receive messages and updates.

For information on setting up email communication, see 'Setting up email communication between central office and shops' on page 49.

Collection process

When the collection process runs

Normally, the process is scheduled to be run automatically at a set time, usually at night, following each business day.

However, if there is a failure during the overnight collection for any reason, the process can be run manually at any time. For example, if a remote computer at one of the shops was not available or online, the collection process would not be completed for that site.

For more details of the procedures involved, see 'To start the collection process manually' on page 70.

How the collection process works

The collection process involves the following sequence of automated activities:

1. Transfer any sales and stock data from previously incomplete collections.
2. Establish a list of all shops to be dialled in sequence based on the dial sequence set up in the Region record (each shop is assigned to a region).
3. Take the following action for each shop in the list:
   a. Dial up or connect to the shop.
   b. Send any messages and instructions pending for the shop.
   c. Establish a connection to the directory that contains the summary information for the shop (usually the same folder where MYOB RetailEnterprise Shop is installed).
   d. Check that the summary information data is ready for collection.
   e. Download the summary information data to a temporary database on the central computer.
   f. If the download is successful, transfer the downloaded data to the permanent database in RetailEnterprise Central.
   g. If the connection fails, the process makes retry attempts if you specified a retry count when setting up RetailEnterprise Central.
4. Record all events and errors that occur during the collection process, including the result of each dial-up connection in the event log file.
5. If you are using Stock At Other Shops, RetailEnterprise Central will then:
   a. Connect to each shop in the list of shops that has had a successful download.
   b. Send Stock At Other Shops information to each shop in the list.

After the collection process has finished

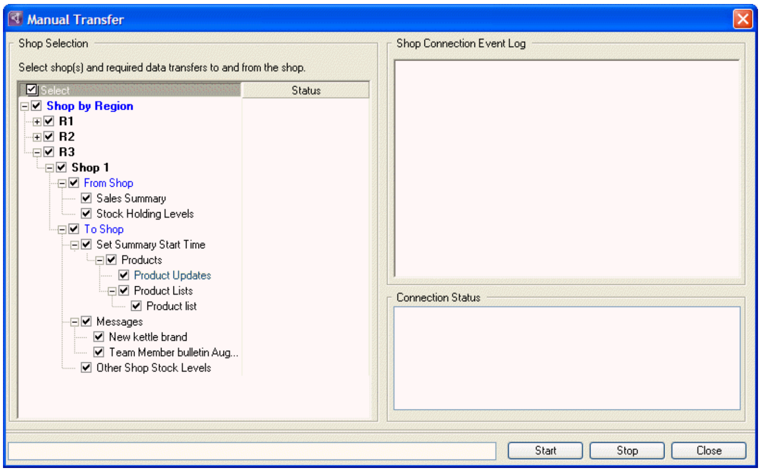
On the following business day, the relevant person in your central office should check the results of the overnight collection process in RetailEnterprise Central. This involves reviewing the event log files created by the collection process on the central computer. If these log files show that any of the collection sessions failed, the relevant person must take the appropriate action. For more information, see 'Viewing the connection event log' on page 81.

After collection is completed, you can use the RetailEnterprise Central functionality to manage and analyse the data, and also produce comprehensive reports—as described in the following sections of this chapter.

NOTE: Before starting You may want to notify the shops involved that you are about to start the process to ensure that they have their modem and phone lines ready for when RetailEnterprise Central starts connecting to the shops. You can do this either by phone or fax, or by sending a new message as described in 'Sending messages to shops' on page 61.

To start the collection process manually

1 Go to the **Transfers** menu and choose **Manual Transfer**. The **Manual Transfer** window appears.



2 In the **Shop Selection** list, specify the following:

- The regions or shops that you want to receive information from—tick the checkbox next to the region or shop that you want to include in the transfer, and clear the checkbox next to those you want to exclude.
- For each selected shop, the kind of data transfer (**From Shop** or **To Shop**)—for example, if you only want to collect data, you can clear the checkbox next to **To Shop**.
- For each selected shop, the specific data you want to transfer—expand the **From Shop** list and clear the checkboxes next to the data you want to exclude. For example, if you do not want to collect **Stock Holding Levels**, you can clear the checkbox next to it. For more information about this window, see 'Manual Transfer window' on page 65.

3 Click **Start** to begin the collection process.The progress of the transfer is displayed in the **Shop Connection Event Log** area.

If you need to halt the process at any time, click **Stop**.

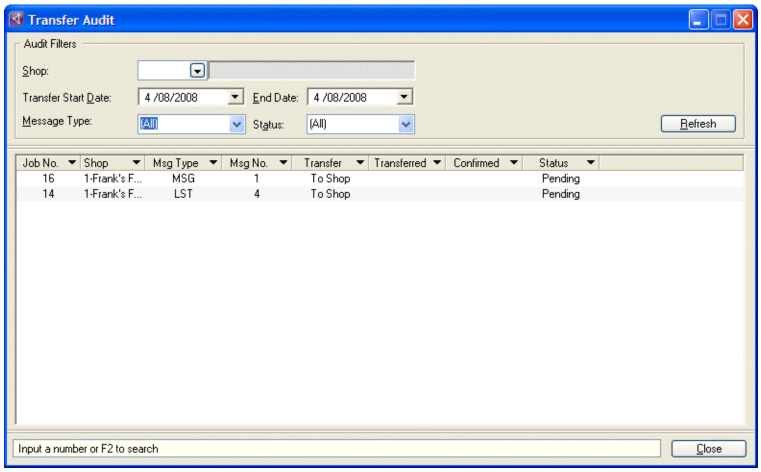
4 When the transfer is complete, click **Close** to close the **Manual Transfer** window.

Viewing the history of transfers to and from shops

The **Transfer Audit** function allows you to view the history of communications and transfers to and from shops.

To view the history of transfers to and from shops

1 Go to the **Transfers** menu and choose **Transfer Audit**. The **Transfer Audit** window appears.



Audit Filters

• Shop	Click in the field and press F2 or click the drop-down arrow to display the **Search for Shops** window. Select the shop and click OK.
• Transfer Start Date	Click the drop-down arrow to display a calendar. Select the date for the beginning of your search.
• End Date	Click the drop-down arrow to display a calendar. Select the date for the end of your search.
• Message Type	Click the drop-down arrow to nominate the type of messages you are searching for. You can choose from the following message types, or choose **(All)**. • SAS—Sales Summary • STL—Stock Holding Levels • STC—Product Updates • MSG—Messages • OSL—Other Shop Stock Levels • SHP—Shops • SUP—Supplier Updates • LST—Product Lists • SST—Set Summary Start Time.
• Status	Click the drop-down arrow to nominate the status of the messages you are searching for, for example, Pending, Confirmed, etc.

2 Click **Refresh** to apply your search criteria. The results are displayed in the grid.

3 If the audit indicates that there were some connections that were unsuccessful, you should find the cause by:
- checking the event log—see 'To view the connection event log' on page 82.
- checking the computer connection details for your shop—see 'To test the connection to a shop' on page 44.
- contacting an individual shop to determine if the computer and modem are correctly connected.

4 Click **Close** to close the **Transfer Audit** window.

Setting up pricing

Bulk price updates

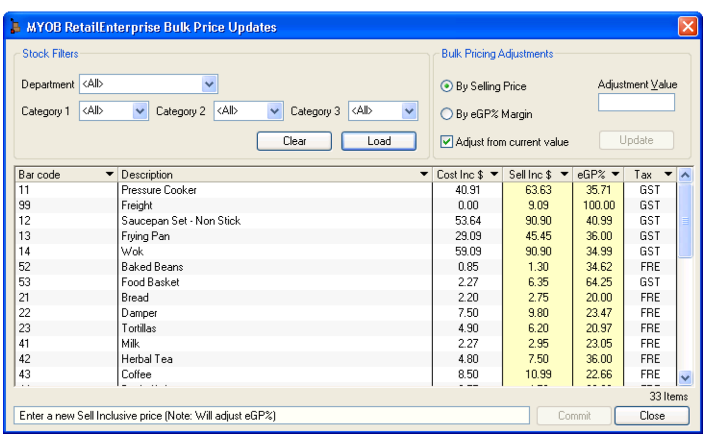
Bulk price updates enable you to apply a price adjustment to multiple stock items. You select the stock items by department and categories, then apply price updates either as a new price or as an adjustment to the current price.

You can apply bulk price adjustments either as a percentage of expected gross profit or as a dollar value.

If you want to make changes to other stock item details such as bar code, description or quantity held, see 'Updating stock item details' in the *MYOB RetailManager User Guide* for more information. You cannot change quantities in RetailEnterprise Central.

To apply bulk price updates

1 Go to the **Product Management** menu and choose **Bulk Price Updates**. The **Bulk Price Updates** window appears.



2 In the **Stock Filters** group, select the department and categories of the required stock items.

3 Click **Load**.

The stock items that match the selected department and categories are displayed. Ensure the items selected are the items to which you want to make updates before you proceed.

4 If you want to adjust your prices by a dollar value:

a In the **Bulk Price Adjustments** group, click **By Selling Price**.

- If you want to **add or subtract** an amount to or from the current price (for example, you might want to add $2.00 to each stock item), select the **Adjust from current value** option.
- If you want to assign a **new** price (for example, you might want to price all listed stock at $10.00) deselect the **Adjust from current value** option.

b In the **Adjustment Value** field, enter the value that you either want to apply as an adjustment or as a price.

5 If you want to adjust your prices by expected gross profit (eGP%):

a In the **Bulk Price Adjustments** group, click **By eGP% Margin**.

- If you want to adjust the **current** margin, select the **Adjust from current value** option.
- If you want to assign a **new** margin, deselect the **Adjust from current value** option.

b In the **Adjustment Value** field, enter the value that you either want to apply as a new margin or as an adjustment.

6 Click **Update**. The updated prices appear.

7 Check the results of your pricing adjustments to ensure they are correct.

NOTE: Adjusting a price or margin for a single stock item Click either the **Sell Inc** or **eGP%** column of a selected stock item line in the **MYOB RetailManager Bulk Price Updates** window and enter the adjustment.

8 Click **Commit** and then click **Yes** to the confirmation message.

9 Click **OK** in the report window and then **Close** to close the **Bulk Price Updates** window.

The results of your pricing adjustments are saved to the RetailManager stock database.

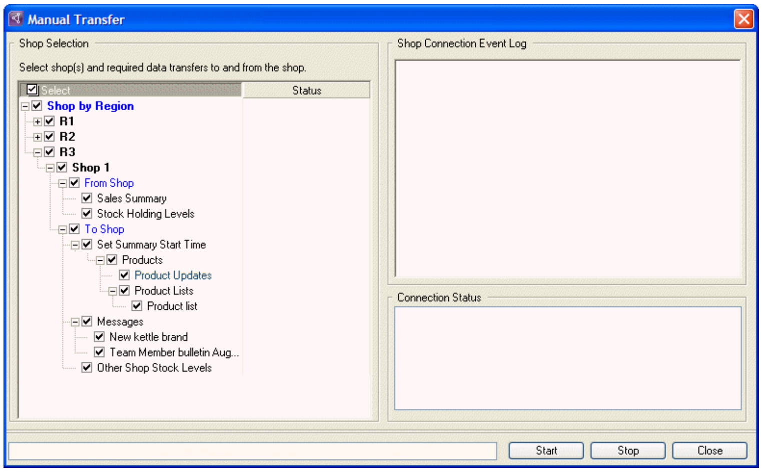
10 Click **Close** to close the **Bulk Price Updates** window.

To send the bulk pricing update to shops

The new pricing information will be transmitted to shops at the next automatic connection for data transfer and collection if you have already set up the shops to receive this information. See 'To set up a shop' on page 40 or 'To change an existing shop' on page 58 for instructions on setting up a shop to receive pricing information.

However, you may want to send this new information immediately.

1 Go to the **Transfers** menu and choose **Manual Transfer**. The **Manual Transfer** window appears.

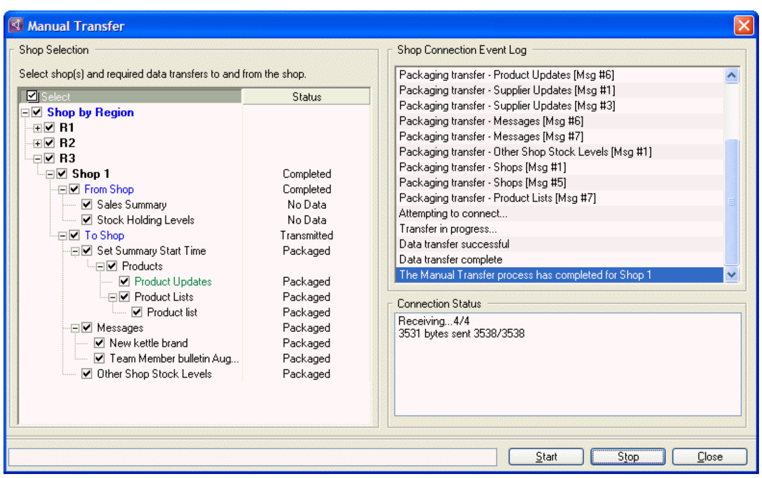


2 In the **Shop Selection** list, specify the following:

- The regions or shops that will receive the information—tick the checkbox next to the region or shop that you want to include in the transfer, and clear the checkbox next to those you want to exclude.s
- For each selected shop, the kind of data transfer (**From Shop** or **To Shop**)—for example, if you only want to send data, you can clear the checkbox next to **From Shop**.
- For each selected shop, the specific data you want to transfer—expand the **To shop** list and clear the checkboxes next to the data you want to exclude. For example, if you do not want to send **Messages**, you can clear the checkbox next to it.

For more information see 'Manual Transfer window' on page 65.

3 Click **Start** to begin the transfer process.The progress of the transfer is displayed in the **Shop Connection Event Log** area.



If you need to halt the process at any time, click **Stop**.

4 When the transfer is complete, click **Close** to close the **Manual Transfer** window.

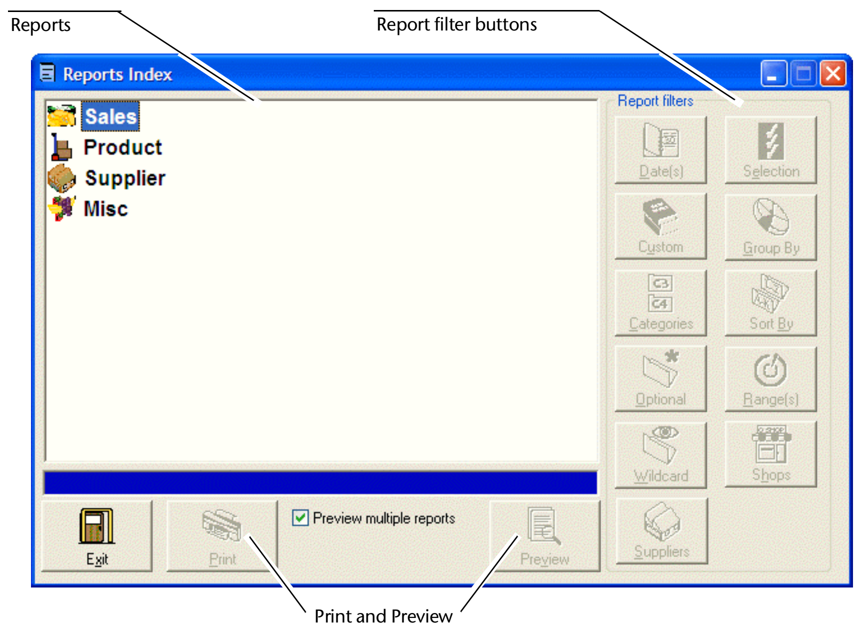
Generating reports

In MYOB RetailEnterprise there are a number of standard reports that are accessed by choosing **Reporting** from the **Tools** menu.

Note that all the reports in RetailEnterprise are based only on current data and do not include data that has been archived. For more information about archiving, see 'To archive non-current data' on page 86.

NOTE: Previewing and printing a report First make sure that you have a printer installed and set up for A4 paper. Make this your default printer. RetailEnterprise will only print to the default printer for your computer.

- Go to the **Tools** menu and choose **Reporting**. The **Reports Index** window appears.



Report filters

Report filters give you control over the content of your reports. When you select a report filter button, the filter window displayed enables you to refine the information displayed on the report. If a filter button is shaded (as shown in the illustration above), it is not applicable to the current report.

These report filters are:

Date(s) filter Enter the date range for the report in the Start and End fields. You can click **Assist** to select a date using the **Date Selection** window in both of these fields.

Selection filter This filter is not available in RetailEnterprise.

Custom filter Select the **Custom** fields by which you want to report.

Group By filter Select how you want to group or separate the information in the report. The report will display subtotals for each group you have defined in this filter. Select **None** if you don't want to group your items with subtotals.

Categories filter Select whether to report for a single product department or all departments. Select a department from the drop-down list, or select **All** to include all departments in the report. You can also select categories you want to include in the report. Click the checkbox next to the category you want to display, or click **Select All** to include all categories in the report.

Sort By filter Choose how you want the report results to be sorted—there are a number of options, including bar code, categories and supplier. Select an option from the list box, and then choose the **Descending Order** option if required. You can also choose a secondary sort order option if there is more than one item with the same Primary Sort value. For example, two items with the same bar code can be sorted by Cost.

Optional filter Select whether to include products with zero sales or not. This filter is only available in the **What's Selling** sales report.

Ranges filter Enter a maximum and minimum value for the number of sales. This filter is only available in the **What's Selling** sales report.

Wildcard filter Enter a wildcard to find a character pattern, for example, `D*` to find all customers whose name begins with the letter 'D'. This filter is only available in the **What's in Stock** product report.

Shops filter Select the shops that you want to include in the report. Click **Select All** to include all shops in the report, or tick the checkbox of the specific shops you want to include.

Suppliers filter Select the suppliers that you want to include in the report. Click **Select All** to include all suppliers in the report, or tick the checkbox of the specific suppliers you want to include.

Print and Preview

These buttons enable you to preview and print the report you have selected. Before you print a report it is a good idea to preview the report to confirm that the details are as you expect. For example, check that you have used the report filters to select the correct dates and sort by fields.

NOTE: Previewing reports You need to have an A4 printer driver installed in your computer to be able to view a report on screen.

Selecting **Preview multiple reports** enables multiple reports to be open for viewing simultaneously.

Report categories

Sales reports

There are two sales reports:

- The **Sales Summary** report lists sales and profit margins for each of the shops, and summary figures for all shops. You can specify the following report filters:
  - Dates
  - Shops.
- The **What's Selling** report lists all items sold in the chosen period and displays the available quantity, number of sales, cost price and stock value. You can specify the following report filters:
  - Dates
  - Custom
  - Group By
  - Categories
  - Sort By
  - Optional
  - Ranges
  - Shops
  - Suppliers.

Product reports

There are two product reports: **Product Listing** and **What's in Stock**. You can specify the following report filters:

- Custom
- Group By
- Categories
- Sort By
- Optional
- Wildcard
- Suppliers.

Supplier reports

There are two supplier reports:

- The **What Needs Ordering** report is a summary of products that require ordering based on their threshold quantities. For each product that needs ordering, the report shows the available amount, current order and back order quantity. You can specify the following report filters:
  - Custom
  - Group By
  - Categories
  - Sort By
  - Shops
  - Suppliers.

- The **What's On Order** report is a summary of products that have been ordered but not received. For each product on order, the report shows the order quantity, back order quantity and total quantity. You can specify the following report filters:
  - Custom
  - Categories
  - Sort By
  - Shops
  - Suppliers.

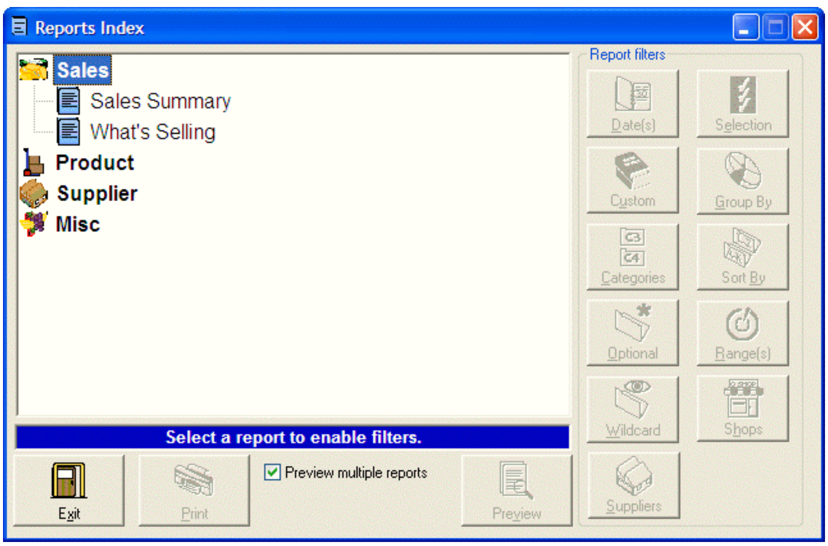
Miscellaneous reports

There is one miscellaneous report—the **Connection Event Logs** report. This report provides a record of the events that occurred whenever RetailEnterprise Central connected to the shops. You can specify the following report filters:

- Dates
- Shops.

To generate a report

1. Go the **Tools** menu and choose **Reporting**. The **Reports Index** window appears.
2. Select the type of report you want. For example, click **Sales** to display all the Sales reports.

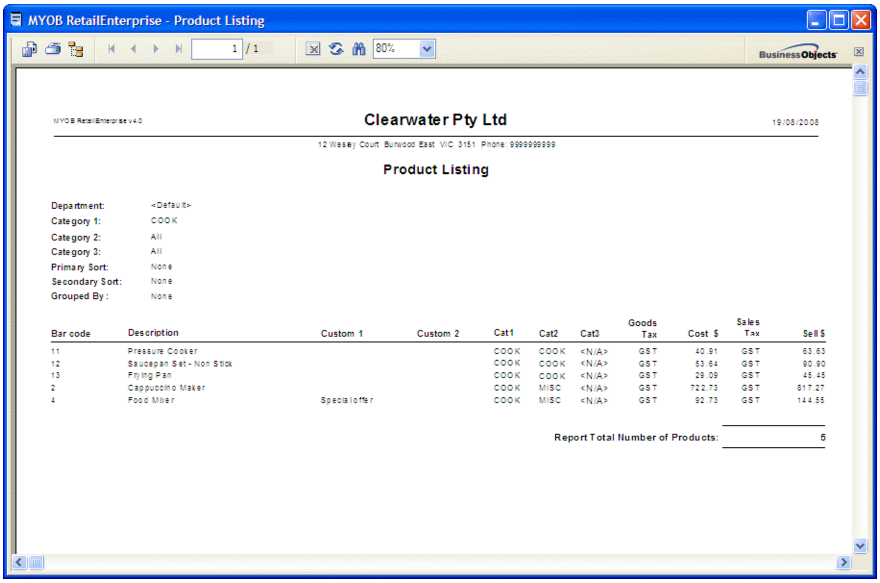


3. Select the individual report from the list of reports. For example, click **What's Selling**. This activates the report filter options for the report.
4. To specify the report filters you require:
   a. Click the report filter button—for example, click the **Group By** filter.
   b. Select the filters.
   c. Repeat this step for each report filter option you need.

5 To display the report using the **Report Viewer** window, click **Preview**.

For more information about the **Report Viewer**, see 'Using the Report Viewer' below.

The information contained in the report depends on the filters you selected. You may need to vary the filter selections until you obtain the information you want.



MYOB RetailEnterprise v4.0

Clearwater Pty Ltd

19/08/2008

12 Wesley Court Burwood East VIC 3151 Phone: 9999999999

Product Listing

Department:	<Default>
Category 1:	COOK
Category 2:	All
Category 3:	All
Primary Sort:	None
Secondary Sort:	None
Grouped By:	None

Bar code	Description	Custom 1	Custom 2	Cat1	Cat2	Cat3	Goods Tax	Cost $	Sales Tax	Sell $
11	Pressure Cooker			COOK	COOK	<N/A>	GST	40.91	GST	63.63
12	Saucepan Set - Non Stick			COOK	COOK	<N/A>	GST	53.64	GST	90.90
13	Frying Pan			COOK	COOK	<N/A>	GST	29.09	GST	45.45
2	Cappuccino Maker			COOK	MISC	<N/A>	GST	722.73	GST	817.27
4	Food Mixer	Special offer		COOK	MISC	<N/A>	GST	92.73	GST	144.55

Report Total Number of Products: 5

Using the Report Viewer

When you preview a report in MYOB RetailEnterprise Central, the separate **Report Viewer** window is opened.

You can use the **Report Viewer** window to:

- view a report
- search for text in a report
- print a report
- export a report.

To view a report

- Zoom in on a displayed report by selecting a zoom percentage (100%) at the top of the window.
- Use the left and right arrows ( ) to move between pages in the report.
- Use the first page arrow ( ) to go to the first page of the report and the last page arrow ( ) to go to the last page of the report.

To search for text in a report

The MYOB RetailEnterprise report viewer has text search capability. To search for a value such as a name, amount or date in a displayed report:

1 Click the search icon ( ) to display the **Search** window.

2 In the **Find what** field, enter the text you are searching for.

NOTE: Search text When entering text in the search field, you can enter either the whole text or part of it.

3 Click **Find Next**. RetailEnterprise will search for the first occurrence of the search text and display a frame around it. Clicking **Find Next** again will move the frame to the next occurrence of the search text.

To print a report

In MYOB RetailEnterprise, reports are printed on standard A4-size paper.

1 Click the print icon ( ). The **Print** window appears.

2 Specify the page range, required number of copies, etc. and click **OK**.

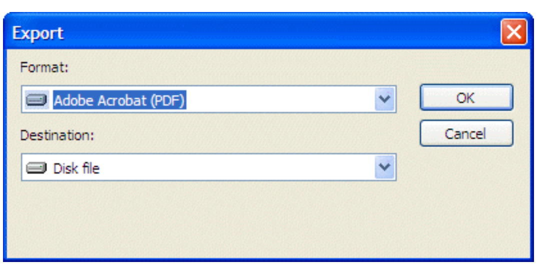
The report is printed to your report printer.

To export a report

You can export an MYOB RetailEnterprise Central report to several word processor and spreadsheet formats, such as Microsoft Word and Microsoft Excel, as well as to HTML, ODBC and common data interchange formats such as text and rich text.

You can save a report to disk or have it open directly in an application. Reports can also be made available to other users through Lotus Notes and Microsoft Outlook if you have these programs installed on your computer.

1 Click the export icon ( ). The following window appears.



2 Specify the format of the report by making a selection from the **Format** drop-down list.

> **NOTE: Report format** When you export a report, you will be prompted for formatting details, depending on the report format you specified.

3 Specify the destination of the report by making a selection from the **Destination** drop-down list. If you select:
- **Application**, the report will be saved to a temporary file and then opened in the appropriate application.
- **Disk file**, you can save the report on your hard drive in the location you specify or to an external storage device such as a USB storage device or external hard drive.
- **Lotus Notes Database**, you can list the report in the Lotus Notes Desktop from where other users can access it.
- **Microsoft Mail (MAPI)**, you can email the report as an attachment in the format you specified.
- **Exchange folder**, you can export your report to an exchange folder in the format you specified.

4 Once you have selected your destination and format, click **OK**.

To exit the Report Viewer

You can exit the **Reports** window by clicking the close icon (❌) in the upper-right corner of the **Reports** window.

Viewing the connection event log

This section describes how you view the connection event log that MYOB RetailEnterprise Central maintains. The connection event log provides a record of the events that occurred whenever RetailEnterprise Central connected to the shops.

This is especially useful for checking the results of the automated collection process in RetailEnterprise Central. After the process has collected summary information of sales and stock data from your shops, you need to verify if the process has been successful.

During the collection process, RetailEnterprise Central makes a connection to a shop and records the details of each connection in the event log file on your computer. Normally, the process should finish successfully but occasionally there may be errors or problems with the process.

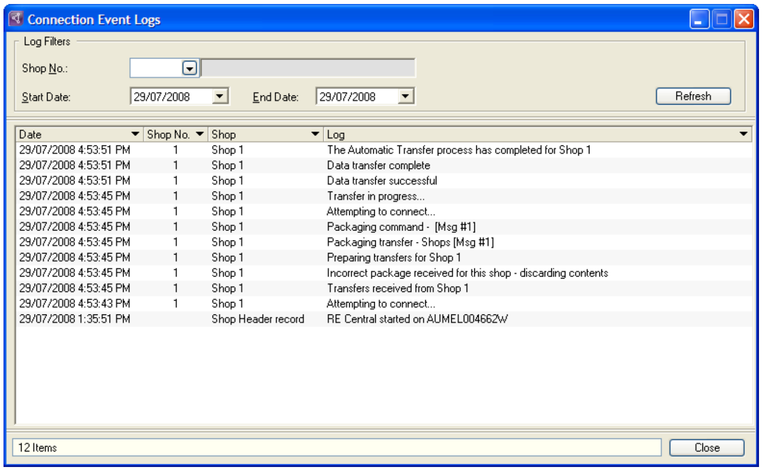
Reviewing the collection process includes the following tasks:

- checking results of the collection process by viewing the connection event log or generating the **Connection Event Logs** report
- following up on any problems or errors in the connection event log
- starting the collection process manually, if necessary.

To view the connection event log

To view the details in the connection event log file, perform the following steps:

1 Go to the **Tools** menu and choose **Connection Event Logs**. The **Connection Event Logs** window appears.



2 Choose the shop that you want to view the log for.

3 Specify the date range—typically yesterday's and today's date if you are checking for last night's processing.

To change the range of dates displayed:

a In the **Start Date** field, click the arrow and select the required start date from the calendar list.

b In the **End Date** field, click the arrow and select the required end date from the calendar list.

4 Click **Refresh** to view the event log details for the new date range.

5 Check that the information seems correct. If you notice that there are no connections to a certain shop or some other discrepancy, you will need to check the connection set up. This may include any or all of the following:

- checking the computer connection details for a shop as described in 'Testing the connection to a shop' on page 44
- contacting the individual shop to determine if the computer and modem are correctly connected.

6 Click **Close** to close the **Connection Event Logs** window.

Printing a connection event log report

There are two ways to print a connection event log report. You can print from the **Connection Event Logs** window or from the **Reports Index** window.

To print from the Connection Event Logs window

1. Generate the connection event log as in the previous procedure.
2. To preview the report before printing:
   - a. Go to the **File** menu and choose **Print Preview**. The **Report Viewer** appears.
   - b. Click the print icon ( ) in the **Report Viewer** and then click **OK** to print the report.
   - c. Click the close icon ( ) to close the **Report Viewer**.
   - d. Click **Close** to close the **Connection Event Logs** window.
3. To print the report without previewing:
   - a. Go to the **File** menu and choose **Print**.
   - b. Click **OK** and then **OK** again.
   - c. Click **Close** to close the **Connection Event Logs** window.

To print from the Reports Index window

1. Go to the **Tools** menu and choose **Reporting**. The **Reports Index** window appears.
2. Click **Misc** and then click **Connection Event Logs**.
3. Specify the **Date(s)** and **Shops** report filters.
4. To preview the report before printing:
   - a. Click **Preview**. The **Report Viewer** appears.
   - b. Click the print icon ( ) in the **Report Viewer** and then click **OK** to print the report.
   - c. Click the close icon ( ) to close the **Report Viewer**.
   - d. Click the close icon ( ) to close the **Reports Index** window.
5. To print the report without previewing:
   - a. Click **Print** to print the report.
   - b. Click the close icon ( ) to close the **Reports Index** window.

NOTE: The **Connection Event Logs** report will not include logs pertaining to RetailEnterprise Central (for example, `RE Central started on PC028N`). You can view these logs in the **Connection Event Logs** window.

4 Administration

This chapter includes the following tasks:

- managing your Central database
- changing your settings
- archiving non-current data from your Central database
- importing and exporting data.

Managing your Central database

It is important to safeguard your Central database by backing it up regularly. Depending on your business activity, this could be daily. The more regular your backups, the less data you may lose if there is a problem with either your computer or the database file.

To back up your Central database

1. Go to the **File** menu and choose **Settings**. The **Settings** window appears.
2. If required, change the backup location in the **Backup Path** field.

   Click **Browse** to select the path from the **Open** window.
3. Click **Backup**. The **Save As** window appears.
4. Enter the name for the backup file or accept the suggested name (which is based on the date). You can also change the location of the file—either browse to the new location or type in the entire path (`e:\Backups\RME060429`).
5. Click **Save** to perform the backup and close the **Settings** window. A confirmation message appears.
6. Click **OK**.

   RetailEnterprise Central makes a zipped, backup copy of your Central database in the location specified in the **Backup Path** field. The zipped file contains:
   - `RMCentral.mdb`
   - `RMCentralArchive.mdb`

Storing your backup data We recommend you store your backup files on removable media such as an external hard drive or a CD, and preferably at another physical location. If your PC fails or there is a fire for example, it’s no use to have the back up on your `c:\` drive or on a disk on your desk.

To restore your Central database

If you need to restore your Central database in RetailEnterprise Central, use your most recent backup file.

Note that RetailEnterprise Central must not be running a process on your central computer while you are restoring your database.

NOTE: Reenter information after restore You will need to reenter any transaction information that has occurred since you created your backup databases.

1 Go to the **File** menu and choose **Settings**. The **Settings** window appears.
2 Click **Restore**. The **Select File to Restore** window appears.
3 Select the backup file you want to restore.
4 Click **Open**. RetailEnterprise Central restores the database.
  A message informing that the database was successfully restored appears.
5 Click **OK**.

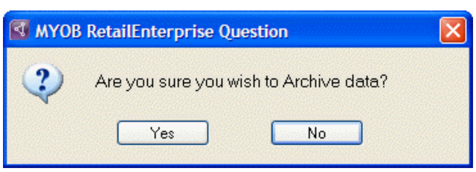
Archiving non-current data

This section describes how to perform housekeeping in MYOB RetailEnterprise Central on your central computer.

To archive non-current data

You have the option to start an archive manually.

1 Go to the **File** menu and choose **Settings**. The **Settings** window appears.
2 If required, change the count in the **Archive data more than x days old** field.
3 Click **Archive Now**. The following message appears:



4 If you want to continue archiving all data created before the date shown, click **Yes**.
  Otherwise, click **No**.

  NOTE: Archived data not included in reports Non-current data is retained in a separate archive database and is not included in reports you generate from now on.

5 When the `Archive complete!` message appears, click **OK**.

Setting up your Central database from a RetailManager shopfront

Using the MYOB RetailEnterprise Import and Export Wizard, you can import and export information about suppliers and stock items from a RetailManager shopfront into your RetailEnterprise Central database. You might want to do this when you are setting up the central office database for the first time. Exporting and importing between databases is quite simple.

For more information on importing and exporting, refer to the Administration chapter of the *MYOB RetailManager User Guide*.

To export data from a RetailManager shopfront

RetailEnterprise Central can import supplier and stock data from your RetailManager shopfront database.

NOTE: Export/import sequence The order in which you export and import files is important. ***Always*** export and import the supplier.txt file first so that the correct relationship between supplier and stock items is maintained in the database.

First, export supplier information

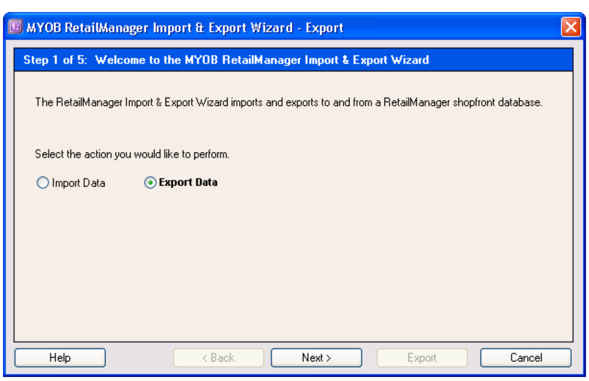
1 Go to the **File** menu and choose **Import & Export**.

If you have an open shopfront you will be asked to close the connection to your shopfront and back up your database.

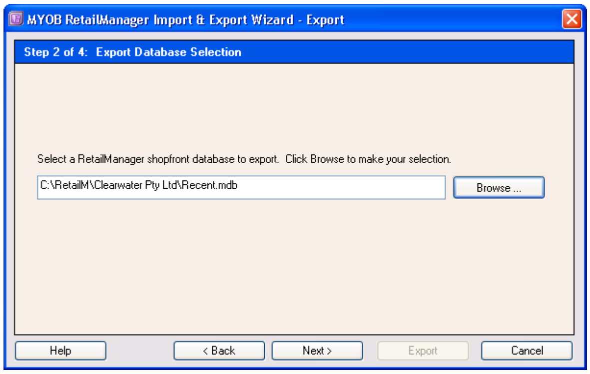
2 If you want to proceed without backing up, click **Continue**.

Or, if you want to back up your database, click **Backup**. In the window that appears, choose a location for the backup file and click **Save**.

The shopfront connection is closed, and the **MYOB RetailManager Import & Export Wizard** window appears.



3 Click **Export Data** and click **Next**. The **Export Database Selection** window appears, showing the database from which data will be exported.

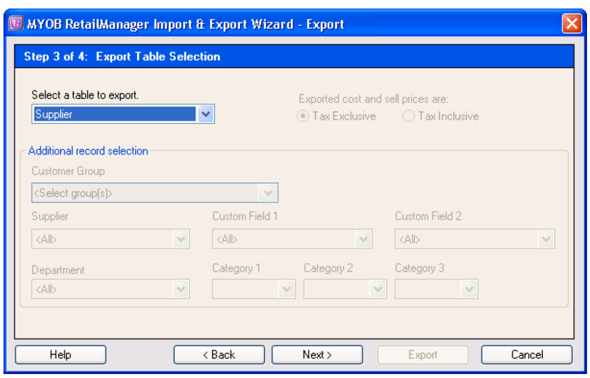


If you are running the Export wizard for a second consecutive time or if no database is displayed, you may need to specify the database:

a Click **Browse.** The **Select Database** window appears.

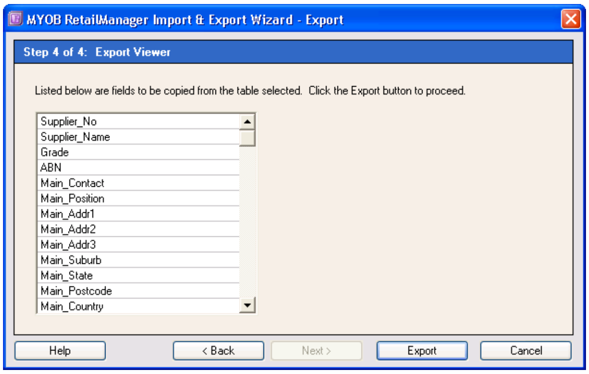
b Open the required shopfront database folder, select the `recent.mdb` file and click **Open**. The name of the database file you selected is displayed.

4 Click **Next**. The **Export Table Selection** window appears.



5 Select **Supplier** from the **Select a table to export** list.

6 Click **Next**. The **Export Viewer** window appears, listing the fields that will be included in the export.



7 Click **Export**. The **Save table as** window appears.

8 Specify the location and file name for the export:

a Specify the folder in which you want to save the export data file.

b Type the name for the file in the **Filename** text box, or use the default name supplied.

c Use the **Save as type** drop-down list to select the format in which you want to save the exported data.

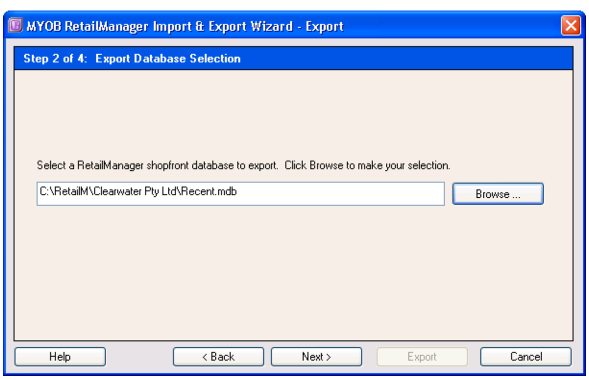
d Click **Save**.

A message appears indicating that the export was successful.

9 Click **Export Again** to run the wizard again.

Next, export stock information

10 Click **Export Data** and click **Next**. The **Export Database Selection** window appears, showing the database from which data will be exported.

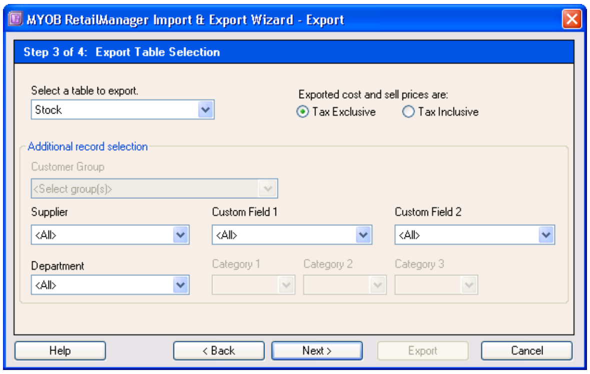


If you are running the Export wizard for a second consecutive time or if no database is displayed, you may need to specify the database:

a Click **Browse**. The **Select Database** window appears.

b Open the required shopfront database folder, select the `recent.mdb` file and click **Open**. The name of the database file you selected is displayed.

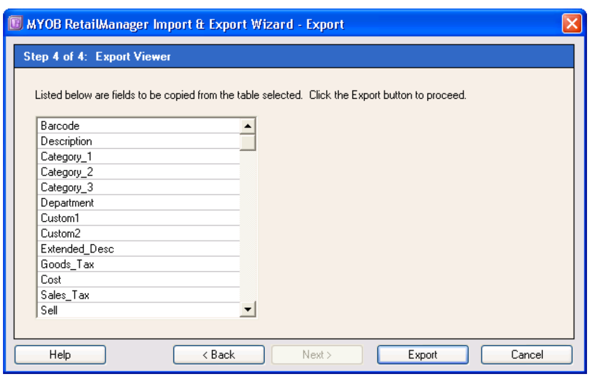
11 Click **Next**. The **Export Table Selection** window appears.



12 Select **Stock** from the **Select a table to export** list.

NOTE: Stock table If you select to export Stock table information, you have the option to export a subset of your stock information. Select specific stock information using the **Supplier**, **Custom Field 1**, **Custom Field 2**, **Department**, **Category 1**, **Category 2** and **Category 3** fields. You set these fields using the RetailManager Stock window. If you wish to export the entire Stock table, leave all other fields as **<All>**.
You can also specify whether you want to export the cost and sell prices as **Tax Exclusive** or **Tax Inclusive** by selecting either of these options.

13 Click **Next**. The **Export Viewer** window appears, listing the fields that will be included in the export.



14 Click **Export**. The **Save table as** window appears.

15 Specify the location and file name for the export:

a Specify the folder in which you want to save the export data file.

b Type the name for the file in the **Filename** text box, or use the default name supplied.

c Use the **Save as type** drop-down list to select the format in which you want to save the exported data.

d Click **Save**.

A message appears indicating that the export was successful.

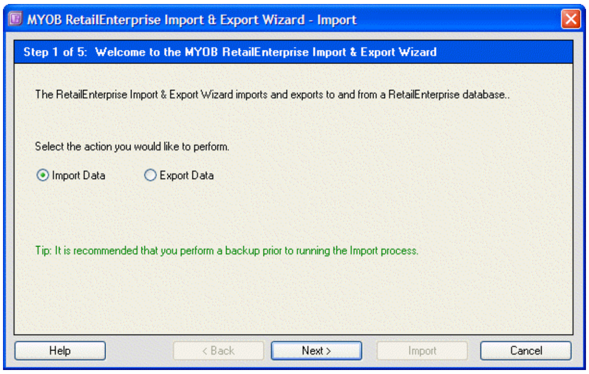
16 Click **Finish.** The **MYOB RetailManager Import & Export Wizard** window closes. Close RetailManager.

To import data into RetailEnterprise Central

First, import supplier information

1 Start RetailEnterprise Central if it is not already running.

2 Go to the **File** menu and choose **Import & Export**. The **Welcome to the MYOB RetailManager Import & Export Wizard** window appears.

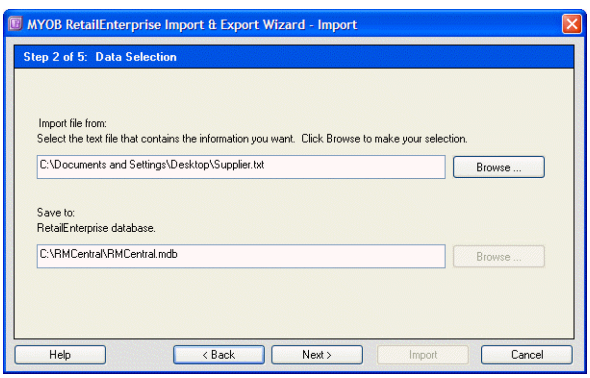


3 Click **Import Data** and click **Next**. The **Data Selection** window appears.

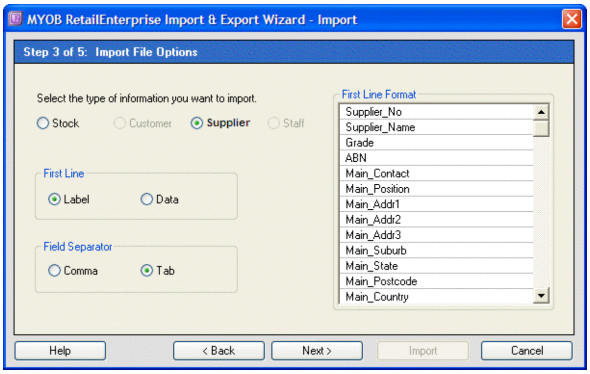
4 Specify the file you want to import data from:

a Click **Browse** next to the **Import file from** field. The **Locate File** window appears.

b Locate and select the file you want to import, and click **Open**. The name of the text file you selected is displayed.



5 Click **Next**. The **Import File Options** window appears.



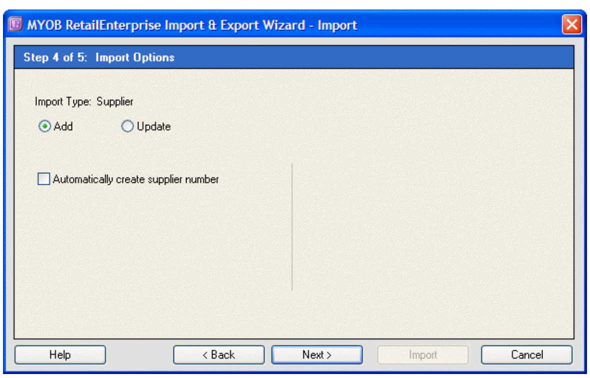
6 Select the **Supplier** option.

7 Specify if the first line (or record) in the import file contains a **Label** or actual **Data**. In most cases the first record in an import text file is a label, and not actual import data.

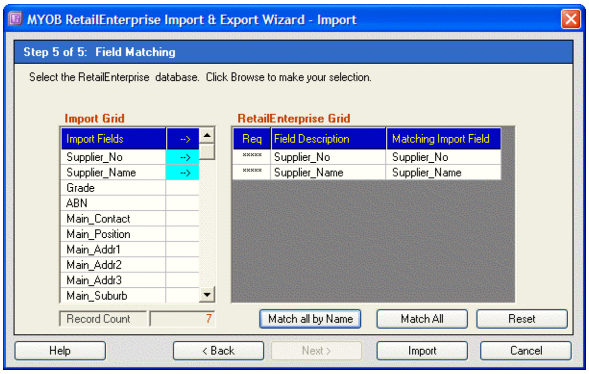
8 Determine and select the type of field separator—**Comma** or **Tab**—used in the import file. Switching between the comma and tab options will cause the grid on the right to display a list of field names. If you select the wrong format, the grid will only have one field name appearing on one line. If this happens, simply select the other format.

NOTE: Field Separator A separator is the character used to separate one field element from another in a text file record.

9 Click **Next**. You will need to specify whether to **Add** or **Update** records. Click **Add** if you are creating new records or **Update** if you are updating an existing database.

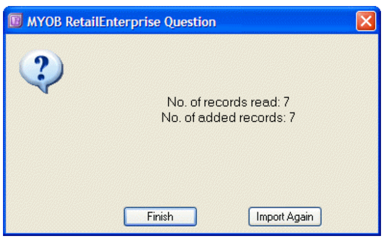


10 When you have finished setting the import options, click **Next**. The **Field Matching** window appears.



11 Click **Match all by name** and then click **Import**.

A message similar to the following appears.



12 Click **Import Again**.

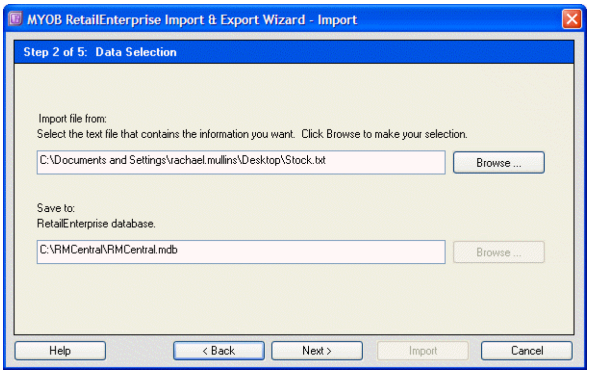
Next, import *stock* information

13 Click **Import Data** and click **Next**. The **Data Selection** window appears.

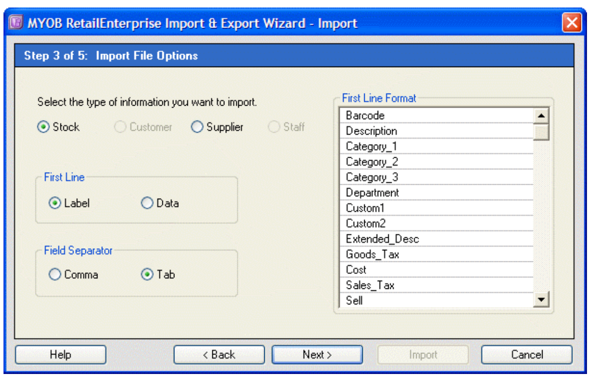
14 Specify the file you want to import data from:

a Click **Browse** next to the **Import file from** field. The **Locate File** window appears.

b Locate and select the file you want to import, and click **Open**. The name of the text file you selected is displayed.



15 Click **Next**. The **Import File Options** window appears.



16 Select the **Stock** option.

17 Specify if the first line (or record) in the import file contains a **Label** or actual **Data**. In most cases the first record in an import text file is a label, and not actual import data.

18 Determine and select the type of field separator—**Comma** or **Tab**—used in the import file. Switching between the comma and tab options will cause the grid on the right to display a list of field names. If you select the wrong format, the grid will only have one field name appearing on one line. If this happens, simply select the other format.

NOTE: Field Separator A separator is the character used to separate one field element from another in a text file record.

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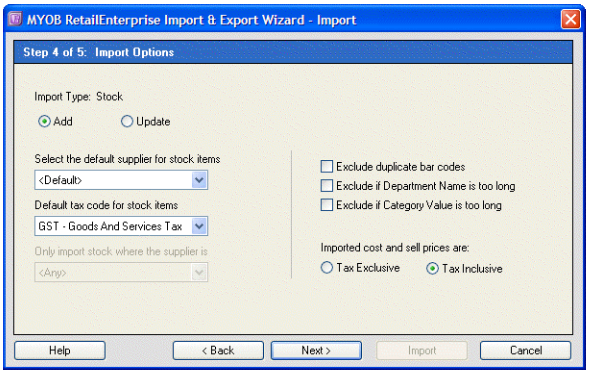
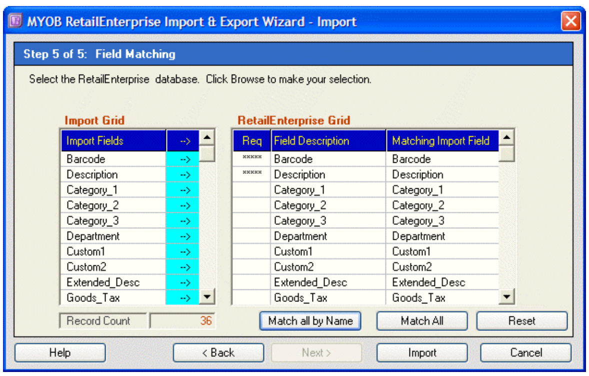
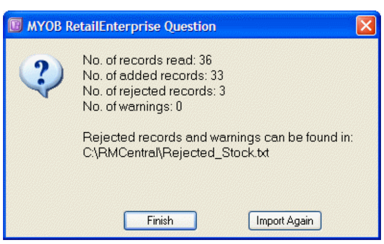
19 Click **Next**. You will need to specify whether to **Add** or **Update** records. Click **Add** if you are creating new records or **Update** if you are updating an existing database.



20 Click **Next**. The **Field Matching** window appears.



21 Click **Match all by name** and then click **Import**. A message similar to the following appears.



22 Click **Finish**. The **MYOB RetailManager Import & Export Wizard** window closes.

Appendix A: Troubleshooting

This chapter describes solutions to a variety of the problems you may encounter while using RetailEnterprise Central. Not all these problems are caused directly by RetailEnterprise Central, and not all the solutions involve fixes within the product.

The following areas are described in this chapter:

- Troubleshooting tips for common problems
- Problems with maintenance
- Problems with the Data Capture process.

TIP: Keep a record of problems For your own purposes, as well as forother users or employees, it is well worth making a note of the problem, any possible contributing factors, steps and events leading up to the problem, who fixed the problem and the solution.

Troubleshooting a problem requires careful attention to the circumstances that may have contributed to the problem. If MYOB RetailEnterprise Central is not working correctly, consider the following:

- When did you first notice the problem?
- What were you doing in RetailEnterprise Central at the time?
- Was anything happening that might have affected your computer (such as electrical repairs in your building, street or community)?
- Did the problem arise when you were trying to upgrade the system by installing new hardware or software?
- Can you recreate the problem (by repeating a pattern of events)?
- Who has been using RetailEnterprise Central? Is it only the authorised employees?

Have this information handy when you call technical support.

Troubleshooting tips for common problems

This section includes useful troubleshooting tips for some common problems that can affect your computer.

For example, you may notice that the computer seems to slow down when you are using MYOB RetailEnterprise Central. Although this problem is experienced while using RetailEnterprise Central, it is not necessarily caused by it. The problem may be caused by another component or application in your Windows environment.

Before calling for expert and possibly, expensive help, there are a number of tips you can try. These tips are not specific to RetailEnterprise Central, but they have been tried and tested to resolve some common problems in Windows.

These troubleshooting tips are listed below:

- **Restart your computer and printers.** Click **Start**, choose **Shut Down**, and then choose **Shut Down**. After your computer has shut down, turn off the computer and any printers. Then take the following action:
  - a Wait 30 seconds.
  - b Turn on the printers.
  - c Turn on and restart your computer.
  - d Restart RetailEnterprise Central.
- **Check your hard disk using Disk Cleanup**. Click **Start**, choose **Programs**, **Accessories**, **System Tools**, and choose **Disk Cleanup**. See Windows Help for more information.
- **Defragment your hard disk.** Click **Start**, choose **Programs**, **Accessories**, **System Tools**, and choose **Disk Defragmenter**. See Windows Help for more information.
- **Delete the files in your temp folder.** Use Windows Explorer to go to your temporary folder (usually `c:\WINDOWS\Temp`) and delete all the files in it. Make sure there are no other programs running in the background when you do this.
- **Check your computer for viruses.** To do this you will need a virus checker program. Check with your retailer.
- **Maintain your database.** If you are having problems with your database, see 'Managing your Central database' on page 85 for more information about managing your database, and what options are available for fixing it.

After you have tried one or more of the fixes listed above, restart your computer. If the problem still occurs, contact your MYOB RetailManager Professional or technical support.

Appendix B: MYOB technical support

Our technical support team can offer assistance with installing, using and troubleshooting MYOB RetailEnterprise Central. However, support cannot be provided on issues arising from hardware or operating system faults, or incompatible hardware or software. You may need to contact an MYOB RetailManager Professional if these issues arise.

Technical support options for your region

If you're in...	See...
Australia	page 100
New Zealand	page 102
Hong Kong	page 103
Malaysia	page 104
Singapore	page 105

Prepare before you call technical support

Gather information about the problem

- Try to recall and write down details of the problem, including what you did before the problem occurred, and the exact text of any error message that appeared. See if you can reproduce the problem.

Gather the following information about your software

- The serial number, which is printed on the RetailEnterprise Central CD sleeve or registration form. To check this in the software, go to the **Help** menu and select **Company Details**.
- The version of the software, which is printed on the RetailEnterprise Central CD sleeve. To check this in the software, go to the **Help** menu and select **About MYOB RetailEnterprise**.

Gather the following information about your computer

- Your computer type, processor and model, and the version number of the operating system you are running. To locate this information, do the following:

If you are using...	do this...
Windows Vista	1 Go to the **Start** menu. 2 Right-click **Computer** and choose **Properties**. The **System** window displays the hardware and operating system details.
Windows XP or 2000	1 Right-click the **My Computer** desktop icon. 2 Choose **Properties** and then click the **General** tab. The **System Properties** window displays the hardware and operating system details.

Australia

Technical support phone numbers and charges

Support Plan	Phone number	Available times (EST)	Charges
Retail Enhancement and Support	**1300 555 115**	9.00am to 7.00pm (Monday to Wednesday) 9.00am to 9.00pm (Thursday to Friday) 9.00am to 5.00pm (Saturday to Sunday)	Local call charges
Pay-Per-Call Support If your introductory support period has expired and you are not subscribed to Retail Enhancement and Support.	**1300 555 128**	9.00am to 7.00pm (Monday to Friday)	Local call charges and Pay-Per-Call charges. To find out what our current Pay-Per-Call charges are, call **1300 555 115**.

Technical support options

Retail Enhancement and Support

Maintaining your Retail Enhancement and Support subscription provides you with:

- technical support seven days a week
- all upgrades and updates we release for your product
- regular communications including *Coverage*, or monthly e-newsletter
- exclusive discounts and special offers.

On expiry of your initial subscription, the Retail Enhancement and Support subscription can be renewed at your expense.

For the terms and conditions of Retail Enhancement and Support, visit myob.com.au/retail and click **MYOB RetailEnterprise**. From the **Quick Links** section on the right side of the page, click **Support plans for businesses** and then click **MYOB Retail Enhancement and Support**.

Pay-Per-Call support

If you do not renew your Retail Enhancement and Support subscription, you can access technical support on a Pay-Per-Call basis. Pay-Per-Call support is charged at a per-minute rate and a minimum charge applies. Prices and conditions are subject to change without notice and are available from MYOB by calling **1300 555 115**.

Support notes

You can access a wide range of technical support notes at myob.com.au/supportnotes

Keep up to date with RetailEnterprise on the Web

The MYOB website (myob.com.au/retail) is updated frequently and contains the latest RetailEnterprise information, news, and links to many useful resources.

Send us your feedback

We welcome your suggestions for improvements and changes to RetailEnterprise. Go to myob.com/ideas and complete the online form.

New Zealand

Technical support phone numbers and charges

Support Plan	Phone number	Available times	Charges
RetailManager businessUPPORT By subscription only	**0508 123 123**	9.00 am to 5.00 pm (Monday to Wednesday), 9.00 am to 9.00 pm (Thursday and Friday) and 11.00 am to 5.00 pm (Saturday and Sunday)	Calls are free when subscription is paid. (Subscription fee can only be paid via direct debit.)

Technical support options

BusinesSUPPORT

Maintaining your businesSUPPORT subscription provides you with:

- **Automatic software upgrades**—automatically upgrade to a new version of your MYOB RetailManager product when it is released during the course of your subscription, keeping your business up to date with the latest retail business management technology.
- **Quarterly issues of MYOB *InFocus***—a year's subscription to the quarterly publication written by MYOB Technical Communications specialists, providing you with tips and techniques to help you get the most out of your retail business management and accounting system.
- **0508 number access to MYOB technical support**—telephone a technical support specialist for advice about your MYOB RetailManager software.
- **Email access to MYOB technical support**—email a concise and accurate description of your technical issue to the technical support email address. MYOB will usually reply by the next business day.
- **Fax access to MYOB technical support**—fax a concise and accurate description of your technical issue to the technical support address. MYOB will usually reply by the next business day.
- **Notification of and access to regularly-updated web-based MYOB support notes**—combine an up-to-date subscription with an up-to-date email address to receive notice of the latest software support information online.

For the terms and conditions of businesSUPPORT, visit myob.co.nz, click **Support**, then click **Business Owners** and then click **Join MYOB businesSUPPORT**.

Support notes

You can access a wide range of technical support notes at myobnz.custhelp.com

Send us your feedback

We welcome your suggestions for improvements and changes to RetailEnterprise. Go to myob.com/ideas and complete the online form.

Hong Kong

Technical support phone numbers and charges

Support Plan	Phone number	Available times	Charges
Retail Enhancement and Support	**(852) 3402 9888**	9.30am to 6.00pm (Monday to Friday)	For information about call charges, contact technical support.

Technical support options

Retail Enhancement and Support

Maintaining your Retail Enhancement and Support subscription provides you with:

- priority telephone technical support five days a week
- fax and email technical support, with an answer by the next business day
- all upgrades and updates we release for your product
- exclusive discounts and special offers.

The purchase price of your MYOB RetailManager software includes one year's subscription to Retail Enhancement and Support.

When your initial subscription to Retail Enhancement and Support expires, you can renew your subscription if you want.

NOTE: Your subscription to Retail Enhancement and Support starts from the date you register MYOB RetailManager.

Support notes

You can access a wide range of technical support notes online.

1. Go to the MYOB website at myob.com.hk
2. Click the **Support** tab.
3. In the **Business Management** products section, click **Support Notes and Advanced Academy**.

Send us your feedback

We welcome your suggestions for improvements and changes to RetailEnterprise. Go to myob.com/ideas and complete the online form.

Malaysia

Technical support phone numbers and charges

Support Plan	Phone number	Available times	Charges
MYOB Business Support	**(603) 8991 0188** or **1300 88 6962** (The latter number is for customers outside the Klang Valley region. Calls to this number are charged at the local call rate.)	9.00am to 5.30pm (Monday to Friday)	For information about call charges, contact technical support.

Technical support options

MYOB Business Support

Maintaining your MYOB Business Support subscription provides you with:

- priority telephone technical support five days a week
- fax and email technical support, with an answer by the next business day
- all upgrades and updates we release for your product
- exclusive discounts and special offers.

The purchase price of your MYOB RetailManager software includes three months' subscription to MYOB Introductory Support.

When your initial subscription to MYOB Introductory Support expires, you can subscribe to MYOB Business Support if you want.

NOTE: Your subscription to MYOB Introductory Support starts from the date you register MYOB RetailManager.

Support notes

You can access a wide range of technical support notes online.

1. Go to the MYOB website at myob.com.my
2. Click the **Support** tab.
3. In the **For Businesses** section, click **Technical Support Notes**.

Send us your feedback

We welcome your suggestions for improvements and changes to RetailEnterprise. Go to myob.com/ideas and complete the online form.

Singapore

Technical support phone numbers and charges

Support Plan	Phone number	Available times	Charges
MYOB Business Support	(65) 6505 6584	9.00am to 5.30pm (Monday to Friday)	For information about call charges, contact technical support.

Technical support options

MYOB Business Support

Maintaining your MYOB Business Support subscription provides you with:

- priority telephone technical support five days a week
- fax and email technical support, with an answer by the next business day
- all upgrades and updates we release for your product
- exclusive discounts and special offers.

The purchase price of your MYOB RetailManager software includes three months' subscription to MYOB Introductory Support.

When your initial subscription to MYOB Introductory Support expires, you can subscribe to MYOB Business Support if you want.

NOTE: Your subscription to MYOB Introductory Support starts from the date you register MYOB RetailManager.

Support notes

You can access a wide range of technical support notes online.

1. Go to the MYOB website at myob.com.sg
2. Click the **Support** tab.
3. In the **For Businesses** section, click **Technical Support Notes**.

Send us your feedback

We welcome your suggestions for improvements and changes to RetailEnterprise. Go to myob.com/ideas and complete the online form.

MYOB training options

MYOB RetailManager Professionals

NOTE: In this document, MYOB Point of Sale Specialists [New Zealand], MYOB POS Partners [Hong Kong] and MYOB Professional Partners [Malaysia and Singapore] are referred to as MYOB RetailManager Professionals.

MYOB RetailManager Professionals provide independent on-site assistance with MYOB RetailEnterprise and associated products and services, including:

- Retail business system needs and analysis
- RetailEnterprise installation, setup and implementation
- Point-of-sale hardware and peripheral solutions
- On-site training and support for RetailEnterprise
- RetailEnterprise database maintenance
- Integration with MYOB business management software.

As independent businesses, MYOB RetailManager Professionals offer a range of services.

For more information or a list of MYOB RetailManager Professionals, go to myob.com, choose the link for your region and click **Partners**.

MYOB training and MYOB Approved Training Providers

NOTE: MYOB training is not available in Hong Kong.

If you want to know more about the new features in MYOB RetailManager or how RetailManager can improve the profitability of your retail business, enrol in an MYOB RetailManager course. An MYOB RetailManager course will show you how to set up your system correctly from the start, and how to use RetailManager's many features to help you improve your store's sales performance. You'll be trained using the latest version of RetailManager by MYOB professional trainers.

[Australia only] In addition to an MYOB RetailManager training course, independent classroom-based training is available through our network of MYOB Approved Training Providers.

For more information about your training options, go to myob.com, choose the link for your region and click **Training + Events**.

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