User Guide

RetailEnterprise Shop v4

MYOB®

MYOB Australia Pty Ltd

Website: myob.com.au

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Website: myob.co.nz

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Website: myob.com.hk

MYOB Asia Sdn. Bhd.

Website: myob.com.my

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Website: myob.com.sg

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.

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Writers

Suchitra Govindarajan, Naomi Hall, Merrin Hughes, Claire Mahoney, Rachael Mullins, Kylie Nicholson, Steven Rao, Mirjana Sicevic, Ronald Tierney, John Wilson.

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Contents

1 Getting Started

Welcome to MYOB RetailEnterprise—the extension to MYOB RetailManager that provides a competitive advantage to your multiple-outlet retail business.

About this manual

This MYOB RetailEnterprise Shop *User Guide* provides you with the information you need to use the features and benefits of RetailEnterprise Shop. You may need to refer to the *User Guide* when:

- getting started
- setting up RetailEnterprise Shop
- performing the regular, daily tasks in RetailEnterprise Shop
- setting up and using RetailEnterprise Stock At Other Shops.

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

## Overview of MYOB RetailEnterprise

MYOB RetailEnterprise enables you to establish electronic communication between your shops and the central office of your business. In this way, you can receive information such as centralised product updates, while your central office collects a daily summary of sales and stock levels from the shops.

RetailEnterprise Shop interfaces with RetailManager and leaves you free to get on with operating your shop. RetailEnterprise Shop 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 a quiet time for your shop, typically at night.

Using RetailEnterprise Stock At Other Shops, you can view stock holdings from other shops, perform searches on other stock holdings and, if required, display shop details, name, address and contact details. See for more information.

Typical RetailEnterprise Shop model

The illustration below shows a typical model of how RetailEnterprise Shop is implemented in a retail business like yours.
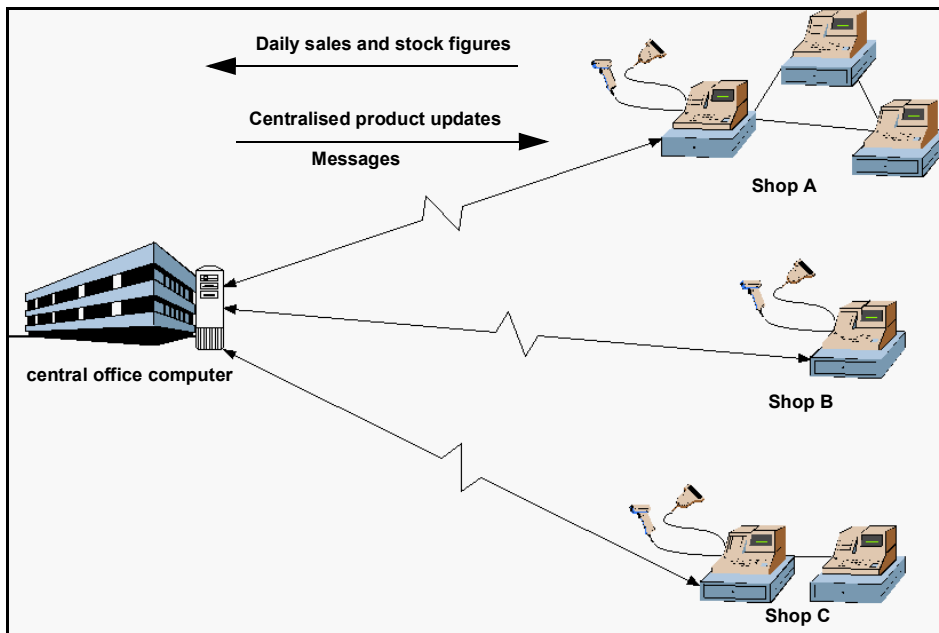
As the illustration shows, RetailEnterprise Shop enables your shops to send information to and receive information from the central office.
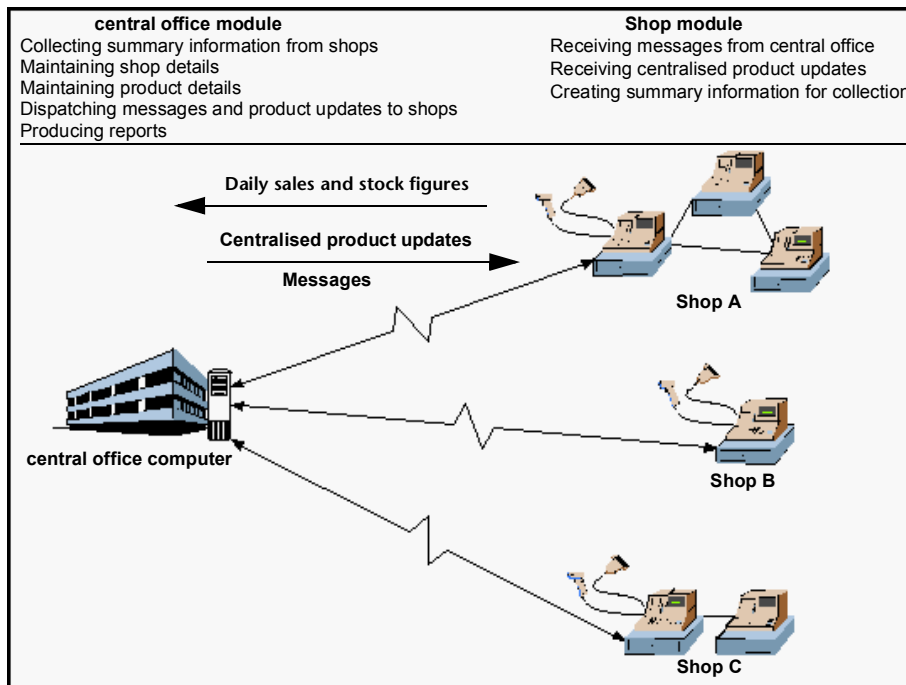
About RetailEnterprise

The RetailEnterprise software is made up of two separate parts:

■ the Shop module installed in your shops

■ the Central module installed in your central office.

Each module is designed to perform different activities. The Central module, installed at your central office, is used to perform centralised product updates and to act as a messaging service to multiple shops. The Shop module, installed locally at each shop, is used to receive messages and receive and process centralised product updates for your shop.

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

Shop module

This module of RetailEnterprise usually runs behind the scenes on a computer in your shop. Occasionally, you may need to respond to events or messages initiated by staff in the central office of your organisation. You use the Shop module to:

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

Central module

central office staff use this module of RetailEnterprise to:

- monitor the collection process that collects daily sales and stock data from shops
- maintain details of every shop (including any at the central office)
- maintain details of products
- broadcast messages to shops (including any at the central office)
- broadcast other shop stock holding information
- generate reports based on the daily sales and stock data collected from shops.

Checklist for implementation

This section contains a checklist for implementing RetailEnterprise Shop. The checklist is included especially for first time users of RetailEnterprise Shop. We recommend that you talk to your central office before you follow the sequence of steps outlined in the checklist.

Implementation checklist—Shop

Step	Action	By who
1	Ensure you have the appropriate hardware and software to establish 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.	Hardware supplier, Telecomms provider
2	Is RetailManager already installed? If yes, continue from step 4.	Shop manager
3	Implement RetailManager in your shop, as described in the *MYOB RetailManager Getting Started guide* and *MYOB RetailManager User Guide*.	Shop manager
4	Install RetailEnterprise Shop. See 'Installing MYOB RetailEnterprise Shop' on page 11.	Shop manager
5	Understand your technical support options. See 'MYOB technical support' on page 59.	Shop manager
6	Set up general settings for RetailEnterprise Shop. See 'Setting RetailEnterprise options' on page 21.	Shop manager
7	Set up communications between central and shop, depending on your chosen communications method. • See 'Setting up email communication between your shops and your central office' on page 24, 'Setting up dial-up networking between your shop and your Central office' on page 29, and the separate *Communications Setup Guide* which you can access from the **Help** menu.	central office staff or RetailManager Professional
8	Test your connection.	Shop manager

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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 Shop v4 CD.

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Installing MYOB RetailEnterprise Shop

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
Software	MYOB RetailManager v10 must already be installed on the computer.
Backup solution	We strongly recommend a backup solution such as a CD/DVD writer or a USB storage device.

Registering MYOB RetailEnterprise v4

MYOB RetailEnterprise Shop is registered when you register the MYOB RetailEnterprise Central module.

For more information about how to register, see the Getting Started chapter of the *MYOB RetailEnterprise Central User Guide*.

Do you need additional shop licences?

When you first install and register MYOB RetailEnterprise Central, you are supplied with five shop licences. If you need to bring more shops online, you must purchase and register additional shop licences.

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

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

For more information about how to purchase and register additional shop licences, see the Getting Started chapter of the *MYOB RetailEnterprise Central User Guide*.

Before you install RetailEnterprise Shop

- **Make sure you have installed and registered MYOB RetailManager v10.** MYOB RetailEnterprise Shop v4 will not work unless you have installed this on your computer.
- **Disable your anti-virus program.** If you use an anti-virus program, disable it before you install this version.

To install RetailEnterprise Shop

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 Shop.

3   Insert the MYOB RetailEnterprise Shop 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 Shop**.
  - [Hong Kong, Malaysia and Singapore] Click **Select RetailEnterprise Shop installer**, and then select the installer for your country.

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

5 Follow the onscreen instructions.

NOTE: Warnings   If any warnings appear during installation, see 'Troubleshooting your installation' on page 14.

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.

When you install MYOB RetailEnterprise Shop, the installation process sets RetailEnterprise Shop to start automatically whenever you start the computer. To confirm that RetailEnterprise Shop is running, check if the RetailEnterprise Shop icon ( ) is in the system tray at the bottom of your computer desktop, as shown:

If the icon is not displayed in the system tray, you can start RetailEnterprise Shop from the **Start** menu in Windows. Click **Start**, choose **Programs**, then choose **MYOB RetailEnterprise - Shop v4**.

CAUTION: [Windows Vista users only] Allow RetailEnterprise Shop to accept incoming network connections   When you first open RetailEnterprise Shop after installation, a Windows security alert may appear to tell you that some program features have been blocked by the Microsoft firewall. To unblock RetailEnterprise Shop and allow incoming network connections, click **Unblock**. If you do not see the security alert, you can add RetailEnterprise Shop as a Windows firewall exception.

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 Shop CD.

Where to from here?   Continue from step 5 in the 'Implementation checklist—Shop' table on page 10.

Troubleshooting your installation

During the installation of RetailEnterprise Shop, 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 59.

Starting MYOB RetailEnterprise Shop

The installation process sets RetailEnterprise Shop to start automatically whenever you start the computer. When RetailEnterprise Shop starts for the first time, the following message appears.
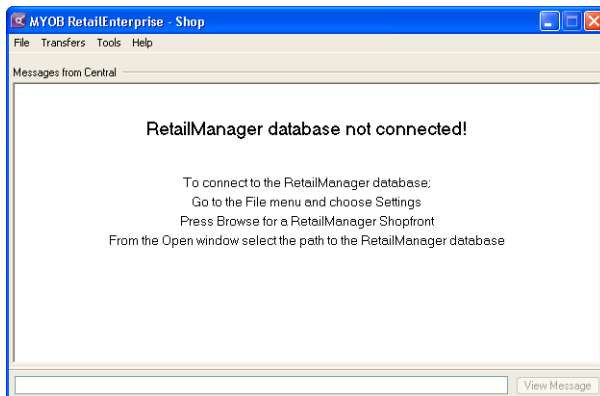
To connect to your RetailManager shopfront

1   Go to the **File** menu and choose **Settings**. The **Settings** window appears.
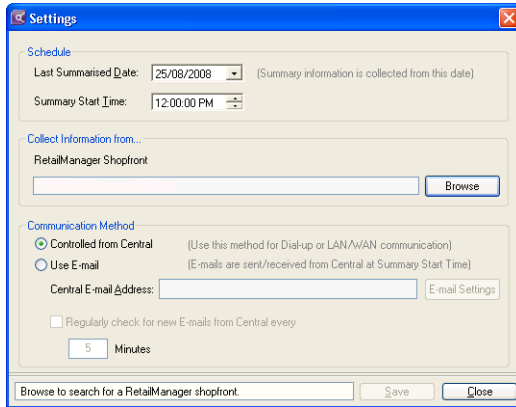
2   Click **Browse**. The **Browse for Folder** window appears.

3   Locate the folder where the shopfront is stored and click **OK**.

NOTE: Check with your central office   To ensure that you select the correct shopfront, check with the appropriate person in your central office.

The **Settings** window reappears with the path inserted.

4   Click **Save**. Don't worry about **Schedule** or **Sending Method** yet. These are explained in the 'Setting RetailEnterprise options' on page 21.

The **MYOB RetailEnterprise - Shop** window appears.
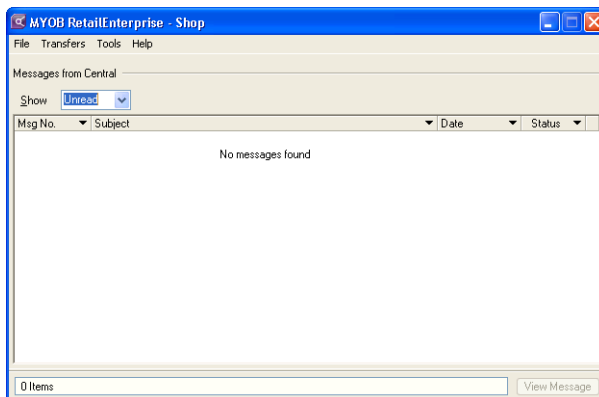
5   Click the close icon ( ) to close the **MYOB RetailEnterprise - Shop** window.

2   Setting Up

This chapter describes how to set up MYOB RetailEnterprise Shop for your business. Before beginning this chapter, make sure you have installed MYOB RetailEnterprise Shop as described in 'To install RetailEnterprise Shop' on page 12.

This chapter explains how to:

- set RetailEnterprise Shop options
- set up email communication between your shops and your central office
- set up dial-up networking between your shops and your central office for the following operating systems:
  - Windows Vista Ultimate
  - Windows XP Professional
  - Windows 2000.

To help you become familiar with RetailEnterprise Shop, the first part of the chapter describes some basic navigation techniques for RetailEnterprise Shop.

Starting MYOB RetailEnterprise Shop

When you install MYOB RetailEnterprise Shop, the installation process sets RetailEnterprise Shop to start automatically whenever you start the computer.

When you complete the installation of MYOB RetailEnterprise Shop, you must restart your computer. After the restart, RetailEnterprise Shop should be running. To confirm this, check if the RetailEnterprise Shop icon ( ) is in the system tray at the bottom of your computer desktop, as shown:

If the icon is not displayed in the system tray, you can start RetailEnterprise Shop from the **Start** menu in Windows. Click **Start**, choose **Programs**, then choose **MYOB RetailEnterprise - Shop v4**.

Navigating in RetailEnterprise Shop

This section describes the basics of navigating your way around MYOB RetailEnterprise Shop. The basics of navigation include the use of:

- common Windows® features such as tabs, tables, buttons, list fields and checkboxes—these 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 navigate in RetailEnterprise Shop.

Common Windows features

RetailEnterprise Shop window example

The illustration below shows the title bar, a grid, button and the message bar:
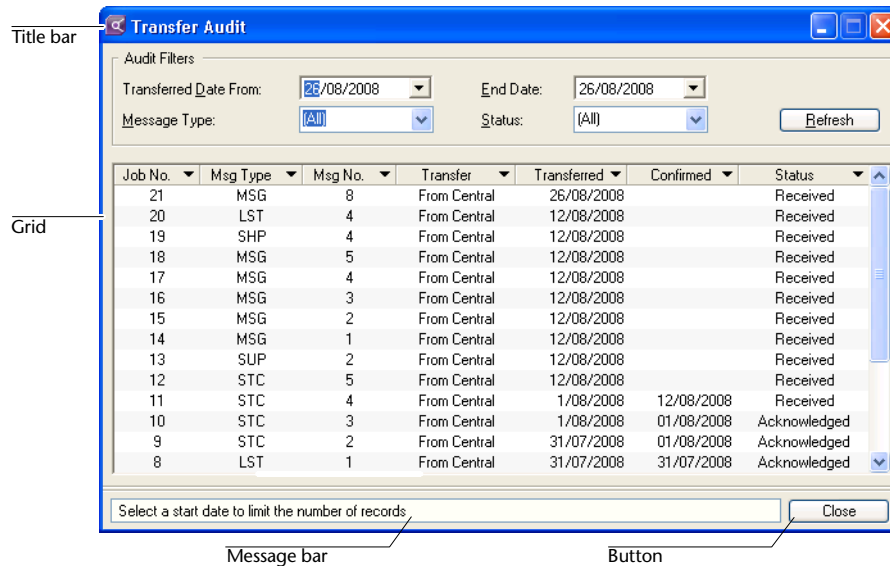
NOTE: To display the example window (Products window) To display the example window above, go to the **Information** menu and choose **Products**.

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.
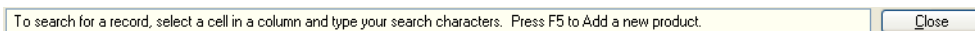
Buttons

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

| Commit |

Message bar

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

| To search for a record, select a cell in a column and type your search characters. Press F5 to Add a new product. | Close |

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.

| General | Connection | Transfer | Audit |
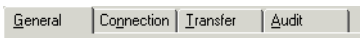
Types of fields

There are various types of fields in RetailEnterprise Shop 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:

| Category 1 | FOOD |
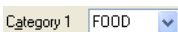
While in some list fields you can only select from the list of available options, in other fields you can either select from the list or type a new entry that is not in the list.

Keyboard shortcuts

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

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)

TRANSFERS MENU COMMANDS

Press …	To …
CTRL+A	Open the **Transfer Audit** window

TOOLS MENU COMMANDS

Press …	To …
CTRL+E	Open the **Connection Event Logs** window

Closing a window

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

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

Setting RetailEnterprise options

These settings are essential to the correct operation of MYOB RetailEnterprise Shop. The settings involve specifying:

- the time at which the summary information file of your daily sales and stock figures should be created
- the shopfront database from which the summary information will be accessed
- the method used to send and receive information between your shops and your central office location.

Workflow

Each day, each shop (including your own) that is part of a wider RetailEnterprise network creates a summary file that contains information about the shop's daily sales and stock figures.

At a set time (typically at night) your central office starts a collection process using RetailEnterprise Central. If you are using the direct dial-up method of communication between shops and central office, this process might include establishing an electronic communications connection with each shop. The summary file from each shop is collected and processed by RetailEnterprise Central.

The collection process relies on summary information already having been processed at your shop location, ready to be collected by RetailEnterprise Central.

It is important that you set MYOB RetailEnterprise Shop to create this summary information file before the collection process from RetailEnterprise Central begins.

It is also important that you contact your central office to determine the appropriate time for your shop to create the summary information file.

Communication methods   There are three methods that RetailEnterprise and RetailEnterprise Shop can use to communicate. These methods are:

- through direct dial-up communication (using a modem)
- over a local area network (LAN) or wide area network (WAN)
- via email.

Communications via direct dial-up or over a LAN/WAN are initiated and controlled by RetailEnterprise Central from your central office location.

Communication via email is not controlled by RetailEnterprise Central, as the information is sent by RetailEnterprise Shop to the email address of your central office. Each party can only receive messages and updates when they are online (that is, connected via their ISP). central office and your shops do not need to be connected to each other simultaneously. If you will be using third-party email software, the shop summary file is automatically placed in the Outbox but can only be sent when the email software is online.

To set up your RetailEnterprise Shop options

- -
CAUTION: Proceed only after checking with your central office.
- -

1   Double-click the RetailEnterprise Shop icon (◙) in the system tray at the bottom of your computer desktop. The **MYOB RetailEnterprise - Shop** window appears.

   If the icon is not displayed in the system tray, you can start RetailEnterprise Shop from the **Start** menu in Windows. Click **Start**, choose **Programs**, then choose **MYOB RetailEnterprise - Shop v4**.

2   Go to the **File** menu and choose **Settings**. The **Settings** window appears.
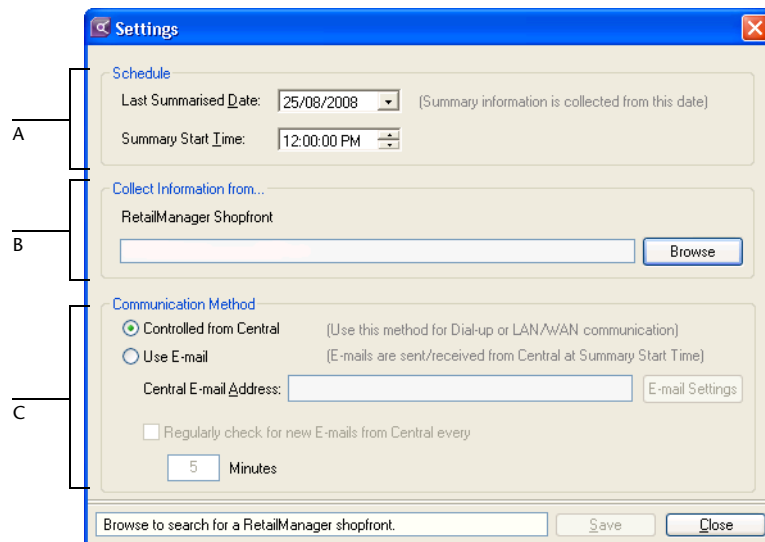
The **Settings** window has three groups.

A	**Schedule**	Select the date and time for RetailEnterprise to create your summary information file for the next collection process. See 'Set the schedule' below.
B	**Collect Information from**	Select the correct shopfront for the collection process. See 'Select the shopfront' on page 23.
C	**Communication Method**	Select the method you will use to establish electronic communications between your shops and your central office. See 'Choose your communication method' on page 24.

Set the schedule

3   In the **Last Summarised Date** field, click the down arrow and select the required date from the calendar.

   When you are setting up MYOB RetailEnterprise Shop for the first time, you should set the date when you first started using RetailManager.

   This means that the first summary file created for your shop will contain all information prior to installing RetailEnterprise Shop.

4 In the **Daily Summary Time** field, enter the time you want to create the summary file. You should set a time that is after your trading hours and before the collection process from your central office begins. Check with your central office to make sure you enter the right time.

   a Click to select the part of the time you want to change—hours, minutes or seconds.

   b Type or select the relevant time using the up and down arrows.

At the time specified in the **Daily Summary Time** field, MYOB RetailEnterprise Shop will recreate summarised shop data for the period from midnight on the entered date up to the current date.

Select the shopfront

5 Is the correct shopfront displayed in the **RetailManager Shopfront** field?
- If yes, go to 'Choose your communication method' on page 24.
- If no, go to the next step.

6 Click **Browse**. The **Browse for Folder** window appears.
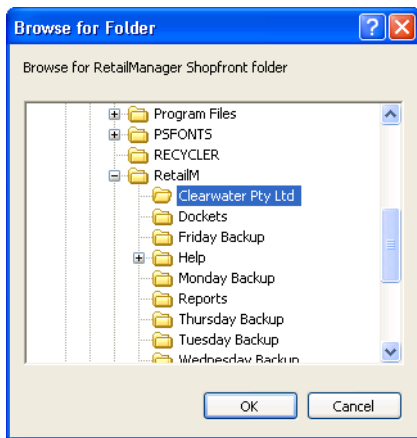
7 Use the **Browse for Folder** window to locate the required shopfront database folder.

- -

NOTE: Check with your central office Check with the appropriate person in your central office to ensure that you select the correct shopfront folder.

- -

8 Select the required folder and click **OK**.

If you have selected a folder with a valid RetailManager database, the **Browse for Folder** window closes and the **Settings** window appears with the path and name of the selected shopfront in the **RetailManager Shopfront** field. Go to 'Select the shopfront' above.

If the folder you selected does not contain a valid RetailManager shopfront, a RetailManager warning message appears.

9 Click **OK**.

10 Repeat the procedure from step 6 above.

Choose your communication method

11 Do one of the following:
   - If RetailEnterprise Central uses dial-up or LAN/WAN to communicate with your shop, click **Controlled from Central**.
   - If RetailEnterprise Central uses email to communicate with your shop, click **Use E-mail**. Then, see 'Setting up email communication between your shops and your central office' below for instructions on configuring your email account.

12 Click **Save** to save the settings for your shop.

13 Minimise the **MYOB RetailEnterprise Shop** window to continue running the application in the background. You can restore the window by double-clicking the RetailEnterprise Shop icon (🔲) in the system tray at the bottom of your computer desktop.

Setting up email communication between your shops and your central office

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 shops and your central office 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 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 an 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	The *MYOB RetailEnterprise Central User Guide*
2	In RetailEnterprise Central, enter the email addresses for every shop that uses email as the communication method	The *MYOB RetailEnterprise Central User Guide*
4	At every shop that uses email, open RetailEnterprise Shop and: • enter the email address of your central office • specify email settings for the shop • test the connection	See 'To specify email settings in RetailEnterprise Shop' below

To specify email settings in RetailEnterprise Shop

Before you start

For this method...	Check this...
[If you use Vista, or XP Service Pack 2 or 3] Allow RetailEnterprise Shop to accept incoming network connections	When you first open RetailEnterprise Shop after installation, a Windows security alert may appear to tell you that some program features have been blocked by the Microsoft firewall. To unblock RetailEnterprise Shop and allow incoming network connections, click **Unblock**. If you do not see the security alert, you can add RetailEnterprise Shop as a Windows firewall exception by doing the following. • Go to the **Control Panel** and double-click **Security Center** • Click **Windows Firewall** • Click **Allow a program through Windows Firewall** • Add RetailEnterprise Shop 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   Double-click the MYOB RetailEnterprise Shop icon (▧) in the system tray at the bottom of your computer desktop. The **MYOB RetailEnterprise - Shop** window appears.

   If the icon is not displayed in the system tray, you can start RetailEnterprise Shop from the **Start** menu in Windows. Click **Start**, choose **Programs**, then choose **MYOB RetailEnterprise - Shop v4**.

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

3 Click **Use E-mail** and type the email address used by RetailEnterprise Central to receive summary information from your shop. Make sure you confirm the email address used with your contact at your central office location.
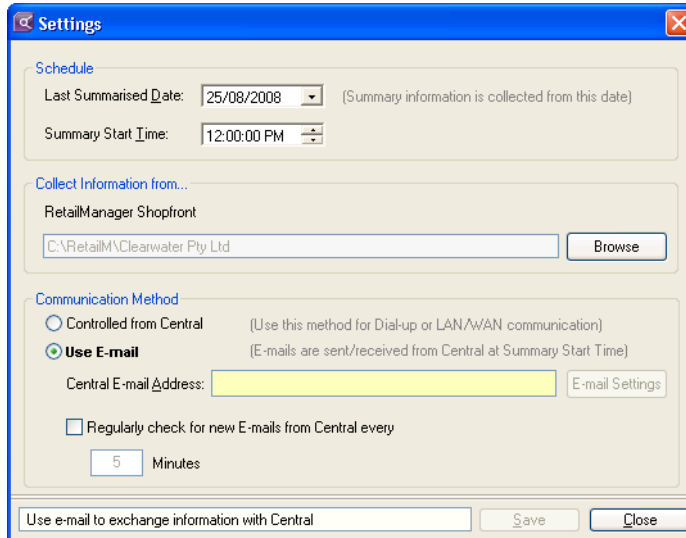

4 If you want to check for RetailEnterprise Central messages regularly, for example, every five minutes, select the **Regularly check for new E-mails from Central every x minutes** option and enter the interval (in minutes).

- -

NOTE : If you are using third-party email software, this is the interval at which RetailEnterprise checks the software's inbox The interval at which the email software actually connects to the Internet and downloads new emails is determined by the settings within the software.

- -

5 Click **E-mail Settings**. The **E-mail Settings** window appears.
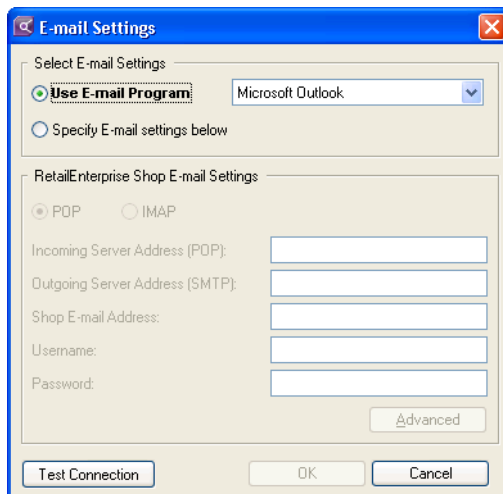
6   Choose how you want to send and receive MYOB RetailEnterprise messages and updates:
    ■   If you want to enter your email settings directly into MYOB RetailEnterprise, select the **Specify e-mail settings below** option. Continue with step 7 below.
    ■   If you want to use third-party email software, select the software from the **Use E-mail Program** drop-down list. Continue with step 13 on page 28.

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

8   In the **RetailEnterprise Shop 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.

9   Click **Advanced**. The **Advanced E-mail Settings** window appears.
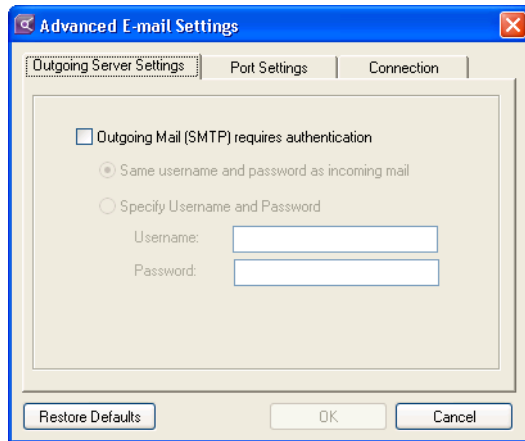
10 Check if the settings in the **Outgoing Server Settings** and **Port Settings** tab need to be changed for your email account and make any necessary changes.

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

11 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 the Windows help.
    -

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

13 Test your connection:

   a Ensure that your computer is online.

   b If you chose to use third-party email software in , ensure that it is running.

   c Click **Test Connection**.

A **Test E-mail Settings** window, similar to the one below, appears.
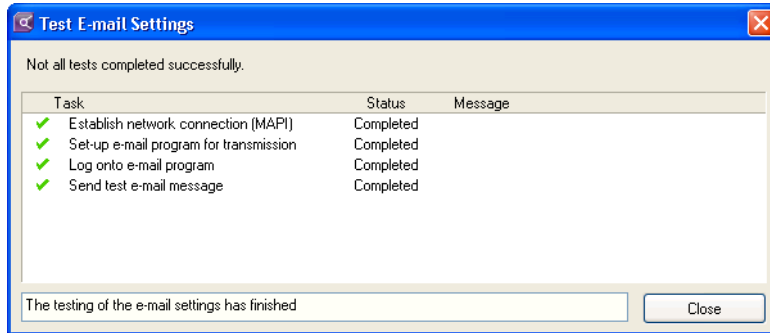
14 The **Test E-mail Settings** window shows the status of each task:

- 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 .
- 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. Check that you have entered the correct email settings in the **E-mail Settings** window, or, if you're using third-party email software, if your email software is configured correctly and is running. Then, repeat the test () until you achieve a successful connection.

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

CHAPTER 2 SETTING UP

Setting up dial-up networking between your shop and your Central office

This section provides brief guidelines for setting up the communications options for RetailEnterprise Shop 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 MYOB RetailEnterprise Shop

- 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	Allow RetailEnterprise Shop to accept incoming network connections	When you first open RetailEnterprise Shop after installation, a Windows security alert may appear to tell you that some program features have been blocked by the Microsoft firewall. To unblock RetailEnterprise Shop and allow incoming network connections, click **Unblock**. If you do not see the security alert, you can add RetailEnterprise Shop as a Windows firewall exception by doing the following. • 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 Shop as an exception to the firewall.
2	Set Network ID options	Give computer a meaningful name—usually decided by central office
3	Set up a user account	• Set up new user with a meaningful name such as 'RetailManager' • Set account type as **Standard User** • Set password.
4	Set up dial-up connection options	• Go to the **Control Panel** and click **Network and Sharing Center**. • Click **Manage network connections**. • Press ALT to display the menu bar. Go to the **File** menu and select **New incoming connection**. • Select the user accounts that you want to allow access to the computer and network. Make sure you select the account you added in step 3. • Select the **Through a dial-up modem** option, and select your modem. • Click **Allow access**.

Setting up in Windows XP Professional

NOTE: Windows XP There are many variations of the Microsoft Windows XP operating system and the steps for creating a dial-up connection vary accordingly. The method described here is for Windows XP Professional Classic. Your version may be slightly different.

Step	Action	Comments
1	**[If you use Service Pack 2 or 3]** Allow RetailEnterprise Shop to accept incoming network connections	When you first open RetailEnterprise Shop after installation, a Windows security alert may appear to tell you that some program features have been blocked by the Microsoft firewall. To unblock RetailEnterprise Shop and allow incoming network connections, click **Unblock**. If you do not see the security alert, you can add RetailEnterprise Shop as a Windows firewall exception by doing the following. • Go to the **Control Panel** and double-click **Security Center** • Click **Windows Firewall** • Click **Allow a program through Windows Firewall** • Add RetailEnterprise Shop as an exception to the firewall.
2	Set Network ID options	Give computer a meaningful name—usually decided by central office
3	Set up a user account	• Set up new user with a meaningful name such as 'RetailManager' • Set account type as **Limited** • Set password.
4	Set up dial-up connection options	• Select **Set up an advanced connection** • Select **Accept incoming connections** • Select modem • Select **Do not allow virtual private connections** • Allow new user to have permission to connect to this computer • Set **Networking software** as **Internet Protocol (TCP/IP)** • Accept default name for the new connection.

Setting up in Windows 2000

Step	Action	Comments
1	Set Network ID options	Give computer a meaningful name—usually decided by central office
2	Set up user options	• Add new user with name such as 'Manager'—leave **Full Name** and **Description** blank • Set password • Set level of access to **Restricted user**.
3	Set up dial-up connection options	• Make new connection of type **Accept incoming calls** • Select modem • Set **Do not allow virtual private connections** • Set new user to be allowed to connect to this computer • Set **Networking component** to **TCP/IP** • Accept default connection name.

3 Using RetailEnterprise Shop

This chapter describes the few tasks that you may have to carry out in MYOB RetailEnterprise Shop. These tasks may only need to be carried out occasionally.

As mentioned before, RetailEnterprise Shop mostly works behind the scenes, and involves little extra effort in your shop.

The following tasks are described in this chapter:

- working with messages
- receiving product updates from your central office
- creating the summary information file for collection
- viewing the history of transfers between your shop and your central office
- viewing the connection event log
- backing up your data.

Messages

With MYOB RetailEnterprise Shop, you can receive messages sent electronically from your central office. These messages are used to inform you of a coming event or action that affects your shop.

For example, your central office might send a message to your shop to notify you that there are centralised product updates ready to be dispatched. In this case you would need to take the appropriate action to receive the product updates (as described in this chapter).

When a message is sent by your central office to your shop, RetailEnterprise Shop notifies you by opening the **Shop** window. In the window, the **New Messages** folder shows the new messages that have arrived.

This section contains procedures that show you how to:

- view message details
- print messages
- delete messages.

Open RetailEnterprise Shop   To perform the tasks in this section, you must have the **RetailEnterprise Shop** window open. To open the this window, double-click the RetailEnterprise Shop icon ( ) in the system tray area of the Windows task bar.

- -

NOTE: RetailEnterprise Shop should always be running   When you start the computer on which RetailEnterprise Shop is installed, RetailEnterprise Shop should start and remain active, running in the background. When RetailEnterprise Shop is active, an icon is displayed in the system tray, normally on the right side of the Windows task bar.

If RetailEnterprise Shop is not running, you can start it manually from the **Start** menu in Windows. Click **Start**, choose **Programs** or **All Programs**, then select **MYOB RetailEnterprise - Shop v4** from the displayed list.

- -

To read a message

To read a message and take further action if required, perform the following steps:

1   Open RetailEnterprise Shop. The **RetailEnterprise - Shop** window appears.
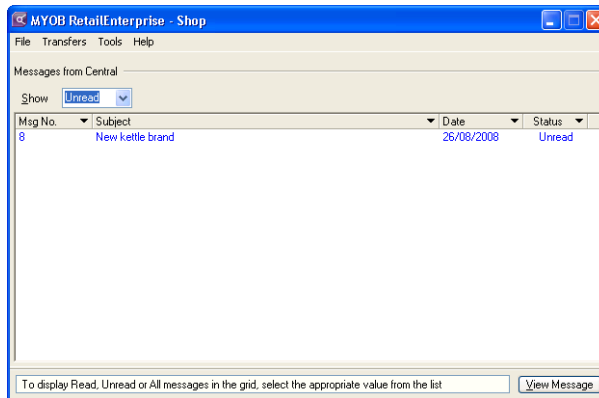
Messages that you receive from central office are listed in the lower area of the window.

2   Do one of the following to read the message:

- Select the message and press ENTER.
- Select the message and click **View Message**.
- Double-click the message.

The **Message Details** window appears.
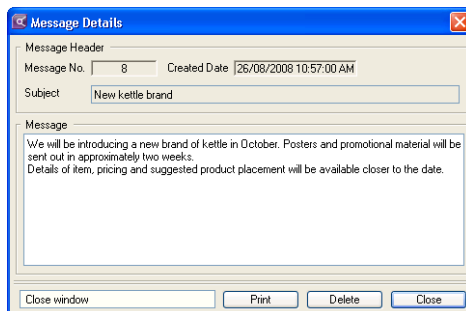
To print a message

1   Select the message you want to print.

2   Do one of the following to display message details:
    - Select the message and press ENTER.
    - Select the message and click **View Message**.
    - Double-click the message.

    The **Message Details** window appears.
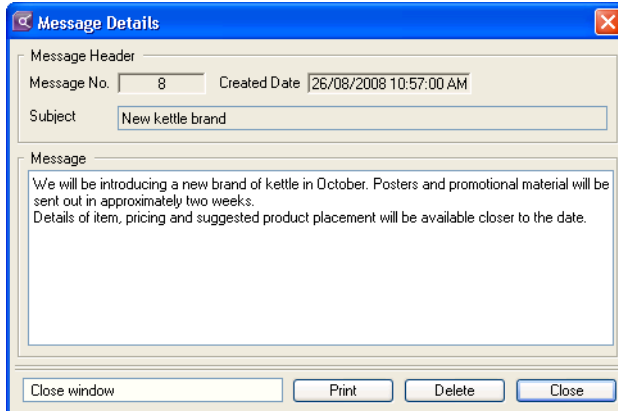
3   Click **Print**. The following message appears.
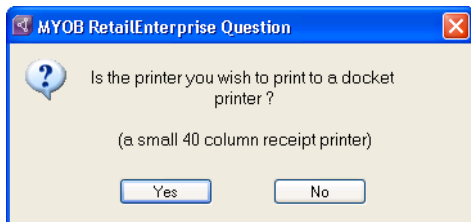
4   Do one of the following:
    - Click **Yes** to print the message on 40-column-wide receipt paper.
    - Click **No** to print the message on A4 size paper—if you have a default printer connected.

To delete a message

1 Select the message you want to delete.

2 Do one of the following to display the message details:
   - Select the message and press ENTER.
   - Select the message and click **View Message**.
   - Double-click the message.

   The **Message Details** window appears.
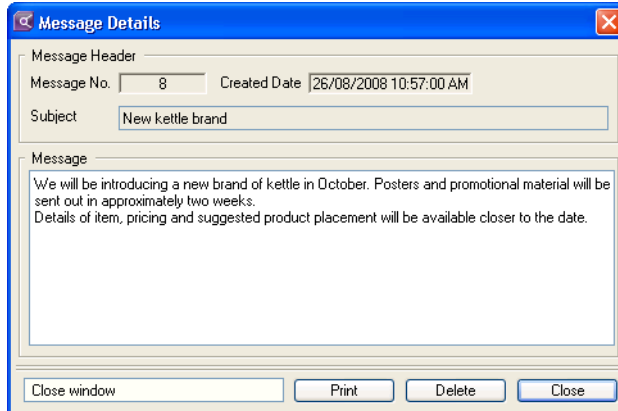
3 Click **Delete**. The selected message is deleted.

Creating summary information for collection

The collection process occurs when RetailEnterprise Central in your central office collects a summary file of sales and stock figures from your shop. The summary file is automatically created at a set time (see).

However, there may be times when your central office asks you to trigger the creation process manually in your shop prior to collection, for example, if the previous night's collection from your shop was unsuccessful.

Open RetailEnterprise Shop   To perform the tasks in this section, you must have the **RetailEnterprise Shop** window open. To open the this window, double-click the RetailEnterprise Shop icon ( ) in the system tray of the Windows task bar.

- -

NOTE: RetailEnterprise Shop should always be running.   When you start the computer on which RetailEnterprise Shop is installed, RetailEnterprise Shop should start and remain active, running in the background. When RetailEnterprise Shop is active, an icon is displayed in the system tray of the Windows task bar.

If RetailEnterprise Shop is not running, you can start it manually from the **Start** menu in Windows. Click **Start**, choose **Programs** or **All Programs**, then select **MYOB RetailEnterprise - Shop v4** from the displayed list.

- -

**To manually create a summary file for the current day**
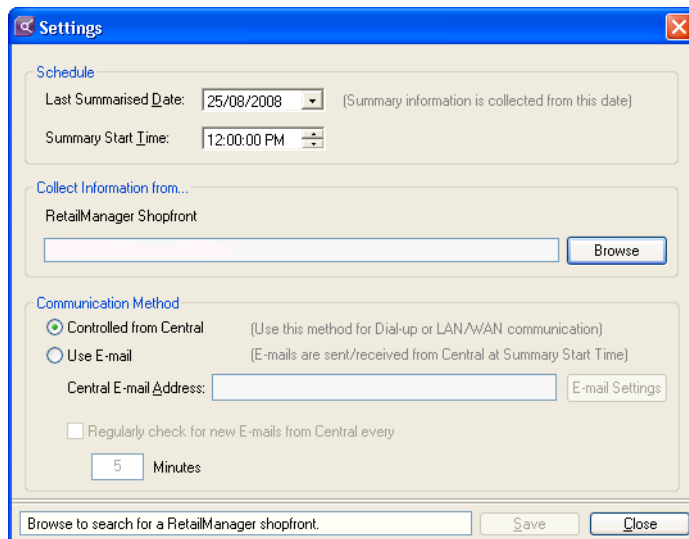
1   In the taskbar of the computer desktop, double-click the RetailEnterprise Shop icon ( ) in the right-hand corner. The **MYOB RetailEnterprise - Shop** window appears.

2   Go to the **File** menu and choose **Summarise now**. The stock holdings and sales summary information for the current day are collated and a message appears when the process is complete.

3   If you communicate with central office via a dial-up or LAN/WAN connection, the summary file will automatically be sent the next time central office collects data from your shop.

    If you are using email as your communication method, the summary file will be sent the next time your computer goes online. Note that if you have chosen to use third-party email software with RetailEnterprise, your email software will also need to be online before the summary file information can be sent.

To manually create a summary file for a prior period

NOTE: **Check with your central office before continuing.**

1   In the taskbar of the computer desktop, double-click the RetailEnterprise Shop icon ( ) in the right-hand corner. The **MYOB RetailEnterprise - Shop** window appears.

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

The **Last Summarised Date** field displays the date when your shop's sales and stock data were last summarised (prior to collection by your central office). You have the option to change this date and re-create your summarised shop data from the changed date.

3 In the **Last Summarised Date** field, click the down arrow to display the calendar window.
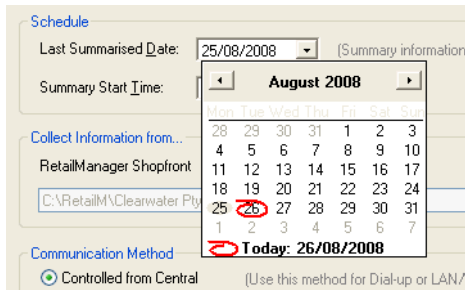
Select the required date in the calendar window. You can select a past date or today's date but not a future date.

At the time specified in the **Summary Start Time** field, RetailEnterprise Shop will re-create summarised shop data for the period from midnight on the changed date up to the **Summary Start Time**.

For example, if you select today's date, the creation of summary data will start from the time you specify in the **Summary Start Time** field. However, if you select a date in the past, the collection process will create summary data from that date until today's date.

4 In the **Summary Start Time** field, change the time to when you want the summary file to be created.

NOTE: If the time in the **Summary Start Time** field has already passed, RetailEnterprise Shop starts creating the file immediately. The status bar shows the dates that are included in the file of summary information.

5 Make sure the correct shopfront is displayed in the **RetailManager Shopfront** field.

See 'Select the shopfront' on page 23 for information on how to select a shopfront to be summarised.

6 Click **Save**.

NOTE: **Creating the summary file**   At the time specified in the **Summary Start Time** field, the file of summary information is created from the date specified in the **Last Summarised Date** field.

7 Click the close icon () to close the **Shop** window.

Viewing the history of transfers between your shop and your central office

The **Transfer Audit** function allows you to view the communications history between your shop and central office.

To display all transfers between your shop and central office

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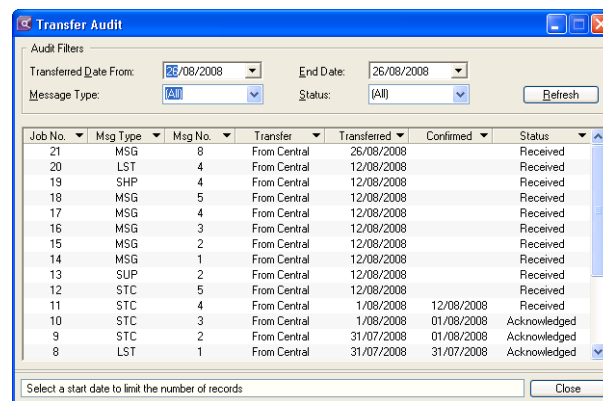
Audit Filters

•	Transferred Date From	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 41.
   - checking the computer connection details for your shop. This is done from central office. See the Using RetailEnterprise Central chapter of the *MYOB RetailEnterprise Central User Guide*.
   - contacting an individual shop to determine if the computer and modem are correctly connected.

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

Viewing the connection event log

This section describes how you view the connection event log that MYOB RetailEnterprise Shop maintains. The connection event log provides a record of the sequence of events involved each time RetailEnterprise Shop connects to central office to send or receive information.

This is especially useful for verifying if the process has been successful.

During the collection process, RetailEnterprise Shop 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

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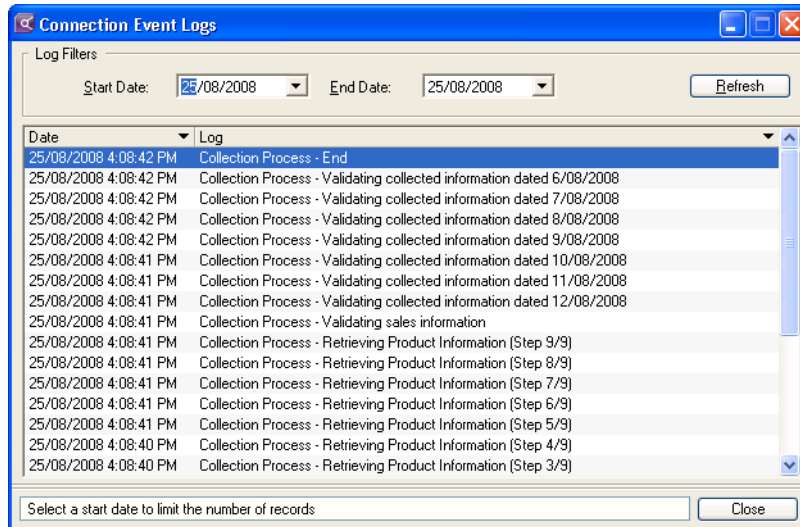
2   Specify the date range—typically yesterday and today's date if you are checking for last night's processing.

   To change the range of dates displayed:

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

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

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

4   If you notice that there are no connections to central office or there is some other discrepancy, you will need to check the connection setup. This may include any or all of the following:
   - checking the computer connection details for your shop. This is done from central office. See the Using RetailEnterprise Central chapter of the *MYOB RetailEnterprise Central User Guide*.
   - contacting the individual shop to determine if the computer and modem are correctly connected.

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

Receiving product updates from central office

central office maintains the product database and can send product updates to the shops. Typically these updates would include:

- new products
- price updates.

With any product update, you have the option of either accepting or rejecting the proposed changes depending on various factors such as whether:

- your organisation has a central pricing policy
- the changes are applicable to your shop.

Your central office should send a message to notify shops of forthcoming product updates. When you get notification of centralised product updates for your shop, decide on a suitable time to process the pending updates. You cannot apply changes to your stock file items while they are being accessed by RetailManager in processing retail transactions.

You can either choose a time outside normal business hours, or halt all retail transactions while you process the product updates. It should only take a few minutes to process the centralised product updates as described below.

- -
CAUTION: Keep data consistent with RetailManager   It is important to keep supplier details and tax codes consistent with your Central database.
- -

The process of receiving and loading product updates involves steps through RetailEnterprise Shop and RetailManager.

The product updates process is documented in the following table.

Step	Procedure
At central office	
Send messages and product update to shops. See the Using RetailEnterprise Central chapter of the *MYOB RetailEnterprise Central User Guide*.	
At Shop	
Step 1	Check for new messages received in RetailEnterprise Shop. See 'To read a message' on page 34.
Step 2	Check product update has arrived in RetailEnterprise Shop (**Transfers** > **Transfer Audit**). See 'To display all transfers between your shop and central office' on page 39.
Step 3	Open shopfront in RetailManager. See the Setting Up chapter of the *MYOB RetailManager User Guide*.
Step 4	View product updates in RetailManager (**Stock Management** > **Centralised Updates**). See step 4 on page 45.
Step 5	Accept or reject stock list items for update. See step 7 on page 46.

| Step	Procedure
Step 6	Load update into RetailManager. See step 10 on page 46.
Step 7	View and print report. See step 12 on page 47.

To review centralised product updates

NOTE: Perform a backup You may find it useful to make a backup of your RetailManager shopfront database before you accept a centralised product update in case you need to revert to your previous data. See the Administration chapter of your *MYOB RetailManager User Guide*.

------

1   Each shop is usually advised by central office that a centralised update is waiting. A message similar to the following appears in RetailEnterprise Shop.
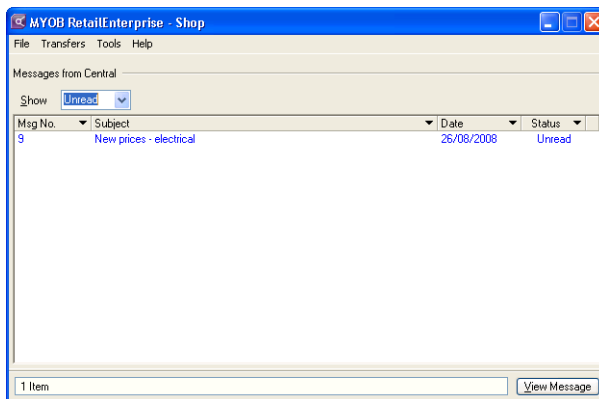
2   Double-click the message to read it. It may have information about the update.

3   Go to the **Transfers** menu and choose **Transfer Audit**. The **Transfer Audit** window appears.
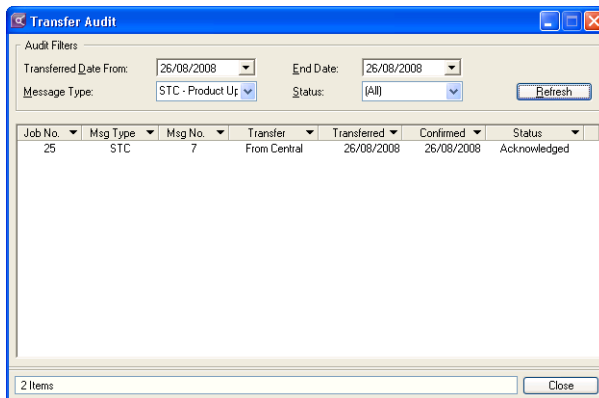
You may need to change the **Audit Filters** and click **Refresh** if you have many messages in the list and can't immediately see the update message. (See 'To display all transfers between your shop and central office' on page 39.)

The next step in loading a centralised update occurs in RetailManager.

To load centralised product updates

1   Start RetailManager if it is not already running.

    If you have more than one shopfront database, you will need to select the database that is to receive the update from the list that appears when you start RetailManager.

2   In RetailManager, go to the **Stock Management** menu and choose **Centralised Updates**. The following message appears:
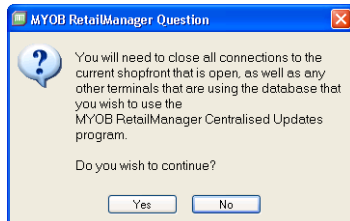
3   Close any other retail terminals that are running RetailManager, and then click **Yes**. The **MYOB RetailEnterprise Centralised Updates** window appears.
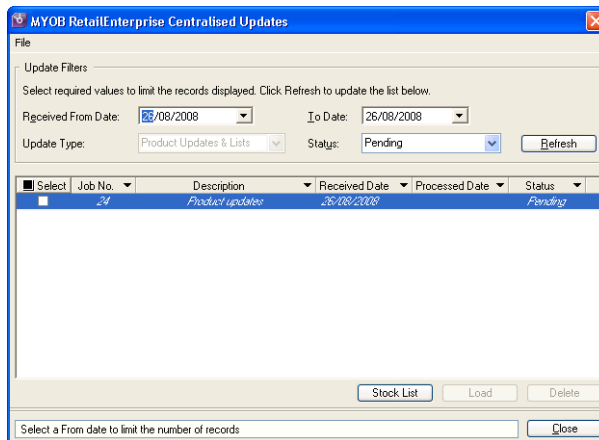
    The product update can have a status of:

    Pending—Update records have not been processed.

    Partial—Stock item(s) were rejected due to an invalid tax code or excluded from the load. The stock item will be set with the status of either **Rejected** or **Cancelled** after loading.

    Processed—All associated stock items have been loaded successfully.

    If the product update is displayed in *italics*, it consists of selected invalid stock items.
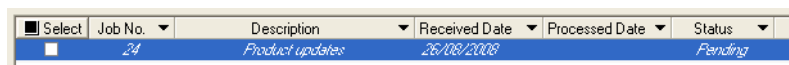
4 Select the update and click **Stock List**. The **MYOB RetailEnterprise Centralised Updates - Product Updates** window appears.
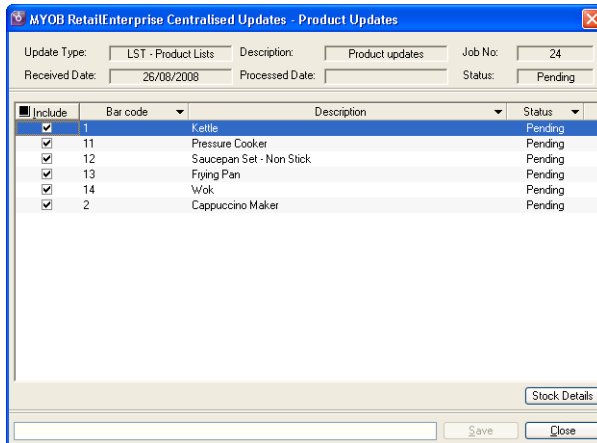
This window displays a list of the stock items to be updated.

5 Double-click an item to view its details.

- -

NOTE: No update records found   If there are no available updates, a text message is displayed on the grid: 'No update records found.' The **Stock List**, **Load** and **Delete** buttons are disabled when there are no records.

- -

HOW TO INTERPRET THE LIST

- Stock items can have different statuses.

  Pending—Stock items have not been processed.

  Partial—Stock items were rejected due to an invalid tax code or excluded from the load. The stock item will be set with the status of either **Rejected** or **Cancelled** after loading.

  Processed—All associated stock items have been loaded successfully.

- Stock items can appear in a colour.

  - If a stock item in the list is in red, it means that the record is invalid for some reason, for example, it has an invalid tax code (**Invalid Tax Code**). Double-click that item to view it and find the problem.

  - If a stock item in the list is in blue, it means that it is a new item (**New stock from Central**). Double-click that item to view the details.

6 Review the product update details.

7   Select the product updates that you want to accept in your shop.
- To select all the product update lines displayed, click the **Select** column heading in the **MYOB RetailEnterprise Centralised Updates** window.
- To select a particular product update line, select the **Include** option on that item in the **MYOB RetailEnterprise Centralised Updates - Product Updates** window.
- To reject a particular product update line, deselect the **Include** option on that item in the **MYOB RetailEnterprise Centralised Updates - Product Updates** window.
- To reject the entire update, click **Delete** in the **MYOB RetailEnterprise Centralised Updates** window.

When you have made your selections, ensure you have selected only the product updates that are applicable to your shop.

8   If required, you can print a product update before loading it:
a   In the **MYOB RetailEnterprise Centralised Updates** window, select the product update.
b   Go to the **File** menu and choose **Print**. The update appears in the report viewer.
c   Click the print icon ( ) to print the product update report.

9   Click **Save** if you have made any changes and then click the close icon ( ). The **MYOB RetailEnterprise Centralised Updates** window appears.
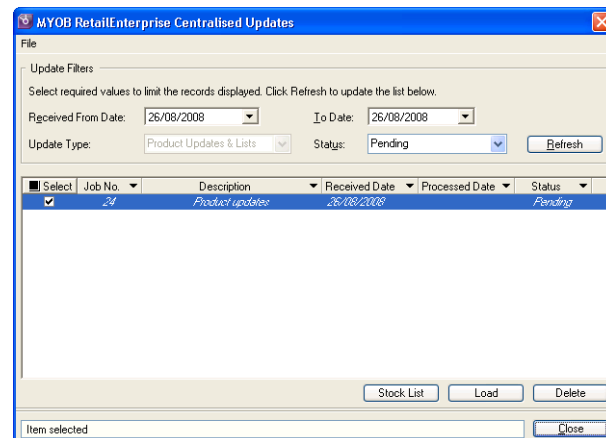
10   Click **Load** to start the centralised update.
- If an earlier update record is found, the load process will terminate and display an information window. Click **OK** to return to the **MYOB RetailManager Centralised Updates** window and retain the selected records. The update record will retain the status of 'Pending'.
You should process the updates in job order to ensure the shop database is kept consistent with the database at central office.
- If there are no stock items in the product update, a window advising you of this appears. Click **Yes** to process the update or click **No** to terminate the update.

11 The following message appears when the update is completed. Note that the status of the product update also changes to 'Processed'.
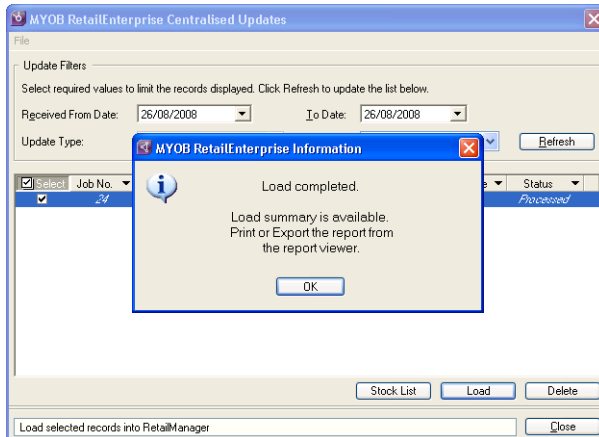
12 Click **OK**. The report viewer displays the details of the product update.

This shows the number of stock items updated and the number (if any) of records rejected from the product update. If selected product updates are valid, they are saved to your shopfront database in RetailManager.

The most likely cause of an invalid product item update is if your RetailManager stock database is not consistent with your central office product database. This can happen if you modify a stock item in RetailManager by changing one of the following fields: bar code, description, department or category. In this situation, we recommend that you do one of the following:

- Contact your central office and discuss how to keep the two databases consistent.
- Contact an MYOB RetailManager Professional for assistance.

13 Click the print icon (🖨) to print the report or click the close icon (❌) to close the viewer.

14 Click **Close** to close the **MYOB RetailEnterprise Centralised Updates** window.

You can now reopen your RetailManager shopfront and retail terminals.

Managing your shop database

It is important to safeguard your shop database by backing it up regularly and 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 shop 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.

You can either enter the new backup path, or 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). If you are saving to another medium you must specify the entire path, for example, `e:\Backups\RME040429`.

5 Click **Save** to perform the backup and close the **Settings** window.

RetailEnterprise Shop makes a zipped, backup copy of your shop database in the location specified in the **Backup Path** field.

Storing your backup data   It's good practice to store your backups 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 at all to have the backup on your `c:\` drive or on a disk on your desk.

To restore your shop database

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

Note that RetailEnterprise Shop 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 Shop restores the database.

    A message informing that the database was successfully restored appears.

5   Click **OK**.

4 Using Stock At Other Shops

The Stock At Other Shops feature is a separately installed program that is included with RetailEnterprise Shop. Stock At Other Shops allows you to view the stock holdings of other shops in a RetailEnterprise network.

Stock levels in other shops cannot be modified remotely by another shop.

Stock At Other Shops operation

RetailEnterprise Central performs a regular collection of information from shops in an Enterprise network, including (if set up) summary sales information and current stock holdings at each shop.

When the collection has been completed, RetailEnterprise Central then passes other shop stock-holding information back to each shop in the Enterprise network.

A RetailEnterprise Shop user can then view stock holdings at other shops, perform searches on other stock holdings and if required, display shop details, such as the name, address and contact details.

NOTE: Shop Details   Shop details information is set using MYOB RetailEnterprise Central.

Installing MYOB RetailEnterprise Stock At Other Shops

Before you install Stock At Other Shops

You need to have MYOB RetailEnterprise Shop installed and accessible from the computer you use for Stock At Other Shops.

NOTE: Where to install Stock At Other Shops   You do not need to install Stock At Other Shops on the same computer as you have installed MYOB RetailEnterprise Shop, but you do need to have LAN access to the computer on which your RetailEnterprise Shop database is stored.

To install MYOB RetailEnterprise Stock At Other Shops

You install **MYOB RetailEnterprise Stock At Other Shops** using your MYOB RetailEnterprise Shop CD.

1   Before you start, close all open applications. This is very important for correct installation.

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 Stock At Other Shops.

3   Insert either the MYOB RetailEnterprise Shop 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 Stock At Other Shops**.
   - [Hong Kong, Malaysia and Singapore] Click **Select RetailEnterprise Stock At Other Shops installer**, and then select the installer for your country.

   The **Welcome to MYOB RetailEnterprise Stock At Other Shops v4 Setup** window appears.

5   Follow the onscreen instructions.

> **NOTE: Warnings** If any warnings appear during installation, see 'Troubleshooting your installation' on page 53.

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

   You do not need to restart your computer.

   A shortcut to RetailEnterprise Stock At Other Shops is automatically created on your desktop.

> **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 Shop v4 CD.

Troubleshooting your installation

During the installation of RetailEnterprise Shop, 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 59.

Starting Stock At Other Shops

When you start Stock At Other Shops, an automatic check is performed to see if you have RetailEnterprise Shop installed on your local computer.

- If the RMShop database is not found, see 'Connecting to your RMShop database' on page 54.

- If the RMshop database is found, Stock At Other Shops automatically connects to the RMShop database, and the **MYOB RetailEnterprise Stock At Other Shops** window appears.
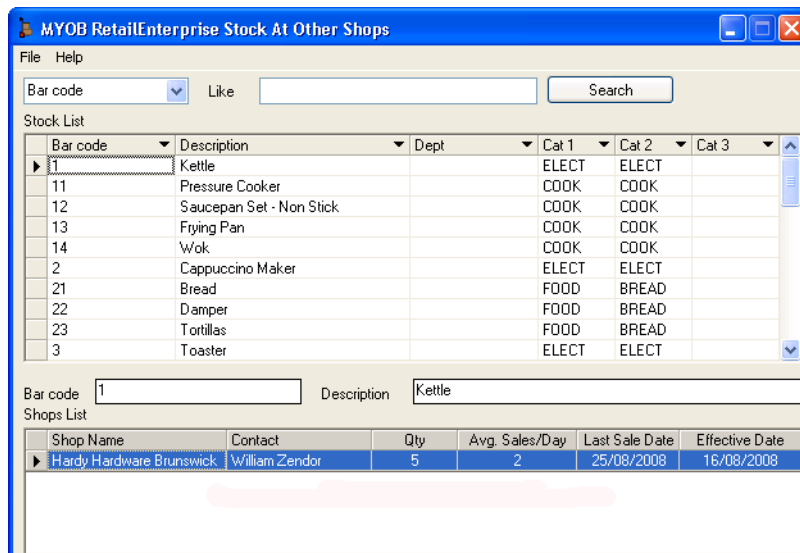
Connecting to your RMShop database

If you have installed Stock At Other Shops on a computer that does not have RetailEnterprise Shop installed, the **MYOB RetailEnterprise Stock At Other Shops** window appears with a message informing you that the RMShop database is not connected.
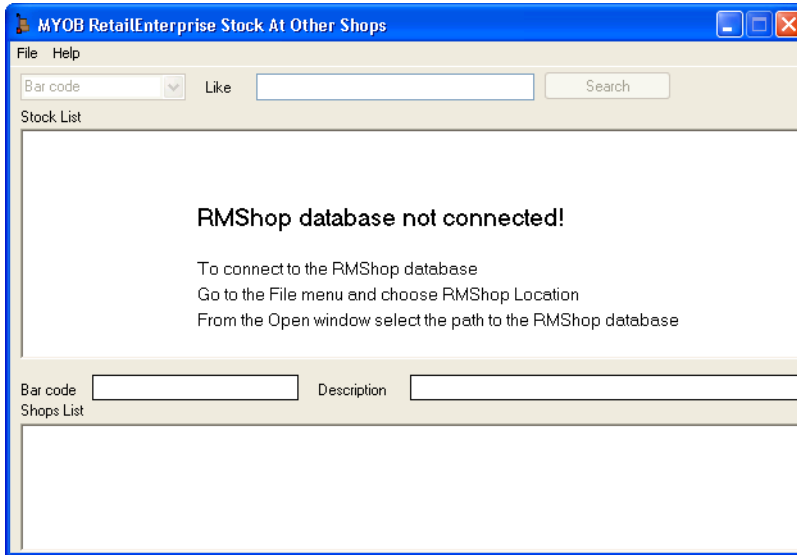
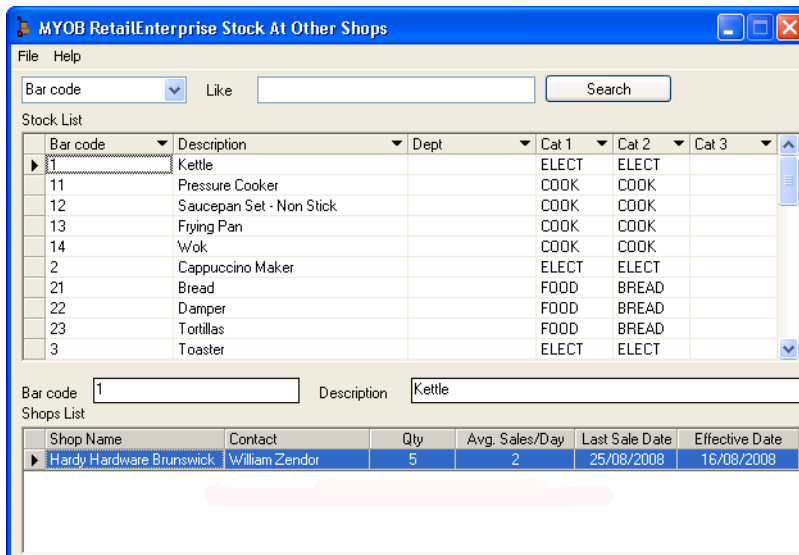**To connect to your RMShop database**

1   Go to the **File** menu and choose **RMShop Location**.

The **Locate the MYOB RetailEnterprise - Shop database** window appears.
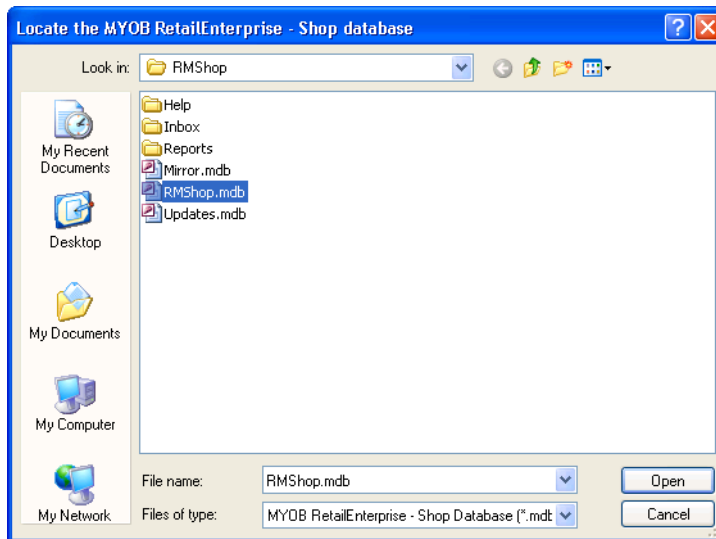
2   Select the `RMShop.mdb` file, and click **Open**.

The **MYOB RetailEnterprise Stock At Other Shops** window appears.

You can now view the stock holdings at other shops.

Managing Stock

Using Stock At Other Shops, you can select a particular stock item from your inventory and see if other shops in your RetailManager network have the same stock item in their inventory.

Details are provided so you can contact other shops in your RetailEnterprise network should you need to arrange pick up of a particular stock item, or wish to determine whether a particular shop still has the item in stock.

Searching for stock items

You search for stock items in Stock At Other Shops in the same way as you perform searches in any other RetailManager product.

The **Stock** list displays all the stock items you have in your RetailManager inventory.

Click column headings in the **Stock** list to sort stock information in alphabetical order based on the data in that column.

To search for a stock item in your inventory

You can search for a particular stock item in your inventory using Stock At Other Shops.

1   In the **MYOB RetailManager Stock At Other Shops** window, click the down arrow above the **Stock** list to select a type of search.

You can choose to search by bar code, description, department or category.

2   In the **Like** text box, type the first few letters or a complete bar code, description, department or category you want to match in your search, and click **Search**.

Leave the **Like** text box blank and click **Search** to see all items for a particular type of search.

3   Select the display line for a particular stock item.

The bar code and description of the product appear below the **Stock** list.

When a selected stock item in the **Stock** list is available in another shop or shops, a list of shops that have this stock item appears in the **Shops** area of the **MYOB RetailEnterprise Stock At Other Shops** window.

If no shops in your RetailEnterprise network have the selected stock item, a message informing you that no shops have the stock item appears in the **Shops** list.

Displaying details of another shop

When a stock item is selected, and other shops in your RetailEnterprise network also have this stock item in their inventory, shop details appear in the **Shops** area of the **MYOB RetailEnterprise Stock At Other Shops** window.
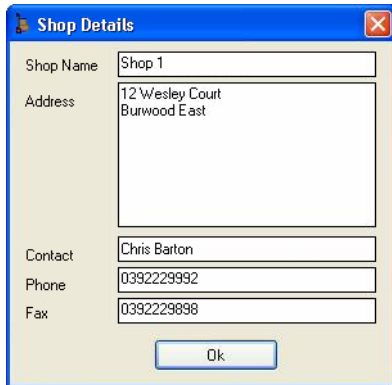
Shop details shown in this window are the:

- name of the shop
- name of the contact person
- quantity of the item in stock
- average number of sales per day of this item
- last time a stock item was sold at that shop
- effective date, that is, the last time stock information for the displayed shop was collected.

To display contact details

- Double-click a **Shops List** display line. The **Shop Details** window appears.

You can use this information to directly contact the shop.

Appendix A: MYOB technical support

Our technical support team can offer assistance with installing, using and troubleshooting MYOB RetailEnterprise Shop. 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 60
New Zealand	page 62
Hong Kong	page 63
Malaysia	page 64
Singapore	page 65

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**	9.00am to 5.00pm (Monday to Wednesday), 9.00am to 9.00pm (Thursday and Friday) and 11.00am to 5.00pm (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.

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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

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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