

EziSolution Point of Sale (ESPos) system setup

The **ESPos** system is capable of running in multiple modes, it can run directly from the local station, local server or head office server, however, each setup will require some different tweaking to make sure the data exchange between stations and servers is up to date.

Please be aware that the ESPos must be installed on all machines and server running it which will allow local or server access to the program.

The **file DataSync.exe** is a Terminate and Stay Resident (TSR) program that usually sits in the Windows System Tray (bottom right hand side of the Windows screen), and is responsible for uploading/downloading data between the local stations and the servers. This needs to be running all the time on all servers and stations, failure to run will result in data not being uploaded or downloaded from the work stations and servers.

This program is responsible for uploading sales data from local pos stations (if they are running local copy), or from the local servers if running from there, but even if you are running from the main server, this program is still needed to make a local backup to the local hard disk drive automatically.

The controls for this program are actually done form the Maintenance > System Setup > Locations screen as shown here.

The screenshot shows the 'System Setup' window with the 'Locations' tab active. The 'Hardware ID' field is highlighted in yellow and contains the text 'SHUTTLE_1 56380ED4'. Below this, there are several configuration options:

- Station Number: 3
- Location Number: 2
- Save Transactions Data in: Monthly Folders
- Reset Invoice Numbers: Daily
- Working Server Path: H:\ESPOS
- Inbox on HQ Server: H:\ESPOS\INBOX
- Inbox on Local Server: L:\ESPOS\INBOX1
- Outbox Folder to Local Server: C:\ESPOS\INBOX
- Outbox Folder to HQ Server: C:\ESPOS\OUTBOX1
- Local Backup Folder: C:\ESPOS\BACKUP\
- Sync Timers: 300, 300, 10, 900

Four red boxes highlight specific fields:

- Hardware ID (SHUTTLE_1 56380ED4)
- Stock Download Timer (300)
- Transactions Timer (300)
- Clients Sync Timer (900)

At the bottom left, there are buttons for 'Save (F2)' and 'Close (Esc)'. The 'Save (F2)' button is highlighted in blue.

When you first open the Locations screen, all of the fields will be disabled and no editing is allowed, if you need to make any changes, you will need to double click on the Hardware ID field, this will

enable all fields for editing, but please note, using the wrong parameters can be catastrophic, so extreme care needs to be taken when doing any changes.

The Hardware ID is unique to each station, it's the hardware signature that for the computer system and will not change unless the internal parts are changed, if it does change due to parts replacement, your product key will become invalid and the ESPos system will turn to a demo version, however, no data will be lost and you will still be able to add more transactions but will have no printing.

Station Number: This is the unique station number, this number must be unique and can not be repeated in the same setup. Valid station numbers are from 1 to 99.

Location Number: This is the store or location number, valid numbers are 1 to 99.

Save Transactions Data in: This option is selected at the start of using the ESPos system, once work starts, it **cannot** be changed, changing it after work is started will result in data loss, valid entries are Yearly Folders, Monthly folders or Daily folders, small to medium businesses should use the yearly folders, medium to large businesses to use the Monthly folders option, and large to very large should use the Daily folders option, please note that reports speed is best with the yearly option as the system has less folders to sift through.

Reset Invoice Numbers: This option allows you to choose when to reset the invoice number to start from 1, valid options are daily, monthly or yearly. Please note each station will have its own numbering sequence based on the following:

Daily: YYMMDDLSSNNN where YY is the year, MM is month, DD is day, LL is the location number, ss is the station number and NNN is the invoice number, an example of that is

1604250203204 for 25th April 2016 location 2, station number 3 and invoice sequence number 204

Monthly: YYMMLLSSNNNNN with the sequence number expanded to 5 digits, example:

1604020310204 for April 2016 location 2 station 3 sequence number 10204.

Yearly: YYLLSSNNNNNNN with the sequence number expanded to 7 digits, example:

1602035012336 for 2016 location 2 station 3 and invoice sequence number 5012336.

It is recommended to use the daily option as this will reduce the risk of matching numbers due to hardware, software or other failures, however, if you normally work directly from the servers, you may want to set the invoice numbering to Monthly for the local station only, this will help you avoid matching numbers if you frequently have to switch between local and server setups.

Working Server: This field is used to enter the head office server if all the data goes back to it, or local server if you do not have direct access to the head office server.

Inbox on HQ server: Enter the inbox folder path if you have a head office server or leave blank if not, this field must be filled if you do have an accessible head office server and you are working from either the local server or local machine, otherwise, it must be blanked.

Inbox on Local Server: Enter the Inbox folder path on the local server if you are working from the local machine, or leave blank if you are working from that server.

Outbox folder to the Local server: This field must be filled if you are working from the local machine and it will ensure the data entered on the local machine is transferred to the local server, the folder must be located on the local machine (default is C:\ESPos\Outbox) which will allow you to work on your local machine with the local server unavailable or down, and once the server is back up, the DataSync.exe will ensure to send the data from this folder to the Inbox folder on the local server which will be then uploaded to the local server's data when the DataSync.exe that is working on the local server sees this data in its local inbox folder. This field must be blank if you are working directly from the local server.

Outbox Folder to HQ Server: This field must be filled if you are working from either the local machine or local server and do have an accessible HQ server, this will ensure the local data entered is transferred up to the HQ server. If you do not have an accessible HQ server or are working directly from the HQ server, this field must be blank.

Local Backup Folder: This folder is used to back up all transactions made from the working station regardless if the work is done from the station itself, the local or HQ server, so each transaction is backed up to this folder automatically as its done and will serve as an extra layer of data protection. The default value of this field is C:\ESPos\Backup, and it will save the transactions as text files in daily sub-folders that are easily accessible and can be uploaded to any machine using the DataSync.exe utility. This field must be filled regardless of the work location.

Sync Timers: The sync timers are used by the DataSync.exe utility program to upload/download data from and to the local station, local server and HQ server, changing values will require you to exit the DataSync program and restart it for the new values to take effect.

The first timer is the **Stock file** timer (in seconds), this will download the stock file from the Working Server Path, and it will update the values on the local machine, it will also add new stock entries that was entered on the working server, the timing can be from 10 seconds and up to 86400 seconds (24 hours), the default is 300 seconds which is 5 minutes. If you do not wish this timer to be active, then leave it at zero.

The second timer value is the **Stock pricing** file sync, again, values are in seconds and the recommended time is 300 seconds (5 minutes) and values can range from 0 (for no updates) to 86400 seconds (which is 24 hours)

The third value is the **transactions files** sync, this need to be frequent with the default sat at 10 seconds to allow for quick transactions uploads/downloads as transactions are processed.

The forth value is the **Clients file sync**, this will download and sync the latest clients file from the server down to the local machine, since this is not a frequent update, the timing can be done at larger intervals such as 30 minutes or longer.

This is a sample screen shots of various setups:

Working on the LOCAL MACHINE with Local and HQ server

The screenshot shows the 'System Setup' window with the 'Locations' tab selected. The window title is 'System Setup'. The 'Company' tab is active, and the location name is 'SHUTTLE_1 56380ED4'. The configuration is as follows:

Station Number	3
Location Number	2
Save Transactions Data in	Monthly Folders
Reset Invoice Numbers	Daily
Working Server Path	H:\ESPOS
Inbox on HQ Server	H:\ESPOS\INBOX
Inbox on Local Server	L:\ESPOS\INBOX
Outbox Folder to Local Server	C:\ESPOS\OUTBOX
Outbox Folder to HQ Server	C:\ESPOS\OUTBOX1
Local Backup Folder	C:\ESPOS\BACKUP\
Sync Timers	300 300 10 900

Buttons at the bottom: Save (F2) and Close (Esc).

Working on the LOCAL MACHINE with a Local Server but without HQ server

The screenshot shows the 'System Setup' window with the 'Locations' tab selected. The window title is 'System Setup'. The 'Company' tab is active, and the location name is 'SHUTTLE_1 56380ED4'. The configuration is as follows:

Station Number	3
Location Number	2
Save Transactions Data in	Monthly Folders
Reset Invoice Numbers	Daily
Working Server Path	L:\ESPOS
Inbox on HQ Server	
Inbox on Local Server	L:\ESPOS\INBOX
Outbox Folder to Local Server	C:\ESPOS\OUTBOX
Outbox Folder to HQ Server	
Local Backup Folder	C:\ESPOS\BACKUP\
Sync Timers	300 300 10 900

Buttons at the bottom: Save (F2) and Close (Esc).

Working on the Local Server with HQ server

The screenshot shows the 'System Setup' window for 'SHUTTLE_1 56380ED4'. The 'Locations' tab is active. The configuration is as follows:

Station Number	3
Location Number	2
Save Transactions Data in	Monthly Folders
Reset Invoice Numbers	Daily
Working Server Path	H:\ESPOS
Inbox on HQ Server	H:\ESPOS\INBOX
Inbox on Local Server	
Outbox Folder to Local Server	C:\ESPOS\INBOX
Outbox Folder to HQ Server	C:\ESPOS\OUTBOX1
Local Backup Folder	C:\ESPOS\BACKUP\
Sync Timers	300 300 10 900

Buttons: Save (F2), Close (Esc)

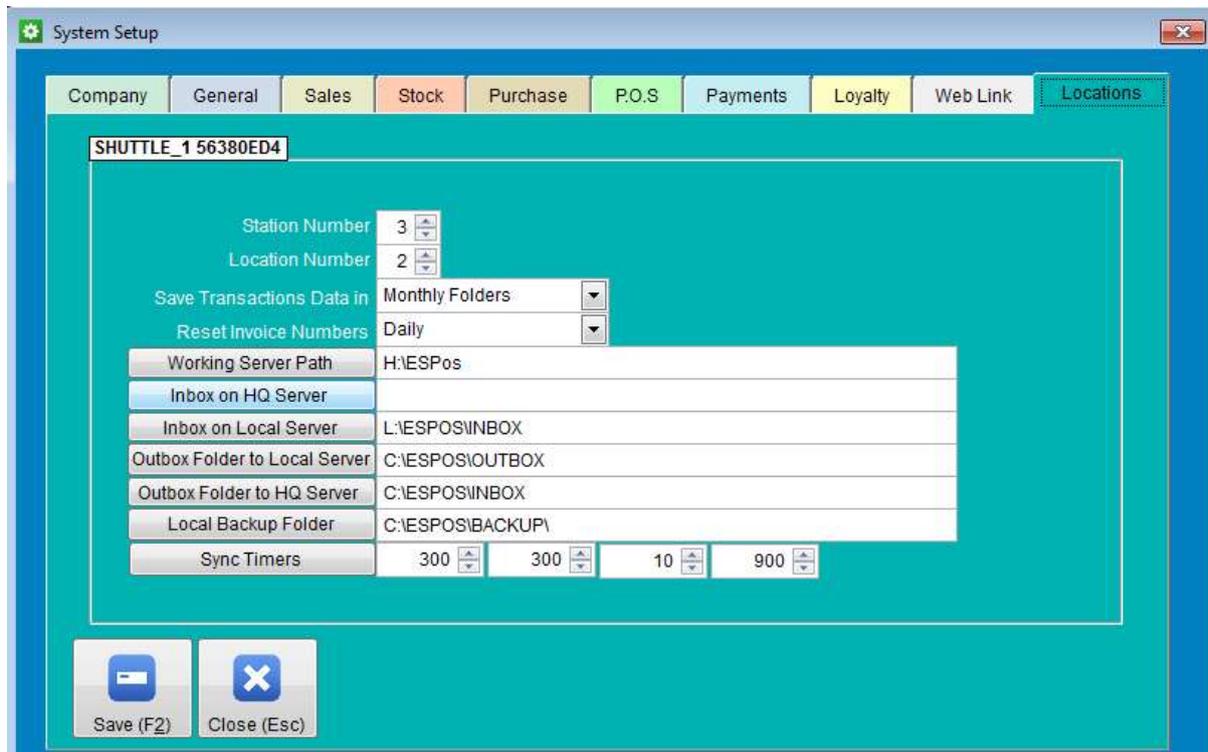
Working on Local Server without HQ server

The screenshot shows the 'System Setup' window for 'SHUTTLE_1 56380ED4'. The 'Locations' tab is active. The configuration is as follows:

Station Number	3
Location Number	2
Save Transactions Data in	Monthly Folders
Reset Invoice Numbers	Daily
Working Server Path	L:\ESPos
Inbox on HQ Server	
Inbox on Local Server	
Outbox Folder to Local Server	C:\ESPOS\INBOX
Outbox Folder to HQ Server	
Local Backup Folder	C:\ESPOS\BACKUP\
Sync Timers	300 300 10 900

Buttons: Save (F2), Close (Esc)

Working on HQ Sever with Local Server



The above examples assume the setup folders on the local station to be on C:\ESPos, and on the Local Server to be on the C:\ESPos drive on the local server but mapped to L: drive so it will appear as installed on L:\ESPos folder, while the folder on the HQ server is mapped to the H: drive with the folder appearing as H:\ESPos.

The **DataSync.exe** must also reside in the ESPos folders on all stations and servers and must be run locally from each station and server, so to run the utility on the local machine, it must reside on the local drive, this applies to the servers as well. This is to make sure each station/server have local access to this utility program and will not go down even if all other servers/machines are offline.

It must also be added to the start up folders so it starts automatically if local machines or servers are restarted for whatever reason. If the windows machines do not have a start up folder, then it must be started using the Windows scheduler as the machine restarts, it can also be started manually. The utility will not allow more than one instance of itself to run at the same time, so trying to start another instance will give you a warning message that the program is already running and quits the second instance by itself. You can stop the utility from running by right clicking on it and answer Yes to the exit question, you can also double click on its icon to see the version number and folder it is using.

It is highly advisable to manually exit the DataSync utility when shutting down machines to stop any data files corruption.

Note that If you do have a head office server, then you must create persistent network drive H: on all machines, including local server, the reason for this is to enable all machines whether working on the local machine or the local server to setup to update the HQ server as transactions are entered, it will also allow the local machines and servers to be updated with all the stock, pricing and clients that changes on the HQ server.

As a rule of thumb, all back office machines should be working on the HQ server directly, and all pos machines with heavy traffic should be working from either the local server, or if the local server is down, then they can be working from the local machines directly, and if the setup is correct, all data saved on the local machines will eventually make its way back to the local servers as well as the head office server. But for this to happen, the Datasync.exe utility program should be running on all machines including the HQ server as well as the local servers and individual machines.

In case a machine breaks down, and a replacement machine is installed, the ESPos program must be first run on the C: drive to setup the machine id and location, the machine ID will stick to this machine and creating short-cuts to the ESPos program will always pick up that ID number from the local C: drive regardless if the station ID and location number are entered on the short-cut or not.

Please note entering different parameters values on the short-cut will over-ride the ones stored on the C: drive.