

AIMsi / Polling V7 Interface Setup

Table of contents

AIMsi Setup	Page 2
Polling Setup	Page 3
Setting up AIMsi from Polling V7	Page 4
Exporting Sales Reports to AIMsi	Page 5
Normal Usage	Page 5
AIMsi Information	Page 6
Other Considerations	Page 7
Appendix A: Setting up Auto Report Transfers	

AIMsi Setup

The first step is to install both V7 Polling and AIMsi. (For instructions on installing Polling, please see the Polling Setup section below.) To install AIMsi, put the CD in your CD-ROM drive and it should autorun. If it does not you should run the file \AIMSi\setup.exe. After AIMsi is installed you should run the setup file in the AIMSiRuntime folder. You only need to run the AIMSi\setup.exe on the server, the client machines (pcs) each need the runtime files. Create a shortcut to the aimsi.exe program on each PC. Each client machine also needs an environment variable for AIMsi to work. You can setup an environment variable in the control panel if you select system, then select the advanced tab and click environment variables. Add one new environment variable, under the User variable section, called USER# and give it a unique number. This will be your AIMsi workstation number.

The first time you start AIMsi it will ask for your serial number, series code and activation code. You will need to enter that information to continue. The default user password is 'PASSWORD' If you need more help on getting AIMsi started you can refer to the 'getting started' of the AIMsi manual at <http://www.aimsibiz/help/default.htm>

After that is done you will need to enable the polling interface functionality. In AIMsi Admin menu option select the enable program option. Type in the program code exactly as it was given to you. You will not get a confirmation message, the reason for that is to discourage people from trying random codes. After you enter your program code you will need to restart AIMsi in order for polling connectivity to be enabled.

After you have restarted AIMsi you can verify that polling connectivity is enabled by going to Help → About AIMsi. You should see a checkbox labeled 'PC Poll Interface', and it should have a checkmark next to it. If it does not, you should retry entering your program code.

After you have enabled polling connectivity, you will need to go into Maintenance → XML/EDI Services → Vendor EDI Info. Look for the entry titled Polling Interface and select it to bring up the polling setup screen.

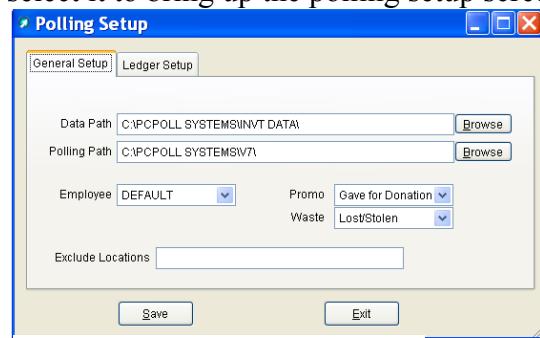


Figure 1- Polling Setup, General Tab

Select the general setup tab. For data path you should select a temporary folder that both Polling V7 and AIMsi can read and write too. Both systems must be setup to use the same path. The polling path must be the path to the Polling executable. Employee will be the employee that gets credit for the sales that are created during a sales import. It would be a good idea to create a separate employee just for this

purpose. The last two fields are promo and waste. When a sales import is run, items that are reported in Polling V7 as promotional items or waste items will be imported as transfers in AIMsi, and these two fields determine which transfer categories are used.

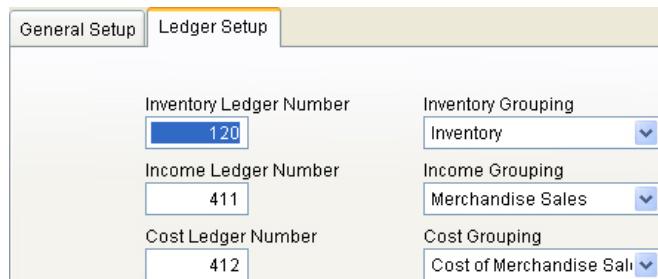


Figure 2 - Polling Setup, Ledger Tab

and the ledger number to debit for cost of goods is going to be the ledger number that will be debited for the cost of goods. The grouping fields determine the groupings for any ledger accounts that need to be created during category creation. For most configurations, the categories pictured above are applicable.

The last thing you will have to do is copy and register ad.dll. This file is located in /AIMsi/Dll on your install CD. Copy it to your AIMsi folder. Click the start menu and select run. Type in cmd and click ok. This will bring up a command prompt window. Type in the following command: regsvr32 'FullPathToAIMsi\ad.dll' then hit the enter key. Be sure to substitute the FullPathToAIMsi with the actual full path to the location of AIMsi.exe. For example: 'C:\Programs\AIMsi\ad.dll'. Note: On Vista systems UAC may need to be disabled before registering your ad.dll. Reactivate UAC after the process is completed.

Polling Setup

To install Polling V7, please go to www.pcpoll.com and follow the Version 7 Polling link to download the software. Run the installation. Open the software and call Tri-Technical Systems or use the web release code generator to obtain release codes for the software. Users must have version 7.1.1.531 or higher to connect with AIMsi.

In Polling V7 click the preferences menu bar. After the preferences screen opens, click the AIMsi Inventory Link tab.

After that is done go ahead and select the Ledger Setup tab. The fields on this tab pertain to the creation of inventory categories. The inventory ledger number is going to be the ledger number to credit for inventory, the income ledger number is going to be the ledger number to credit for income,

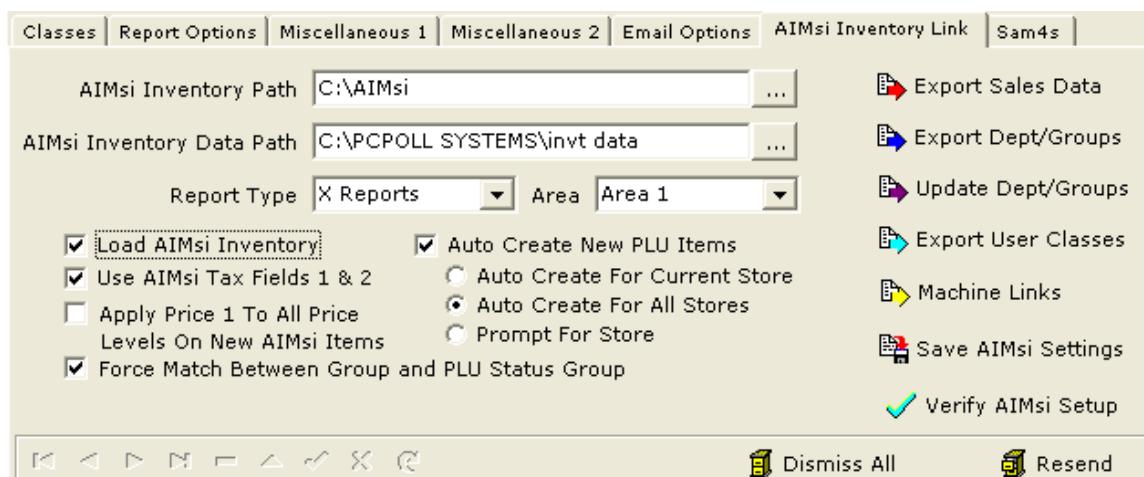


Figure 3 - AIMsi Inventory Link

You will need to fill in the AIMsi inventory path. The AIMsi inventory path must be the path to the AIMsi executable. You also need to fill in the AIMsi Inventory Data Path, which should be a folder that AIMsi and Polling V7 can both read and write to, and both systems must be setup to use the same path.

The obtain Report Type field will determine which set of reports the sales import screen will pull from, and the Area field determines which area the sales reports will pull from. The load AIMsi Inventory checkbox determines if AIMsi Inventory is loaded or not. Users may also choose whether or not to auto create a link to AIMsi on creation on new PLU/UPC items. After you have made your selections, click the Save button.

You also will have to link your V7 machines and stores to AIMsi locations. Before Machine Links can be set up each store must to be created and the AIMsi Location must have a value. Click the setup menu bar in Polling V7 then select the store option. For each store that you want to interact with AIMsi you must fill in the AIMsi location ID.

Next, within the preferences area, click on the Machine Links button. Select the machine(s) and click the Link Selected Machine(s) button. The machine name(s) will move from the Unlinked Machines grid to the Linked Machines grid. Click Close to save your changes.

Setting up AIMsi from Polling V7

If you have an established Polling V7 system or have already setup user classes or departments in Polling V7 you can send that information to AIMsi. User classes get mapped to AIMsi as selection codes, however there are a few differences that are worth mentioning. In AIMsi the selection code field is a 2 digit alphanumeric field so the user class number is converted into hexadecimal which means that only user classes between 0 and 255 get sent to AIMsi.

In AIMsi there is only one set of inventory categories, so your Polling V7 departments/groups need to be the same for every machine that you wish to connect to AIMsi.

In Polling V7 click the preferences menu bar. After the preferences screen opens, click the AIMsi Inventory Link tab (See Figure 3 above). After you have completed the Polling Setup section you are ready to create AIMsi inventory categories and selection codes. Click the Export Dept/Groups button to send your departments/groups to AIMsi as categories, then click the Export User Classes button to send your user classes to AIMsi as selection codes. Note: To update an existing Dept/Group list within AIMsi, simply click the Update Dept/Groups button.

The last step would be to create the inventory items in AIMsi. To create skus in AIMsi from Polling V7 you will need to select the Machine List menu bar and select the machine you wish to use. Once you have the correct machine selected you should select the Maintain menu bar and click on the PLU, UPC or Scan PLU option. This will open up the PLU maintenance area. Highlight all of the PLU's you want to create inventory items for. You may shift or control click to highlight multiple items. Once you have everything highlighted select Tools → Create AIMsi Inventory Items From PLUs from the menu.

Exporting Sales Reports to AIMsi

In Polling V7 click the preferences menu bar. After the preferences screen opens, click the AIMsi Inventory Link tab (See Figure 3 on page 4). Clicking the Export Sales Data button will bring up the sales export screen. From here you have to select the store you want to export data from. Then you must select if you want to use the transaction date or the poll date for the report. Then you can select the poll from and poll to date. Previously collected reports, that match the criterion, will show up in the grid on the bottom of the screen. To add them to the list of reports you want to create sales data for in AIMsi, select the report or reports in the grid and hit the right arrow. Select Begin Export to start the export.

Normal Usage

After the initial setup is done the data in the systems will mirror each other for the most part. There are a few cases where manual interaction is required by the user. In the tables on the following page, items in green indicate automatic actions that require no action unless an error has occurred. Items in yellow are actions that must be manually initiated in the application you are working in, and items in red indicate actions where the action must be performed in both systems. Note: If a maintenance screen for Category/Department, Selection Code/User Class or SKU/PLU, is open in either AIMsi or PcPoll, users may need to close and reopen that maintenance area to refresh the dataset. Also, if a record is in edit mode, on PcPoll, it may be locked and thus prohibit an

AIMSi auto-update. It is best to have the corresponding program closed, while making edits within either of the modules.

AIMsi to Polling V7 Action Table

	Category	Selection Code	SKU
Addition	Department must be manually created in Polling V7	User class is automatically added in Polling V7	PLU is automatically created in Polling V7
Change	Department is automatically updated in Polling V7	User class is automatically updated in Polling V7	PLU is automatically updated in Polling V7
Deletion	Department must be manually deleted in Polling V7	User Class is automatically deleted in Polling V7	PLU must be manually deleted in Polling V7

Polling V7 to AIMsi Action Table

	Department	User Class	PLU
Addition	Must manually run the department update export if the addition was done at the register. If done within the software, it is automatic	Selection code automatically created in AIMsi	SKU must be manually sent to AIMsi. Note: This can happen automatically if the desired preference is set to Auto Create.
Change	Category automatically updated in AIMsi	Selection code automatically updated in AIMsi	SKU changes automatically update in AIMsi. If the items were created/updated at the cash register they will need to be manually sent to AIMsi after they are saved back to PcPoll
Deletion	Category must be manually deleted in AIMsi	Selection code automatically deleted in AIMsi	SKU must be manually deleted in AIMsi

Note: For ease of use, it is recommended that Department/Group and PLU changes not be made at the cash register. Making them within Polling or AIMsi, as detailed above, will help keep the systems in sync. If items are entered/updated at the register, the PLU maintenance area can be filtered by using the Tools option: Show PLUs Not Linked to AIMsi Inventory to allow for easy linking. After all items are linked to AIMsi, select all items from the PLU grid area and use the Tools → Update Selected AIMsi Inventory Items option to send all PLU changes to AIMsi.

AIMsi Information

You can setup a category that is separate from PcPoll. In order to do this you can flag a category as 'Not A Polling Category' in Maintain Inventory Categories. This will disable any attempts by AIMsi to try to create or update a PLU in PcPoll for items that use that category. This will also alter how the enter new Sku screen looks. It will no longer have the option between PLU or Scan code.

AIMsi categories and subcategories that are linked to polling behave a little differently than ones in a traditional AIMsi system or ones that are set as a ‘Not A Polling Category.’ For polling categories you can only have one subcategory and its description and number must be the same as the category. In fact AIMsi will prevent you from adding a subcategory with a number different than it’s category number, and if you change the category or subcategory description, the corresponding category or subcategory description will be automatically updated. Non polling categories do not have those restrictions, you are free to create up to 999 subcategories for each category and they can be called whatever you wish.

The enter new sku maintenance screens look and act a bit differently depending on if you are working on a polling category or not. If you are working with a polling category you will see group of radio buttons that say ScanCode and PLU. This radio group determines how skus are created in PcPoll and AIMsi. When you use the ScanCode option you will need to fill in all of the fields that you would normally and that information is sent to PcPoll when you save a sku. When you have the PLU option selected AIMsi asks PcPoll what the next available PLU is, then creates a sku with that PLU. This means that you do not need to enter a model and sku. After the new items are added you should re-enter PcPoll and customize your register specific PLU information. Then send the file to the cash register.

There are a couple of things that are available in copies of AIMsi that interface with PcPoll that traditional copies of AIMsi do not have. There is a program that you can use to manually make changes to the table that tells us which sku / location is attached to which Plu / program ID. This program is located in inventory maintenance and is called Maintain Plu Links. For the most part you should not have to make any changes here, but it’s there in case a sku / plu are linked incorrectly. There is also a report called List Plu Links, which is located in the Inventory tab of the report catalog. This report will list out the plu / sku link table for review.

Other considerations

User classes that are numbered higher than 255 in Polling V7 will not be created in AIMsi. If a PLU is sent to AIMsi that has a user class greater than 255 the item will be created in AIMsi, but those selection codes that are larger than 255 will be left blank.

There is no mass export of data from AIMsi to Polling V7. Basically you would want to avoid setting up your AIMsi system before you get the interface functionality working. After that is done you can add skus and selection codes in AIMsi and they will be pushed to PcPoll, but categories cannot be created in AIMsi & moved to PcPoll. It may be a better idea to setup PcPoll first, then do data exports to AIMsi. Once that’s done you can work with skus in either system.

PLU's across multiple program ID's must mean the same item. For instance you cannot have PLU 1 be a six pack of beer in one program ID, and PLU 1 mean a bottle of wine in another program ID.

You can not have two machines that are linked to the same location that use different Program ID's. In other words, every machine that is attached to a location must share the same program ID, even if they have different PLU items.

Also, with the release of Polling build 7.2.71 and AIMsi update 8/27/09 there have been changes made to the transfer file layouts. For both software packages to work correctly the versions must be in sync. On the Polling side user notifications have been added to automatically check system files for mismatches.

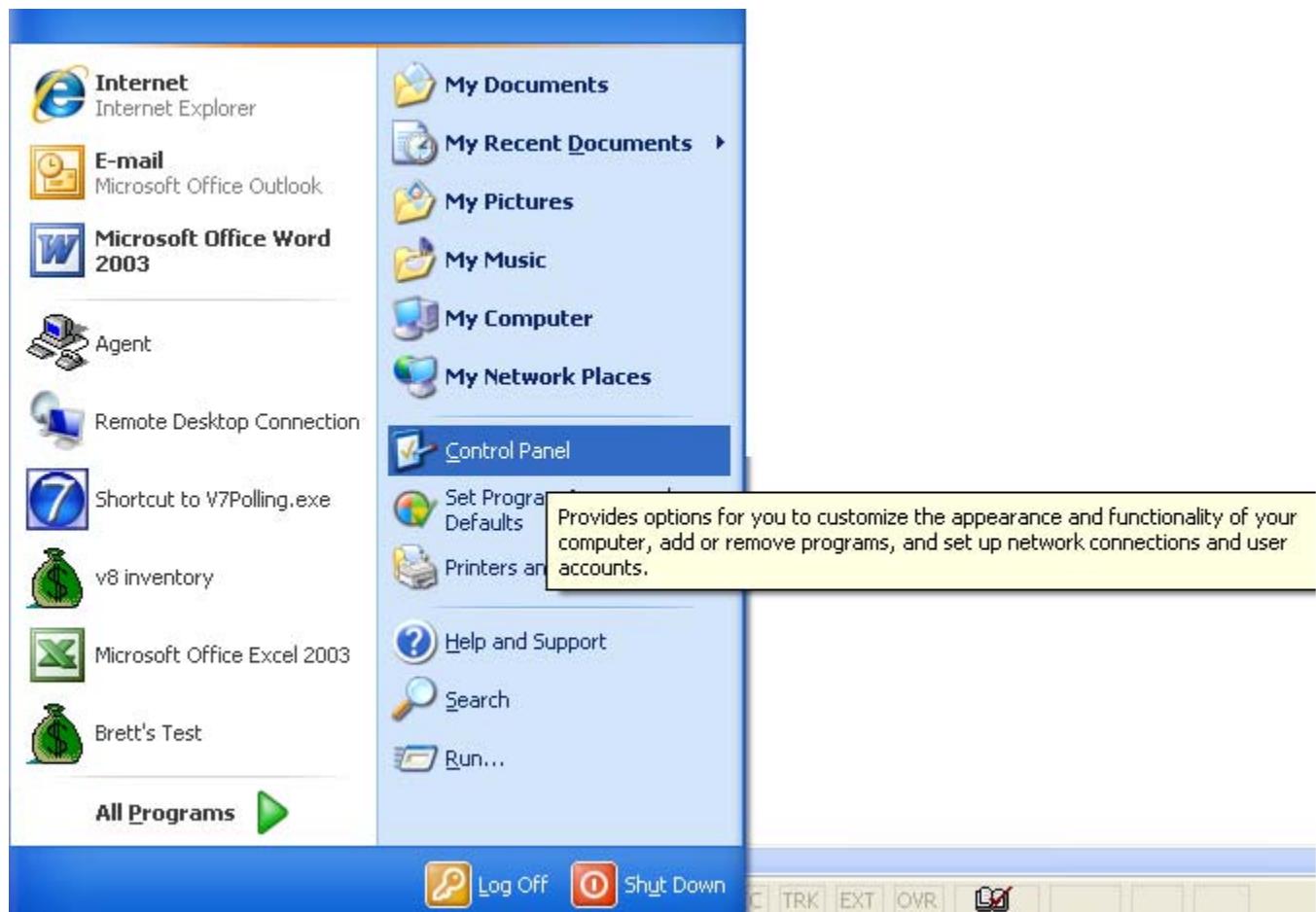
Appendix A

Setting up auto transfer of sales data from V7 Polling to V8 AIMsi Inventory

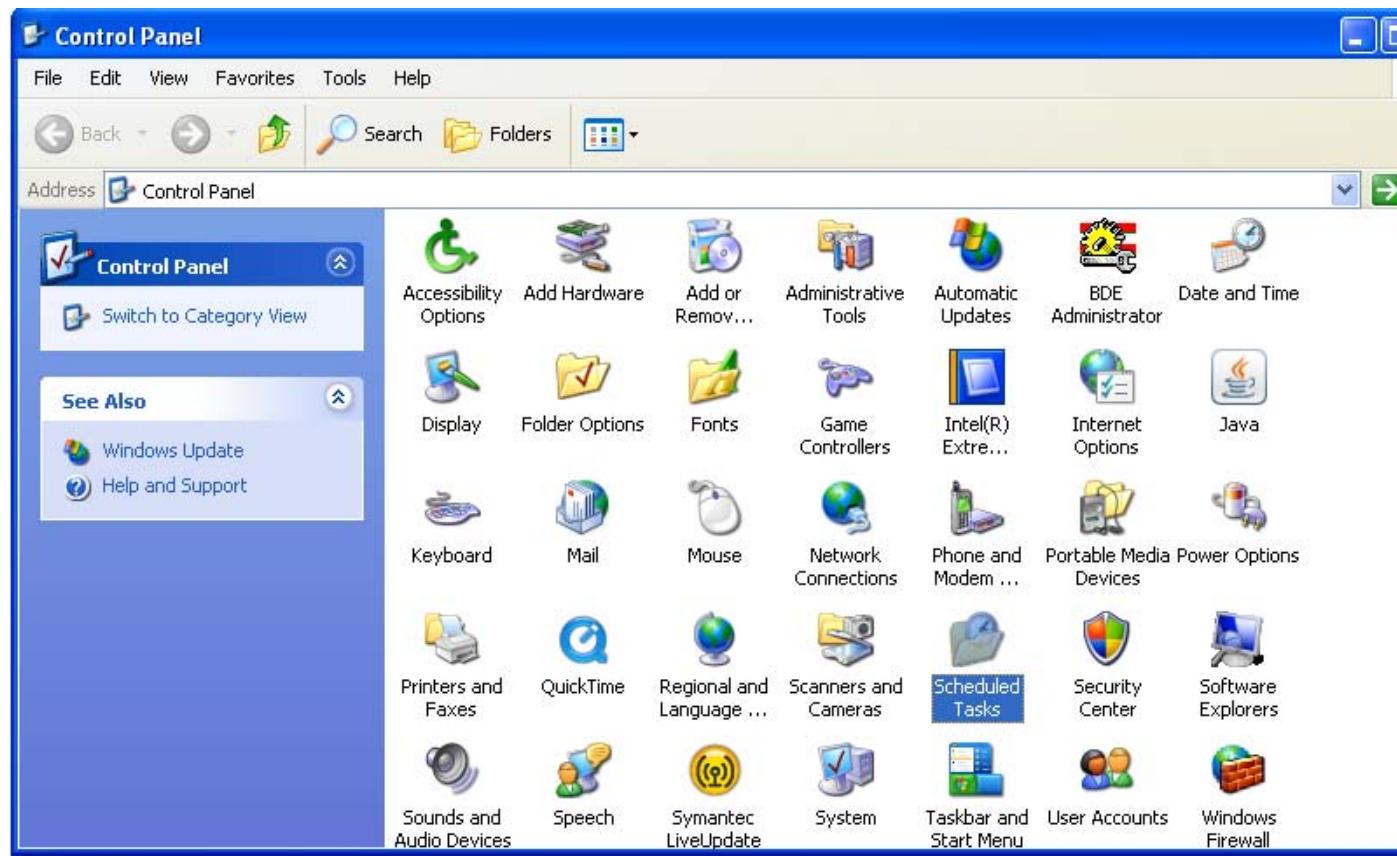
(Configuration of AIMsiSalesUpdate.exe)

Before beginning, make sure that all your preferences are set correctly within V7 Polling | Preferences | AIMsi Inventory Link. It is recommended to conduct at least 1 manual transfer of a sales report prior to configuring the auto transfer system. Users should also configure their V7 Calendar polling prior to implementing the V8 Inventory auto transfer routine.

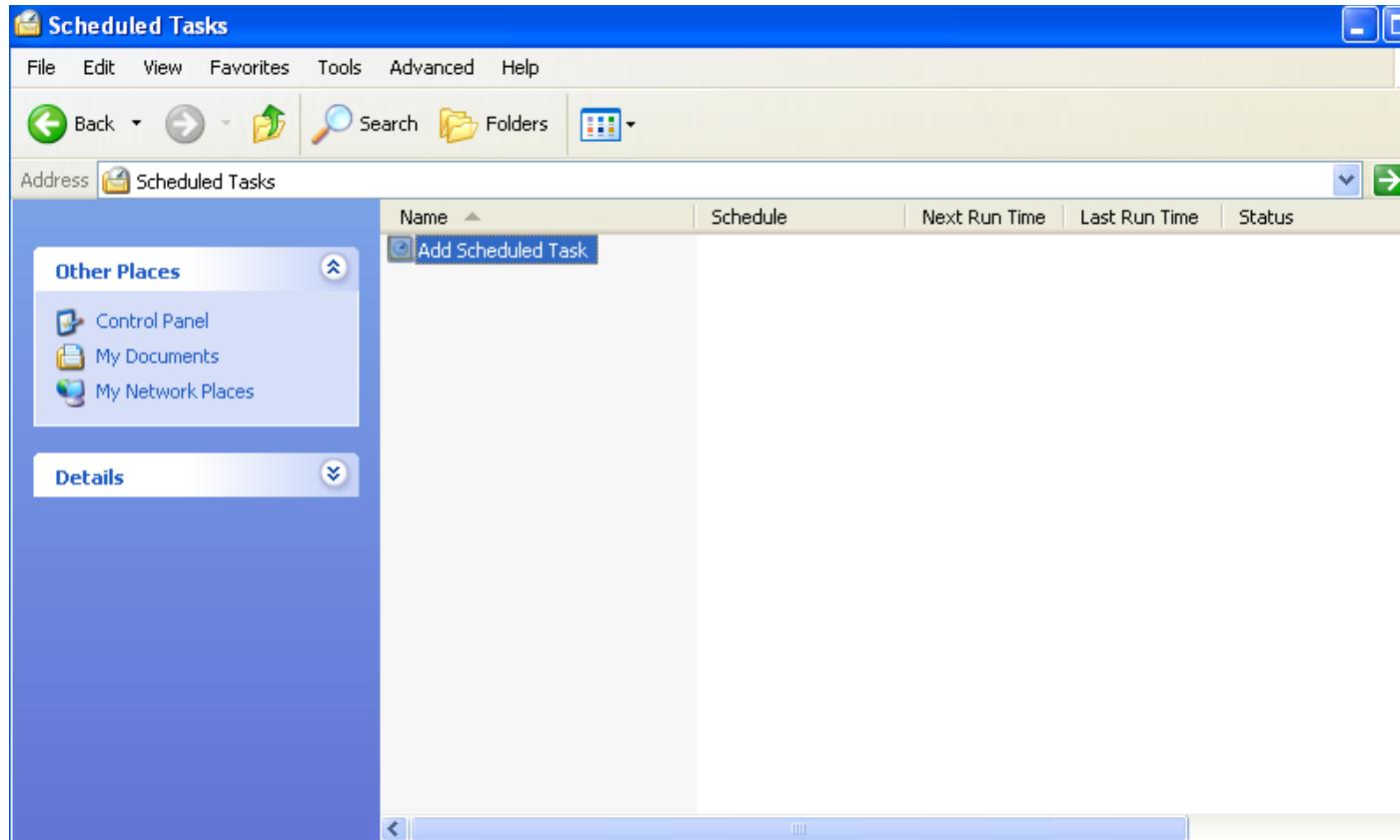
The auto transfer routine will transfer all reports that meet the specified criteria setup within the Preferences area. Any report that should not be exported can be set to ‘Skipped’ in Preferences | AIMsi Inventory Link | Export Sales Data.



1. Go to Windows Start and choose Control Panel as shown above.



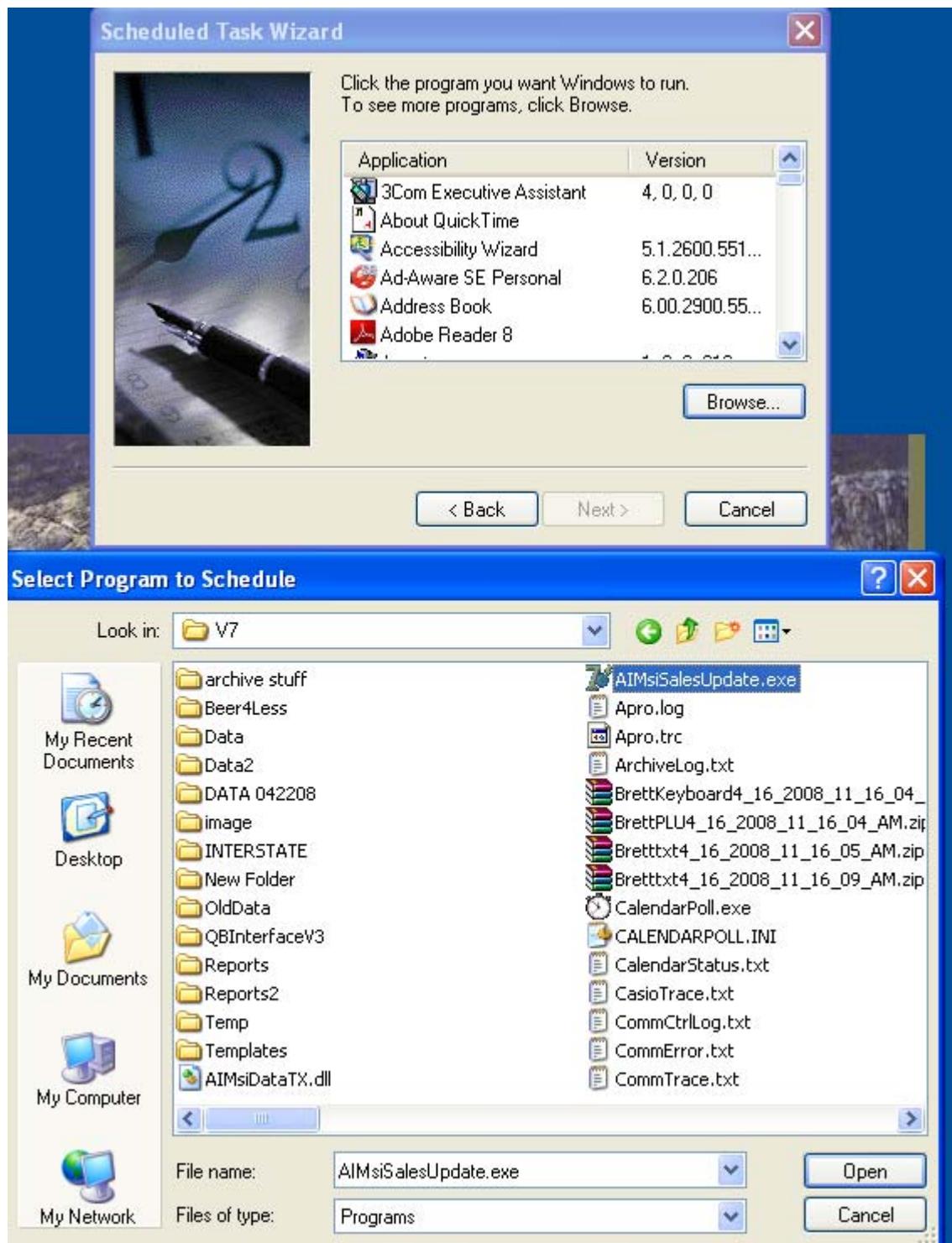
2. Open Scheduled Tasks, by double-clicking on the icon shown above.



3. Open Add Scheduled Task as shown above.

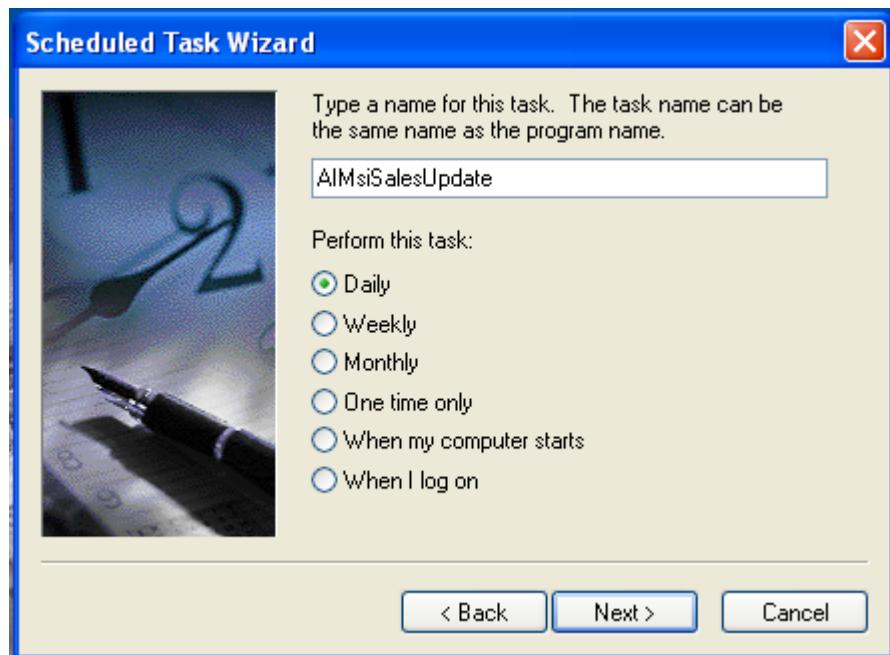


4. The Scheduled Task Wizard will appear as above, click next.



5. Click Browse as shown above, an explorer window will open and you can navigate to the AIMsiSalesUpdate.exe which is found in the V7 folder. (The

default location is: C:\Program Files\PCPOLL SYSTEMS\V7) Highlight AIMsiSalesUpdate.exe and then choose open.



6. Select how often to run the task, Daily is chosen above. Click the Next button.



7. Schedule the Sales Export to run **AFTER** your normal nightly scripted polling events (Calendar Events). Click the Next button.



8. Enter your windows user name and password you log in with. Click the Next button.



9. Click Finish you are done.

Be sure to leave the PC on and active (not in hibernate) in order for your scripted reports and AIMsi Sales Updates to be conducted.