



Digital Retail
SOLUTIONS

DRS Add-ins for Microsoft® RMS

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DRS BS-CRM Interlink™ Help

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1 DRS BS-CRM Interlink Online Help

1.1 Welcome

This utility allows you to interface RMS with Body-Scanning CRM™ on your sales floor. You can also view the customer's scan profile before importing them into RMS. Plus this utility checks for existing customer records in RMS so you can avoid duplicate entries.

BS-CRM Interlink can be run in POS or as a standalone application at the Body Scanning station or on a back office PC. BS-CRM Interlink is designed to work with Store Operations or Store Operations in a HeadQuarters environment.

BS-CRM Interlink is only installed on PCs where Store Operations is installed or on networked PCs with access to the Store Operations database.

You can use BS-CRM Interlink to:

- Instantly view customer records created at the Body Scanning station
- View the customer's scan profile prior to import
- Automatically check for customers in RMS that match the same name/address/phone
- Instantly add customer records into RMS at the POS screen
- Process all Body Scanning records entered since the last import
- Assign the customer to a POS transaction or process all scanned records in batch mode

NOTE: For BS-CRM Interlink to work properly your Body Scanning station needs to have file sharing enabled on your network and the Body Scanning folder set to shared with write privileges enabled.

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1.2 What's New

The following enhancements have been added since the initial release of **BS-CRM-Interlink**.

June 2012

- Changed email message used for sending registration request
- Moved registration key to database so user has to enter it only once for all workstations
- Added time limit to the registration key; updated Registration form and About form to show the expiry date

August 2010

- Changed the account number generation routine to support global customers and DRS V.I.P. Zone™
- When connected to a store location database in HQ environment, the Sync button is disabled
- POS version will not allow connection to an HQ database

October 2007

- Added code to allow user to pick between using Email client or Notepad when requesting a registration key
- Added code so all forms center on main form

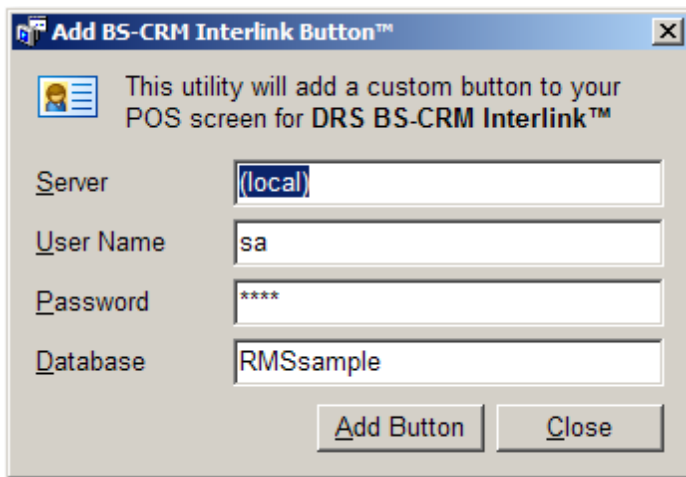
March 2007

- Added code so title will flash if expiring within 3 days.
- Added code to decide if database is RMS v1 or v2 and read info from appropriate table
- Made changes to Register form to show the SN for v1 and ID for v2 database
- Added code to encrypt the password in the registry
- Updated Add Button utility to encrypt the password
- Added ability to email key request from register form; email message includes store details

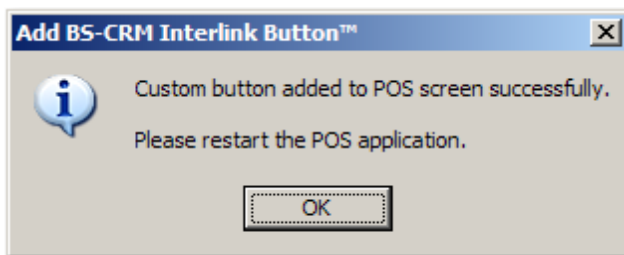
1.3 Configuration

1.3.1 Add Button to POS

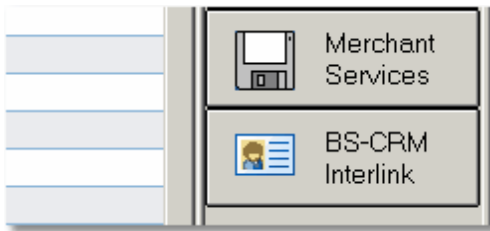
If you did not perform this step during installation select **Start, Programs, Digital Retail Solutions, DRS BS-CRM Interlink, Add Button to POS**.



Click on **Add Button** and a confirmation will appear.



Exit POS (if already running) and return to POS. The Custom POS Button should appear on the right side of the screen.



If Custom POS Buttons are not visible on your screen press **Ctrl-F6 Screen** and select the **Transaction Screen** tab. Check off the display option and enter a percentage relative to your screen resolution (typically 12-18%).



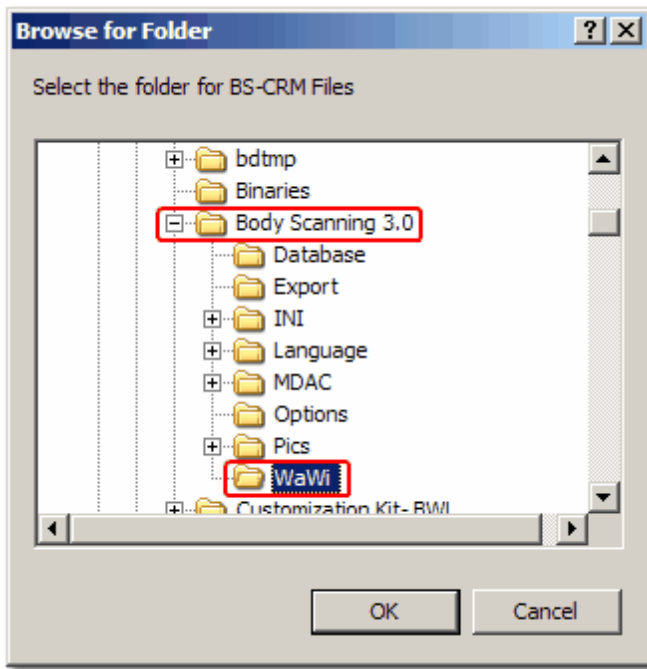
Click **OK** to display your settings.

1.3.2 BS-CRM File Location

When you first run BS-CRM Interlink you will be asked to enter the location for the Body Scanning POS export data folder. This assumes you have already enabled file sharing on the Body Scanning station and set the Body Scanning folder to shared with read-write access enabled.



Click the ellipsis on the right side of the Directory box and locate the PC where Body Scanning CRM runs on the network. Locate and highlight the folder called **WaWi** then click **OK**.

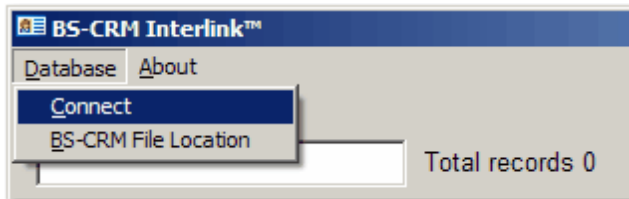


NOTE: You must enable the customer record export option in Body Scanning-CRM under **Configuration, Options, POS M.A.P** or the customer records will not be available for import into RMS. This feature is only available in Body Scanning version 3.0 or higher.

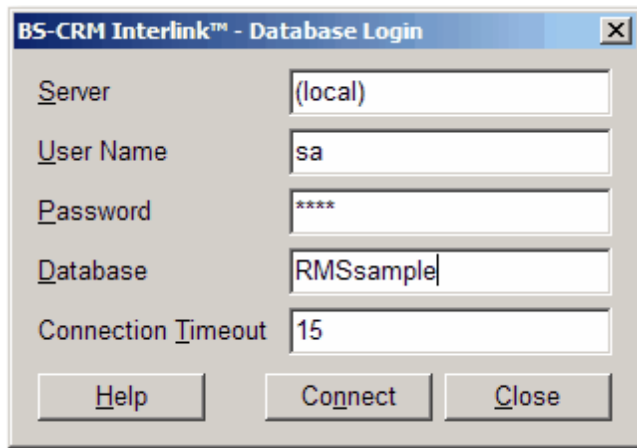
1.3.3 Database connect

From your Windows Desktop select **Start, Programs, Digital Retail Solutions, DRS BS-CRM Interlink, BS-CRM Interlink**.

Once **BS-CRM Interlink** loads select **Database, Connect**.



This will pop-up the login window (unless another DRS utility has already been installed and configured on the same PC).

**Database Login:**

Server: Name of your RMS server. Use (Local) if BS-CRM Interlink is installed on the PC where your RMS database resides.

User Name: SQL Server User Name (default = sa)

Password: SQL Server Password for above user. Your SQL database password is created when you first installed MSDE or SQL Server.

Database: The name of your RMS database (located under RMS Administrator, File, Configure).

Connection Timeout: 15 should be fine; increase if you have a slow network connection.

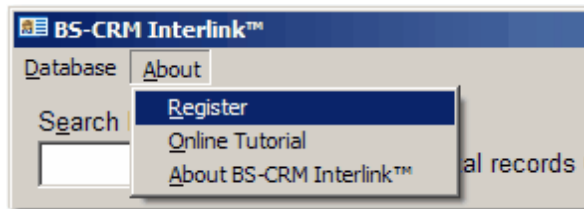
Click on **Connect** to confirm connection. If successful you will be returned to the main screen.

NOTE: The initial entry of database connections settings will update these settings for all DRS applications currently installed. Subsequent changes will need to be entered for each application on an individual basis. In HQ environments (multi-store), you cannot connect the POS version of BS-CRM Interlink to the HQ database.

1.3.4 Registration

From your Windows Desktop select **Start, Programs, Digital Retail Solutions, DRS BS-CRM Interlink, BS-CRM Interlink**.

Once **BS-CRM Interlink** loads select **About, Register**.



This will pop-up the registration key entry window.

IMPORTANT: Your company information must be correct before requesting a registration key. To edit your company information select **Store Operations Manager, File, Configuration, Store** tab. For an HQ key select **HeadQuarters Manager, File, Configuration, Accounts** tab, **Billing Statement Return Address**. Make sure company name, city, state, zip, and phone number are correct. There is a charge to re-issue a registration key for an incorrect address or change of address.


RMS v1.x: Your serial number will begin with QC for Store Operations.

RMS v2.x: Your serial number will be an alphanumeric entry.

Serial Number: If your serial number is not listed correctly, you must first [connect to your database](#).

To secure a license key, click on the envelope icon  and follow the instructions to email your serial number and company information to register@digitalretailer.com.

Key: When you receive your registration key, insert the key into the box provided and select **Save**. This will license all PCs running the same version of the application on the local network.

Expiration: Date shown will indicate the last day the software will run without renewing the license, To renew, click the envelope icon  and follow the instructions.

NOTE: The expiration date will show in the title bar of the application when 30 days are remaining and start blinking when 5 days are left. You should renew your license during this period to ensure continued operation. The expiry date is also displayed in the **About** form.

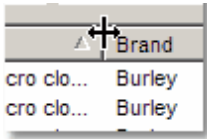
NOTE: If you are installing a DRS bundled suite of add-ins and connect to a Store Operations database, you can enter the master key and it will be saved for all applications in the bundle that support a master key. If you subsequently connect to a HeadQuarters database, you must enter the registration key for each DRS application even if it is the master key.

1.4 Operation

1.4.1 General

You can press **Esc** on any form to return to the previous form, or to exit the program from the main screen.

Columns can be sized to view all data in that column. Hover over the separator line between columns with your mouse and the cursor will change to a cross with left-right arrows.



Right-click and drag the column to fit, or double-click on the cross to auto-size the column to its longest entry.

To reset the list view to its default column width settings, press F8.

This application includes hot keys to support fast keyboard operation of menus, buttons, and screen layout.

F3 -- clears string search entry boxes without affecting combo box selections

F5 -- refreshes list view; useful when database changes have occurred on other stations

F6 -- resets the search criteria and clears any list views

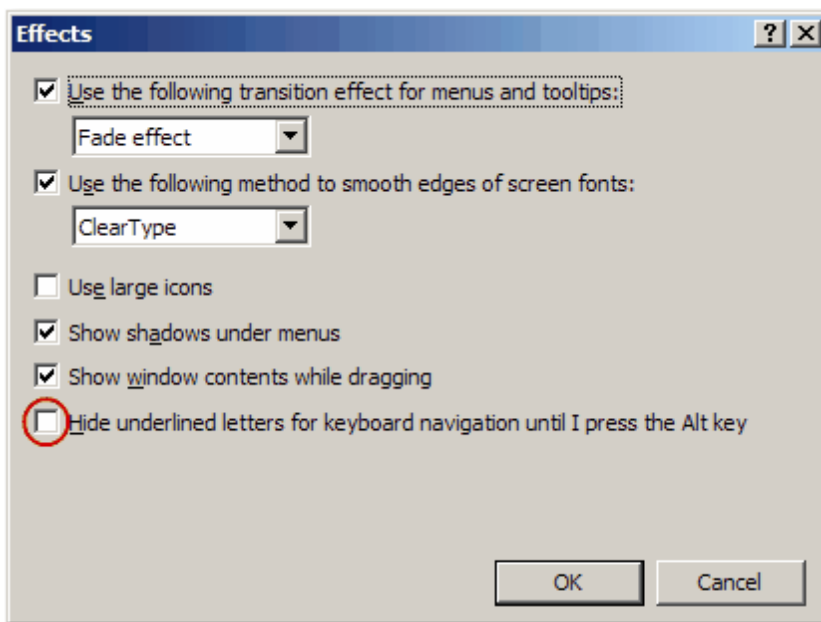
F8 -- resets the column width to the default settings on list views

Hot keys also include Alt-X combinations for menu and button options.



Example: **Alt-V** for **View**, **Alt-C** for **Close**

If you do not see underlined characters on most buttons and options it means this feature is set to hidden in Windows. To enable this feature go to **Display Properties**, select the **Appearance** tab, then the **Effects** button. Make sure "Hide underlined letters for keyboard.." is unchecked.



Bright blue text is used whenever a checkbox option has been enabled to aid quick identification.

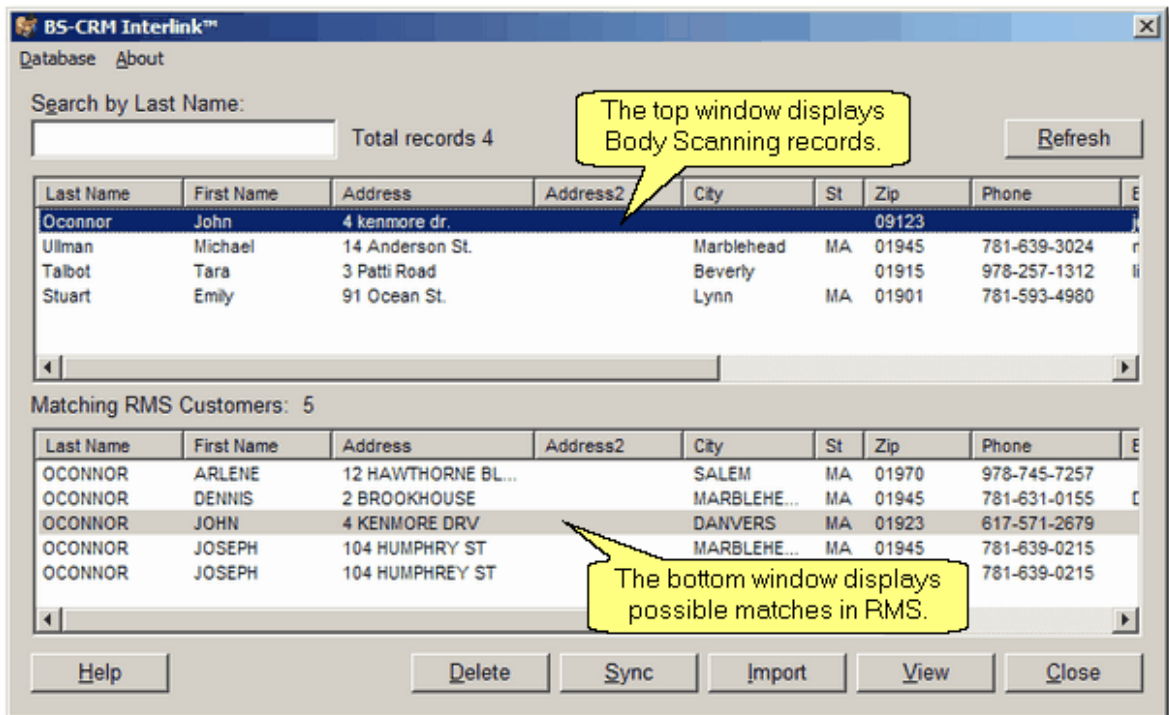
Dark blue text is used for instructional messages.

We welcome and encourage your feedback to help us improve this application. Please send your comments and suggestions, or any problem reports, to our [Suggestions](#) box.

1.4.2 Main

There are two versions of the BS-CRM Interlink application. One version can be run standalone on any PC (including the Body Scanning station) and another runs from within POS. The POS version differs in that during import you will be prompted to add the customer to the transaction in POS.

When activated, BS-CRM Interlink lists all scanned customers at the Body Scanning station that have not been imported into RMS. The most recent Body Scanning record is listed first. You can scroll to the right to view additional information including Email address, BS-CRM ID, and File Name (from the [WaWi](#) folder).



View -- displays the highlighted customer's Body Scanning chart

Import -- inserts the customer record into RMS; in POS will also prompt to assign customer account to the transaction

Sync -- combines the data from the top window (Body Scanning record) with the bottom window entry (RMS customer account)

Delete -- removes the entry in the top window as an import candidate; original data is retained in the Body Scanning software

TIP: You can exit BS-CRM Interlink at any time by pressing the **Esc** key. The **Refresh** button (F5) will add entries that may have been created at the Body Scanning station while the program has been left

idle.

1.4.3 View

The **View** button will display the fit chart from the customer's Body Scanning session.

The screenshot shows a window titled "BS-CRM Details" with the following fields and sections:

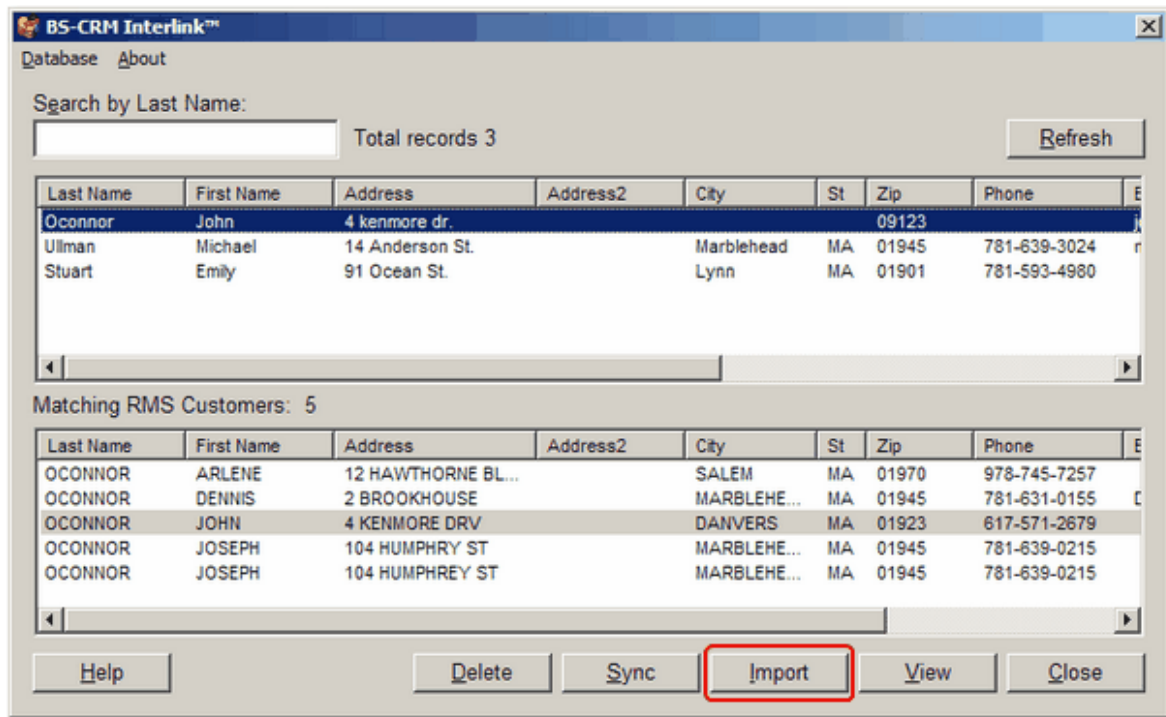
- Name: Oconnor, John
- Phone: [Empty]
- E-mail: jo'connor@dolben
- Staff: Jason
- Created: 25.06.2005 - 10:56:53
- BS ID: 795047.3.25052005.121917
- Client Card: N
- Information: N
- Gender: M
- Client No.: [Empty]
- Comments/fitness condition: [Empty]
- Riding Profile**
 - Bicycle category: Road race
 - Usage: Fitness, Recreation
 - Frame material: Steel
 - Seat position: 2
 - Frame style: Women
 - Age class: 31 - 45
 - Suspension: No
 - Miles/month: > 200
 - Gears: Derailleur
 - Brakes: Other
 - Accessories: [Empty]
 - SKU no.: [Empty]
- Measurements**
 - Functional height: 72
 - Shoulder width: 16.675
 - Shoulder height: 59.55
 - Pelvic bone height: 41.28
 - Fist height: 32.52
 - Leg length: 33.024
 - Arm length: 27.03
 - Weight: [Empty]

Buttons: Help, Close

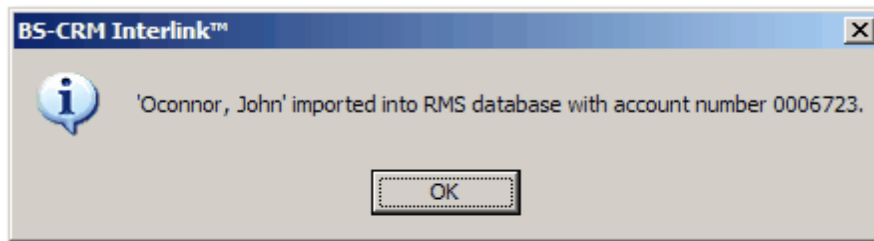
NOTE: This information is for viewing only prior to import. These chart will not be saved in RMS as the original chart data remains in the Body Scanning software.

1.4.4 Import

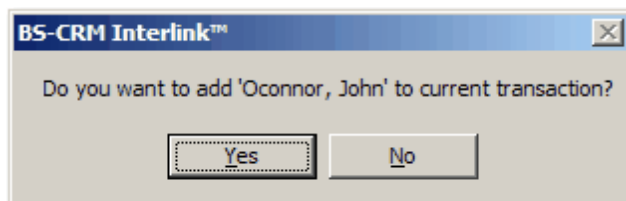
The **Import** button will immediately add the customer record from Body Scanning into RMS. As you import customers they are removed from the list in the upper window. If BS-CRM Interlink finds a similar entry in RMS that customer account will be highlighted in the bottom window for review. If the customer is already on file in RMS you should use the [Sync](#) or [Delete](#) option instead.



A confirmation message will appear to indicate a successful import with the assigned account number in RMS.



If you are running BS-CRM Interlink from POS you will next be prompted to add the customer to the current transaction.



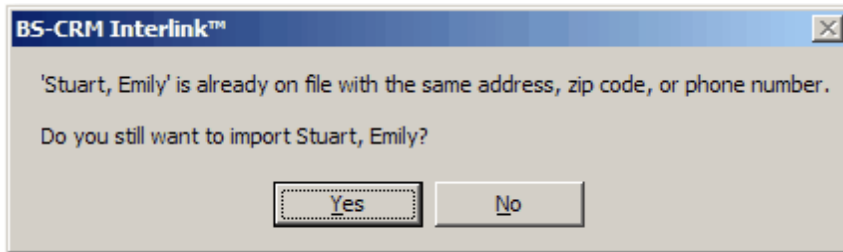
Click **Yes** to set customer record to the transaction and BS-CRM Interlink will return control to the POS screen.

Click **No** to continue processing additional records in BS-CRM Interlink.

If the customer is already on file in RMS you can [delete](#) them from the list, or [sync](#) the information on file

in RMS with any additional data you collected at the Body Scanning station. Example: Address or phone number change.

If you attempt to Import the record and an exact match is on file in RMS (name, address, phone number or zip), you will receive this warning.

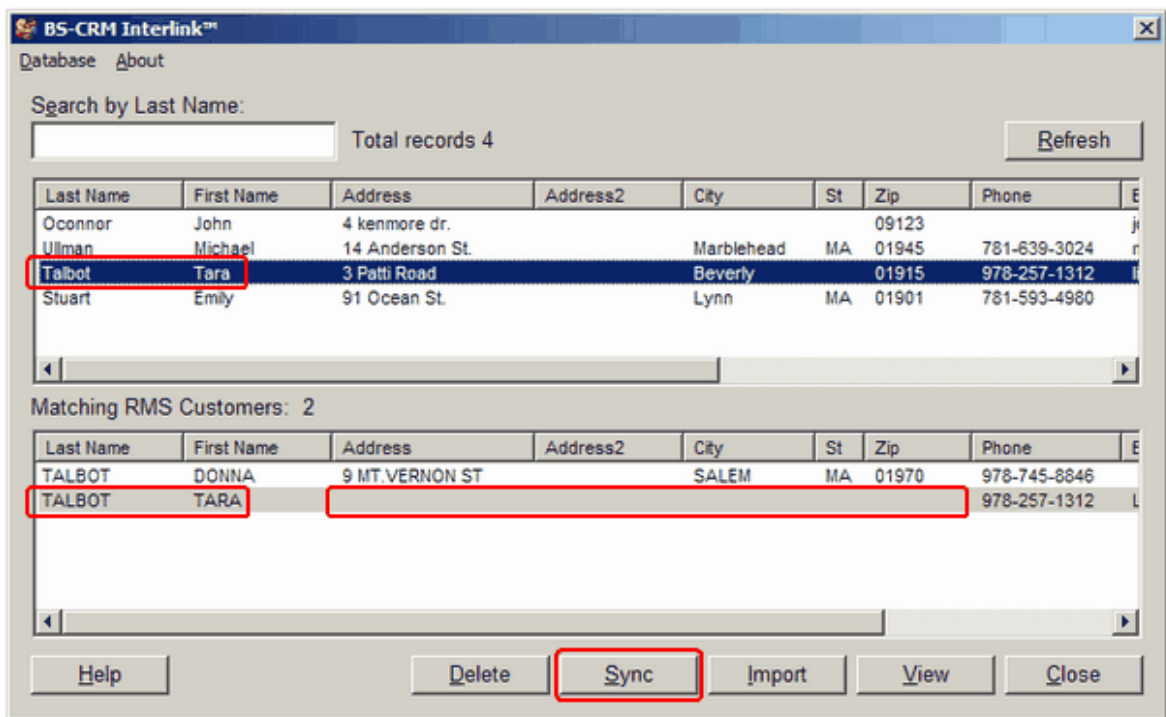


1.4.5 Sync

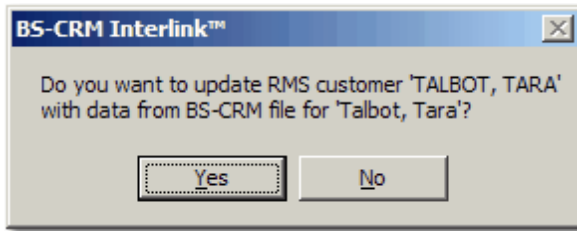
The **Sync** option can be used to merge customer data gathered at the Body Scanning station with a customer account on file in RMS.

Example: The RMS account record is missing a telephone number or full address, or a new email address was entered in Body Scanning.

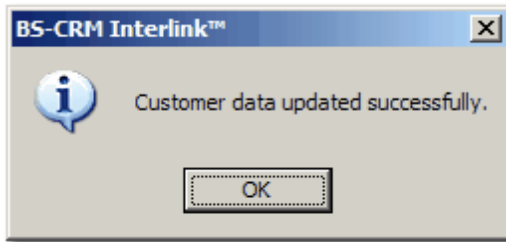
NOTE: The **Sync** button is disabled if connected to a store location database in HQ environments.



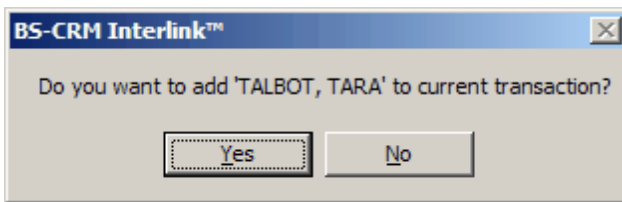
When you click **Sync** a message will prompt you to confirm the operation.



Click **Yes** to confirm the update. Click **No** to return to the main screen.



If you are running BS-CRM Interlink from POS you will be prompted to add the customer to the current transaction.

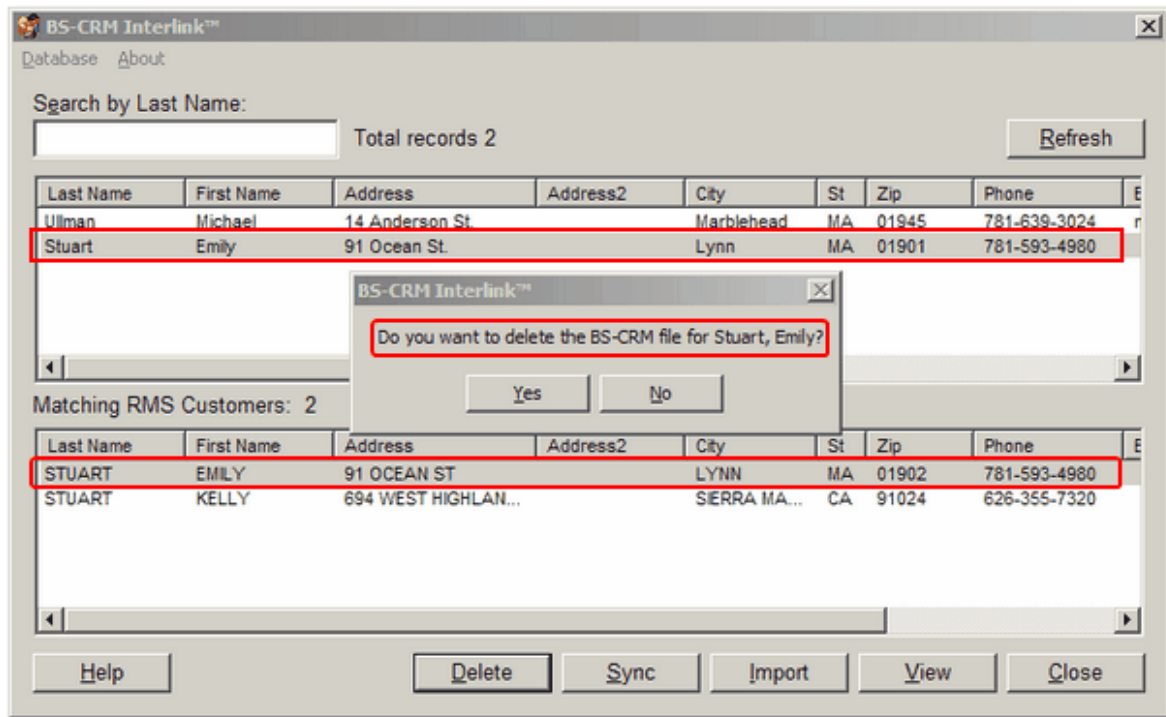


Click **Yes** to set customer record to the transaction and BS-CRM Interlink will return control to the POS screen.

Click **No** to continue processing additional records in BS-CRM Interlink.

1.4.6 Delete

If the customer is already on file in RMS and you don't wish to [Sync](#) the record, you should remove the entry from the top window by clicking **Delete**.



Click **Yes** to delete the entry and return to the main screen.

1.5 Contact Info

Digital Retail Solutions Contact Information

Sales Office:

Phone: 800-322-9471
 Int'l: +1 305 420 6170
 Email: info@digitalretailer.com
 Website: www.DigitalRetailer.com
 Hours: 9am-5pm EST Mon-Fri

Support & Training:

Email: support@digitalretailer.com
 Website: www.DRShelp.com
 Hours: Available 7 days*

*See our [Support Agreement](#) for details.

Mailing Address:

Digital Retail Solutions Inc.
 2018 Electric Rd PMB 205
 Roanoke, VA 24018-1938
 USA



1.6 Make a Suggestion

We are very interested in making improvements to our RMS utilities and add-ins to meet your needs.

- Have an idea for an enhancement?
- Thought of a feature we left out?
- Want to report an operating problem?

Please click through to our [Suggestion Box](#) and let us know right away.

Updates and upgrades to DRS add-in utilities are included with a DRS annual maintenance plan. Contact your RMS reseller for details.