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DRS HQ Bridge™ Help

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Table of Contents

1   DRS HQ Bridge Online Help

1.1   Welcome

This utility allows you to link selected data from Store Operations to Headquarters during a 401 Worksheet update. Once configured, HQ Bridge runs in the background to automate data transfers and updates.

Virtually any data in RMS can be transferred up to HQ from Store Operations and distributed to all stores in the chain. HQ Bridge works in tandem with other DRS utilities to ensure store level data is in sync with HQ.

You can use HQ Bridge to:

- Synchronize SO Tracker item additions created in POS with HQ Manager (ILC, Description, Price, Supplier data)
- Autogenerate SO codes when they are depleted at store locations (requires **DRS AutoGen™**)
- Automate Worksheet 250 in HQ Manager for new item adds on a timed basis (defaults to SO items only; option to include all depts)

HQ Bridge is installed on the PC where HQ Server runs. Scheduling is handled using a timer built into HQ Bridge. Once installed HQ Bridge components run invisibly in background.

This limited edition of HQ Bridge is designed for DRS SO Tracker™ users running in an HQ multi-store environment.

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1.2   What's New

The following enhancements have been added since the initial release of **HQ Bridge**.

October 2007

- Added code to allow user to pick between using Email client or Notepad when requesting a registration key

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
- Updated About form to read store details from HQ Configuration table when connected to HQ database
- Added code to encrypt the password in the registry
- Added ability to email key request from register form; message includes store details

August 2006

- Added ability to auto create SO codes as they are depleted at the stores. The routine checks to make sure that an item with ILC = SO is not already in the table as this would prohibit auto-

generation. If it finds one it stops and puts a message in the log. It will also log how many SO items are created each time.
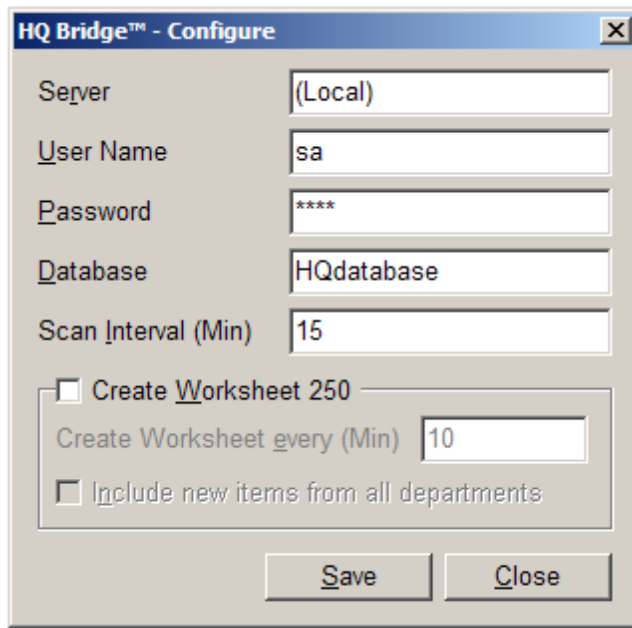
- Added ability to view the logs from the popup menu on the taskbar icon.
- Added ability to quit from the popup menu on the taskbar icon.
- Added ability to create Worksheet 250 for new SO items. User can also select to include new items from all departments. The code tracks the last time the worksheet was created and only looks at new items added since that time. This routine will only look at items created after this version is run for the first time and only picks items that are not already on a previous Worksheet 250.

1.3 Configuration

1.3.1 Configure

From your Windows Desktop select **Start**, **Programs**, **Digital Retail Solutions**, **DRS HQ Bridge**, **Configure HQ Bridge**.

Alternately you can access the Configuration option by right-clicking on the HQ Bridge icon 🔄 in the system tray.

Database:

Server: Name of your RMS HQ server. Use (Local) if HQ Bridge is installed on the PC where your HQ 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 HQ database (located under HQ Administrator, File, Configure).

Scan Interval: The number of minutes between scans

Create Worksheet 250: Enable generation of Worksheet 250s for new items adds

NOTE: Changes made to a database connection setting will *not* update these settings for any other DRS
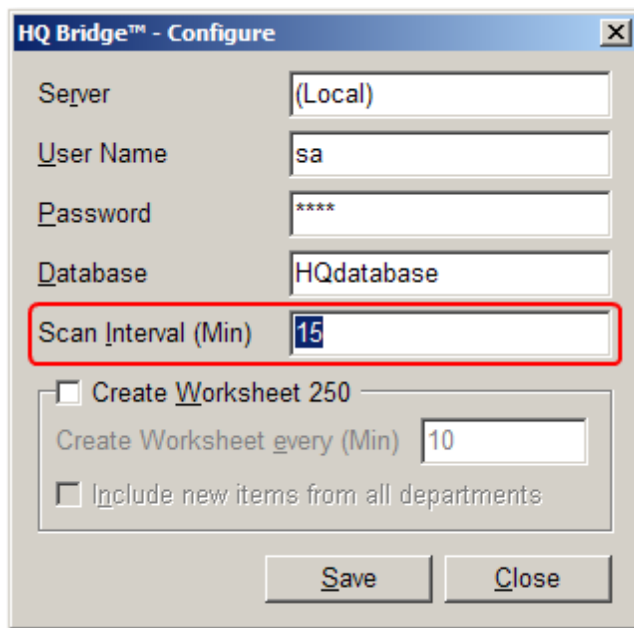
utility.

1.3.1.1 Scan Interval

The Scan interval determines how often HQ Bridge scans for updates arriving from stores. You should set this interval lower than the shortest time that HQ Server connects to your stores.

Example: If you have defined the store connection schedule in HQ Manager to update your stores in sequence every 30 minutes, set the scan Interval in HQ Bridge to 15.

From your Windows Desktop select **Start**, **Programs**, **Digital Retail Solutions**, **DRS HQ Bridge**, **Configure HQ Bridge**. Enter the Scan Interval number in minutes. You should enter a time that corresponds to how often your stores connect to HQ.

1.3.1.2 Create Worksheet 250

HQ Bridge can automate the process of generating SO item codes for each store location and transmit those items on a worksheet 250. The worksheet is created on a timed basis and automatically approved for the next 401 connection.

Items are only added to a worksheet if they have not previously been transmitted on a worksheet 250 and their creation date is later than the last time the routine ran.

The default value of 10 means HQ Bridge will check for qualifying new items adds every 10 minutes and, if found, generate a Worksheet 250. We suggest you set minutes appropriate to your stores' connection schedules. If your store locations only connect to HQ twice a day, the minute interval could be set fairly high.

By default this routine only includes items in the SO dept. If you enable **Include new items from all departments**, all new item adds will be included on the worksheets, not just SO items.

1.3.2 Registration

From your Windows Desktop select **Start**, **Programs**, **Digital Retail Solutions**, **DRS HQ Bridge**, **Register HQ Bridge**.

Alternately you can access the Registration option by right-clicking on the HQ Bridge icon in the system tray.

RMS v1.x: Your serial number will begin with QH for Headquarters.
RMS v2.x: Your serial number will be an alphanumeric entry.

If your serial number is not listed correctly, you must first connect to your database.

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

**IMPORTANT:** Your company information must be correct before requesting a registration key. To edit your company information 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.

When you receive your registration key, insert the key into the box provided and select **Save**.

NOTE: If you are installing a DRS bundle 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.

1.3.3   Alternate Configuration

If you prefer, Configure and Registration options are also available by right-clicking on the HQ Bridge icon in the System Tray.
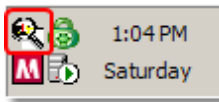
Right-click on the HQ Bridge magnifying lens icon to view the menu options.
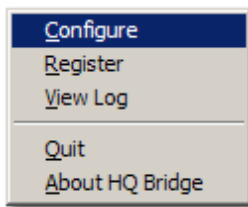
View Log and **Quit** are also accessed from this menu.

1.4   Operation

1.4.1   Store Ops to HQ Sync

Once you have configured HQ Bridge it runs unattended in background to update data sent from the stores to HQ.

Example:

1. SO Tracker is deployed in POS to create a special order item for a customer.
2. SO Tracker assigns a special order Item Lookup Code containing the customer's telephone ID, description, price and supplier data.
3. SO Tracker updates the local RMS database.
4. HQ Client connects to HQ Server during its next scheduled connection.
5. Worksheet 401 from HQ downloads updated data from HQ, then transfers any ILC changes made by SO Tracker back to HQ.
6. HQ Bridge monitors incoming worksheet data and updates the HQ Manager database as needed (see Note below).
7. HQ Manager sends any additional changes to the master item database to the stores on a subsequent Worksheet 250.
8. If SO item codes are running low at any store location, HQ Bridge triggers the creation and transfer of additional codes to those stores on a time basis.
9. If enabled, HQ Bridge monitors all new item adds for all depts and creates pre-approved

worksheets 250s on a timed basis.

This process repeats as often as 401 worksheet connections occur between HQ Server and HQ Client. In the case of SO Tracker, this ensures items created at the store are synchronized with the item database at HQ.

NOTE: In a multi-store environment the ILC entry won't include the coded customer phone number until HQ Bridge runs the periodic update. For this reason the ILC may first appear in HQ Manager as the original number assigned by store location. Example: SO002_1 from Store 1. When HQ Bridge runs, this number will change to the originating special order format such as SO_1_4441234567. This stands for Special Order_Store 1_Customer Phone Number 444-123-4567.

WARNING: Duplicate SO_ codes can be created in error by issuing Worksheet 250s with inactive SO_ items on them. The 250 should only contain SO_ items if the codes have been activated at the store level, sent up to HQ, modified in HQ (ex. price, description, etc), and the changes need to be sent down to the stores. The best way to avoid this issue is to select the Item Filter option when issuing a worksheet 250s for the SO dept. Then exclude Inactive items in the filter settings.

Example: Inactive = No AND Dept = Special Orders AND Last Updated = Today

If you use Recently Changed items instead, on days when SO_ codes are auto-replenished the worksheet may contain inactive items in error. The only SO_ items listed on a user-created worksheet should be those modified in HQ Manager and the changes are being sent back down to the stores.

If you create duplicate entries of this type in error, the only way to fix them is to retire the "bad" codes, cancel the outstanding orders containing those codes, and re-create the order with a new SO_ item. To retire a code, mark it Inactive in HQ and send down a worksheet 250 containing only those codes you want retired.

1.4.2   Automated transfers

Once you have properly configured and tested HQ Bridge the operation is completely automatic. You do not need to create SO_ items manually or process worksheet 250s to transfer these codes to stores. These processes will occur automatically in background as replenishment at the stores is required.

If you experience any problems with HQ Bridge operation, you should first review the log entry for details on the last transfer. If errors are listed, please contact Support.

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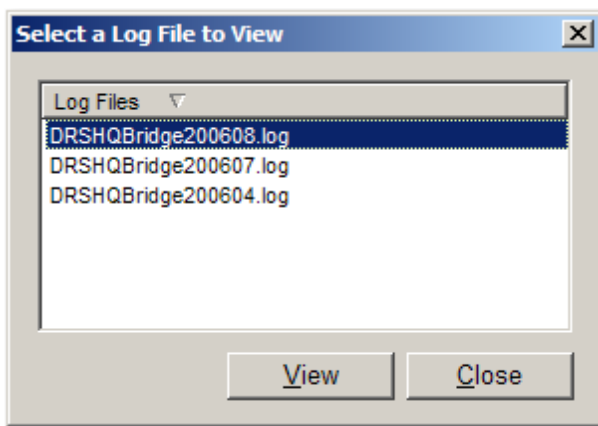
1.4.3 Log auditing

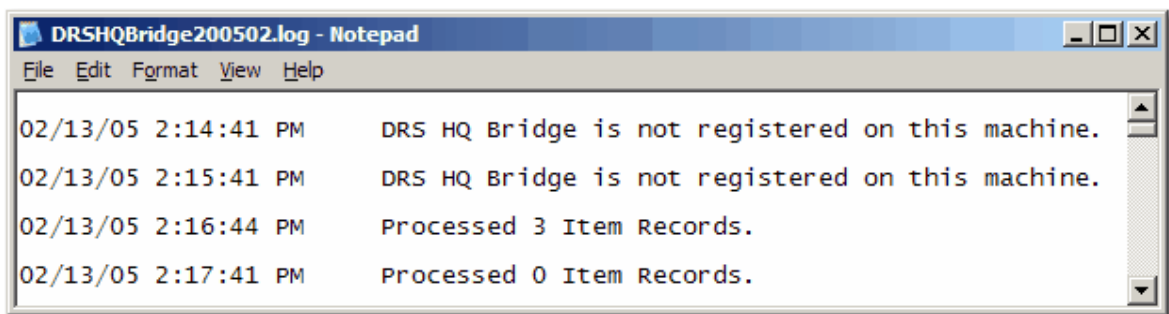**HQ Bridge maintains a connection log for auditing and troubleshooting.**

To view the current log entry, right-click on the HQ Bridge icon 🔄 in the system tray and select View Log.
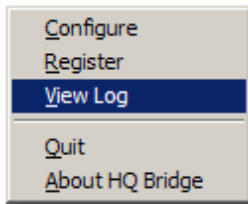
You will be presented with a list of historical logs by month with the default highlight set to the current month's log.

Double-click or select **View** to list the contents in Notepad.

Log entries will include:
  - Registration warning if a valid registration key has not been entered
  - How often HQ Bridge runs or whether it was stopped by user
  - When SO items were added to the database and how many items
  - When SO items were processed from the stores and how many items
  - When a new Worksheet 250 is created and how many items were included

- Timeout warning if the evaluation period has expired

NOTE: This log will reset at the beginning of every month. If errors are listed, please contact Support.

1.5 Contact Info

Digital Retail Solutions Contact Information

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Email: info@digitalretailer.com
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Support & Training:
Email: support@digitalretailer.com
Website: www.DRShelp.com
Hours: Available 7 days*
*See our Support Agreement for details.

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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.