Clientelier Exports for Retail Pro 9

Produced by Cornelius Concepts, LLC
corneliusconcepts.com

Introduction

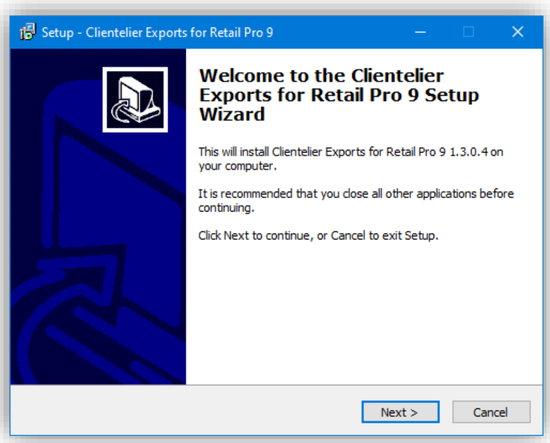
This application allows retailers using Retail Pro 9 to synchronize their sales and customers with the Clientelier platform. It is a Windows application that can reside on the Retail Pro server or that has access to the Retail Pro database. It can be scheduled using the Windows Task Scheduler to run on a periodic basis where it exports data behind the scenes to keep your information fresh.

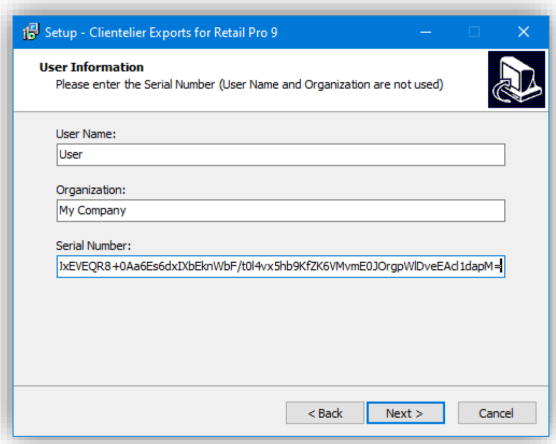
Installation

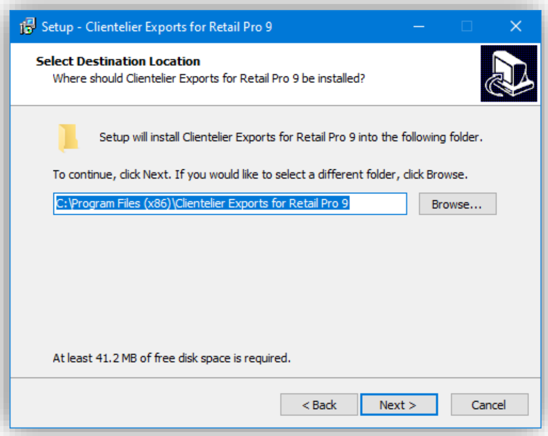
Clientelier Exports for Retail Pro 9 is a standard Windows application and installs like many other applications using a wizard like interface. It requires **Windows 8.1** or **Windows Server 2012 R2** or newer.

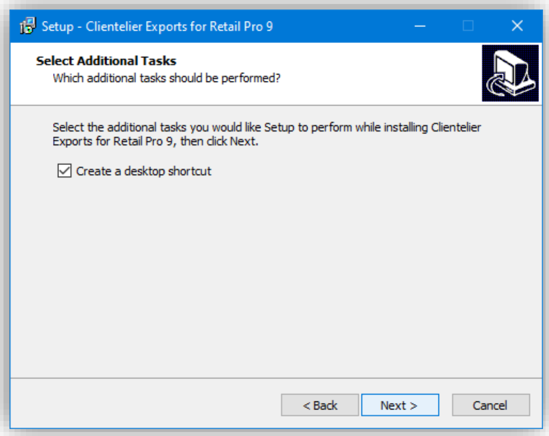
Leaving many options at their default values works for most installations. An uninstaller is automatically hooked into the Windows installed applications list for convenience should the need arise to remove the application.

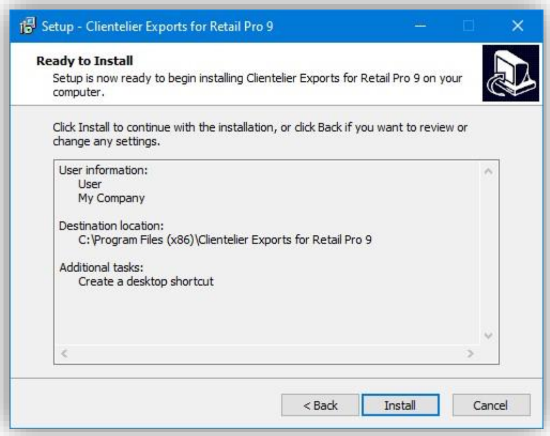
On the User Information page, enter the Serial Number as received from your Clientelier representative. The User Name and Organization fields are required to complete the install but are not used.

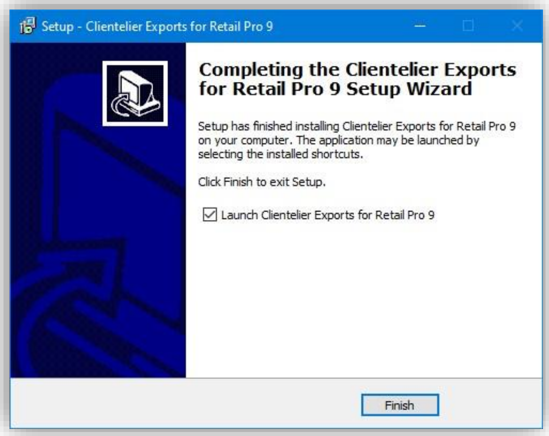





Setup - Clientelier Exports for Retail Pro 9
Select Destination Location
Where should Clientelier Exports for Retail Pro 9 be installed?
Setup will install Clientelier Exports for Retail Pro 9 into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files (x86)\Clientelier Exports for Retail Pro 9
Browse...
At least 41.2 MB of free disk space is required.
< Back
Next >
Cancel

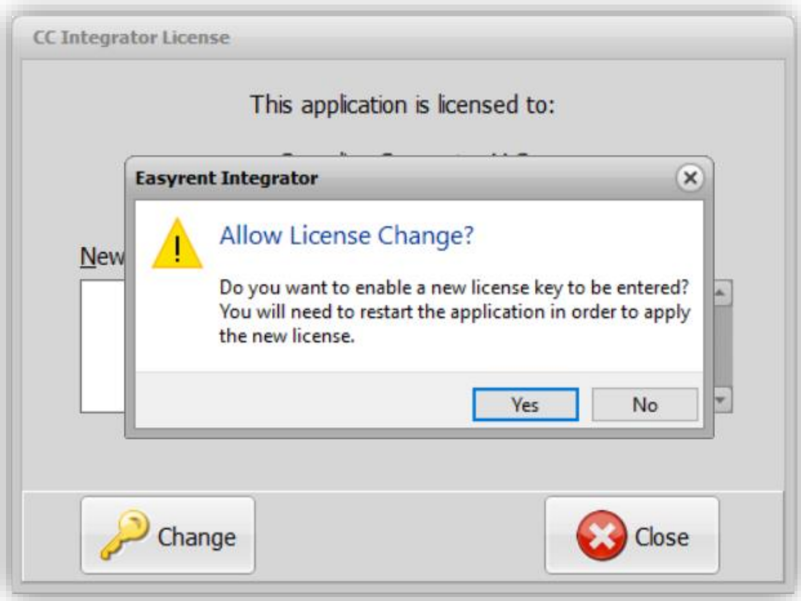

Setup - Clientelier Exports for Retail Pro 9
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing Clientelier Exports for Retail Pro 9, then click Next.
Create a desktop shortcut
< Back
Next >
Cancel


Setup - Clientelier Exports for Retail Pro 9
Ready to Install
Setup is now ready to begin installing Clientelier Exports for Retail Pro 9 on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
User information:
User
My Company
Destination location:
C:\Program Files (x86)\Clientelier Exports for Retail Pro 9
Additional tasks:
Create a desktop shortcut
< Back
Install
Cancel


Setup - Clientelier Exports for Retail Pro 9
Completing the Clientelier Exports for Retail Pro 9 Setup Wizard
Setup has finished installing Clientelier Exports for Retail Pro 9 on your computer. The application may be launched by selecting the installed shortcuts.
Click Finish to exit Setup.
Launch Clientelier Exports for Retail Pro 9
Finish

Licensing

When the application is first installed at a new Retail Pro site, a trial license is given and must be entered in as the "Serial Number" during installation. For continued use beyond the license expiration date, the license must be upgraded to a full, non-expiring license for that Retail Pro site. To enter a new license, click the License button and then in the pop-up license window, click Change to allow a New License to be entered and saved.



Once the new license is entered and click OK, the application will close down. Once you restart it, the new license will be active.

Logging

Since the program often runs without any intervention or monitoring, there needs to be a way to confirm processing actually took place without spot checking data known to have changed. For this reason, logging is an important part of this application. Logging is simply a running history of events that take place during the application process. It can be as simple as listing the date/time when an application started, or a detailed error message resulting from corrupt data or a failed transmission to a remote site.

When the application is running, currently generated log messages are displayed on the main screen, the most recent ones are listed on the bottom. If a message is too long to fit the width of the screen, click on it and the full word-wrapped message appears in a small, resizable window below the scrolling list of messages.

Trouble-shooting

There are two levels of logging, **Normal** and **Detail Messages**. With Normal logging, only summary and overall status messages are generated. Detail Messages include details about every record processed. Error messages are included for both levels of logging. Showing detailed log messages has a small effect on the speed of the integration.

When you first start running integrations, you probably want to have Detail Messages included so that you get a feel for all the data the program is parsing and transmitting. You can then turn off Detail Messages to reduce the number of messages to review and to save disk space if that is a concern (although log files are small in comparison with today's inexpensive storage arrays). If you have questions about certain aspects of an integration, you can turn debug logging back on for a short time to verify or trace a problem, then turn it off again later.

Log Files

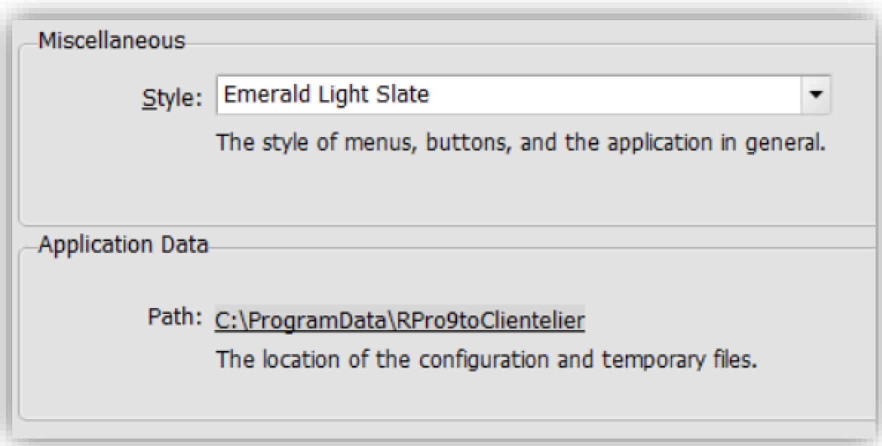
All log messages are saved in log files by module name. There are options on where to save the log files and how often old ones should be purged. To understand more about these and other logging options, see **Configuration – Logging** below.

Only log messages generated since the application started are shown on the screen. To view previously generated log files, see View Logs.

Configuration - General

The first screen of the configuration simply lists the style of the interface, the colors and look and feel of the program. There is a drop-down list of the styles available. Selecting one over the other has no bearing on the speed or effectiveness of the integrations.

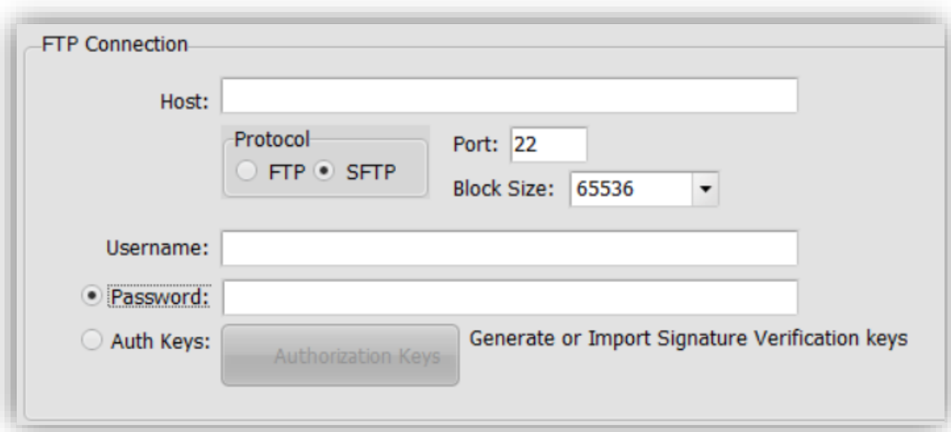
The Application Data section simply contains a clickable link to the folder this application uses for the configuration and temporary files. It cannot be changed. This path is the same for any user that runs the application on that computer.



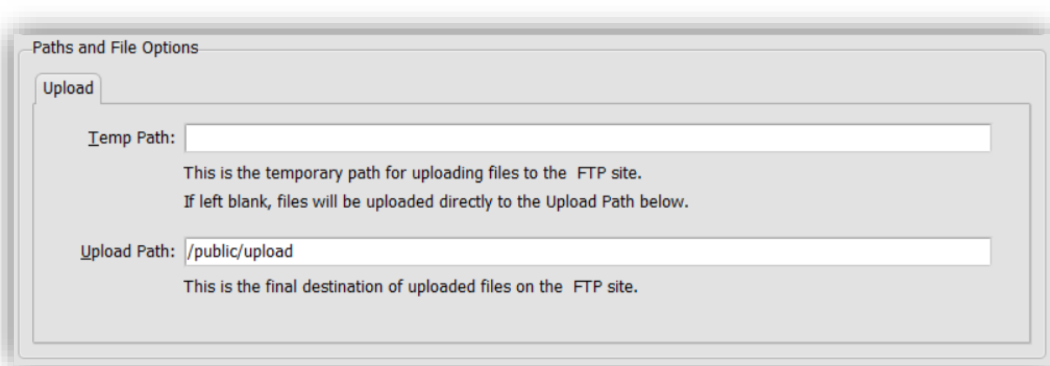
Configuration - FTP

The exported data is sent in files to an FTP site. FTP, or File Transfer Protocol, is a standard way of transmitting files over the internet. There are several options to establishing a connection and sending the files to a remote destination:

- **Host** is the name of the remote server to which to connect.
- **Port** is the port number on that server that will be listening for FTP connection.
- **Protocol** is whether to send via standard FTP or to use Secure FTP.
  - **Passive FTP** (FTP only) often used by FTP sites for increased security.
  - **Block Size** (SFTP only) adjustable if there are problems with large files.
- **Username** and **Password** are the credentials used to authenticate your connection to the remote FTP server.
- For SFTP servers, Authorization Keys can be used instead of passwords for additional security. If you are connecting to an SFTP server and select the **Auth Keys** option, then the Authorization Keys button becomes available. When you click that button, a screen explaining those options and how to setup authorization keys appears.



Once a connection to an FTP server is established, you need to specify the folder name on the remote server that will contain the uploaded files. Some servers have a process that is constantly monitoring the upload folder. If the file being uploaded is large, some processes will try to move the file off and start processing before the upload is complete. Therefore, we offer both a **Temp Path** folder and the final **Upload Path** folder options. If Temp Path has a value, the FTP process will upload to that path first then move it to the Upload path (which is a very quick operation compared to the upload).



Configuration - Logging

Logging Path

The Logging Path shows where the log files are stored. You can override the default setting by changing this path. It won't move previously generated log files or change where the current log messages are stored, but the next time this application is started, the log messages will be saved to the new Logging Path. It is recommended this be left at the default value.

Detail messages

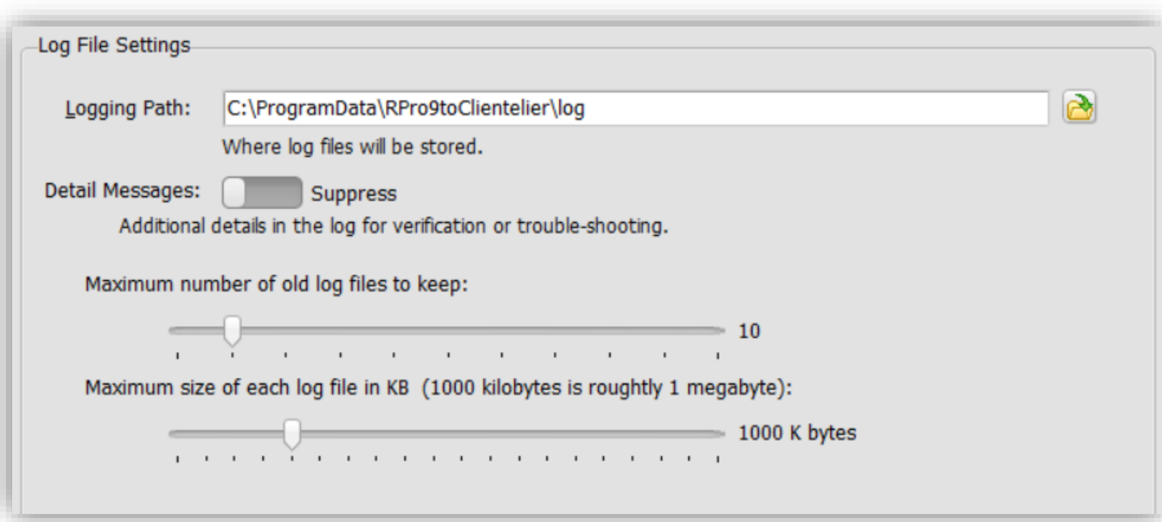
Detail Messages, as described previously, allows you to include details about every item exported.

Purging old log files

Over time, log files, would begin to fill up your hard disk if not purged occasionally. You can set how many backups of log files to keep with the option, "Maximum number of old log files to keep." There will always be at least one log file, the current one.

Maximum file size

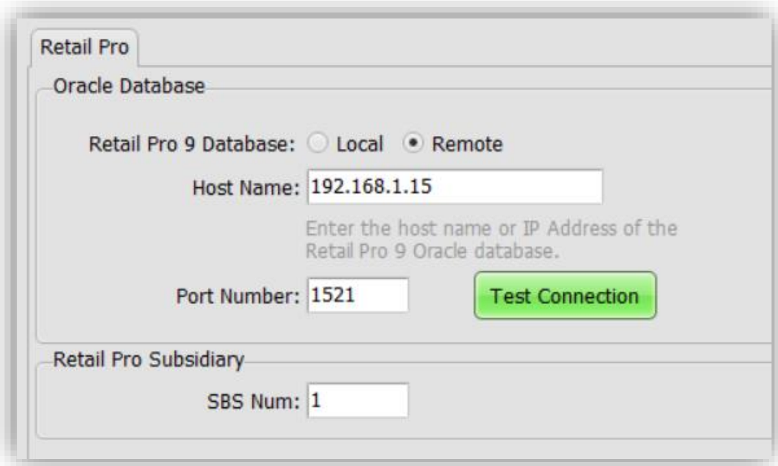
Large files can be slow to load and unwieldy to traverse when troubleshooting. Keeping them to a reasonable size is important. Set the "Max size of each log file" option to a value that is comfortable for your system. The number is in K-bytes, or kilobytes, so 1,024 is 1 MB, or megabyte. A 10 MB file is not a large file, but it can still be a lot of log messages to look through.



Configuration - Retail Pro 9

Retail Pro 9 uses a database on the back end powered by Oracle. The data is accessed by running SQL queries against this database. The Oracle database is accessed through a database server referenced by **Host Name** (also known as the server name—an IP Address can be given instead) and a **Port Number**; the port number is usually 1521 for Oracle databases. If this application is installed on the same server as the Retail Pro 9 Oracle database, you don't have to specify the Host Name but simply select "Local" for the **Retail Pro 9 Database.** Your Retail Pro 9 System Administrator will be able to provide these values. Once you set the values, you can click the **Test Connection** button to verify.

The **SBS Num**, or Subsidiary Number, is usually 1 but can be higher for large enterprises.

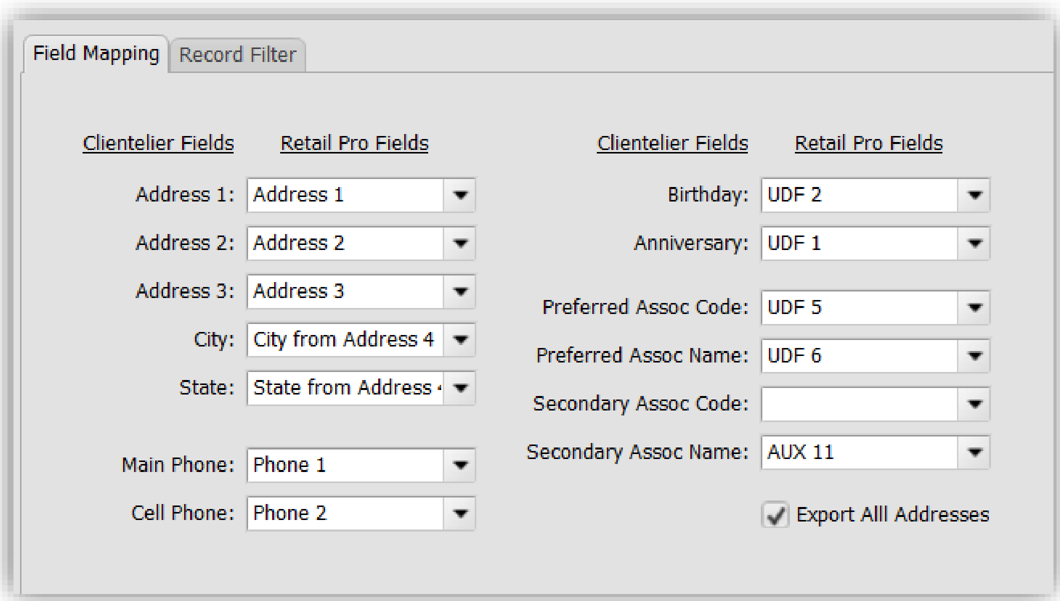


Your Retail Pro 9 System Administrator can help you establish these configuration parameters.

Configuration – Customer Export

Field Mapping

Retailers often customize their POS system for unique aspects of their business. For example, Retail Pro has 6 address fields and multiple user-defined and several auxiliary fields. This application allows these fields to be selectively mapped to the customer fields needed by Clientelier. Some of the fields are hard-coded in the application, the others are listed on this screen:



- **Address 1 – 3:** Three basic address lines can be sent to Clientelier. If you only have two, you can leave one blank.
- **City and State:** Retail Pro users often combine city and state into one of the address fields. The option here allows either a full address field (2-6) to be selected for either city or state, or the city and state can be extracted from one of those fields.
- **Main Phone / Cell Phone:** Clientelier allows for up to two phone fields.
- **Birthday / Anniversary**: These are date fields; there are two user-defined fields set aside in Retail Pro customers specifically for dates.
- **Preferred/Secondary Associates**: if your customer records list designated sales people in a user-defined or auxiliary field, you can synchronize that data.
- **Export All Addresses**: If you have multiple addresses for your customers, you can optionally export all addresses by checking this box.

Each of the fields on this screen can be left blank if you do not have a customer field that contains that data. If you later add this information to your Retail Pro configuration, you can come back here and adjust the mappings.

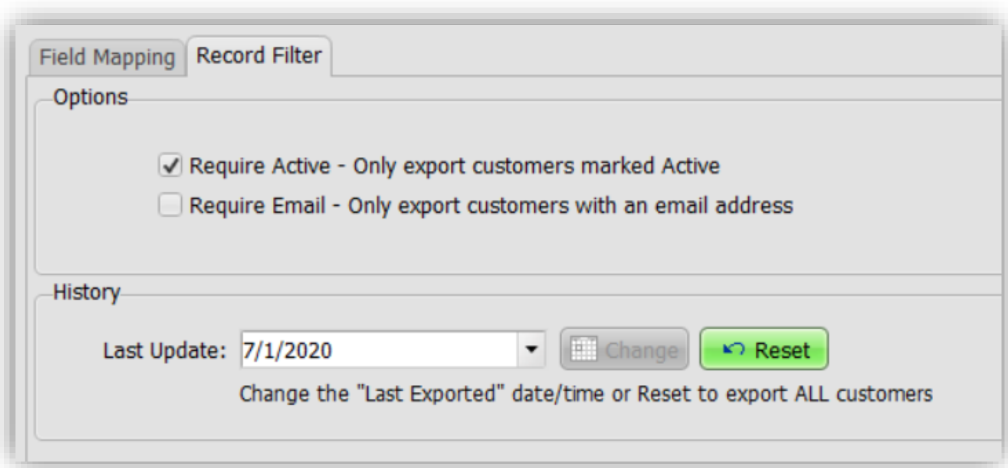
Here is the full list of customer fields in the export file and how they come from Retail Pro 9:

- Customer SID
- Customer ID
- Customer Last Name
- <middle name – *left blank*>
- Customer First Name
- <suffix – *left blank*>
- Address 1 – *Mapped from Address 1-6*

- Address 2 – *Mapped from Address 1-6*
- Address 3 – *Mapped from Address 1-6*
- City – *Mapped from Address 2-6*
- State – *Mapped from Address 2-6*
- Postal (Zip) Code
- Main Phone – *Mapped from Phone 1-2*
- Cell Phone – *Mapped from Phone 1-2*
- Email Address
- Birthday – *Mapped from UDF 1-2*
- Anniversary – *Mapped from UDF 1-2*
- Preferred Associate Code – *Mapped from UDF 3-8, AUX 1-12*
- Preferred Associate Name – *Mapped from UDF 3-8, AUX 1-12*
- Secondary Associate Code – *Mapped from UDF 3-8, AUX 1-12*
- Secondary Associate Name – *Mapped from UDF 3-8, AUX 1-12*
- Extra Addresses – *if the option is selected*

Record Filter

For large stores with a long list of loyal customers, exporting all the records every time would be time consuming and wasteful. This application keeps track of the last time it ran and only exports customers that have been created or updated or have receipt associated with them since the last export date/time. Additionally, you can filter the list down further by only exporting active customers or customers with email addresses:

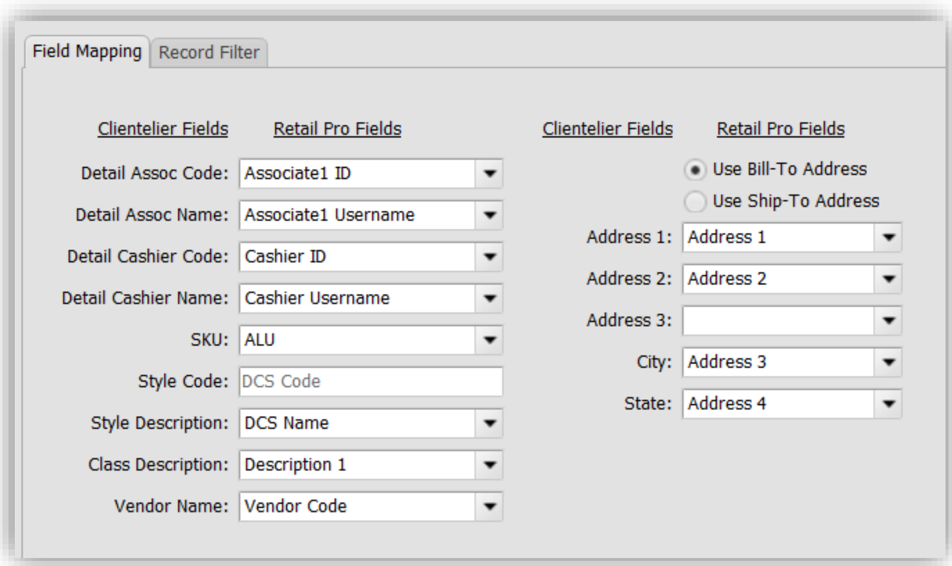


If you want to re-export customers from some date in the past, you can click the Change button which will allow you to change the date of the Last Update. The next time the export runs, it will pick up new and changed customers from that date instead. If you want to export all customers, clicking the Reset button will set that date to December 30, 1899.

Configuration – Sales Export

Field Mapping

Different POS systems store and categorize data in different ways. This application allows the retailer to select which Retail Pro fields map to the sales fields needed by Clientelier. Some of the fields are hard-coded in this screen (shown in a disabled text color) but listed for clarity:



- **Assoc and Cashier Codes/Names:** This maps the Cashiers and Associates from Retail Pro to the Clientelier system; for the "Code" fields, you can send Retail Pro's User ID or Username; for the "Name" fields, you can send Retail Pro's Username or Full Name from the Cashier or Associates on the receipt;
- **SKU:** This will uniquely identify your inventory item; options are Item No, ALU, and UPC.
- **Style Code/Description:** Code is hard-coded to DCS Code; Description can be either DCS Name or one of Descriptions 1-4.
- **Class Description**: This can be DCS Name or one of Descriptions 1-4.
- **Vendor Name**: You can select Vendor Code or Vendor Name.
- **Bill-to or Ship-to**: select to export the Bill-to or Ship-to customer's address on the receipt.
- **Address 1** – *Mapped from Address 1-6*
- **Address 2** – *Mapped from Address 1-6*
- **Address 3** – *Mapped from Address 1-6*
- **City** – *Mapped from Address 2-6*
- **State** – *Mapped from Address 2-6*

Each of the fields on this screen can be left blank. You can come back here and adjust the mappings later at any time and data that is exported after that will contain the values from the mapped fields.

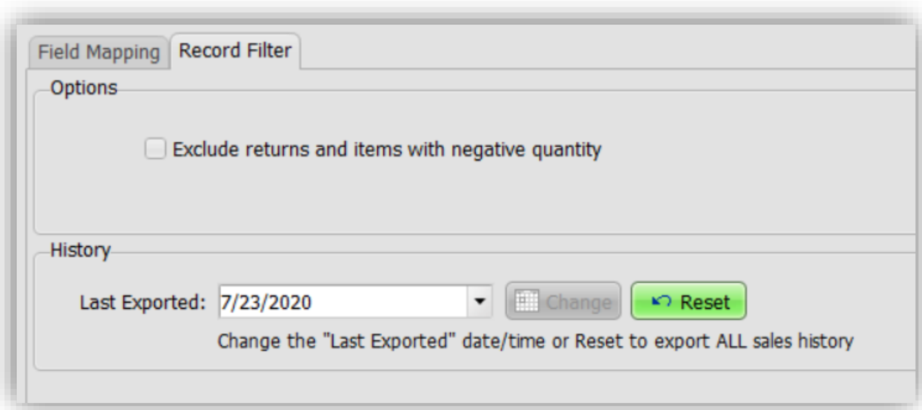
Here is the full list of sales fields in the export file and how they come from a Retail Pro 9 receipt:

- Receipt SID
- Customer SID
- Store Num
- Workstation Num
- Receipt Num
- Post Date
- Cashier Code – *Mapped from Cashier ID/Username or an Associate ID/Username*

- Cashier Name – *Mapped from Cashier Username/Full Name or an Associate Username/Full Name*
- Associate Code – *Mapped from Cashier ID/Username or an Associate ID/Username*
- Associate Name – *Mapped from Cashier Username/Full Name or an Associate Username/Full Name*
- SKU – *Mapped from Item No, ALU, or UPC*
- DCS Code
- Style Description – *Mapped from DCS Name, Description 1, Description 2*
- Class Description – *Mapped from DCS Name, Description 1, Description 2*
- Vendor Name – *Mapped from Vendor Code or Vendor Name*
- Items
    - Size
    - Attribute (Color)
    - Original Price
    - Receipt Price
    - Quantity
- Bill-to or Ship-to Address1 – *Mapped from Address 1-6*
- Bill-to or Ship-to Address2 – *Mapped from Address 1-6*
- Bill-to or Ship-to City – *Mapped from Address 2-6*
- Bill-to or Ship-to State – *Mapped from Address 2-6*
- Bill-to or Ship-to Zip
- Fee Name
- Comment 1
- Comment 2
- Tender Type – *e.g. Cash, Check, Credit Card, Gift Certificate, etc.*
- Item Class

Record Filter

Exporting all receipts every time would be time consuming and wasteful. This application only exports receipts that have been posted since the date/time the sales export ran. You can also limit the export to sales only, ignoring receipts marked as returns or negative items on receipts:



If you want to re-export receipts from some date in the past, you can click the Change button which will allow you to change the Last Exported date. The next time the export runs, it will pick up new sales from that date instead. If you want to export all receipt history, clicking the Reset button will set that date to December 30, 1899.

View Logs

To view previously generated log files, click the **View Logs** button. You will be presented with a list of log files found in the log folder. The file names start with the name of the application and include the module name to help locate the information you need quickly. Files with '.00.' will be current files, other numbers will represent backup files.

Double-click a file and it will be brought up in your default text editor.

Export Customers

After the Retail Pro, FTP, and customer options are set, you are ready to synchronize your customers. Click the **Export Customers** button to manually start the export process. It will export customers to a local file, then upload that file to the FTP site.

With detail messages on, each item added to the export will be logged for verification. A summary of the completed operation will be logged at the end of the process.

```
STARTED
Exporting customers modified or created since Jul 16, 2019...
Exported 399 customers to C:\ProgramData\RPro9toClientelier\Exports\customers_2020-07-16_160244.csv
Connected to the FTP site: ftp.[redacted].com
Uploaded C:\ProgramData\RPro9toClientelier\Exports\customers_2020-07-16_160242.csv
File customers_2020-07-16_160242.csv was archived to C:\ProgramData\RPro9toClientelier\Exports\Archive\customers_202
FINISHED
```

After the file is uploaded, it is archived for a short time in case you need to verify information that was submitted. You can move a file back up from the Archive folder (shown in the log) to the main export folder and the next time a customer export is run, it will get uploaded again.

Export Receipts

When you are ready to synchronize your sales, click the **Export Sales** button to manually start the import process. It will export receipts to a local file, then upload that file to the FTP site.

With detail messages on, each receipt added to the export will be logged for verification. A summary of the completed operation will be logged at the end of the process.

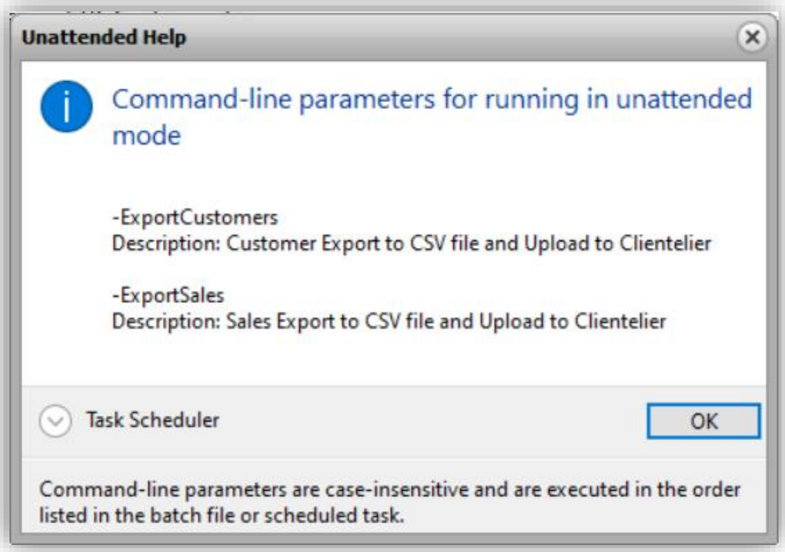
```
STARTED
Exporting sales since Apr 16, 2020...
Exported 29 receipts to C:\ProgramData\RPro9toClientelier\Exports\sales_2020-07-16_161509.csv
Connected to the FTP site: ftp.[redacted].com
Uploaded C:\ProgramData\RPro9toClientelier\Exports\sales_2020-07-16_161509.csv
File sales_2020-07-16_161509.csv was archived to C:\ProgramData\RPro9toClientelier\Exports\Archive\sales_2020-07-16_16
FINISHED
```

After the file is uploaded, it is archived for a short time in case you need to verify information that was submitted. You can move a file back up from the Archive folder (shown in the log) to the main export folder and the next time a customer export is run, it will get uploaded again.

Unattended Mode

This application is designed to work without constant attention. Indeed, it is likely that no one will be watching it a large share of the time because it is meant to run silently and frequently without intervention. When it is first installed, you will want to go through the configuration screens and make sure the options are set for your system and the first few times you will probably want to watch the screen part of the time to make sure there are no errors and that information is processing as expected. But after that, you will likely want to schedule it to run periodically without someone physically starting it.

Starting the program normally by clicking on the menu or desktop icon will launch it in "manual" mode. But when launched with certain parameters (sometimes referred to as "command arguments") it will automatically launch the corresponding synchronization specified, then exit the program. To find out what parameters are available, click the Help button and select Unattended Mode. This application has two options:



Parameters start with a hyphen (-) and have a keyword (case insensitive). Following that is a description of the integration that the parameter will launch.

So if you enter the complete path and filename of the application followed by `-ExportCustomers` in the Task Scheduler (with "-ExportCustomers" as the optional argument), this program would launch at the specified time and immediately start the customer export as if you had manually clicked the Export Inventory button.

When the export finishes, the program exits.

NOTES:
If more than one parameter is given, the integrations are launched in the order specified. For example, if the if both are given like this, `-ExportCustomers -ExportSales`, then the customer export will run and complete first, then the sales export will run. The program uploads each export before moving on to the next export; both exports will run before the program exits.