

RITE Delivery Automation Tool Installation Guide

Web service install and configuration:

The web service needs to be installed once on each local area network. The service was built to be able to connect to multiple database and you will configure it to connect to each of the stores databases (typically the main, display, and back room databases).

1. Install the RITE Delivery Automation Web Service Setup.msi
2. Go to Start > All programs > RITE > RITE Delivery Automation > RITE Delivery Automation Web Service Manager.
3. Add a location to the configuration for each database that needs to be accessible at the POS.
 - a. Click Add.
 - b. Enter a name for the location. This will be the name used when configuring the POS side of this application, and it is case sensitive.
 - c. Enter the SQL database connection information for the location you are configuring.
 - d. Click Test Connection
 - e. If the connection tested successfully you may now configure the reason code to use when item changes are made. Select the reason code you want to use from the drop down, and the cashier you want the application to assign to its item movements.
 - f. Click OK to save the location, repeat these steps for each location.
4. Make sure that the web service it creates is accessible. To do this browse to the web service by going to <http://localhost/DeliveryAutomation/DeliveryAutomationService.asmx>

POS installation and configuration:

The RITE Delivery Automation RMS Tools software needs to be installed on each POS station. This piece of the application runs at each POS station and interacts with the cashier to allow them to choose a location from which to sell a product.

1. Install the RITE Delivery Automation RMS Tools Setup.msi
2. Go to Start > All programs > RITE > Delivery Automation > RITE Delivery Automation Store Configuration.
3. Configure the database connection by going to File > Configuration, if you are not prompted automatically.
 - a. Enter the connection information for the SQL database that RMS is configured to connect to – this should be connected to the main store database if there are multiple local databases.
 - b. Enter the information used to connect to your mail server for sending warning messages.
 - c. Click OK to save to configuration information.
4. On the General Settings tab:
 - a. The send email alerts check box tells the program to send emails if it encounters an issue where it does not synchronize within a configurable amount of time.
 - b. The “Send email error if sync does not process in:” text box allows you tell the system to send an email alert if a sync has not completed successfully in the last X minutes.
 - c. The “Synchronize data with other stores every:” text box allows you to tell the system how often it should attempt to synchronize data.
 - d. Enter the email address’ you would like the alerts sent to separated by a comma in the “Send alerts to” field.
 - e. Email title should contain what you want to appear in the subject line of the email.
 - f. Email text should contain the body of the email you want to send.
 - g. Click on the “Send Test Message” button to test your mail server configuration settings.
5. The Inventory Settings tab:
 - a. Here you can set the default location to use for each of the listed Inventory locations.
 - b. Use the “Item default location flag” drop down to tell the system where to look in an item to determine if it has a default delivery location. This allows you to link an inventory location that has been created to an item flag – see below.
 - i. You can place “<Cash&Carry>”, “<BackRoom>”, “<Display>”, or “<Warehouse>” in the selected field to denote the default delivery location.

1. Example: if you configured Bin Location to be the default location flag, you could input <BackRoom> into this field and at the POS the default selection would be the configured back room inventory location.
- c. Next configure the reason code to use when item changes are made. Select the reason code you want to use from the drop down, and the cashier you want the application to assign to its item movements. This is so that when you view the item movement history the reporting will be accurate and you will be able to see when this application made a change to the quantity on hand and why.
 - i. We recommend that you make a special RMS cashier and a special reason code for this program specifically to make the reports easier to understand and sort.
6. Click OK when you are done to save the settings.

Windows service install and configuration:

The RITE Delivery Automation Service is a windows service needs to be installed on one machine per local are network. This service does the actual exchanging of data between the local stores database and the remote/local web services.

1. Install the RITE Delivery Automation Sync Service Setup.msi
2. Go to Start > All programs > RITE > Delivery Automation > RITE Delivery Automation Store Configuration.
3. If you previously configured this via the RMS Tools setup then the remainder of this setup is complete otherwise see the POS installation and configuration section of this document.
4. After configuring the service you may need to stop and start the service or restart your computer.

Other Notes:

1. **Exception handling** - All exceptions and errors are logged to the event viewer under applications. Web service exceptions will be emailed if possible. The log file can be found at
2. **Networking** – this program operates using web services and Microsoft IIS and therefore and be configured in many different ways. Typically it would be as simple as allowing port 80 traffic to travel from one point on the network to another. Precautions should be taken if port 80 will be

exposed to the internet (IE, limiting traffic through that port to specific IP addresses, using a VPN, etc). The use of other ports or SSL is possible with the proper network configuration.

3. **Settings** – all settings are either stored in the database OR in the application data folder (IE - C:\Documents and Settings\All Users\Application Data\RITE\Delivery Automation) OR C:\RITE\Delivery Automation depending on your computers configuration. The logged in user must have access to this folder and the configured database user must have access to create (at least initially), view, and edit tables. All configuration tables and files will be automatically created when the applications first run.
4. **RMS Settings** – you must configure RMS to record POS transaction entry comments for this application to run properly. To do this go into RMS Manager > File > Configuration > Options tab > POS Options > check the box that says “Record item comments”. **It is also HIGHLY recommended** that you set permissions at the POS to NOT allow the user to modify the contents of the transaction entry / item comments at the POS. If a user is allowed to modify these comments it could create unexpected results.
5. **Security** – this program makes use of industry standard web service technology – this is a great thing in terms of its future expandability however it does mean that others could potentially access information via its web service. Security measures should be taken to secure it – RITE accepts no responsibility for this task or damages resulting from not doing so. The following are a few suggestions, please contact your IT vendor for additional information;
 - 5.1. Use this program within a VPN – this will eliminate access to the service from the internet completely.
 - 5.2. Limit internet access to only known IP addresses (your known store locations)
 - 5.3. Use security certificates
 - 5.4. Use encryption / SSL
6. **Confirming the application is running properly**
 - 6.1. Pick a few items – notate their quantity on hand at the local store and at a remote location from which they will be sold (in this test)
 - 6.2. Create a work order that contains one of these items for each different remote location you can sell from.
 - 6.3. Log into the remote database and confirm that the appropriate items have had their quantity committed increased by the amount sold and that the local quantity committed has not changed.

- 6.4. Go back to the local systems database and pickup/finalize the work order. Verify that the local quantity on hands have not been adjusted and that the remote database quantity on hands have been adjusted and their quantity committed has been reduced.
- 6.5. **Troubleshooting** - if there are problems connecting to the web service you will notice a few things;
 - 6.5.1. The log files will generate messages that give clues as to the issues. Log files are stored in the application data folder (IE - C:\Documents and Settings\All Users\Application Data\RITE\Delivery Automation) OR C:\RITE\Delivery Automation depending on your computers configuration
 - 6.5.2. Also, until the data is successfully transmitted to the remote location it will sit in a cache table. You can check this to view if there are any entries waiting to be uploaded. The table name is RITE_DeliveryOrderSync
 - 6.5.3. Finally, some events and errors may be logged in the Event viewer under the applications tab. This may be useful in diagnosing potential issues.
 - 6.5.4. You will also need to confirm that the service is running – you can check this by going to Control Panel > Administrative Tools > Services on the machine that you installed the service on. Find the RITE Delivery Automation service and make sure its status is “Started”, you can also try stopping it and then starting it again.

Typical Use

Web services and windows service

Once these are setup the users should have little to no interaction with these applications.

At the POS

1. Once the user enters the POS and is inside a work order, as they add items to a transaction they will be prompted to select a location from which to sell the product.
 - a. The default location selected will be based on the location selected as the back room location OR, if a user has set the appropriate item properties to contain one of the flags the default
2. When a work order has been created this program will do the following
 - a. Undo the quantity commitment changes RMS made
 - b. The next time a synchronization occurs the quantity committed will be changed at the location where the product was sold from (selection made on the custom prompt).

3. When a work order is recalled and completed at the POS the program will do the following;
 - a. Undo the quantity on hand and quantity committed changes RMS made at the local store and utilize the configured reason codes to do so.
 - i. An exception is made when the location is setup as a non remote location (meaning the "Remote location" check box is not checked. If it is not a remote location then it will treat the work order entry as a normal work order.
 - b. The next time a synchronization occurs the quantity committed and quantity on hand will be changed at the location where the product was sold from (selection made on the custom prompt). Reason codes will also be used in this case.

In Headquarters

All communications are setup to allow for direct store to store communications, so, while information will be uploaded from HQ in its normal way no special setup or use needs to take place.