Go Green

email Receipts for

Global Customers

Microsoft Retail Management System

Installation Guide

RMS Email Receipts for Global Customer Add In
Microsoft Retail Management System
Installation Guide

Before you begin….

To ensure a smooth installation setup, please read the three points below:

1) You will require your RMS Headquarters Database and Store Operations Database connection information. This is the exact same information that you will find in Headquarters and Store Operations Administrator which you can open to obtain the settings (Open Headquarter / Store Operations Administrator → Click File → Click Configuration)
2) You will require an email address, email password, STMP Server Name and STMP Port number
3) Perform your installation between 9am-5pm Eastern time so that you can obtain your license. (more on this in preceding pages)
4) You must be able to log in to the computer as an Administrator.
5) If your RMS version is lower than 2.0.1000 you must download and install Microsoft SQL 2012 CLR types from http://www.microsoft.com/en-ca/download/details.aspx?id=35580 (ENU\x64\SQLSysClrTypes.msi or ENU\x86\SQLSysClrTypes.msi)

Download

Click the link below to download the RMS Email Receipt

http://tricityretail.com/Resources/RMS%20AddIns/RMSEmailReceiptsHQSetup.zip
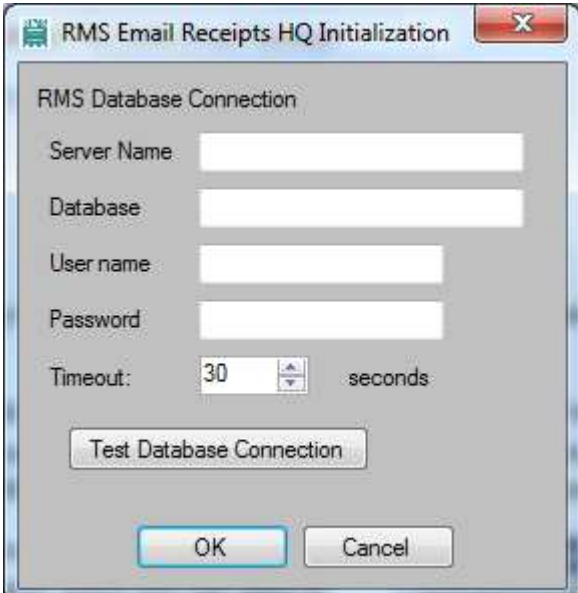
Installation at HQ (Run on one PC)

The purpose of this installation is to initialize your HQ database for the email receipts program.

Extract the files from the zip file then right-click RMSEmailReceiptsHQInitSetup-x.x.x.x.exe and choose "Run as Administrator".

Follow the prompts to install. Once launched, you will see a screen similar to the one pictured. You will need to fill out the **Headquarters** server name, database, user name and password. Once you've filled in the fields, click "Test Database Connection" to verify your settings.

This is the exact same information that you will find in Headquarters Administrator which you can open to obtain the settings (Open Headquarters Administrator → Click File → Click Configuration)

Click OK once you successfully tested.

Installation at HQ (Run on one PC at HQ) – No license required

Step 1 of 2: Create table in stores (from HQ)

To ensure you do not receive any sync errors the email table must exist in all stores before you install at HQ. The easiest way to do this is by sending the following query to all stores on a worksheet 51. Even if a store will not be installing the email receipt program this table must exist or sync errors will appear.

```
IF (SELECT COUNT(*) FROM Sys.Tables WHERE Name = 'TRSEmailReceiptHQ') = 0
     BEGIN
           CREATE TABLE [dbo].[TRSEmailReceiptHQ](
                 [AutoID] [int] IDENTITY(1,1) NOT NULL,
                 [ID] [int] NOT NULL,
                 [StoreID] [int] NOT NULL,
                 [CustomerID] [int] NOT NULL,
                 [HQID] [int] NOT NULL,
                 [AccountNumber] [nvarchar](20) NOT NULL,
                 [EmailAddress] [nvarchar](255) NOT NULL,
                 [Updated] [int] NOT NULL,
                 [DBTimeStamp] [timestamp] NULL
           ) ON [PRIMARY]
     END
```

Step 2 of 2: Install Email Receipts for HQ (Initialization)

The purpose of this installation is to initialize your HQ database for the email receipts program.

Extract the files from the zip file then right-click RMSEmailReceiptsHQ**Init**Setup-x.x.x.x.exe and choose "Run as Administrator".

Follow the prompts to install. Once launched, you will see a screen similar to the one pictured. You will need to fill out the **Headquarters** server name, database, user name and password. Once you've filled in the fields, click "Test Database Connection" to verify your settings.

This is the exact same information that you will find in Headquarters Administrator which you can open to obtain the settings (Open Headquarters Administrator → Click File → Click Configuration)

Click OK once you successfully tested.

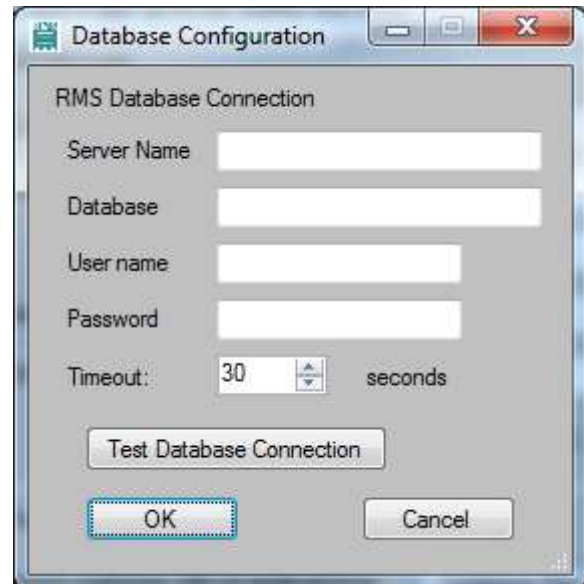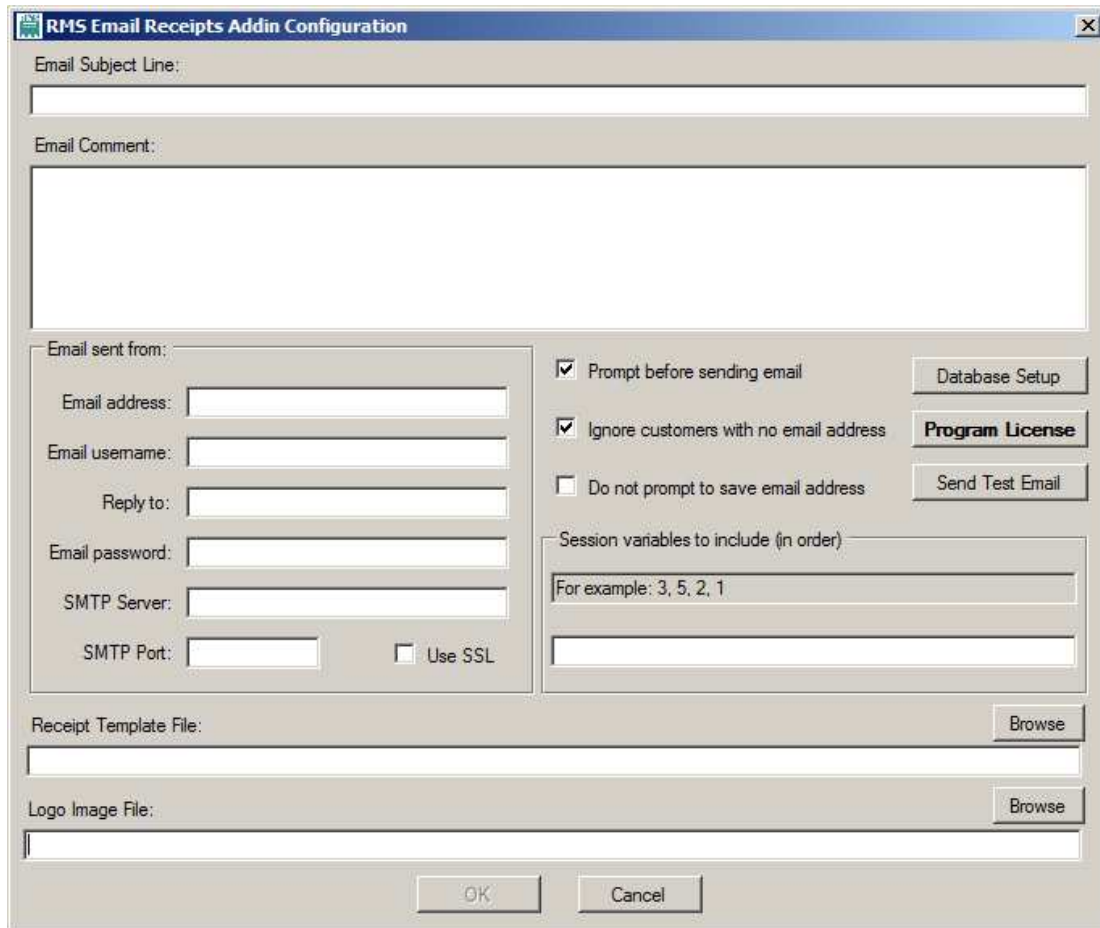# Installation at POS (license required)

Step 1 of 3: Install Email Receipts at POS

Extract the files from the zip file then right-click RMSEmailReceiptsHQSetup-x.x.x.x.exe and choose "Run as Administrator".

Follow the prompts to install. Once launched, you will see a screen similar to the one pictured. You will need to fill out the **Store Operations** server name, database, user name and password. Once you've filled in the fields, click "Test Database Connection" to verify your settings.

This is the exact same information that you will find in Store Operations Administrator which you can open to obtain the settings (Open Store Operations Administrator → Click File → Click Configuration)

Click OK once you successfully tested.

Configuration

Email Subject Line

This text will appear in the subject line of the email. Example:

Your receipt from (Store Name)

Email Comment

This text will appear in the body of the email. Example:

Thank-you for shopping at (Store Name)

Check out our amazing deals at www.yourstoreweb.com

Email sent from Setup

The following fields will be required and can usually be obtained from your ISP or existing email setup.

        Email Address
        Email Username
        Reply to
        Email Password
        SMTP Server
        SMTP Port
        Use SSL (Optional)

Option: Prompt before sending email

Check this on if you want to be prompted prior to sending the email to the customer. You will be provided an option to send the email or not.

Option: Ignore customers with no email address

Check this on if you want to skip the request to send the email to a customer that does not have an email address on file already.

Option: Do not prompt to save email address

Check this on if you do not want the cashier prompted to save the email address. A change of email address will not be saved in the customer information if this option is checked.

Receipt Template File

Click the browse button and navigate to the directory referenced below to locate "RMSReceipt.rdl"

32 Bit Computer
C:\Program Files\Microsoft Retail Management System\Store Operations\AddIns\RMS Email Receipts Addin

64 Bit Computer
C:\Program Files (x86)\Microsoft Retail Management System\Store Operations\AddIns\RMS Email Receipts Addin

Logo Image File

Click the browse button to locate a logo image to include on your receipt.

Session Variables to Include

This feature is only required for users who have other add in applications that use the RMS session variables. Most users can leave this area blank. See the troubleshooting section for more information on session variables.

Step 3 of 3: Program License

Click the "Program License" button. This will reveal an "Auto-generated license ID". You can obtain your license either calling Tri-City Retail Systems (1-877-877-4767) or by emailing your license code to license@tricityretail.com (please include your store name and the "Auto Generated License ID). Type or copy your license code from Tri-City Retail Systems into the License Code box.

Click Validate to verify the license code and click Close to Exit.
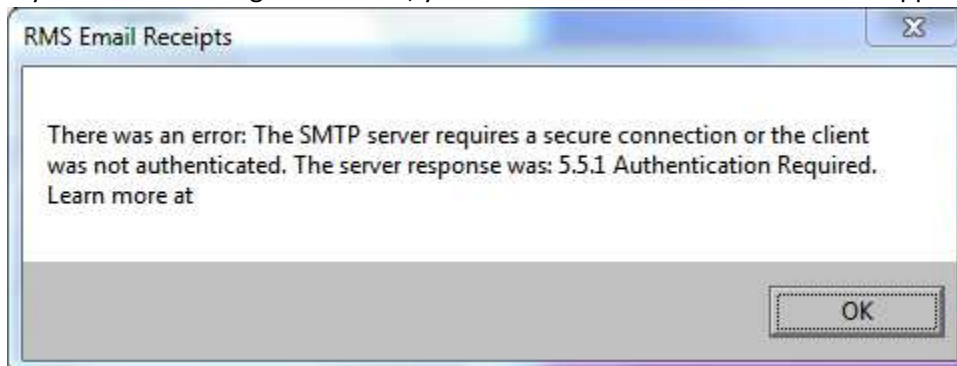
Troubleshooting

Troubleshooting Email Accounts

In the event that your email account is not working we recommend testing with a Gmail account. Below are all the steps required to set it up.
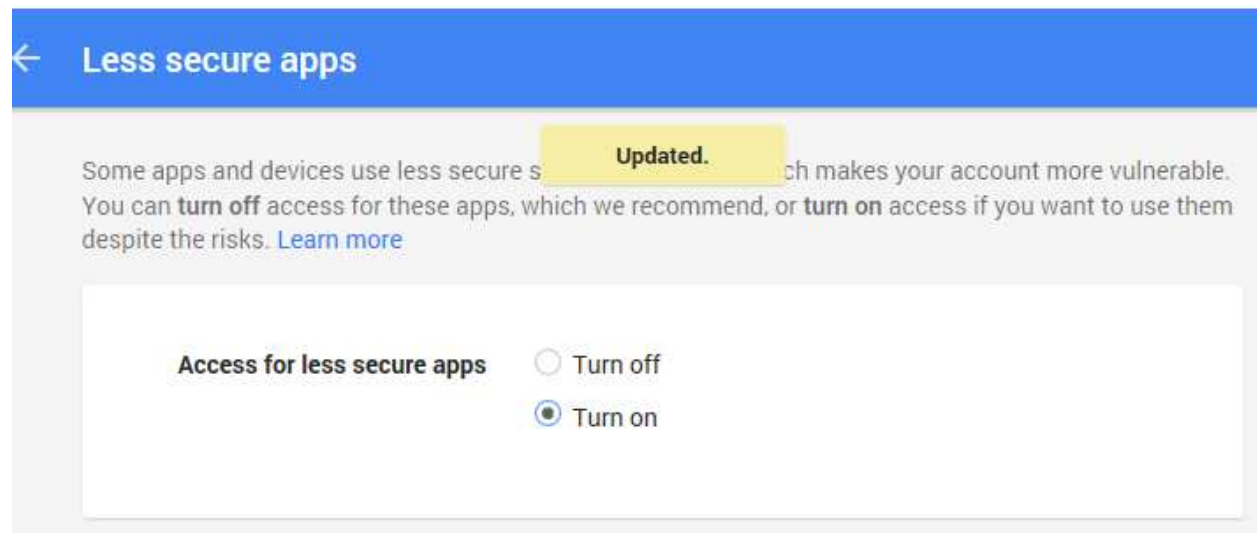
Step 1: Go to www.gmail.com to setup a Gmail account if you do not already have one. If you do have a Gmail Account it is recommended that you verify your password

Step 2: Modify your Gmail account to allow access from less secure applications. This setting must set to "Turn On"

If you see the message box below, you do not have Access for less secure apps turned on.

Go to https://www.google.com/settings/security/lesssecureapps and Turn On access for less secure apps.

Step 3: Setup your Gmail account in configuration.
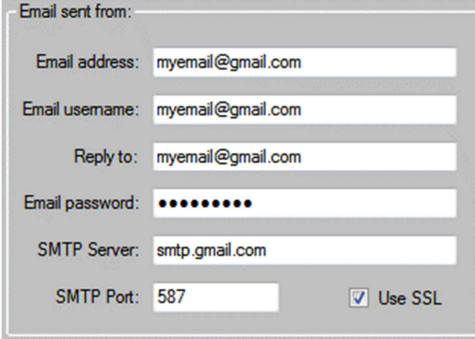
Email Address: (your Gmail email)

Email Username (your Gmail email)

Reply To: (either your Gmail email or another email where customers can reach you)

SMTP Server: smtp.gmail.com

SMTP Port: 587

Use SSL: Checked on

Now it's time to test! If your test fails, continue onto the final step to determine if you can connect to the SMTP Server.

If the Telnet Client is not already enabled, you'll first need to enable the Telnet feature:

1. Click the Start button, then Control Panel, and Programs.
2. Click Turn Windows Features On or Off.
3. If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
4. In the Windows Features box, check the box labeled Telnet **Client**, and click OK. (It may take a few minutes for the installation to complete.)

To run the telnet test on a Windows computer:

5. Open the Start menu, and select Run.
6. Enter command in the Open: field, and click OK.
7. Enter 'telnet smtp.gmail.com 465,' and hit Enter, or if you're using Outlook 2007, enter 'telnet smtp.gmail.com 587' instead. (Does the information in the prompt window clear? If not, please note the message that appears.)
8. Close the prompt window.

Troubleshooting Session Variables

In the event that you are using an RMS add in that uses session variables you will need to request a customized receipt if you wish to show the information stored in the session variables on your email receipt. Some examples of add ins that use custom variables are:

Semi Integrated Credit Authorization for Global Payments in Canada (defaults 1,2)
Semi Integrated Credit Authorization for Chase Paymentech in Canada (defaults 1,2)
Givex add in (defaults varies with edition)
Moneris Credit Card Authorization (defaults varies with edition)