

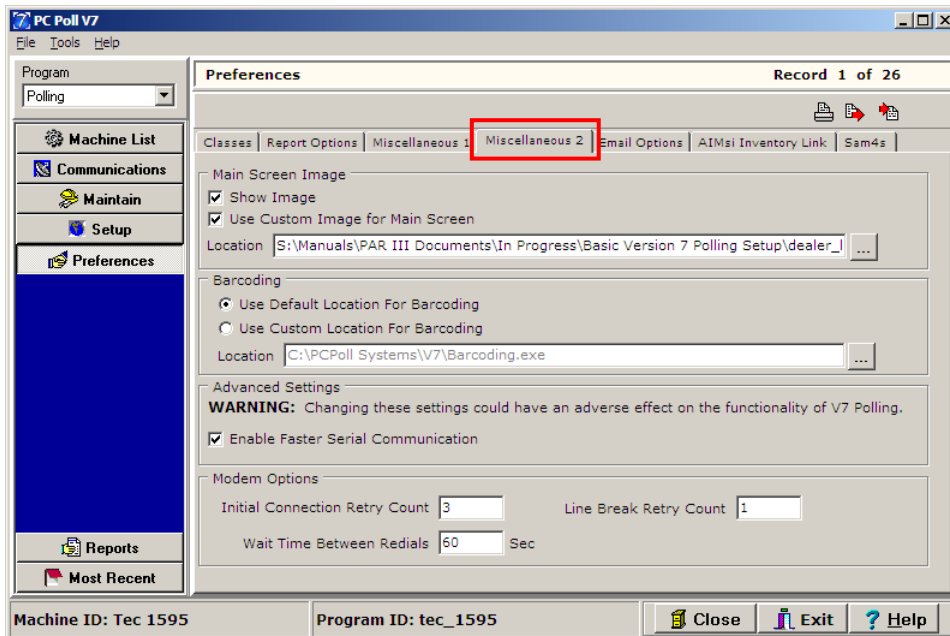
# Basic Version 7 Polling Setup Instructions

## Creating a Store, Machine & Saving All Programs

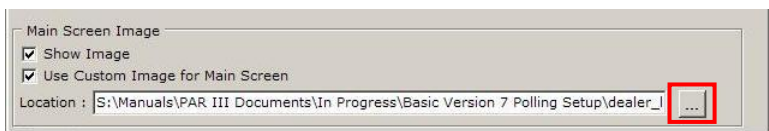
Before you begin:

1. Have the cash register configured for polling
2. Have a physical connection between the PC and the register (direct connect, modem, ether to serial device, USB to serial device, LAN, or Internet)
3. Make sure you are using the correct cabling for your register type
4. Install the Version 7 Polling software
5. Have a valid release code entered into the software.

These instructions are intended to be general for most direct connect and LAN TCP/IP connections. Specific details will vary by cash register model.

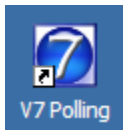


*Note: The main screen image can be customized by clicking on **Preferences** on the left main menu then the **Miscellaneous 2** tab on the screen below.*

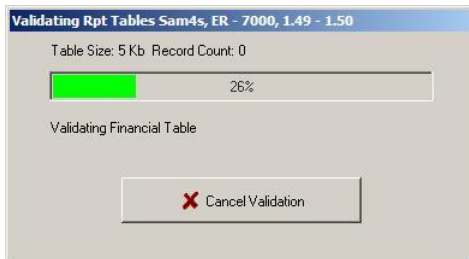


Use the **Browse** button in the red box, to locate the image to use.

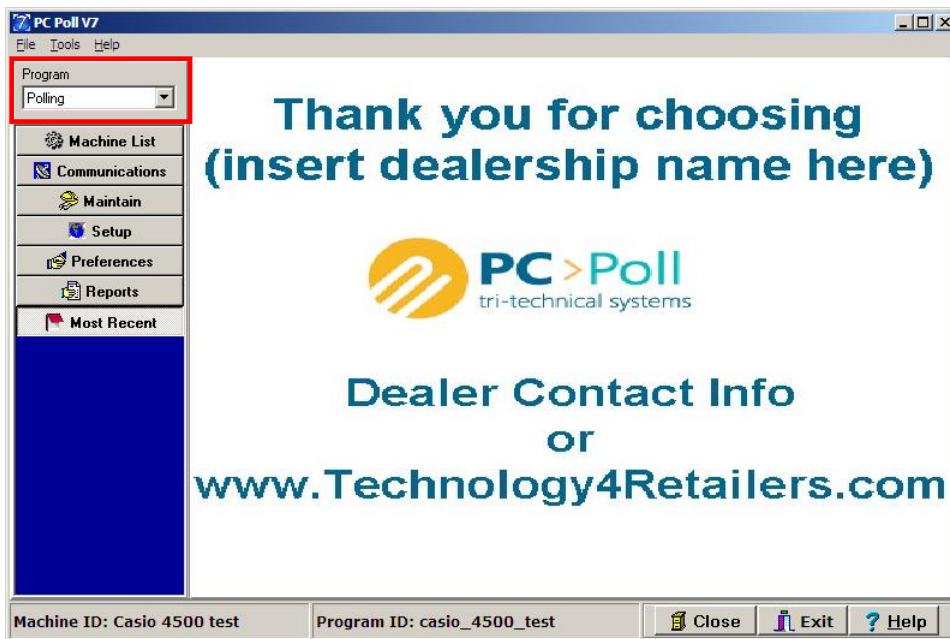
## Adding a Store



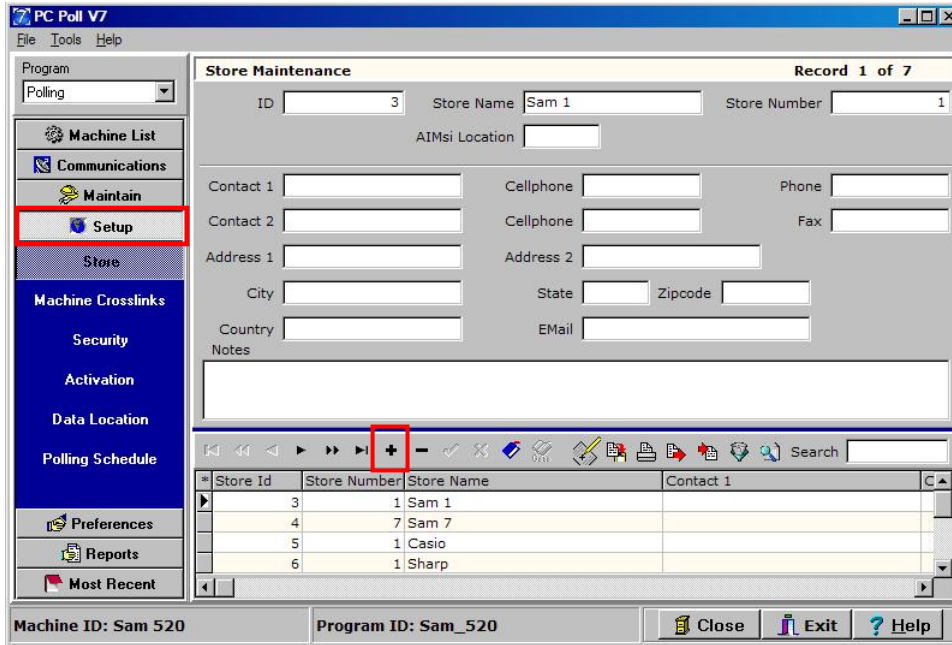
1. Open the software by double-clicking on the V7 Polling icon found on the PC's desktop.



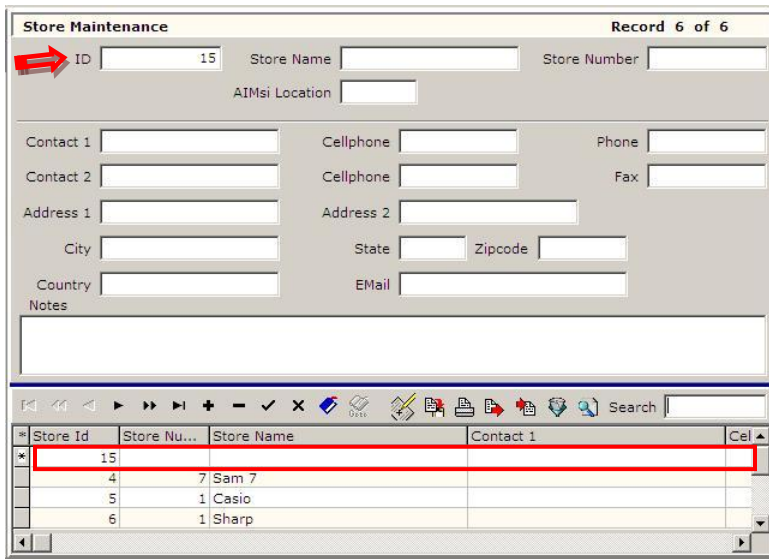
2. The software will load. The loading time will vary as the system checks for existing software databases. Please allow the software to conduct these processes.



3. The software will open to the main screen. Version 7 Polling should automatically open and **Polling** should be visible in the Program drop down menu.



4. Click on **Setup** from the menu on the left.
5. Click on the **Store** button under **Setup**.
6. Click on the **Insert new record (+)** button from the lower toolbar in the red box, to add a new store.



7. A new entry will be added to your store setup list in the lower grid. Within the upper, detail, area of the screen, the ID field will be populated automatically. This ID number is used by the system. *Note: Please leave the setting as created by the software.*

**Store Maintenance** Record 6 of 6

ID  Store Name  Store Number

AIMsi Location

Contact 1  Cellphone  Phone

Contact 2  Cellphone  Fax

Address 1  Address 2

City  State  Zipcode

Country  EMail

Notes  
Open Mon - Fri 9:00 am to 10:00 pm. For emergencies call Jean on his cell. |

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* Store Id	Store Nu...	Store Name	Contact 1	Cel
6	1	Sharp		
7	1	Casio II		
11	11	Store11	Jason Smyth	
I 15	39	Locust Street Store	Jean Smyth	

8. The only other required fields are Store Name & Store Number. The Store Name should be the name of the location that will be polled. The Store Number must match the store or register number programmed within the cash register. *Note: Not all registers have a store number.*

* Store Id	Store Nu...	Store Name	Contact 1	Cel
5	1	Casio		
6	1	Sharp		
7	1	Casio II		
* 15			Jean Smyth	

9. After the ID, Store Name, and Store Number contain the desired values, click the **Post changes of current records** (check mark) button found on the lower toolbar.

**Store Maintenance** Record 7 of 7

ID  Store Name  Store Number

AIMsi Location

Contact 1  Cellphone  Phone

Contact 2  Cellphone  Fax

Address 1  Address 2

City  State  Zipcode

Country  EMail

Notes

Navigation icons: Home, Back, Forward, Refresh, Print, Copy, Paste, Delete, Search

Store Id	Store Nu...	Store Name	Contact 1	Cel
6	1	Sharp		
7	1	Casio II		
11	11	Store11	Jason Smyth	
15	39	Locust Street Store	Jean Smyth	

10. The new store is now created and saved in the system.

### Adding A Machine

PC Poll V7

File Tools Help

Program:

**Machine List**

- Casio 4500
- Casio 6600
- Casio 6600 II
- QB Sam 7000
- Sam 2000
- Sam 520
- Sam 520 test
- Communications
- Maintain
- Setup
- Preferences
- Reports
- Most Recent

**Machine Table** Machine Count 16 Satellite Count 1

Detail | Comm | Programs | RJE Timing

Machine ID  Store

Program ID  Comm Type

Machine #  Number of Satellites

Mfg  ROM Version

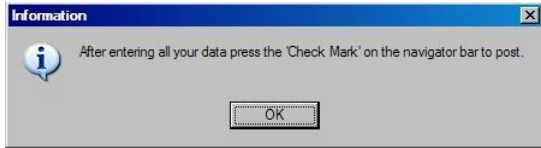
Model  Baud Rate

Navigation icons: Home, Back, Forward, Refresh, Print, Copy, Paste, Delete, Search

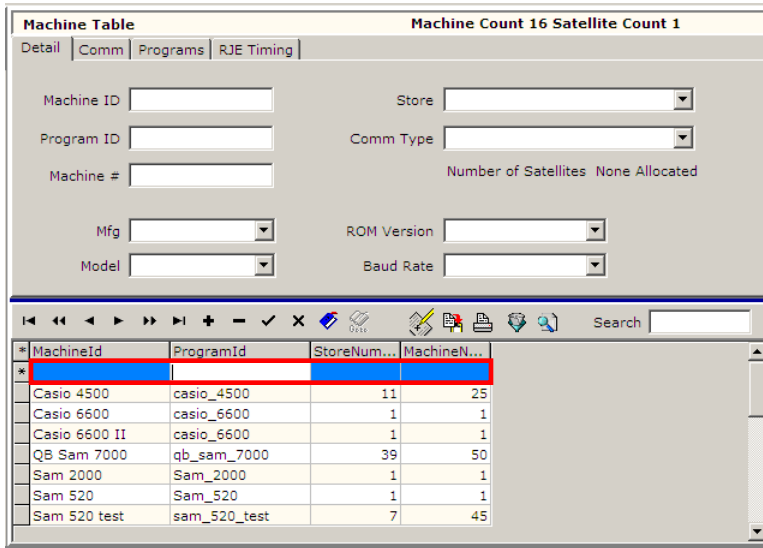
MachineId	ProgramId	StoreNum...	MachineN...
Casio 4500	casio_4500	11	25
Casio 6600	casio_6600	1	1
Casio 6600 II	casio_6600	1	1
QB Sam 7000	qb_sam_7000	39	50
Sam 2000	Sam_2000	1	1
Sam 520	Sam_520	1	1
Sam 520 test	sam_520_test	7	45
Sam 650 usb to seri	sam_650	39	25

Machine ID: Casio 4500    Program ID: casio\_4500    Close    Exit    Help

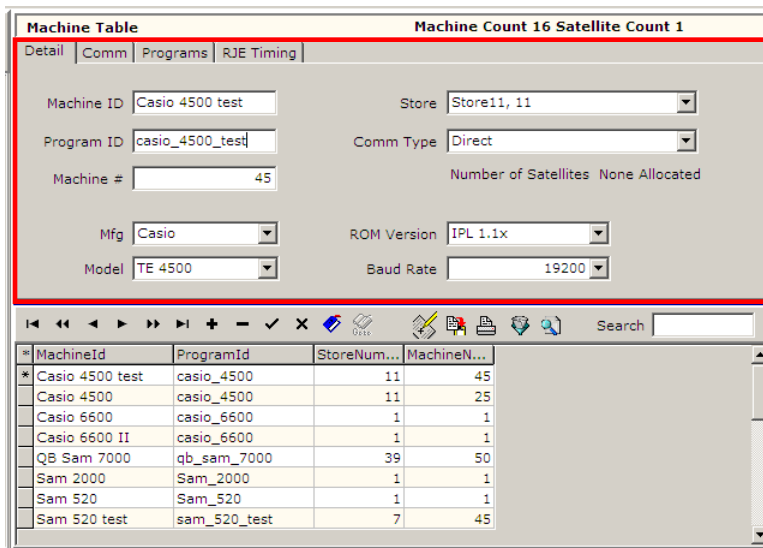
1. After the store is created, return to the menu on the left side of the screen and select the **Machine List** option.
2. Click on the **Insert new record**  button from the lower toolbar to add a new machine.



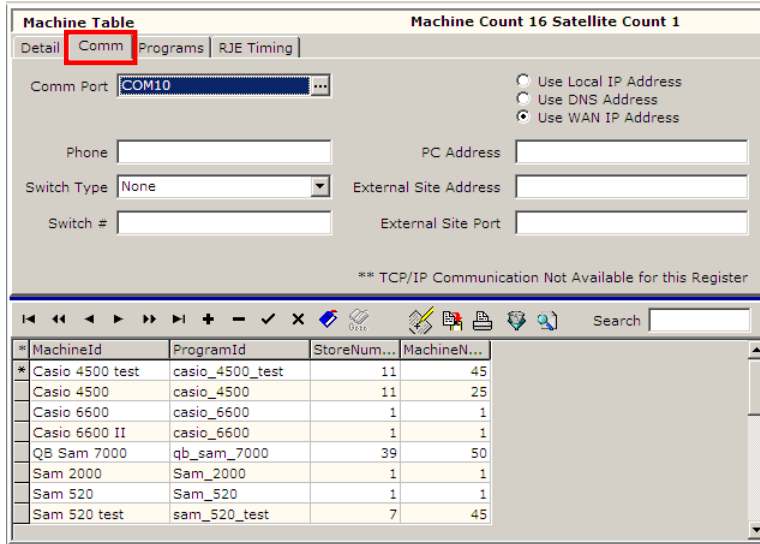
- The Information screen above will open reminding the user to click the **Post changes to current record**  button to post the changes when done. Click the **OK** button.



- A line is inserted in the lower grid for a new machine.



- From within the upper detail area, fill in the required fields. See the software fields chart. Do not fill in the fields via the lower grid area, use the **Detail** and **Comm** tabs in the upper area.



- Use the **Comm** tab to enter the information for communications other than comm. type.

**Software Fields:**

Detail Tab	
Machine ID	A user defined name for the machine that is usually the name of the store.
Program ID	A user defined name for the database files. Usually the same name as the Machine ID without spaces.
Machine #	This number must match the Register Number within the cash register.
Mfg	Select the manufacturer that matches the cash register. It can be CASIO, Sam4s, Sharp, or TEC.
Model	Select the corresponding cash register model.
Store	Select a previously created store that corresponds with the programmed Store Number within the cash register.
Comm Type	Direct, Dialup or TCP/IP
ROM Version	The ROM, IPL, or EPROM version installed within the cash register.
Baud Rate	This is the register's programmed baud rate for PC communications, which is only needed for serial communications.

<b>Comm Tab</b>	
Comm Port	This is the serial port on the PC used for communications. It is only needed for serial communications.
Phone	The phone number of the site where the register is installed that is only needed for serial communications via modem.
Switch Type	The type of switchbox used for connecting to the cash register. The switch type is only needed for serial communications via a switchbox.
Switch #	The switch number of the register is only needed for serial communications via a switchbox.
<b>Use Local IP Address option</b>	
PC TCP/IP Address	This address is the IP address of the communicating PC. Please consult your IT administrator for this number; or, from a command prompt, enter IPCONFIG. The screen will display the IP address as well as additional network settings. It is only needed for TCP/IP communications.
Register TCP/IP Address	The address is the IP address of the cash register. This address will depend upon previously programmed settings at the cash register. If using a WAN connection it is the external IP address of the router. It is only needed for TCP/IP communications.
Register TCP/IP Port	This port is the register TCP/IP communications port. It will depend upon previously programmed settings at the cash register. It is only needed for TCP/IP communications.
<b>Use DSN Address option</b>	
PC Address	This is the IP address of the communicating PC. Please consult your IT administrator for this number; or, from the command prompt, enter IPCONFIG. The screen will display the IP address as well as additional network settings. This is only needed for TCP/IP communications.
DNS Address	Using DNS (Domain Name System) allows stores to use dynamic external IP addresses instead of static. *Please, contact your network administrator or ISP to setup a DNS address for the register. *This is for a WAN (Wide Area Network) polling connection.



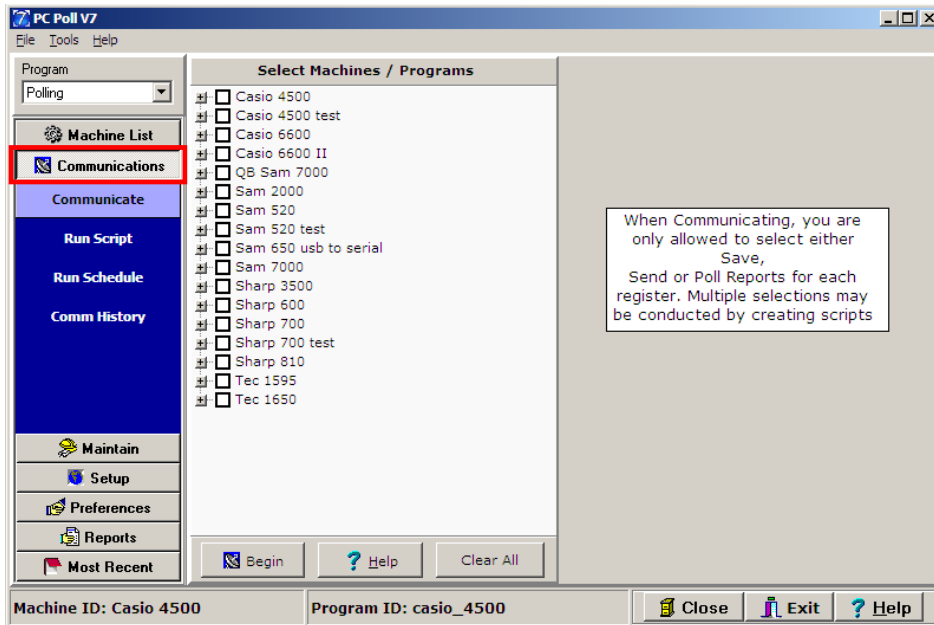
DNS Port	This is the register TCP/IP communications port. It will depend upon previously programmed settings at the cash register. It is only needed for TCP/IP communications.
Use WAN IP Address	
PC Address	This is the IP address of the communicating PC. Please consult your IT administrator for this number; or, from the command prompt, enter IPCONFIG. The screen will display the IP address as well as additional network settings. This is only needed for TCP/IP communications.
External Site Address	This is the external IP address of the site or router where the register resides. It is not the IP address of the cash register. It is recommended to have a static IP address at the store. This setting is only used for WAN (Wide Area Network) connections when the registers and the Polling PC are not in the same physical location.
External Site Port	This is the register TCP/IP communications port. It will depend upon previously programmed settings at the cash register. This is only needed for TCP/IP communications.

7. After all required fields are selected; click the **Post changes of current record** (check mark) button on the lower toolbar to save the Machine to the software's database.
8. The Machine is now created and saved to the system.

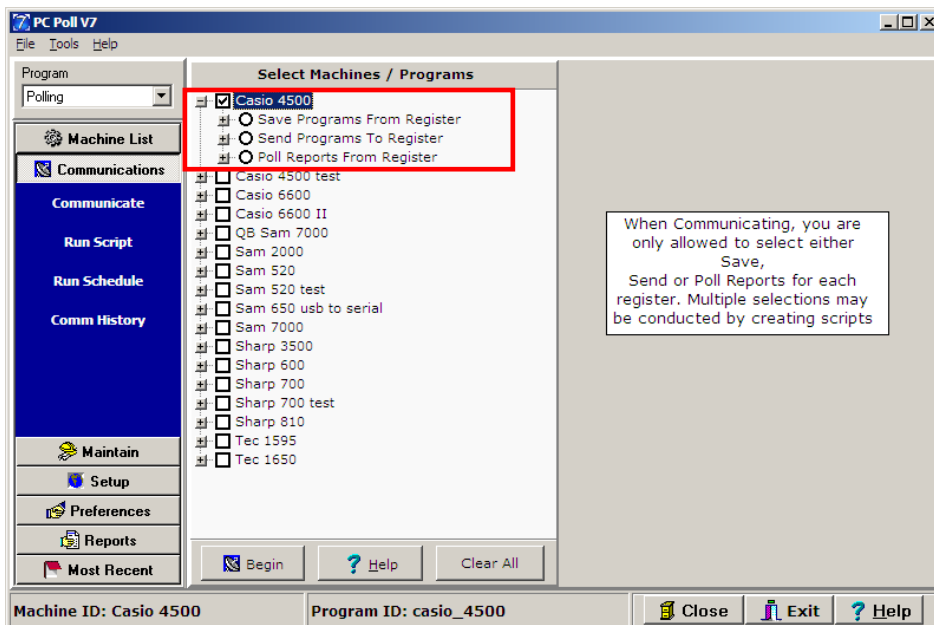
*Note: The Program ID field is used to name the program databases for the specified machine. Version 7 Polling does support database sharing to help users minimize updating time. i.e., sharing one PLU/UPC file for multiple machines, thus allowing users to make changes on one machine and have them automatically update another machine(s). To share all programs across two machines users would enter the same base Program IDs on both machines via the **Detail** tab. The Machine ID must be unique for all machines, but the Program IDs can match. Users can also set the Program IDs on a per program basis via the Programs tab within the Machine List.*

*Also Note: Select programs like Department/Group, PLU, and PLU Status Groups can be shared via machine crosslinks. For more information on machine crosslinks, please consult the online crosslink document.*

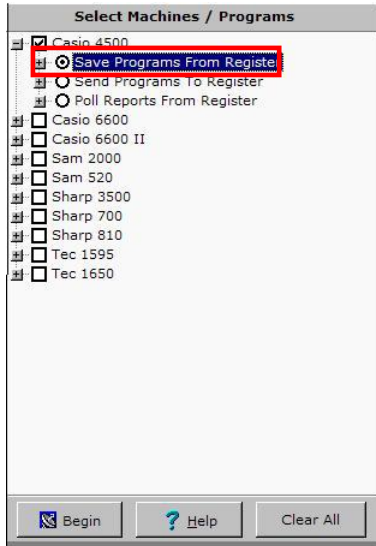
## Saving All Programs



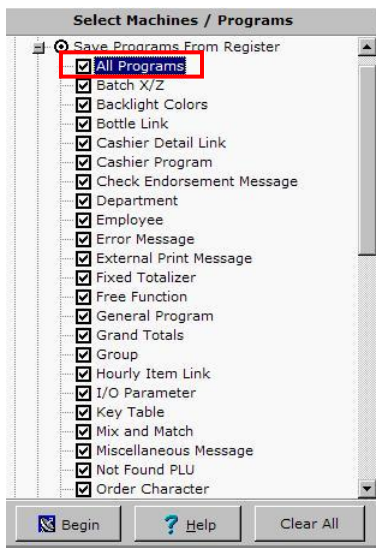
1. After the machine is created, return to the menu on the left side of the screen and select the **Communications** option. Click on **Communicate** underneath **Communications**.



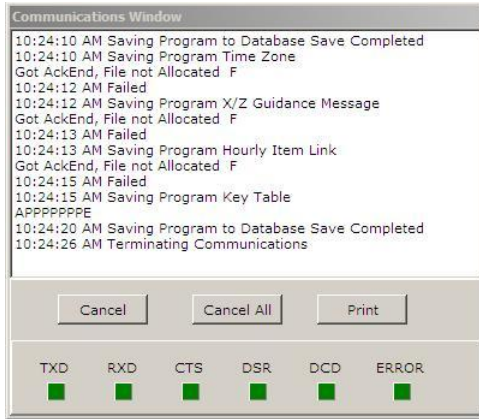
2. From the **Select Machines / Programs** area in the center of the screen, click the box next to the name of the newly added machine that in this case is a Casio 4500.
3. A list of communications options will appear, **Save Programs From Register**, **Send Programs To Register**, and **Poll Reports From Register**.



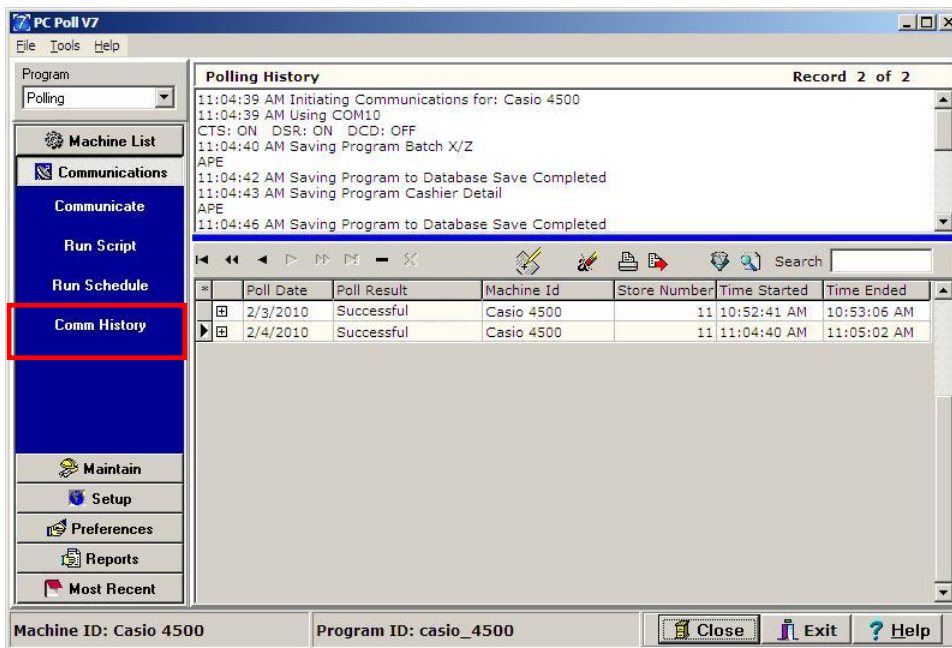
4. Select the **Save Programs From Register** option. *Note: It is recommended for all newly created machines, that the first step is to Save All Programs from the cash register back to the PC to configure the software to match the register system.*



5. A list of available programs will appear. Select the **All Programs** Option at the top of the list. The software will automatically select all the programs from the available list. To clear all checked items, click the **Clear All** button at the bottom.
6. From the bottom of the screen click on the **Begin** button to initialize communications.



7. A Communications Window will appear briefly. If the register is in a pollable state, connected to the PC, and the software settings were properly entered, the software will begin to save all programs from the register. *Note: Please allow the software process to finish. When completed, the Communications Window will close.*





8. To verify the communications were successful, select the **Comm History** option from the menu on the left-hand side of the screen. The most recent entry is displayed at the bottom of the list. The entry should be flagged as Successful.

	Poll Date	Poll Result	Machine Id	Store Number	Time Started	Time Ended
☐	9/15/2009	User Cancelled	Sam 520		7 1:03:33 PM	1:03:39 PM
☐	9/15/2009	Successful	Sam 520		7 1:14:27 PM	1:14:28 PM
☐	9/15/2009	Successful	New test 520		7 2:46:09 PM	2:46:10 PM
☐	9/15/2009	Successful	New test 520		7 2:46:48 PM	2:46:52 PM
☐	10/7/2009	Successful	Sam 2000		1 9:06:43 AM	9:09:57 AM
☐	10/8/2009	Some Items Failed	Tec 1595		1 9:30:28 AM	9:31:24 AM
☐	10/8/2009	Successful	Sam 2000		1 10:15:22 AM	10:18:08 AM
☐	10/12/2009	Successful	Sam 2000		1 9:00:41 AM	9:03:18 AM
☐	10/13/2009	User Cancelled	Sam 2000		1 11:15:59 AM	11:16:20 AM
☐	11/12/2009	Successful	Tec 1595		1 4:00:07 AM	4:00:22 AM
☐	11/12/2009	Successful	Tec 1650		1 5:00:07 AM	5:00:07 AM
☐	11/27/2009	Successful	Casio 4500		1 4:04:14 PM	4:04:15 PM
☐	11/27/2009	Successful	Casio 4500		1 4:04:23 PM	4:04:23 PM
☐	11/30/2009	Successful	Casio 4500		1 9:09:00 AM	9:09:00 AM

*Note: It may also appear that some items have failed, that could still be a successful Save All operation.*

Polling History		Record 4 of 6				
3:02:10 PM Initiating Communications for: Sam 520						
3:02:10 PM Saving Program Memory and Version						
PE						
3:02:10 PM Saving Program to Database, Completed.						
3:02:11 PM Saving Program Age Verify						
PE						
3:02:12 PM Saving Program to Database, Completed.						
3:02:12 PM Saving Program Authority Levels						
PE						
	Poll Date	Poll Result	Machine Id	Store Number	Time Started	Time Ended
☐	2/4/2010	Some Items Failed	Casio 4500	11	10:52:41 AM	10:53:06 AM
☐	2/4/2010	Successful	Casio 4500	11	11:04:40 AM	11:05:02 AM
☐	2/4/2010	User Cancelled	Sam 520	7	3:01:40 PM	3:01:48 PM
☐	2/4/2010	Successful	Sam 520	1	3:02:11 PM	3:04:37 PM
	Poll Result	Program/Report	Action	Start Time	End Time	X/Z
☐	Successful	Age Verification	Save Program	3:02:11 PM	3:02:12 PM	N/A
☐	Successful	Authority Levels	Save Program	3:02:12 PM	3:02:13 PM	N/A
☐	Successful	Cash Drawer Optic	Save Program	3:02:13 PM	3:02:14 PM	N/A
☐	Successful	Check Endorsement	Save Program	3:02:14 PM	3:02:15 PM	N/A
☐	Successful	Custom Report	Save Program	3:02:15 PM	3:02:16 PM	N/A
☐	Successful	Datatron Message	Save Program	3:02:16 PM	3:02:18 PM	N/A
☐	2/4/2010	Successful	Sam 520	1	3:04:45 PM	3:04:46 PM
☐	2/4/2010	Successful	Sam 520	1	3:04:55 PM	3:04:56 PM

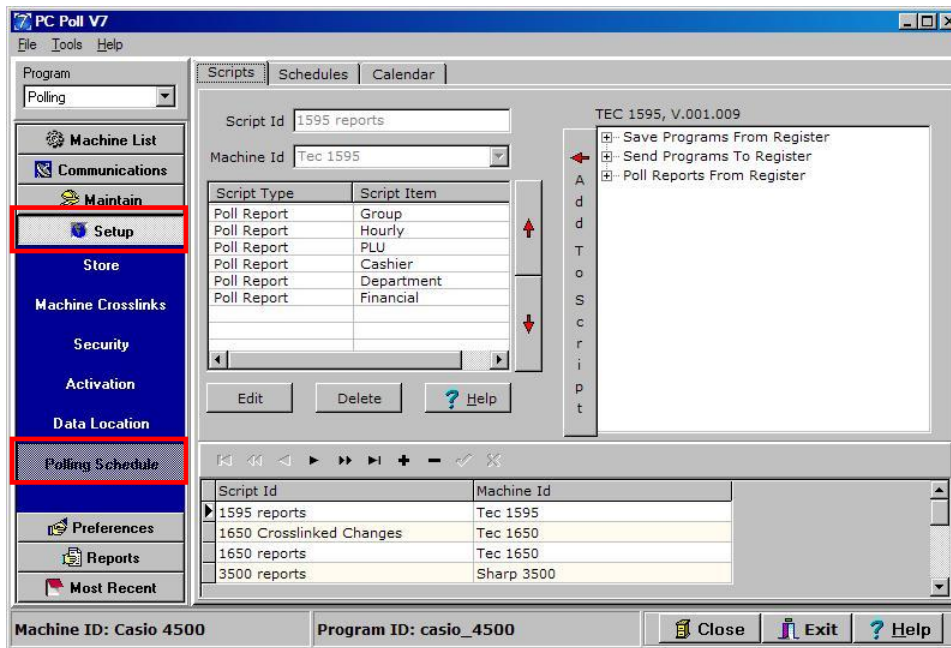
- Click on the history entry button , which will turn to a  when opened and look within the upper window for detailed information on the communications session. The failed items may pertain to register programs that are not configured or allocated on the register system. The Poll Results opens in a scrollable window to show the failed item in red.

The system is now setup to allow for program maintenance, program sends, and report polling. The system could also be configured for automatic polling operations.

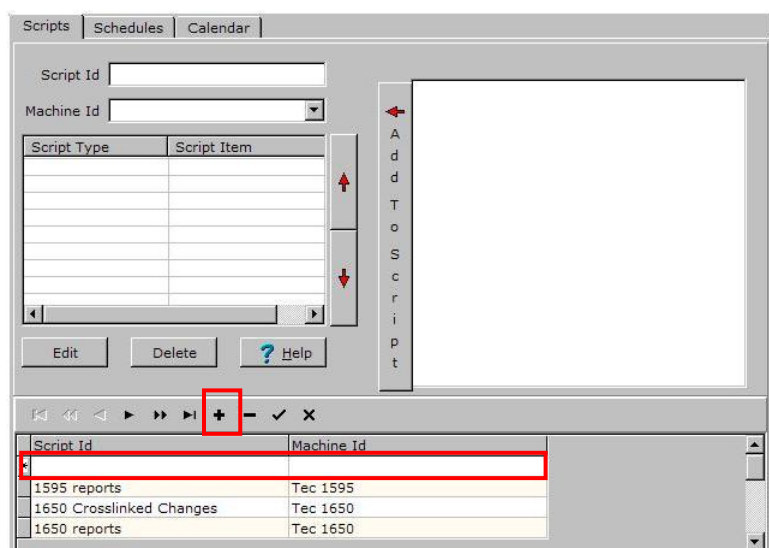
## Automatic Polling Operations: Scripts, Schedules & Calendar

After a V7 machine has been created and all programs saved back to the PC, users can configure their automatic polling options. Below are the basic steps. Scripts are designed to be customized to fit an individual business', needs, thus options will vary.

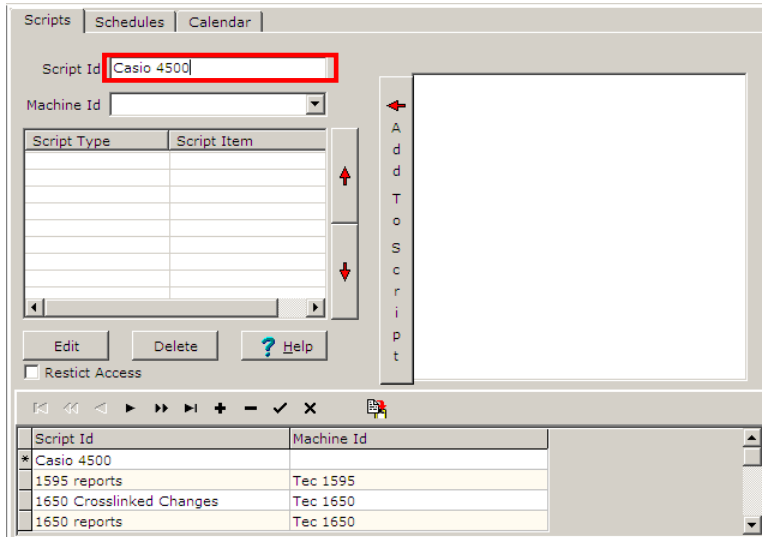
### Scripts



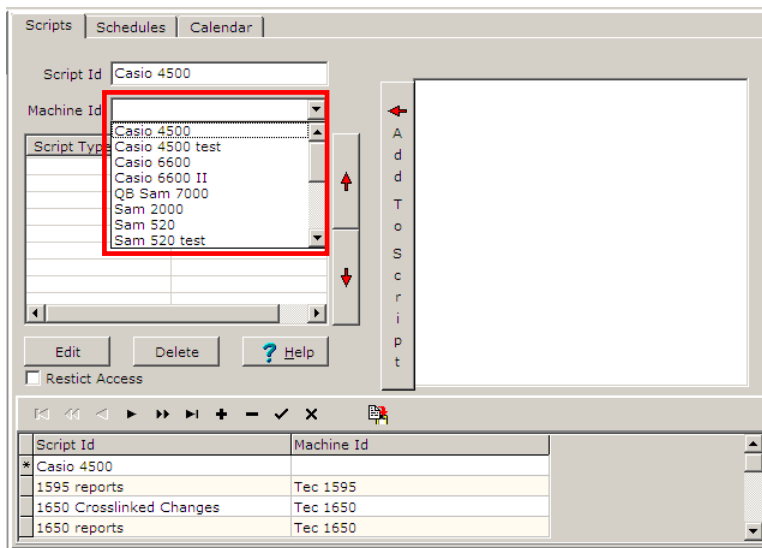
1. Click on **Setup** in the menu at the left of the screen within V7 Polling.
2. Click **Polling Schedule** from the left menu below **Setup**.



3. On the **Scripts** tab in the upper left section of the window, click the **Insert new record** button (+) button on the lower toolbar to add a new script.

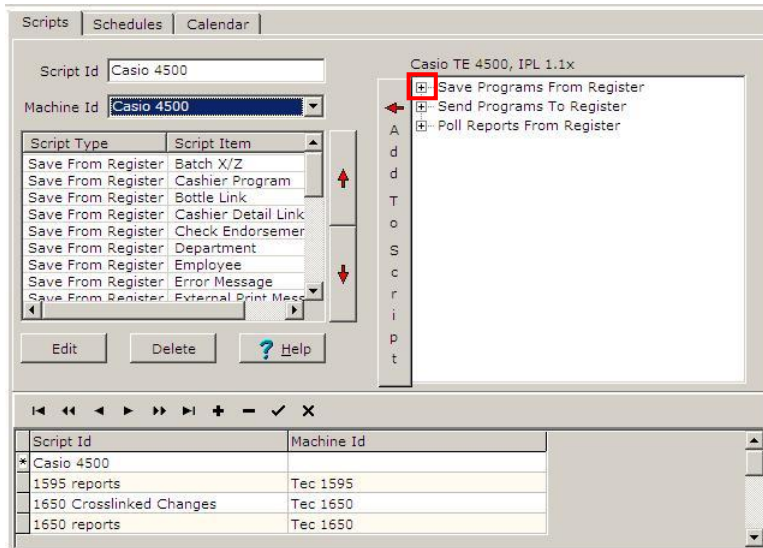


4. At the top of the screen, not within the lower grid, enter a **Script ID**. This will be the name of the script.

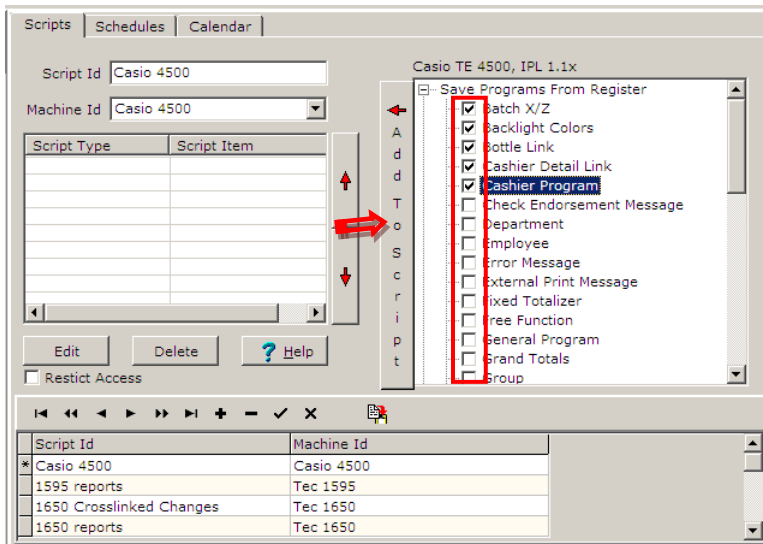


5. Next, select a **Machine ID**. The dropdown will display all previously created machines. Click the **Post changes of current record** button  to add the new record.



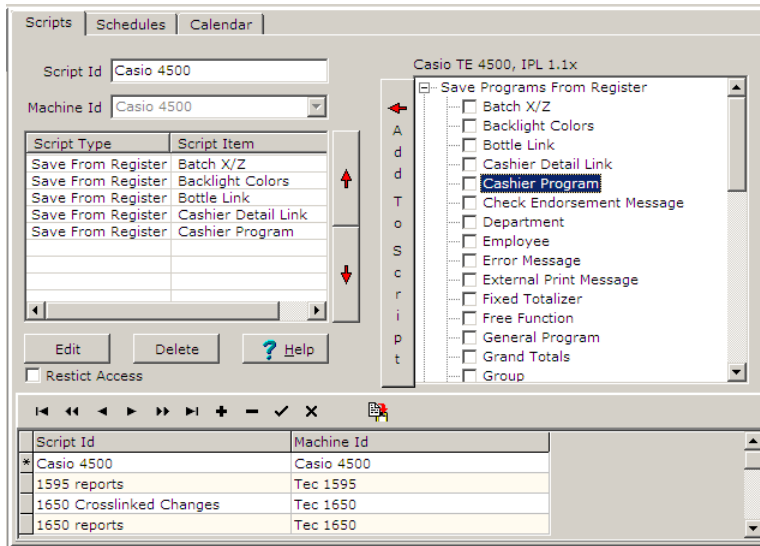


6. After those selections have been made, the right side of the screen will be populated with Save, Send & Reports lists.
7. Expand each of the desired lists by clicking on the plus sign in front of each item.

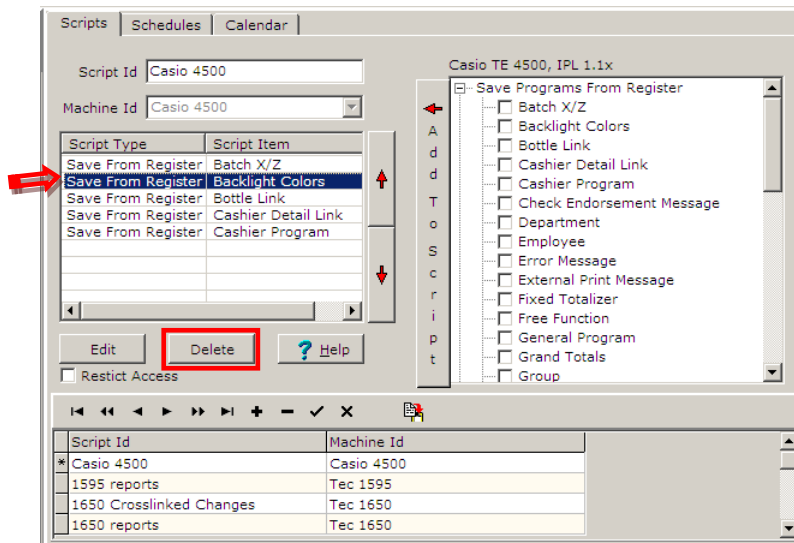


8. Check off the desired events by clicking in the box in front of the item.
9. When completed, click on the **Add To Script** button in the center of the screen. This will move all selected events from the right side of the screen to the Script Type/Script Item grid on the left.

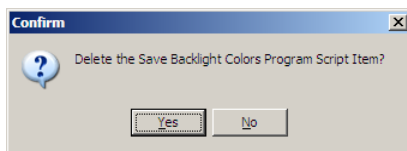




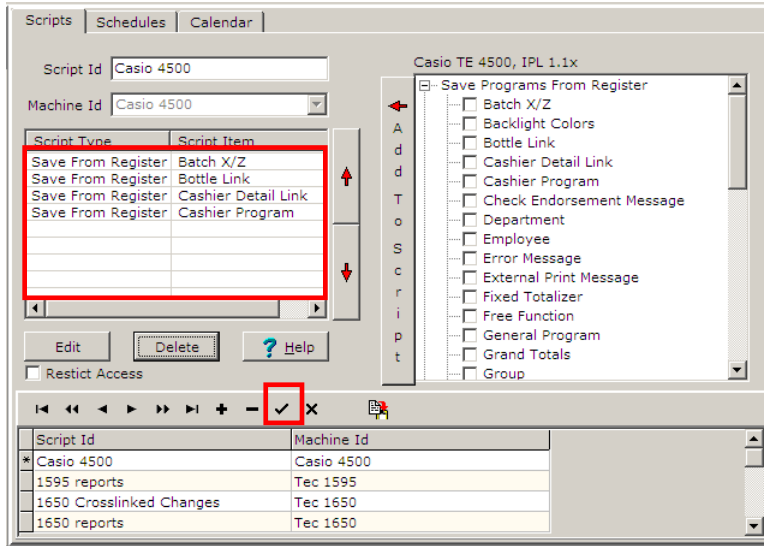
10. Click the **Post changes of current record**  button to save the changes.



11. To remove an item from the Script Type/Script Item window, highlight it by clicking on the item, and then click the **Delete** button.

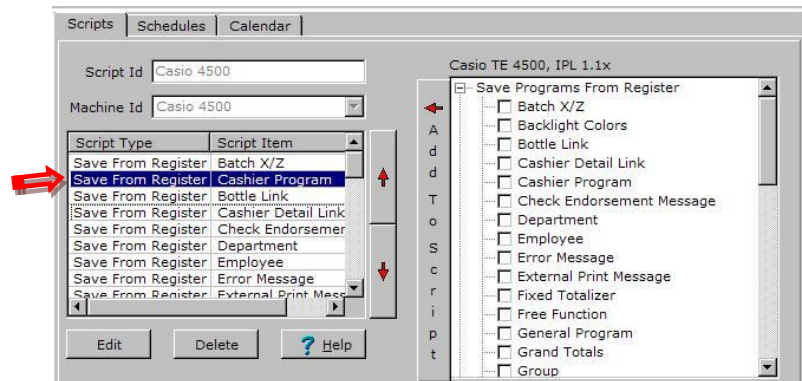
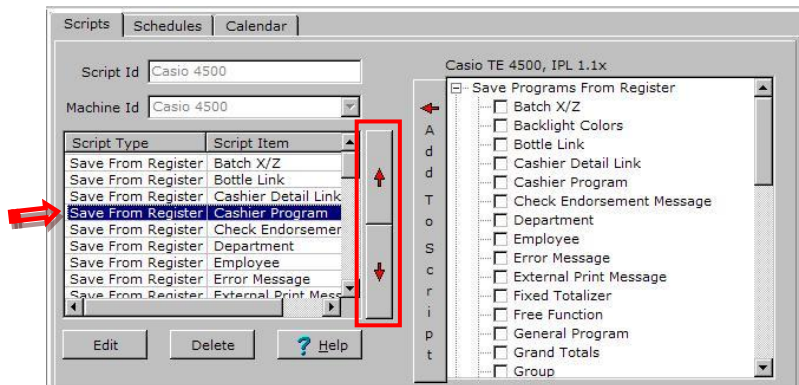


12. A Confirmation screen will open. To delete the item selected click on **OK**. To cancel the deletion, click **No**.

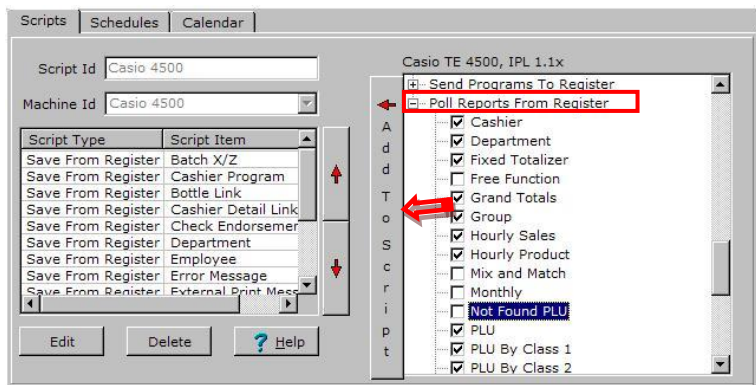


13. **Backlight Colors** is now deleted from the Script Type/Script Item window.

14. Click the **Post changes of current record**  button to save the changes.

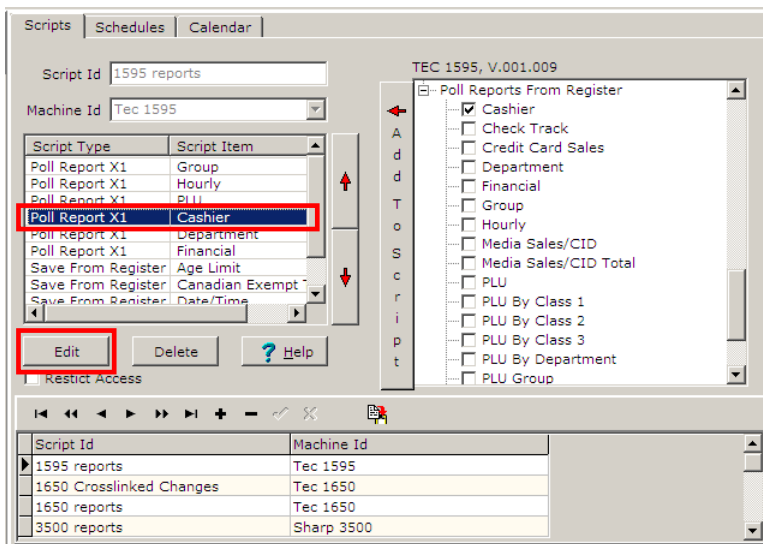


- To change the order of items in the Script Type/Script Item window, click on the item to highlight it and use the red up and down arrows on the center of the window to move the item up or down in the list.

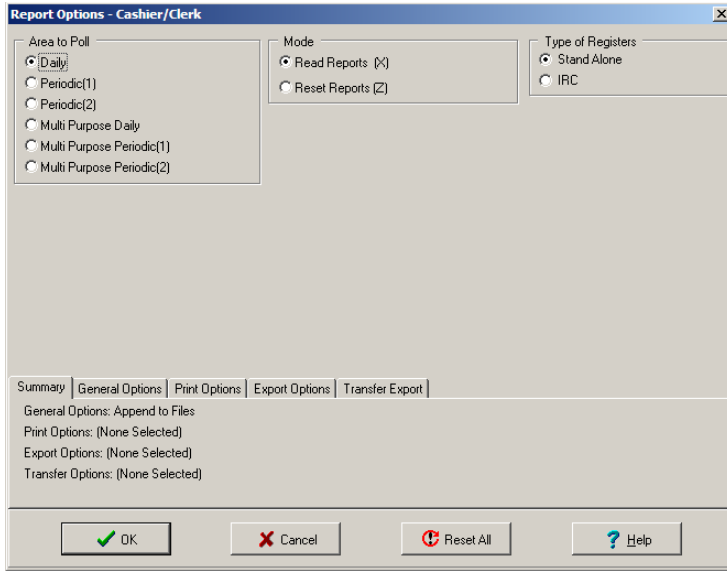


*Note: All report items will require the user to enter additional information, such as X or Z reports, register range, etc., in the Reports Option screen that appears when the **Add to Script** button is clicked.*

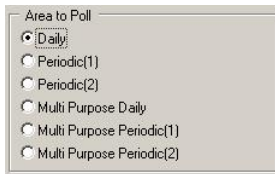
### Report Options



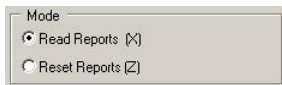
- To edit a report, highlight it, and click the **Edit** button.



17. A Report Options screen will open for that report. The screen will differ according to the report.



18. The Area to Poll section displays different report locations. Please contact your cash register dealer for questions on this section.

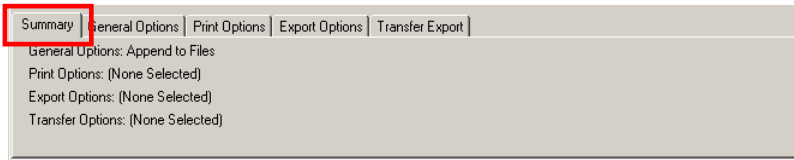


19. In general, X Reports (X) read the data only. Z Reports read and rest the data. Please contact your dealer for more information.



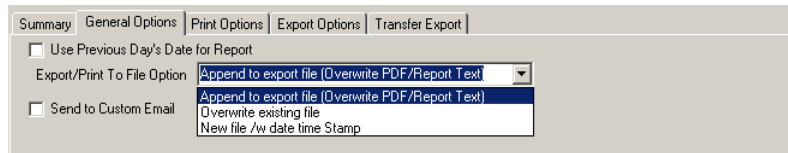
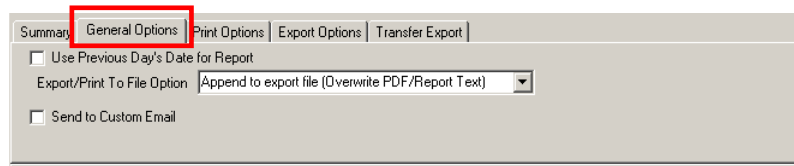
20. A Stand Alone register is one register. IRC can be many registers connected together. If using an IRC, additional selections may be required such as which registers to poll and how to consolidate the data. *Note: Register option screens may vary based upon register type.*

## Summary Tab



21. The **Summary** tab shows on one screen a summary of the options setup on the **General Options**, **Print Options**, **Export Options**, and **Transfer Options** tabs.

## General Options Tab



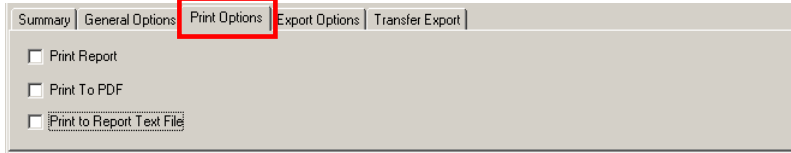
22. The **General Options** tab has the following options to pick from:
- When the **Use Previous Day's Date for Report** option is selected, when the report is polled, the software will set the date of the report back one day. For example, if the polling occurs at 1:00 am on the 3<sup>rd</sup>, the date on the polling report will be the 2<sup>nd</sup>.
  - Export/Print To File Option** allows the user to choose whether to:
    - Append to export file (Override PDF/Report Text)** which will append report data to the existing file if a text or csv file export type is selected. PDF and Report to File exports will be completely replaced and overwritten.
    - Overwrite existing file** will always completely replace/overwrite the existing file with the new file only containing the new data.
    - New file/w date time stamp** will always create a completely new file with the exported data. The software will use the designated file name & append the current date and time to the file name:  
02\_07\_2011 02\_58\_11 PM.



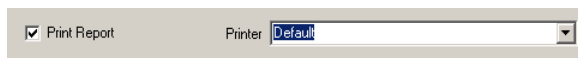
- When the **Send to Custom Email** option is checked, a data entry box will open allowing the user to enter an email address for the program to use. Separate multiple addresses by commas. This field overrides the settings on the

**Preferences** tab. *Note: For auto-email to work, the user must setup the **Preferences** area general email settings prior to use.*

## Print Options Tab



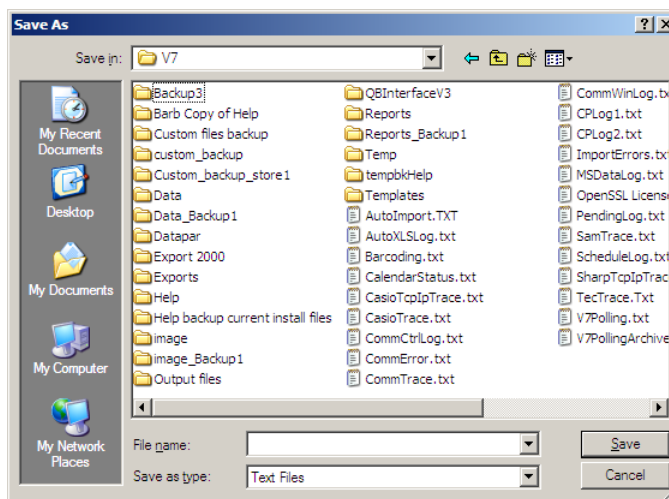
23. The **Print Options** tab has the following options. When each is checked off, a data entry box or a drop down menu will open.



A. The **Print Report** option has a drop down menu to allow the user to select the desired PC printer.



B. Checking **Print To PDF** will print the file as a .pdf document in the location chosen. To choose a location for the PDF, click the **Browse** button.

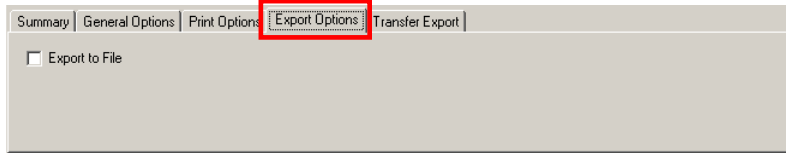


C. A Save As screen will open allowing the user to pick the location to save the file.  
D. The **Auto Email** option just to the right of the **Browse** button will automatically email the PDF to an email address. *Note: Setup the email address on the **General Options** tab or within **Preferences**.*

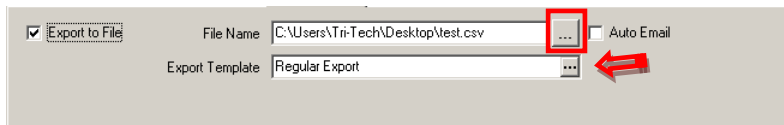


- E. The **Print to Report Text File** option allows the user to name the Report Text File and browse to a location to print the file to a text format. It works the same as **Print To PDF**.

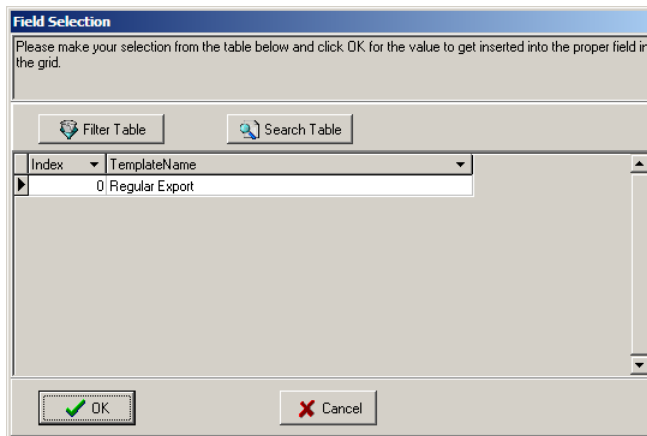
### Export Options Tab



- 25. The **Export to File** option can be setup by clicking the box on the **Export Options** tab. When **Export to File** is checked then **File Name**, **Auto Email**, and **Export Template** become active.

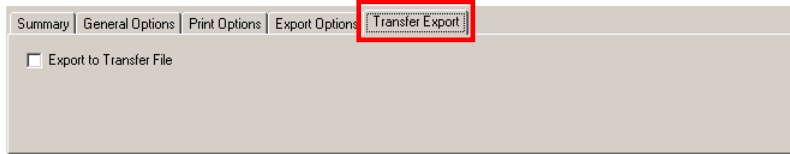


- A. To choose a location for the file, click the **Browse** ... button in the red box above. See the explanation of **Print To PDF** on the **Print Options** tab.
- B. To pick an **Export Template**, click the **Browse** button to the left of the red arrow.



- C. A Field Selection screen will open. Click on the template in the grid. Click **OK**. Additional templates can be setup within the **Reports** area via the **Do a Custom Export** button.

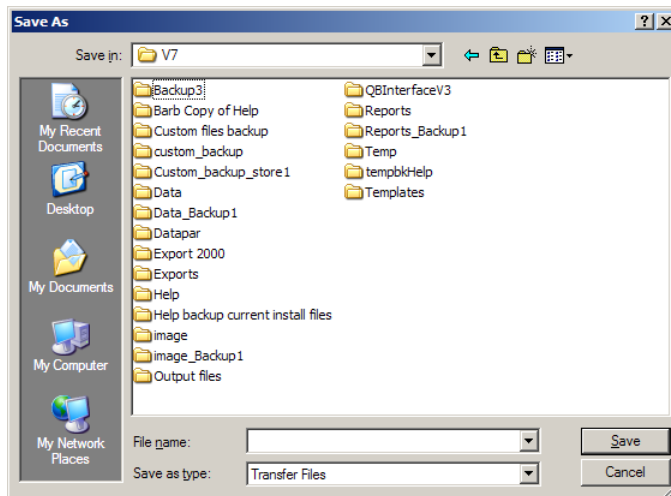
## Transfer Export Tab



26. The **Export to Transfer File** option can be setup by clicking the box on the **Transfer Export** tab. When **Export to Transfer File** is checked then **File Name** option will become active.

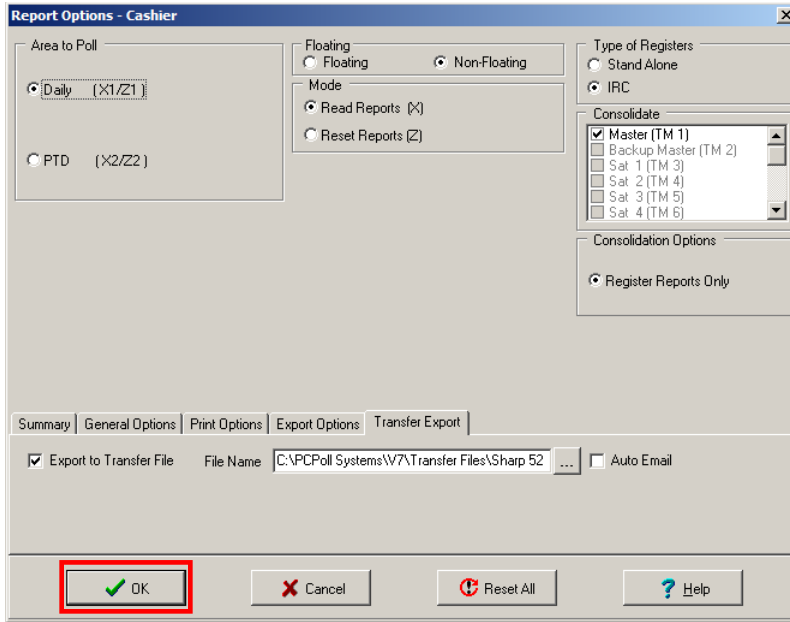


- A. Add a file name or click the **Browse** button to browse to the location to save the file.

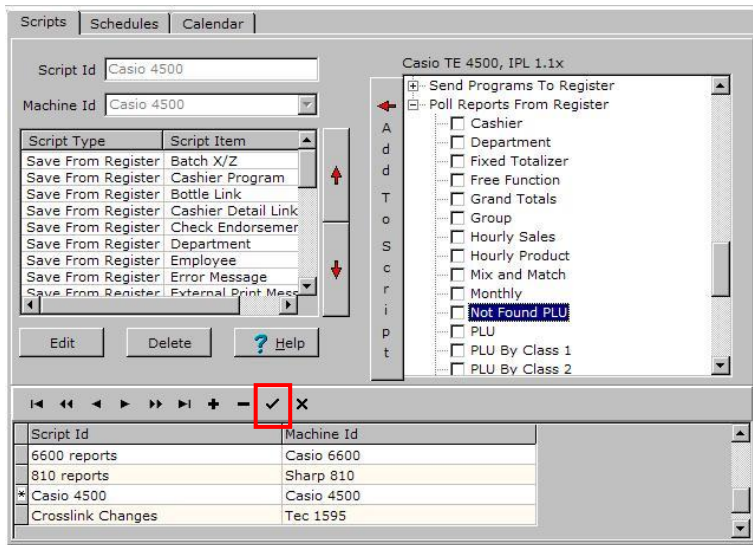


- B. Browse to the appropriate location and click the **Save** button.



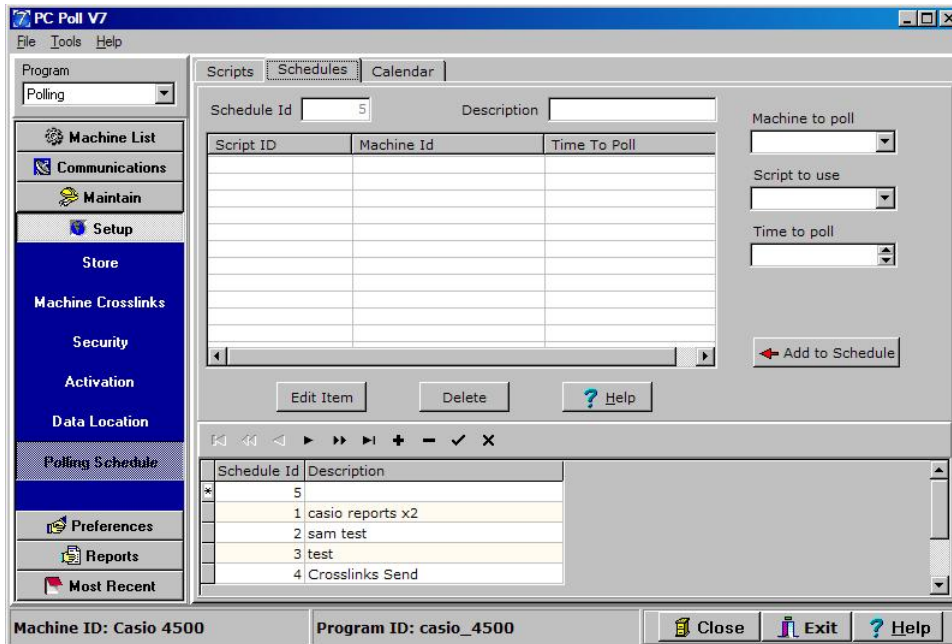


27. When finished setting all report options, click the **OK** button.

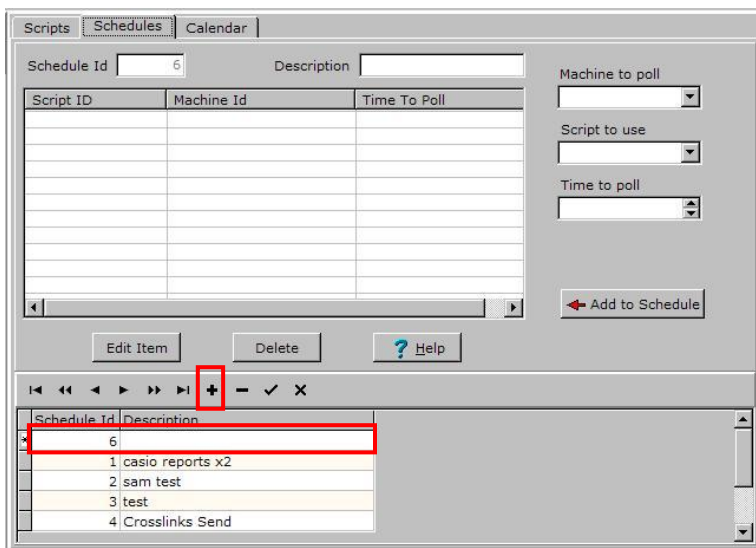


28. Click the **Post changes of current record** (check mark) button to save the script.
27. Repeat for all desired scripts. The check marks in the list of reports above will uncheck when **Add to Script** button is clicked.
28. Scripts can be run manually from within the Communications area. For automatic options, please create a schedule and link it to the Calendar.

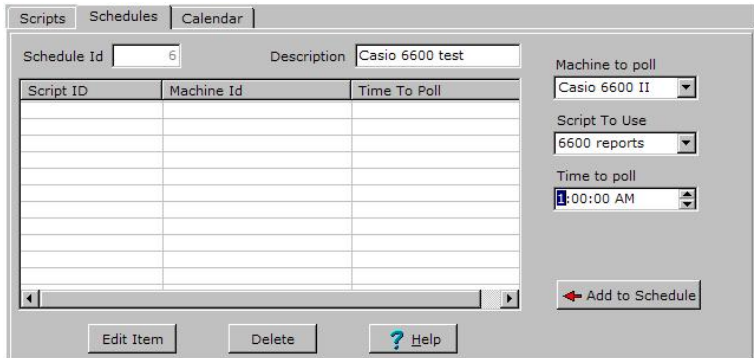
## Schedule



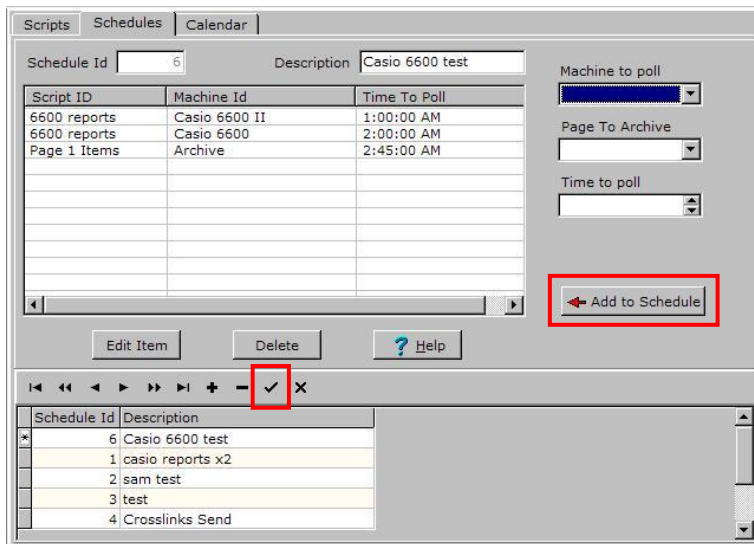
1. Click on the **Setup** button within V7 Polling on the menu on the left side of the screen.
2. Select **Polling Schedule**.



3. Click on the **Schedules** tab at the top of the screen; click the **Insert new record (+)** button on the lower toolbar to add a new schedule.
4. At the top of the screen, not within the lower grid, enter a **Description**. This will be the name of the Schedule. The **Schedule ID** field should be automatically populated by the system.

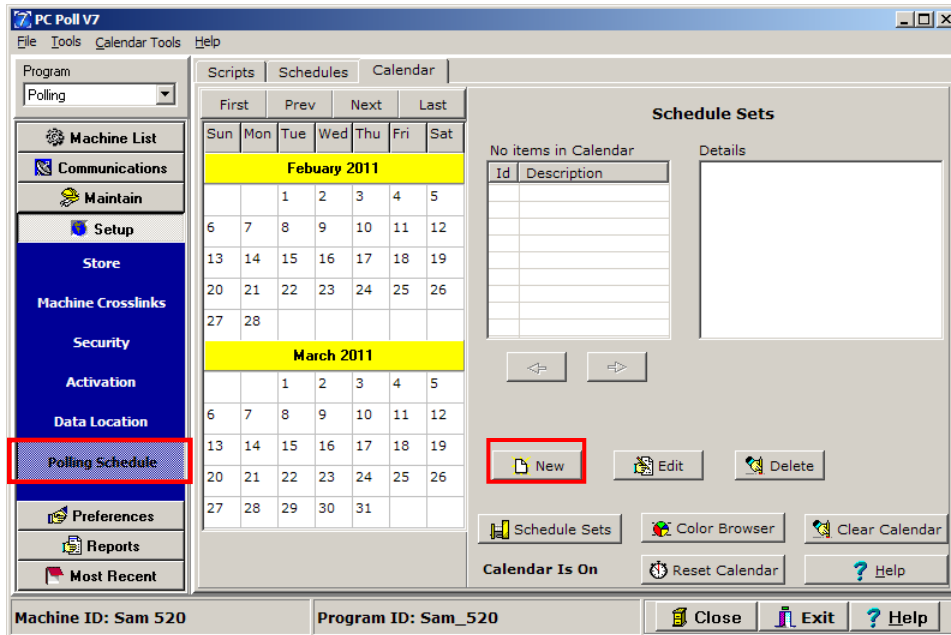


5. On the right side of the screen, there are three selection areas: **Machine to poll**, **Script to use**, and **Time to poll**. Start with **Machine to poll** and select from your list of previously created machines.
6. After the machine is selected, the Scripts to use list will be populated with all previously created scripts for that particular machine. Scripts are ROM dependant thus all scripts created for the same machine type and ROM version will appear.
7. Next, select a time for the event to occur under **Time To Use**.

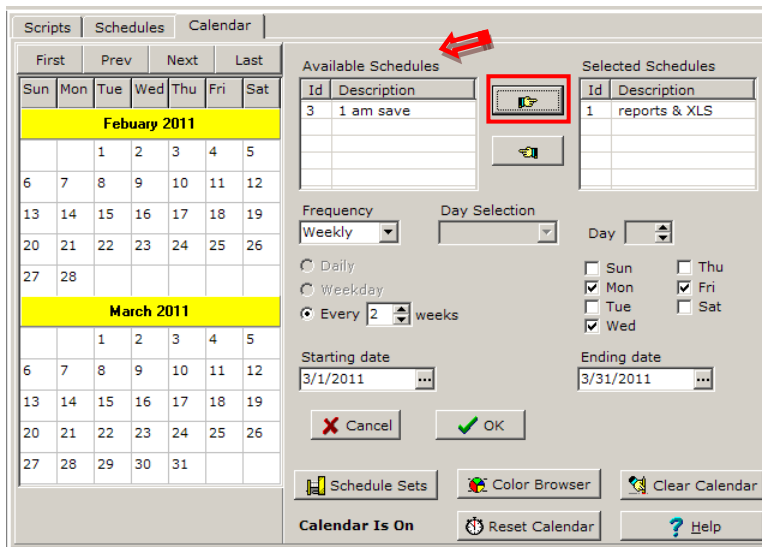


8. Then click the **Add to Schedule** button. Repeat the steps above for all events.
9. Click the **Post changes of current records** (check mark) button in the lower toolbar to save the Schedule when finished. *Note: Automatic Archive Agent, WLS Wizard, and QuickBooks Interface operations can also be scheduled for automatic use. It is recommended that the user not include these types of events within register polling schedules. They should be placed in separate schedules.*
10. Schedules can be run manually from within the Communications area. For automatic options, please link the Schedules to the Calendar.

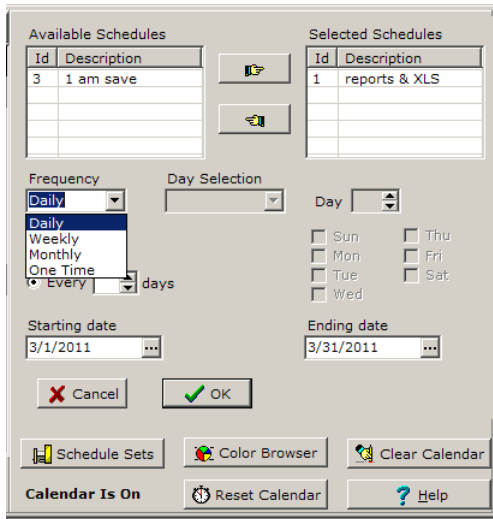
## Calendar



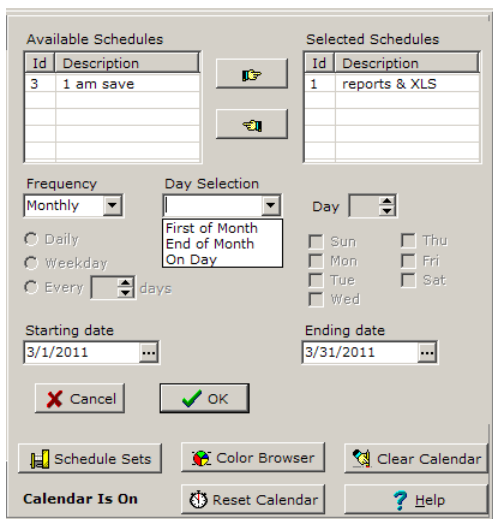
1. Click on the **Setup** button from within V7 Polling. Select **Polling Schedule**.
2. Select the **Calendar** tab.
3. From the Schedule Sets screen click on the **New** button.



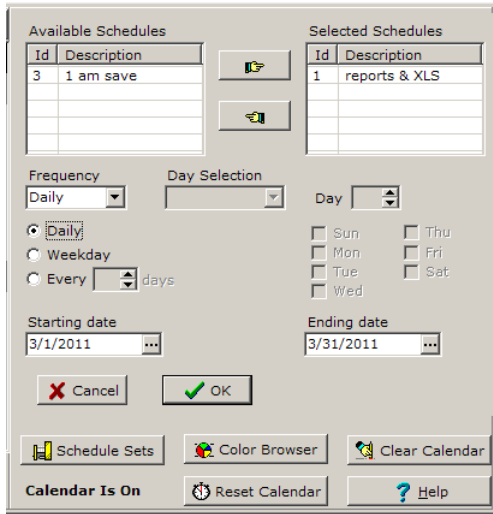
4. Select a schedule from the Available Schedules list in the upper center of the screen and click on the Hand button to move the event to the right, to the Selected Schedules area.
5. Repeat for all desired events.



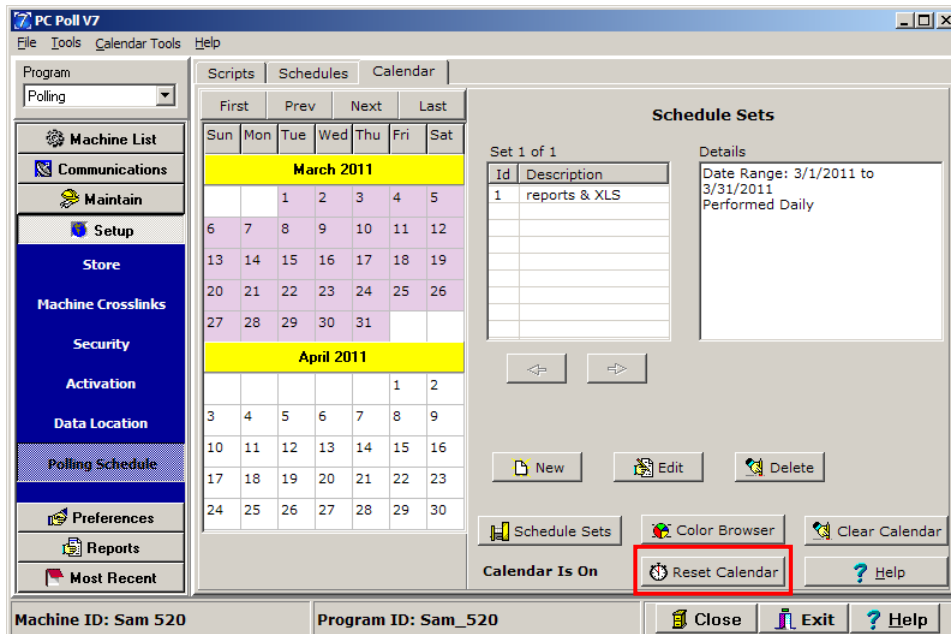
- Next, choose the frequency of the selected events from the **Frequency** drop down menu: Daily, Weekly, Monthly, or One Time.



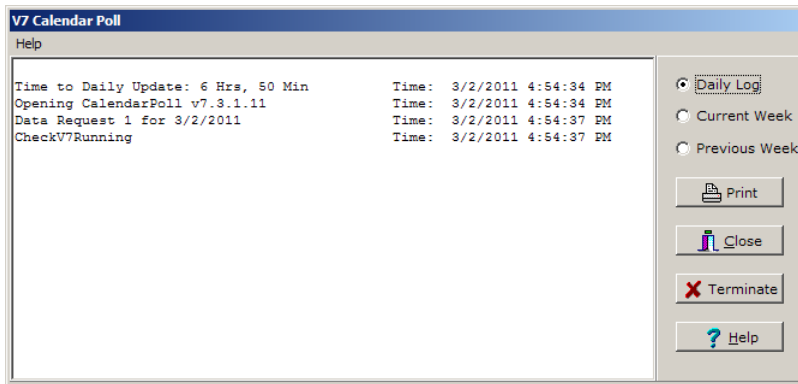
- If the **Monthly** option is selected, the **Day Selection** drop down menu and/or the **Day** options will be enabled for use.



8. When using the **Daily or Weekly** options, the lower **Daily/Weekday/Every** (every so many days) options will activate accordingly. To have an event occur **Every** day, set the frequency to **Daily** and select the **Daily** options from the Daily/Weekday/Every list.
9. Next, pick the starting & ending dates for the events. In the example above, the date to begin is 3/1/2011 and to end is 3/31/2011. The calendar can be programmed for years in advance.
10. Click **OK** to save the Calendar event.
11. Repeat the steps above for all desired events.



12. When all events have been programmed, click the **Reset Calendar** button to activate the automatic polling feature. The display changes from **Calendar Is Off** to **Calendar Is On** when clicked on. *Note: It is recommended to reset the calendar after any schedule set edit.*



13. A new program, CalendarPoll, will open. This program will be running on the system continuously to execute automatic polling. V7 Polling does not need to be left open. CalendarPoll will open the software as needed. The computer simply needs to be left in an active state so the CalendarPoll program can conduct the programmed events.

**Note: Each day at 11:45 PM – 12:00 AM, the CalendarPoll program will load the daily events. No polling events can be scheduled to begin during that time.**