



## Niche International Limited

### **MiniPOS™ Multi-Branch Release Notes**

#### **INTRODUCTION.**

The Multi-Branch upgrade is provided in the latest MiniPOS Upgrade to Version 2.x.x. This upgrade converts any existing data to the Multi-Branch version and provides Multi-Branch functionality. After the conversion to MiniPOS Version 2.x.x. a new Branch Module button will appear in the MiniPOS module selector section.

Existing installations will appear unaffected by the upgrade, however the data will have been converted and stock levels will now belong to a default Head Office created as part of the upgrade. MiniPOS can be used as normal with any stock level changes automatically being assigned to the default Head Office.

When additional branches are required, each remote branch must be a new installation of MiniPOS and registered as a remote branch before connection to the Head Office is permitted. If an installation of MiniPOS has been used as an additional branch, any sales or stock data should be reported on prior to the removal and subsequent reinstallation of MiniPOS. The existing main site installation with the original data must be registered as a Head Office, this will permit the creation of additional branches and communications with each.

#### **MULTI-BRANCH INSTALLATION.**

1. Upgrade the Head Office installation to MiniPOS Version 2.x.x.
  2. Register the Head Office installation as a '**Head Office**' and register for the required number of branches.
  3. Click on the **Branch Button** and then click on the **Configure Branches Button**.
  4. Click on the **Head** entry in the Branch List and then click in the **Name** field on the right. Replace the 'Default Head Office' name with a name of your choosing for your own head office.
  5. Click in the remaining fields and enter details as appropriate for the head office and when finished click the **Save Button**. The **Network Tab** option need not be changed for this Head Office branch.
  6. Click the **Add Button** and type in a four-character branch code in the **Code** field for you first additional branch followed by the branch name and branch details as appropriate. When finished click the **Save Button**. The **Network Tab** option can be set for each branch created when the remote branches have been installed.
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7. For each remote branch, install a new version of MiniPOS (V 2.xx) Back Office and the required number of Tills as follows:

### **Logical Branches.**

Logical branches are used to manage stock for such locations as stock rooms, lockups, warehouses, etc. These stock locations are regarded as branches except they are managed by a **true** branch. A logical branch does not have a system of its own, it is simply used to record the stock levels and stock movements for the location. Logical branches can be defined as part of the head office or as belonging to a remote branch. A logical branch's stock data must be managed by a designated true branch, this can be the Head Office or even a remote branch.

If you wanted to manage different branches or stock locations but without actually having a system in those locations, you could create on the Head Office system a Logical Branch for each. The Head Office is capable of changing the branch it manages stock for and in this way can control stock levels and transfers from these *internal* branches.

If you wish to manage a stock room located at a remote branch in addition to the remote branch's own stock, you would create a logical branch for the stock room and define which location controls the data transfer for the logical branch.

### **Tills Only Remote Branch – No Back Office PC.**

Install the back office on one of the tills and ensure that this till has the necessary means to connect to the Head Office Branch. If there is to be only one till at this branch, the back office and till software will run together on the same till system. If other Tills are to be added, install MiniPOS Till software on each additional till and connect these to the main till that will be running the back office software. The only back office functionality available in this configuration is for Data Transfer with Head Office and the sending and receiving of **IBT's (Inter-Branch Transfers of stock)**.

### **Tills Only Remote Branch – With A Back Office PC.**

In this installation a back office PC has the MiniPOS Back Office Software running that connects to the Head Office Branch and has a network connection to its local tills. The transferring of data will be between the back office PC and the Head Office system with the local tills automatically updated via the network as part of the data transfer process. The only back office functionality available in this configuration is for Data Transfer with Head Office and the sending and receiving of **IBT's (Inter-Branch Transfers of stock)**.

### **Local Back Office Remote Branch.**

A Local Back Office Branch permits back office functionality at a remote branch, the modules of which are purchased and registered as required. This enables stock creation, stock management, reporting, purchasing, goods in and deliveries etc. to be managed locally. Any changes to the database are transferred back to Head Office and subsequently on to all other branches. The back office software can either be on a back office PC with local tills connected via a network or installed on a Till system subject to suitable connection to the Head Office system.

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### **Branch Connections.**

Branches can be connected to the Head Office system in a number of ways as follows:

#### **Branches on Head Office System:**

These branches are created on the Head Office system with direct data control. The Head Office must be registered for the required number of additional branches.

#### **Networked Branches:**

Networked branches are installed on PC's that are connected via a network to the Head Office system. Usually no modem connection is used, however remote dialup networking could be utilised. Branches connected to the Head Office network must have a **Device** and **Network Name** defined in the **Update Transfer / Wait To Receive** pop-up. The name used for the networked branch must additionally be typed into the **Network Name** field on the **Configure Branches / Network Tab** for that branch on the Head Office system.

#### **Remote Modem Connected Branches:**

Remote branches connect to the Head Office system via a suitable modem connection, which can be either standard BT line or ISDN type. The remote branch connection telephone number must be typed into the **Network Name** field on the **Configure Branches / Network Tab** for that branch on the Head Office system.

8. When the remote branch MiniPOS software has been installed and run it **MUST** be registered as the required remote branch type before any data entry or use is made of the system.
  9. Once registered, a remote branch must be initially sent to from the Head Office. This is achieved by clicking on the **Update Transfer Button** under the Branch Module on the remote branch system and then clicking the **Wait To Receive Button** at the bottom of the display. Next ensure the correct **Device** is selected from the pop-up that appears and set the **Update Tills Options** as required. Next click the **Wait Now Button**; the remote branch is now waiting for a call from the Head Office.
  10. The Head Office system must have the **Network Tab Option** set for each remote branch now installed together with the **Network (Address of connection)** field defined.
  11. On the Head Office system under the **Branch / Update Transfer Button**, you can now select which branches to connect to by first clicking on the **Update Button**, then selecting which branch or branches to send to and set the transfer options as required. Next click the **Everything Option** and then the **Update Now button**.
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The Head Office system will attempt to contact branches using the settings defined for each branch. The transfer process takes the following steps:

1. Head Office connects to a branch and requests a transfer of data from the remote branch to the Head Office.
2. If the '**Update Tills Before Send Update**' option is set on the **Wait To Receive** pop-up of the remote branch, the remote branch will perform an *Only Receive Sales* command which collects the local till data for processing. When the till data has been processed by the remote branch software, the required data is transferred to the Head Office and the connection to the remote branch is closed. The remote branch resumes the **Waiting To Receive** process.

If the '**Update Tills Before Send Update**' option is not set, the remote branch will transfer the required data since the last *Only Receive Sales* command was run.

3. The Head processes the transferred data from the remote branch and connects, in turn, to any other branches selected for update transfer. The data received from each branch is processed before the Head Office connects to the next branch.
4. When all received branch data has been processed, the Head Office connects to the first remote branch again. The Head Office transfers to the remote branch all stock additions, price changes, etc. and the stock levels for each of the other branches. Once the data has been sent to the remote branch the Head Office disconnects and continues to transfer data to the other branches.
5. The remote branch processes the received data and if the '**Update Tills After Receive Update**' option is set on the **Wait To Receive** pop-up of the remote branch, the remote branch will perform an *Only Send Stock Changes* command, which sends new data to the local tills automatically.

If the '**Update Tills After Receive Update**' option is not set, only back office specific data will be processed leaving the local tills to be updated manually.

The Head Office updating of remote branches can be performed on demand or can wait for a specific time each day when it will automatically carry out the updates. Timed updating is enabled as follows:

1. Click on the **Branch / Update Transfer Button** and then select the branches to update from the list.
2. Click on the **Update Button** at the bottom of the display and set the **Transfer Every Day At** time on the pop-up that appears.
3. Click the **Update Later Button**. The Head Office will now wait until the time set and perform a remote branch update. If the Head Office remains untouched it will continue to perform the update each day at the set time.

**N.B. Each remote branch must be in Waiting To Receive Mode prior to any contact from the Head Office.**

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After a remote branch has been sent to from the Head Office for the first time, the remote branch name will appear on the various back office software screens.

After the remote branch local tills have been sent to, sales through the tills can commence.

Once all remote branches have been installed and sent to, subsequent data transfers will enable the till to display stock levels for all other branches via the modified **Product Search Key** which now has an option for branch stock listing.

### **INTER-BRANCH TRANSFERS**

Inter-Branch Transfers will be covered in more detail in future manuals, but essentially, an Inter-Branch Transfer creates a record of stock movement from the ***Sending Branch*** to the ***Receiving Branch***. This IBT record is created at the Sending Branch, reducing the stock levels of the products being transferred at the Sending Branch. IBT's are transferred to the Head Office as part of the branch update routine and then sent on to the Receiving branch.

The Receiving Branch creates a record for the IBT against which, the transfer of products can be received. This is similar to deliveries on a Purchase Order. The Receiving Branch increases the **Quantity On IBT** levels for the products being transferred. When products are received against an IBT, the stock levels are increased at the receiving branch and the **Quantity On IBT** levels reduced accordingly.

The IBT process enables full tracking of ***transfers in transit*** and ensures that any missing products are reported on. IBT's are managed as follows:

1. The ***Sending Branch*** creates an IBT by selecting the **Branch / Distribute Stock (IBT) Button** and selecting the **To Branch** on the IBT form followed by clicking the **New Button**.
  2. The products and quantities to transfer are entered followed by any **Picking List** or **Delivery Note** printing required. Once the IBT has been created, click the **Send Button**. During the next remote branch update from Head Office the IBT will be copied to the Head Office and subsequently on to the ***Receiving Branch***.
  3. The ***Receiving Branch*** selects the **Branch/ Receive Stock (IBT) Button** and enters the quantity of products received for a particular IBT.
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