

# PFW to PRM Conversion Guide

**What is it?** POSitive For Windows (PFW) to POSitive Retail Manager (PRM) conversions are when we convert a customer from PFW, which is the old software, to PRM, our new software.

## System Requirements

Before anything is done, the customer needs to know the system requirements. This is a predefined reply in main > pfw to prm conversion > System requirements-step 1

POSitive Retail Manager requires a modern computing system with adequate processor speed and memory in order to run at peak efficiency. Below are the MINIMUM recommended hardware specifications. If you can exceed these specs, program performance will be better.

NOTE: We recommend a separate computer to run the SQL Server software. This may not always be possible, so be sure to meet or exceed the minimum specs for a single register.

### **Hardware Minimums**

#### **Scenario: Single Register running PRM and hosting the SQL Server**

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
2 gb RAM  
Microsoft SQL Express 2005 (included with installation)

#### **Scenario: Single or Multiple Workstations running PRM and with dedicated separate SQL Server**

Register(s):

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
1gb RAM

Server:

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
2gb RAM  
Microsoft SQL Express 2005 (included with installation)

#### **Scenario: Single or Multiple Workstations running PRM and with dedicated separate SQL Server, using Merge Replication with multi-store, per store**

Register(s):

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
1gb RAM

Server:

Modern Processor, dual-core recommended  
1024 x 768 Screen resolution, 1280x1024 recommended  
4gb RAM  
Microsoft SQL Server 2005 Workgroup Edition (additional cost)

### **SQL Server Software**

Single store:

Low to Medium volume (1-100 transactions/day) Microsoft SQL Server 2005 Express  
Medium to High volume (100 + transactions/day) Microsoft SQL Server 2005 Workgroup Edition

Multi-store:

Low to Medium volume (1-100 transactions/day) Microsoft SQL Server 2005 Workgroup Edition  
Medium to High volume (100 + transactions/day) Microsoft SQL Server 2005 Standard Edition

### **Storage**

You should consider your hard drive storage as far as capacity and speed is concerned. For maximum speed, consider 10,000 or 15,000 RPM drives, SAS drives, and striping.

### **Backup Solutions**

Unlike PFW there is no auto-backup in PRM, so you must set this up separately. We have no product recommendations at this time, but whatever you use must be able to backup the SQL database and the PRM directory. You can check Microsoft's web site for more information.

Also, consider mirroring drives.

### **Operating System**

Microsoft Windows 2000 or newer\* with all Windows Updates.

**\*Special Requirements for VISTA (please call us)**

## Test Conversion

A test conversion is done before an actual “live” conversion. This test helps us determine just how long the conversion process will take and if there are any data issues. Remember: Keep track of how long the test conversion will take!

### Attaining the Customers Data:

Before we can do the test conversion, we need to have them upload their data onto our FTP site. These instructions are in the predefined replies on Support Net (main > pfw to prm conversion > Sending Data-Step2) and should be e-mailed to the customer:

- 1.) Connect to the Internet (dial up connection will work, but it will be slow)
- 2.) Run PFW
- 3.) Make a backup (File > Backups > Backup Files Now) from the station that is setup to do the backups (File > Backups > Autobackup Setup).
- 4.) Go to Help: About POSitive For Windows
- 5.) Click on the Support Button
- 6.) Click on Send Last Backup
- 7.) Click on Send [F10]
- 8.) Answer Yes

Once the customer has sent their information, we can then download it from one of our FTP sites. (You will want to have the customer e-mail you back when they are done uploading their data and tell you what the file name is.)

- 1.) Go to the FTP site (<ftp://ftp.gopositive.com/pfwupload>) and download the file with 7-zip manager/winzip/winrar...any type of zip file manager
- 2.) Extract the data onto your desktop or your user file on the server.
- 3.) Rename the folder to be the company’s name.
- 4.) Go into the file and copy the data file (usually it is called “data2”) and all the information below it.
- 5.) Paste the data into the PFW folder (usually found at C:\PFW)

### Password Recovery

Make sure you have pen and paper ready!

- 1.) Open PFW and highlight the company you are going to be converting.
- 2.) Hit Ctrl + Shift +P, the database password will appear. Write it down!
- 3.) Go then to Utilities > Topscan
- 4.) File > Open > Data2 > setup.tps > enter in the password from above.

- 5.) Go to Subfile and scroll down to Sales ID
- 6.) The list of employees, their usernames, and passwords will appear. Write down the information for the person you are in contact with.
- 7.) Exit

### **Deleting the General Ledger (GL):**

*(Optional)*

Not every company uses the GL, which is an accounting feature. If a company does not use GL, it can be removed before starting the conversion process. This will make the conversion go a lot quicker. REMEMBER: DO NOT DELETE THE GL WITHOUT TALKING TO THE CUSTOMER FIRST! If the customer does not use the GL and wouldn't mind having a faster conversion time, here is what you do:

- 1.) Go into the PFW folder (C:\PFW) > Utility > Topcopy
- 2.) File > Left > Open File > C:\PFW\data2\accounts.tps
- 3.) Delete all files that start with "GL"

### **Check File Formats**

- 1.) Highlight company
- 2.) Go to Utilities > Check File Formats
- 3.) Ok

### **TPS Fix On All Files**

The TPS fix can take awhile. Once it is done it will go back to the utilities screen.

- 1.) Highlight company
- 2.) Go to Utilities > Verify/Maintain data
- 3.) Ok to all files

### **Verify Transactions**

- 1.) Log into the company
- 2.) File > File Maintenance > Verify Data Routines
- 3.) Highlight Verify Transactions
- 4.) Under "Which file to verify?" select "Both"
- 5.) Under "How to Verify" select "Full Verify"
- 6.) Leave all default settings, and click Process

## Verify Inventory Files

- 1.) Go to the Inventory Tab > Maintenance > Verify inventory Files
- 2.) Process

## Conversion

- 1.) Go into the PRM folder (C:\PRM)
- 2.) Click on "PFWtoPRM" (It's a yellow icon)
- 3.) The "Path" usually is "C:\PFW", set it to where ever the PFW folder is
- 4.) Select the company you want to convert
- 5.) SQL information varies
- 6.) Next
- 7.) The conversion can take quite awhile or no time at all depending on how much data there is.
- 8.) During the conversion you may see "errors". Take note of where the errors are coming from and hit "ignore" to let it go on. If you get a lot of errors (more than ten or so), you may want to do file fixes and file format fixes again.

## The Demo

After the test conversion is completed, we want to set the customer up with a demo to make sure nothing was missed in the conversion process and to also let them get accustomed to the new software. Below is the pre-defined reply (main > pfw to prm conversion > preparing for the demo-step 3) which should be sent to them to prepare of the demo.

On the computer you would like to demo PRM on:

1.) Download PRM from our website ([gopositive.com](http://gopositive.com)). Click on the Downloads section on the left hand side, choose POSitive Retail Manager, and then choose the full install. This install could take an hour or so, depending on your internet connection.

2.) Once that is done, please go to:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=C243A5AE-4BD1-4E3D-94B8-5A0F62BF7796&displaylang=en> and download a file called "SQLServer2005\_SSMSEE.msi". This to, could take a while to download depending on your internet connection.

3.) Reply to this e-mail to let me know you are done and when would be a good time to set the demo up on your computer.

### **Setting up the demo:**

- 1.) Make a backup of the test converted data in SQL Server Management Studio
- 2.) Compress/zip the back up (which is usually located in C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup)
- 3.) Open up Windows Explorer and go to: <ftp://ftp2.gopositive.com/temp/>
- 4.) Right click in page and login
- 5.) Drag and drop the data backup into the ftp site and let it load.
- 6.) Log onto the customers computer
- 7.) Open up their Windows Explorer and go to: <ftp://ftp2.gopositive.com/temp/>
- 8.) Download their data onto their desktop and extract the file
- 9.) Drag and drop the extracted file into the backup file for the SQL Manager, this file is usually located in: C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup
- 10.) Open up the SQL Manager on the customers' computer and log in.
- 11.) Right-click on databases (located on the left hand side) > Restore databases
- 12.) To database: \*Enter in company name and make note of how you entered it in as you will need it later\*
- 13.) From Device: \*add in the file that you extracted from earlier\*
- 14.) Ok
- 15.) Once the database is restored, exit SQL Manager and open PRM
- 16.) Create a store using all the defaults
- 17.) Ctrl + Shift + E and change the store you just created to have the same SQL database qualities that the database you just restored had.

## **Live Conversion**

Before the live conversion is done, there is a list the customer needs to go through to make sure their computers are prepared (main > pfw to prm conversion > Preparing for live conversion- Step 4). Before you start the conversion, you may want to talk to the customer about what they have done and go through the list with them. This list is as follows:

### **1.) Server Computer/Main Computer**

- 1.) Check to see what version of Windows you are running. If you are running Vista Home, please upgrade to XP or Vista Business or Ultimate.
- 2.) Please check your other system requirements by visiting:  
[http://www.gopositive.com/index.php?option=com\\_content&task=view&id=49&Itemid=58](http://www.gopositive.com/index.php?option=com_content&task=view&id=49&Itemid=58)
- 3.) Connected to the internet via DSL or wireless. NO DIAL UP PLEASE.
- 4.) Check your computer for any Microsoft Updates by going to: [update.microsoft.com](http://update.microsoft.com)

- 5.) Download PRM full install from our website at [gopositive.com](http://gopositive.com) > POSitive Downloads > POSitive Retail Manager > POSitive Retail Manager Full Install.
- 6.) Download SQL Server Management Studio Express by going to the following link:  
<http://www.microsoft.com/downloads/details.aspx?FamilyId=C243A5AE-4BD1-4E3D-94B8-5A0F62BF7796&displaylang=en>

## 2.) Work Stations

- 1.) Please check our workstation requirements by visiting:  
[http://www.gopositive.com/index.php?option=com\\_content&task=view&id=49&Itemid=58](http://www.gopositive.com/index.php?option=com_content&task=view&id=49&Itemid=58)
- 2.) Check your computer for any Microsoft Updates by going to: [update.microsoft.com](http://update.microsoft.com)
- 3.) Download the SQL native client onto each workstation. Please go to the following link to download: <http://www.microsoft.com/downloads/details.aspx?FamilyId=50b97994-8453-4998-8226-fa42ec403d17&DisplayLang=en>

Go down to "Microsoft SQL Server Native Client" and download and install "[X86 Package](#)"

## Networking

POSitive Software does not support creating a network or maintaining one, this is up to you and your personal computer technician. We do, however, suggest you set your PRM network up the following way:

First, install POSitive on the server. Preferably, put it in it's own folder on the drive. For example, a good to place to install would be `c:\positive\PRM`.

Second, share the folder or drive one level above PRM folder. For example, if you use the path above, you would share the positive folder, NOT the PRM folder.

Then, on each of the workstations, you need to map a drive to that share on the server. We usually use drive p:.

Next, create a shortcut to PRM.exe on the desktop of each machine from the mapped drive.

Finally, make sure you are running the latest SQL Native Client on all computers including the server.

- 1) Go to <http://www.google.com>
- 2) Search "sql native client"
- 3) Choose "Microsoft SQL Server Native Client"
- 4) Choose "Get the SQL Native Client Redistributable Package"
- 5) Choose "X86 Package (sqlncli.msi)..." under "Microsoft SQL Server Native Client"

## **Conversion Con't.**

- 1.) Log into the customers computer. (Showmypc.com does great for short viewings, but will time out. I suggest using the customers logmein account if they have one, or putting their server computer on the company's account.)
- 2.) Open up PFW
- 3.) Delete the GL (if the customer agrees to this!)
- 4.) Check File Formats
- 5.) TPS Fix On All Files
- 6.) Verify Transactions
- 7.) Verify Inventory Files
- 8.) Conversion
- 9.) Open up PRM and register online