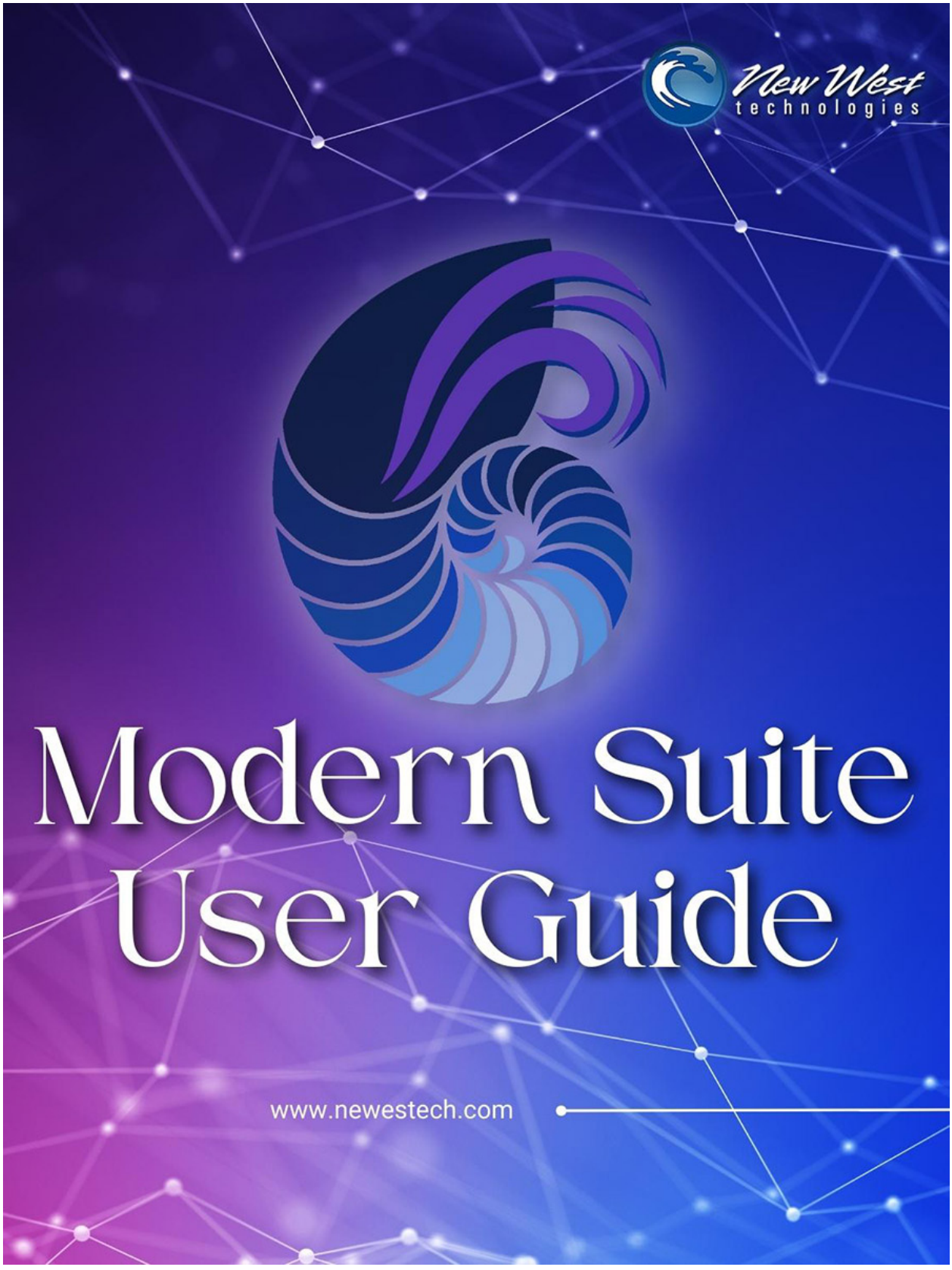
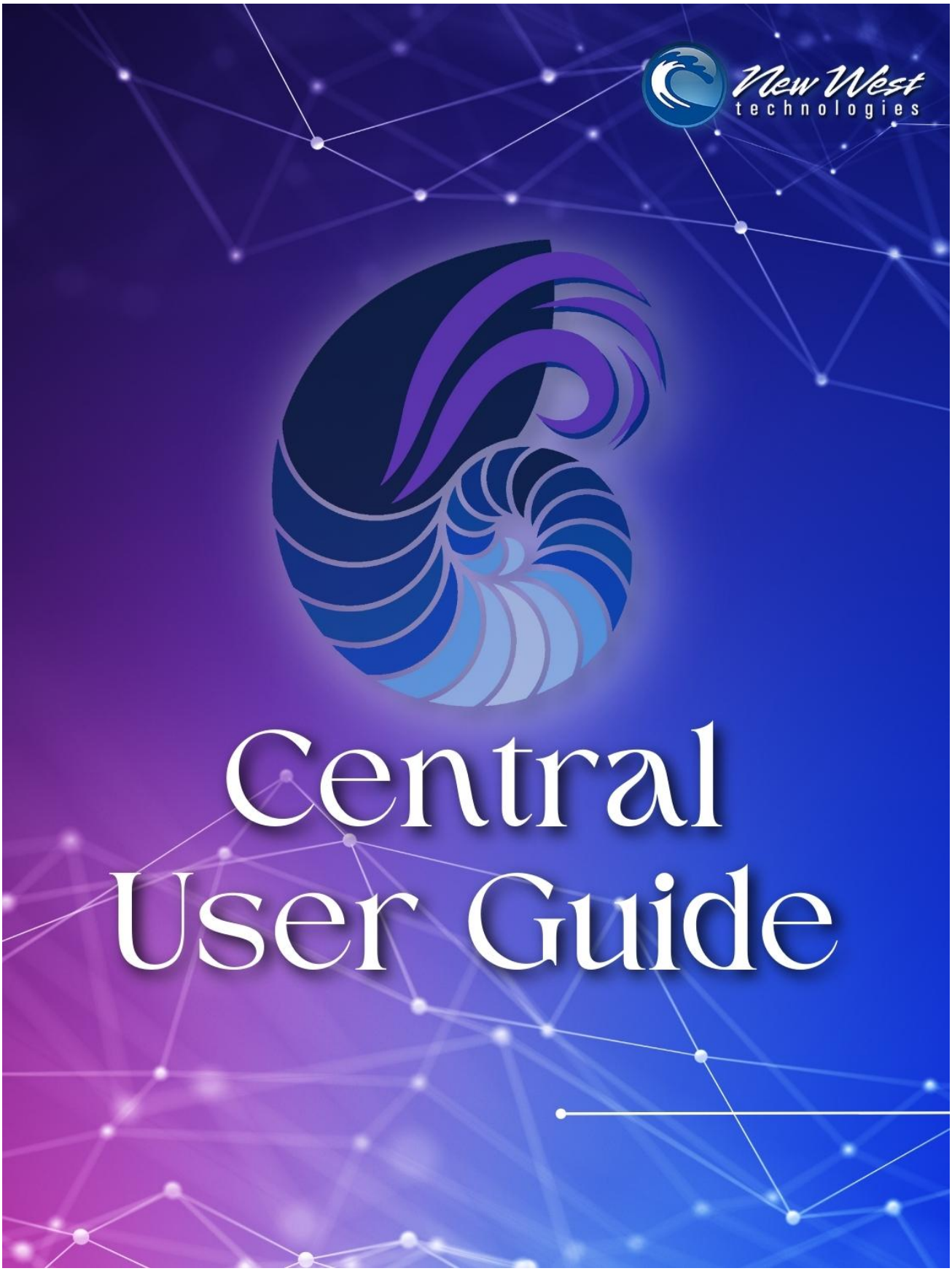

New West
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Modern Suite
User Guide
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Central User Guide



Central Requirements

The following prerequisites must be met prior to installing and running the application:

Supported Operating Systems

Windows 7 (32-bit/64-bit) Windows 8 (32-bit/64-bit) Windows 8.1 (32-bit /64-bit) Windows 10 (64-bit)

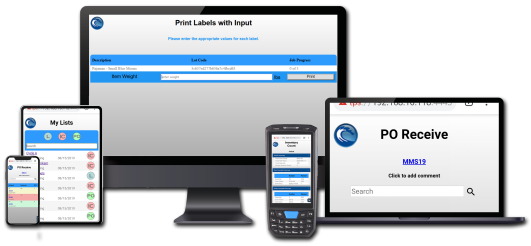
Software

- Retail Management Hero RMH Central (3.9.5 and above).
- Microsoft .NET Framework v4.5.1
- SQL 2008 R2 (Express), SQL 2012 (Express)* or SQL 2014 (Express)*

*Requires SQL Browser service to be running

Additional Hardware and software

- The Modern Suite client is web based and can be accessed from a wide range of modern desktop computers, laptops, tablets and smart phones.



Central Installation

Step #1

Locate and open the installation program. Double- click the icon to begin installation.



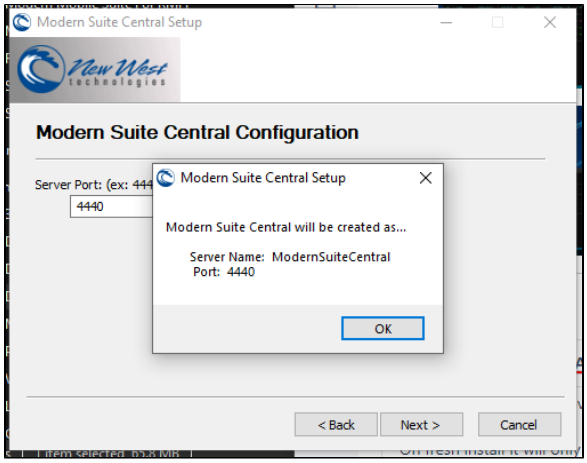
Step #2

Click **Next** to continue.



Step #3

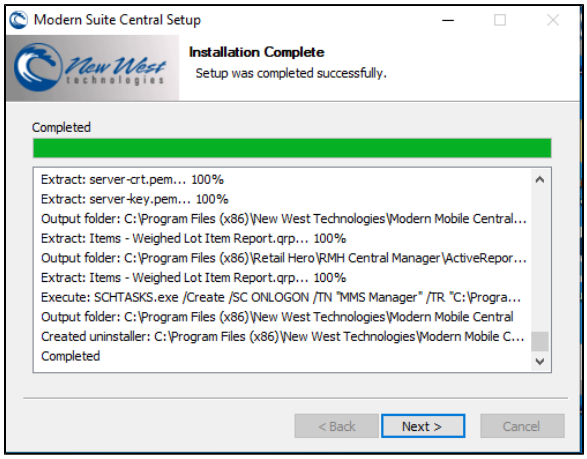
Select the server port number to be used by Modern Suite Central.



Step #4

The installation is complete.

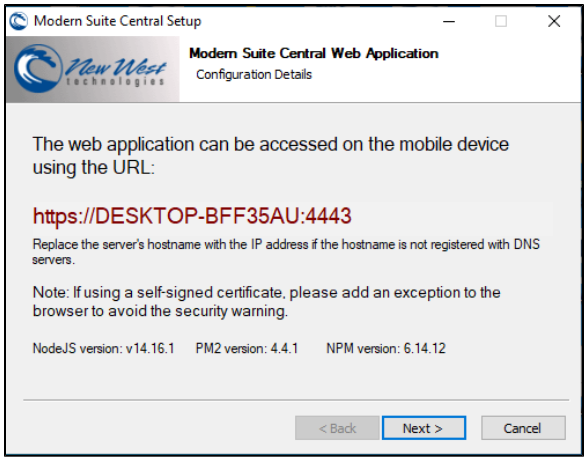
Click **Next** to continue.



Step #5

This window explains how to access the Modern Central client website after the installation has completed.

Click **Next** to continue.



Step #6

Click **Finish** to complete the installation process. Leave the check box checked you wish to launch the Modern Central website.

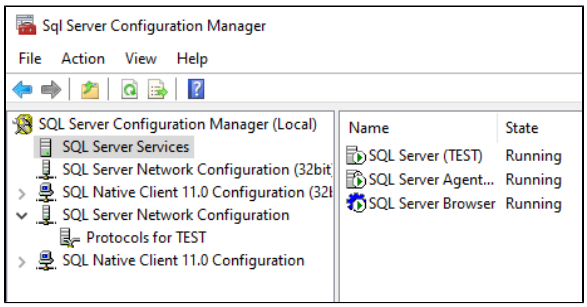


Optional Configuration Options:

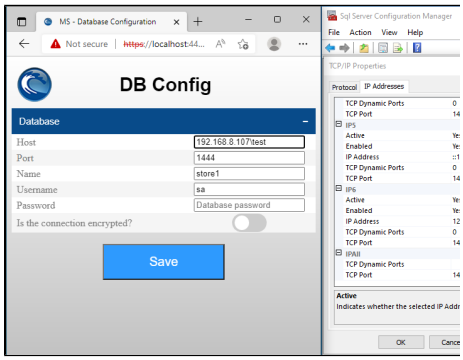
SQL Named Instance support

Sequelize requires the SQL server browser running for named instances. This applies to both SQL servers running on the local machine and remote machine.

Make sure the SQL server Brower is turned on and running. If not, enable SQL server browser and restart SQL servers.



In this example both a SQL Named Instance and non-standard port are used:

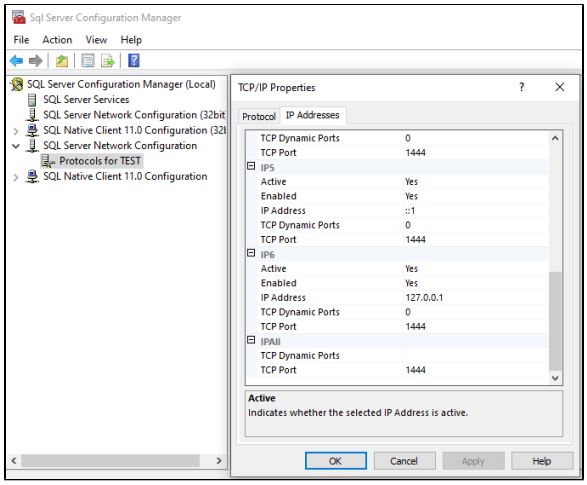


Non-standard Port support

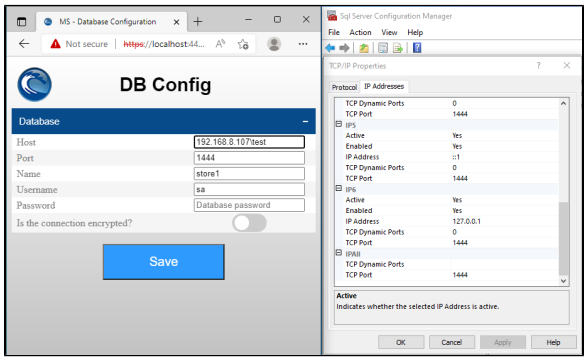
To configure non-standard ports for named instances, launch SQL Server Configuration Manager and expand SQL server network configuration.

Make sure TCP/IP is enabled for each protocol. In the TCP/IP properties, go to IPALL at the bottom node in the list.

Clear the TCP Dynamic Ports field (should be empty) and enter a number in the TCP Port field. Now restart the SQL servers.



In this example both a SQL Named Instance and non-standard port are used:



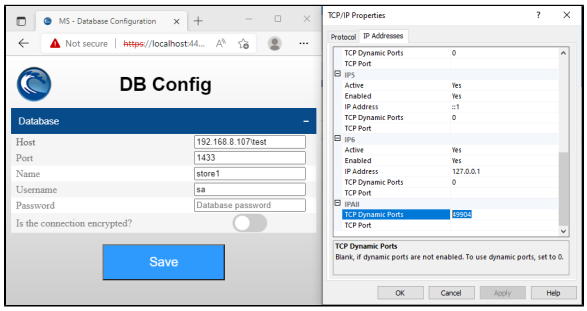
Dynamic Port support

To configure a dynamic ports for named instances, launch SQL Server Configuration Manager and navigate to SQL server network configuration. Make sure TCP/IP is enabled for each protocol.

In the TCP/IP properties, go to the IPALL (bottom node in the list) and enter 0 in the TCP Dynamic Ports field. Clear the TCP port field (should be empty).

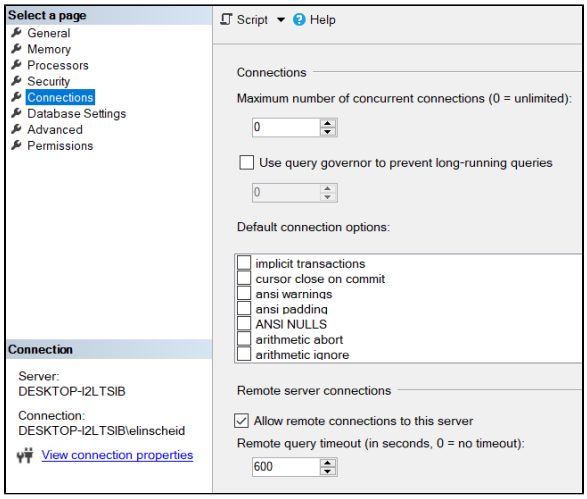
Restart SQL servers, which will assign a random port numbers to the named SQL instances.

In the example to the right, you can see that a dynamic port of 49904 was assigned, although in MS/C there is no need to specify that port number.

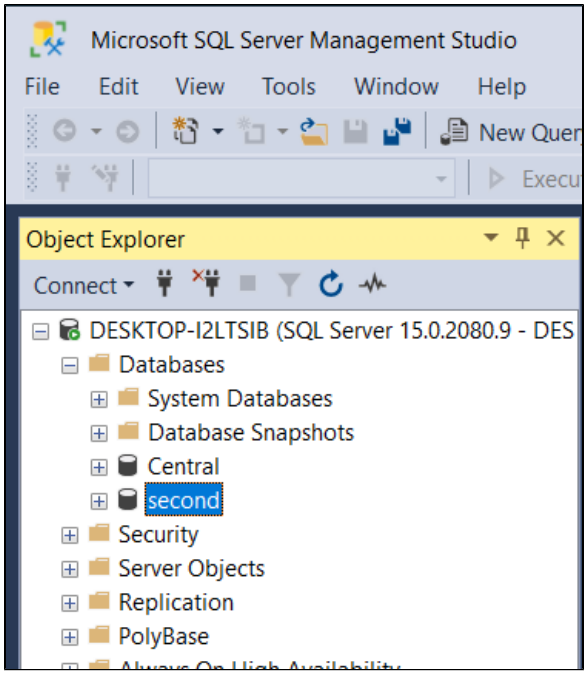


Remote SQL Database support

From the server hosting the SQL database, launch SQL Server Management Studio. Make sure the option "Allow remote connections to this server" is checked in SQL server connection properties.

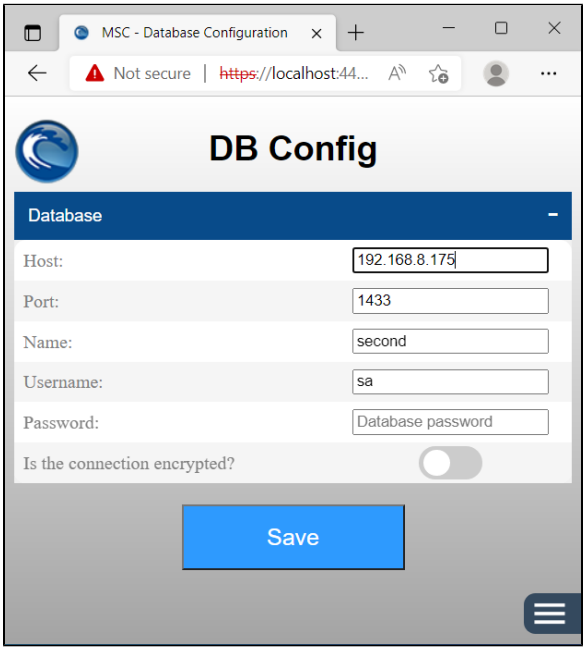


In the example to the right, you can see a database named 'second' is hosted on one computer.



And in this picture, you can see the MSC configuration window where it has connected to database 'second'.

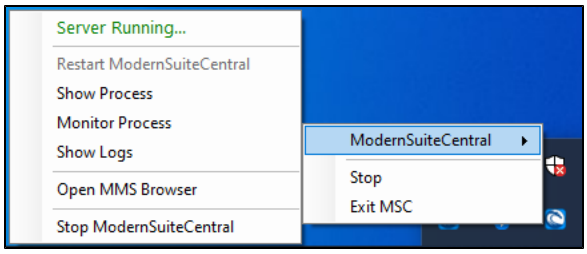
If the connection to the remote database is refused, turn off the firewalls temporary. If the connection works then you may need a firewall exception configured.



MSC Process Manager

Note: If you have MSC and MS Stores installed on the same computer then you will see two MS tray icons, one for MSC and one for MS.

The MSC Process Manager task tray icon will appear on the server computer desktop screen after the installation is completed. Right click on the icon in the windows task tray.



The menu that appears shows:

- ModernSuiteCentral: View further options
- Stop: this will stop the MSC service.
- Exit MSC: This will close out of the MSC Process Manager.

When you click on the option ModernSuitecentral you will see the following options:

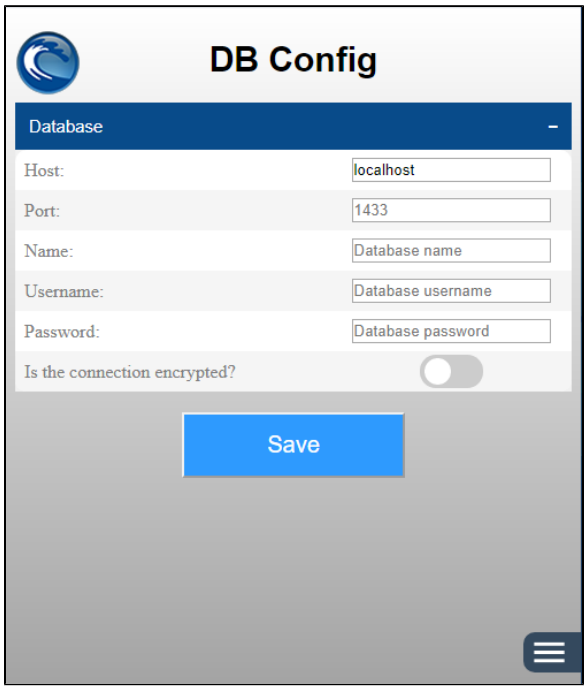
- Server status: Simply shows if the MSC service is actively running or stopped.
- Restart ModernSuitecentral: Use this option if the MSC service is not currently running.
- Show Process: Shows window indicating the status of the web server running MSC.
- Monitor Process: Shows PM2 dashboard window with version numbers and resource information.
- Show Logs: Shows the latest PM2 server logs.
- Open MMS Browser: This launches the MS web client from the server web browser
- Stop (Name of Store) This will stop only the MS store instance selected, any other store instances will remain running.

Logging Into MSC

Step #1

When you first access the Modern Suite Central client website you will be prompted to enter your Central database information.

- Host: The address of the computer running the MSC server software. In most cases you can leave "localhost" in this field.
- Port: The port number of the Central server software. In most cases you can leave "1433" in this field.
- Name: The name of the Central database.
- Username: The username used to log into the SQL Server.
- Password: The password for the username used to log into the SQL Server.

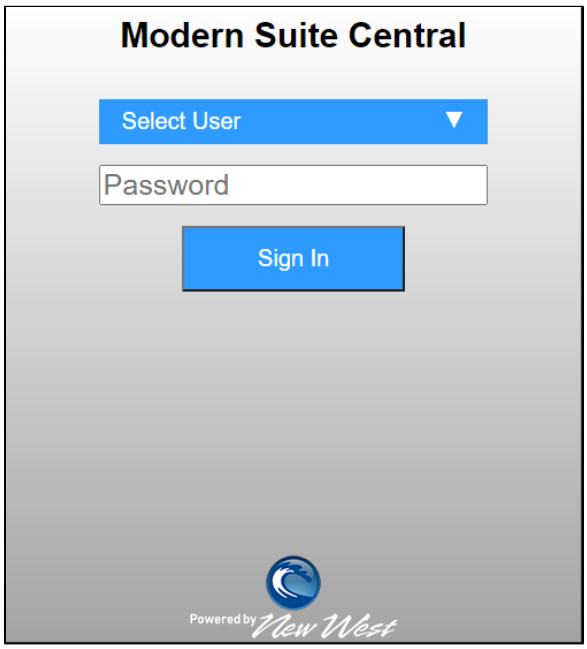


Step #2

The cashier's user names and passwords found in the Central database 'Cashiers' table are the credentials used to log into MSC.

Administration functionality that will only be accessible by RMH Central accounts with a Manager Role - Full Access.





Step #3

The MSC Main Menu has four main functions:

- Administration
- Store Connections
- Sync Errors
- Cashiers
- Worksheet 51

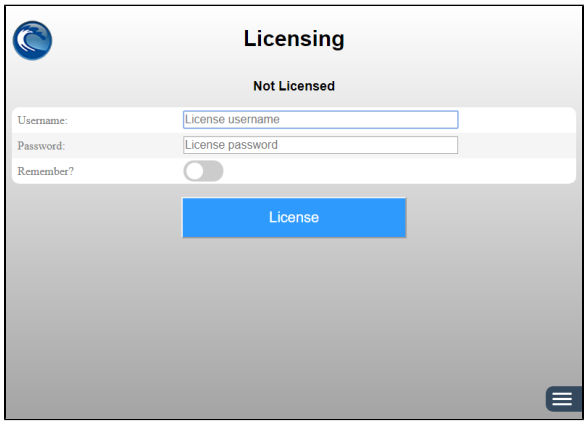
The software is in trial mode after the initial installation. To license and activate the software click on the link "Follow this link to license your copy".



Step #4

At the licensing screen enter the e-mail address and password you received from New West Technologies after you purchased your Modern Suite Central license.

Then click the **License** button.



Central Administration

Step #1

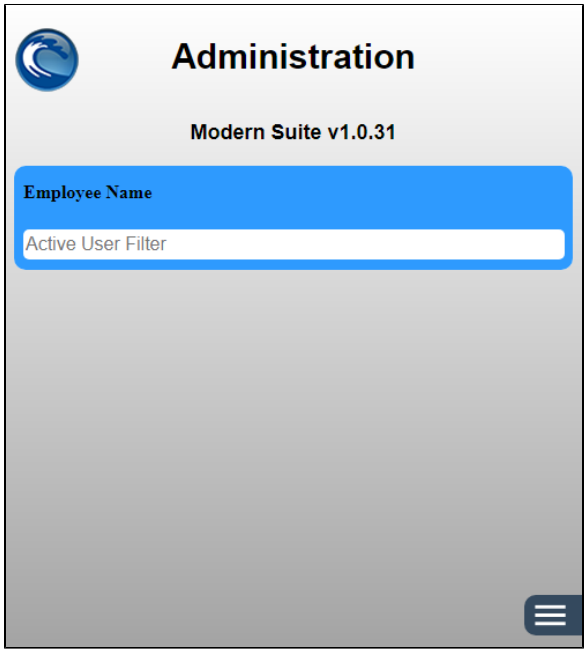
To view the different Administration options click on the **Administration** button from the main MSC window.



Step #2

In the Administration window you will see the current version of the MSC software installed.

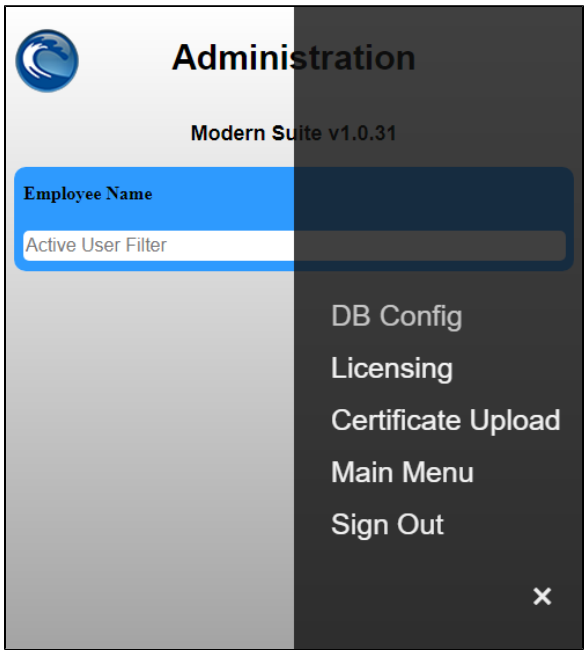
Below that you will see a list of Employees/Cashiers currently logged into the MSC software. If a manager wishes to manually log someone out of MSC they can click on the **Sign Out** button to the right of the employee's name.



Step #3

If you click on the Menu button at the bottom right of the screen you will have the following options:

- **DB Config** (Takes you to the database configuration window)
- **Licensing** (Takes you to the licensing configuration window)
- **Certificate Upload** (Takes you to the certificate configuration window)
- **Main Menu** (Takes you back to the Main Menu window)
- **Sign Out** (Logs you out of the MSC software)

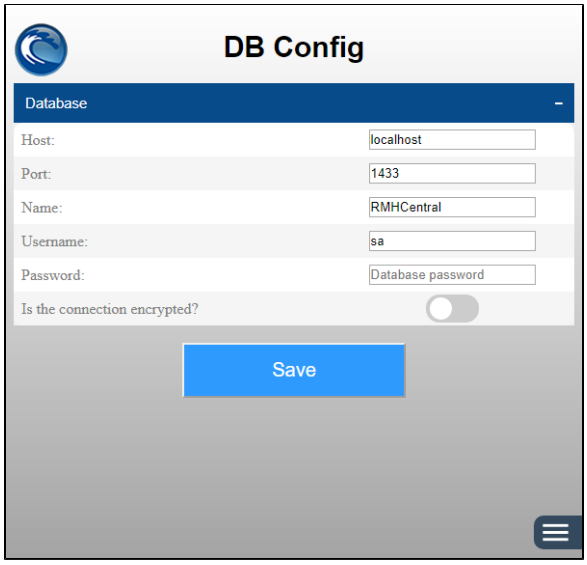


Step #4

DB Config

- Host: The address of the computer running the MSC server software. In most cases you can leave "localhost" in this field.
- Port: The port number of the Central server software. In most cases you can leave "1433" in this field.
- Name: The name of the Central database.
- Username: The username used to log into the SQL Server.
- Password: The password for the username used to log into the SQL Server.

Click the **Save** button to save any changes made.

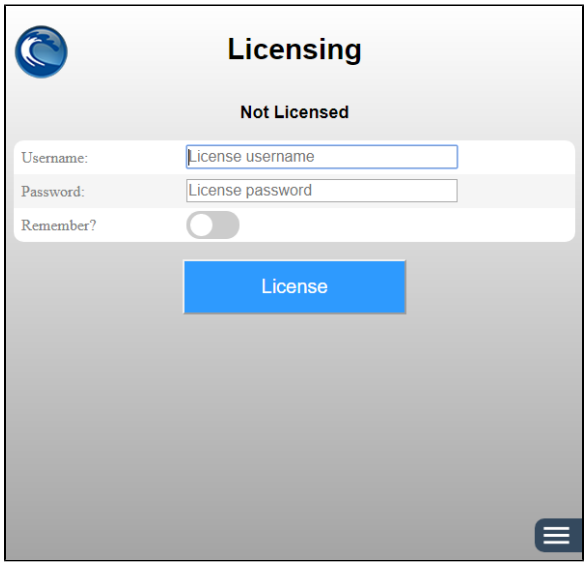


Step #5

Licensing

You can also license the software from this window. Enter the e-mail address and password you received from New West Technologies after you purchased your Modern Suite Central license.

Then click the **License** button.



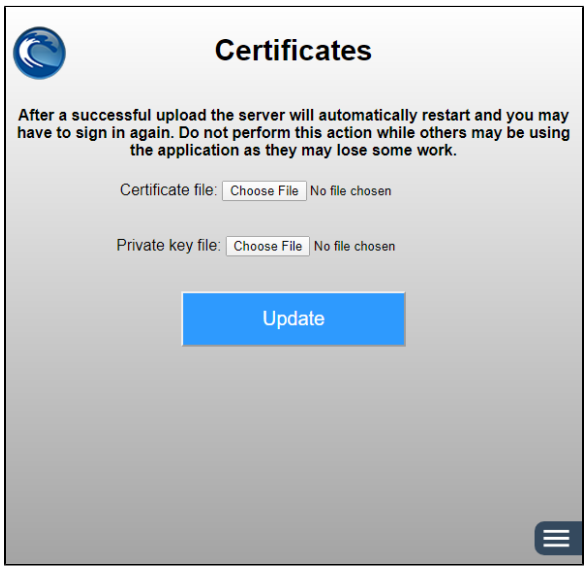
Step #6

Certificates

The MS Client allows both Certificate Files and Private Key Files to be uploaded to the MS server for added security.

Depending on which file you wish to use, simply click on the Choose File button, manually select the file and then click **Update**.

After a successful update the server will automatically restart and you may have to sign in again. Do not perform this action while others may be using the application as they may lose some work.



Store Connections

Step #1

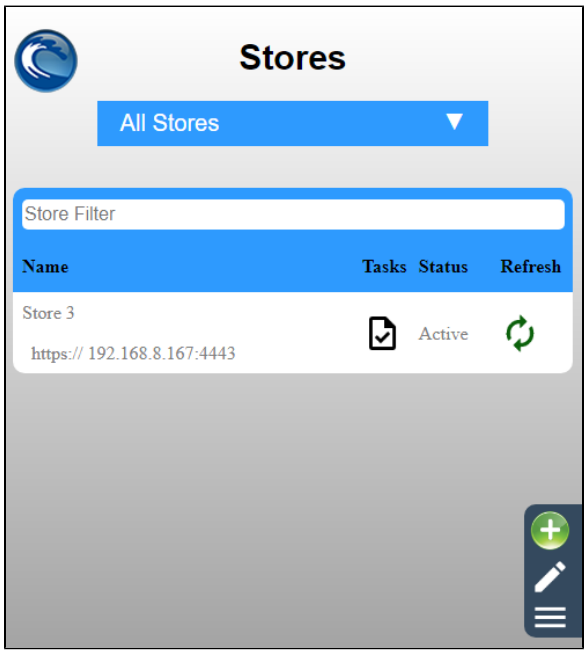
To view or modify a connection between MSC and MS click on the **Store Connections** button.



Step #2

At the Stores window you can view the current sync status of stores connecting to MSC. Click on the green arrows to refresh the connect and update the connection status.

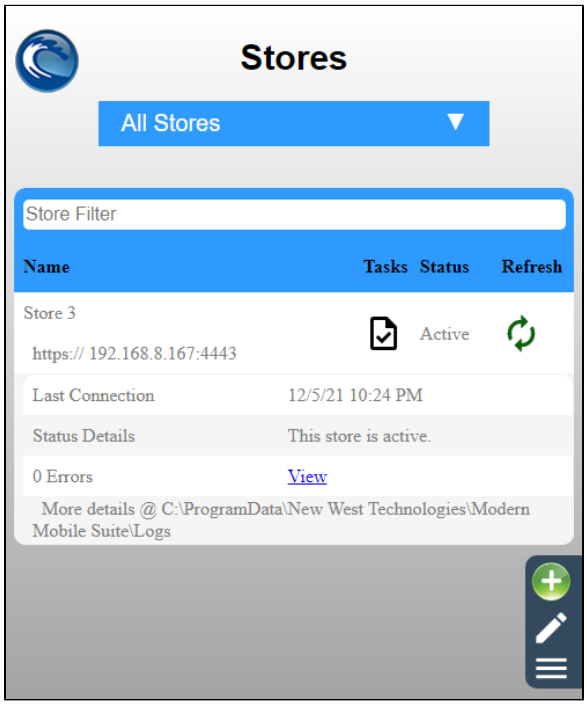
You can also create or remove store connections at this window.



Step #3

Click on an active store and the store details will expand to show information such as:

- Last Connection: The last time the store and central connected to sync information
- Status Details: If the store is active or in another state
- Error: You can click on the View button to see recorded errors. Alternatively you can also go to the Windows file path listed to see the log text file on the computer where MSC is hosted.



Step #4

To create a new Store Connection click on the green plus button at the bottom right of the screen.

From the Select Store drop down menu click on the store of your choice.

Blow that you must enter the HTTPS address of the store you wish to connect to.

Example: https://192.168.254.46:4443

In this example you will see the IP address of the remote store followed by the port number. The port number will usually be '4443'.

Click the **Create** button to save the new settings.



Step #5

To remove a store from this window click on the pencil icon at the bottom right of the window. The icon will turn yellow and you will notice that any currently configured store connections will now have a trash can icon to the right of the store IP address.

Click on the trash can icon to remove any stores and then click on the pencil icon a second time to save the settings.

Click on the Menu button at the bottom right of the screen to either return back to the Main Menu or else Sign Out.



Sync Errors

Step #1

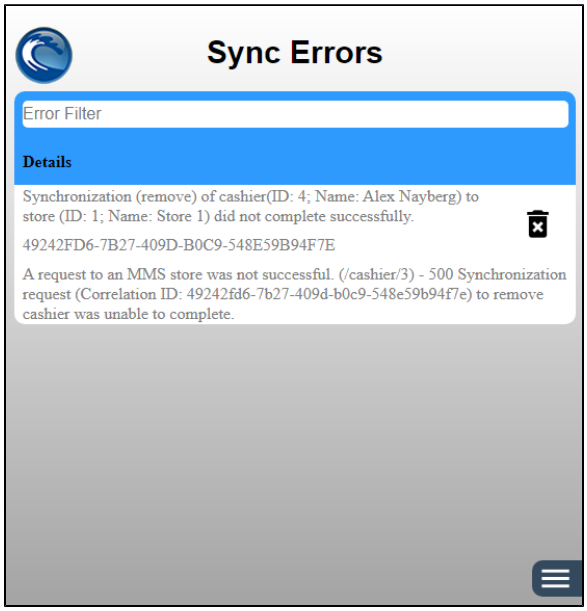
To view any sync errors between MSC and MS running at your stores click on the Sync Errors.



Step #2

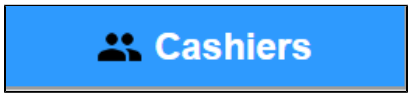
Any sync errors will be show in this window. If you wish to remove the errors to clean up this window simply click on the trash can icon to the right of the error.

Click on the Menu button at the bottom right of the screen to either return to the Main Menu or else log out of MSC.



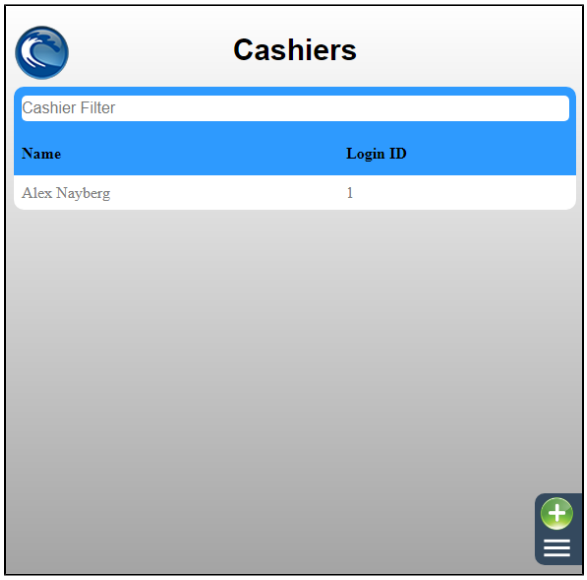
Edit Cashiers

To make modifications to a cashier click on the **Cashiers** button at the main menu.



In the Cashiers window you will see a list of cashiers in your Central database.

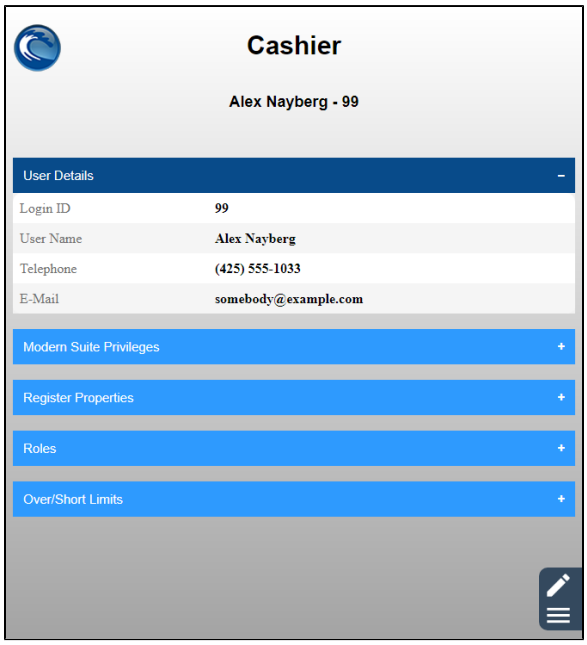
Click on the cashier's name to view the different settings you can configure.



There are five expandable tabs that contain much of the same settings you would see in a cashier's profile in RMH Central Manager.

- User Details
- Mobile Suite Privileges
- Registers Properties
- Roles
- Over/Short Limits

To start editing the Cashier settings first click on the Pencil button at the bottom right of the screen. The pencil button will change to an yellow color and the different fields can now be changed. Once you have made the desired changes click on the pencil button again to save your work.

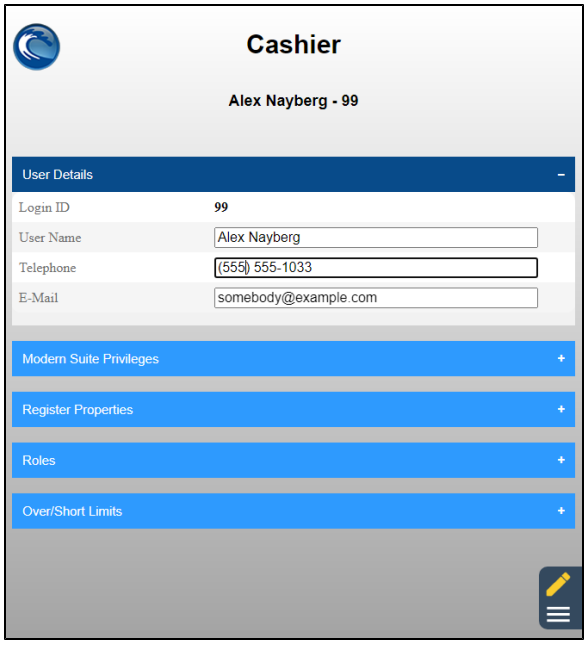


User Details:

Here you can edit the following

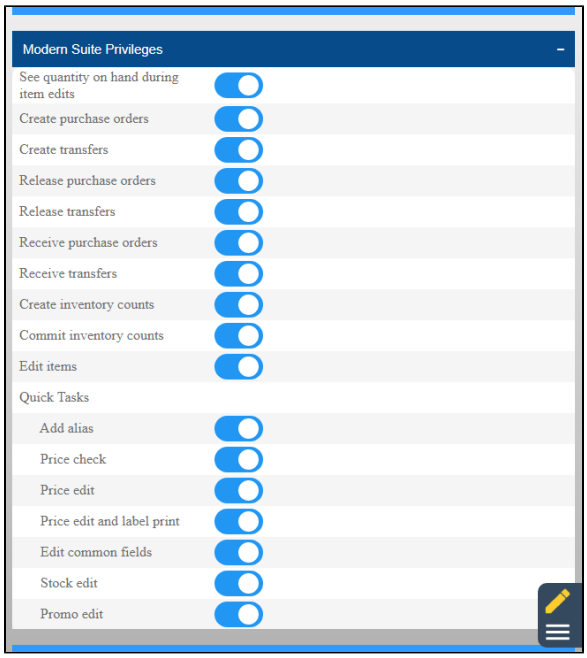
- Login ID
- User Name
- Telephone
- E-Mail

- Reset Password (Toggle this to force a password reset the next time the cashier logs into MS)



Mobile Suite Privileges: Privileges specific to Modern Suite functionality.

Please note: A cashier with a Manager Role with **Full Access** (or equivalent) will already have full access to the functions outlined in this tab. This Privileges tab allows for a more granular approach to Modern Suite permissions for non-managers or people without full access rights.



- **See quantity on hand during item edits:** This privilege allows the user to see quantity on hand in the product details page, whether or not the app config setting is set.
- **Create purchase orders:** This privilege allows the user to create purchase orders. This involves scoping from the main menu, as well as converting a generic list. This privilege also grants access to non released PO pages.
- **Create transfers:** This privilege allows the user to create transfers. This involves scoping from the main menu, as well as converting a generic list. This privilege also grants access to non released transfers pages.
- **Release purchase orders:** This privilege grants the ability to release PO's once they have been created. This is found in the nav menu of the PO Create screen.
- **Release transfers:** This privilege grants the ability to release transfers once they have been created. This is found in the nav menu of the Transfer Create screen.
- **Receive purchase orders:** This privilege grants the user to the PO receive screen. This involves all functionality with this page too. If a user has the release privilege but not the receive privilege, they will be redirected to the product lists screen after they release the order.
- **Receive Transfers:** This privilege grants the user to the Transfer receive screen. This involves all functionality with this page too. If a user has the release privilege but not the receive privilege, they will be redirected to the product lists screen after they release the transfer.
- **Create inventory counts:** This privilege grants the user to create ICs. This involves scoping from the main menu, as well as converting a generic list. (Note accessing the IC page has no restriction once created).
- **Commit inventory counts:** This privilege grants the user to commit ICs. This includes full commits (when permitted from app config) and cycle commits. These can be found in the nav menu of the IC review screen.
- **Edit items:** This privilege grants the user to edit items in the Product Details screen.

Quick Tasks:

Quick Tasks grant the user to use the various quick tasks. The following Quick Task options can be enabled/disabled:

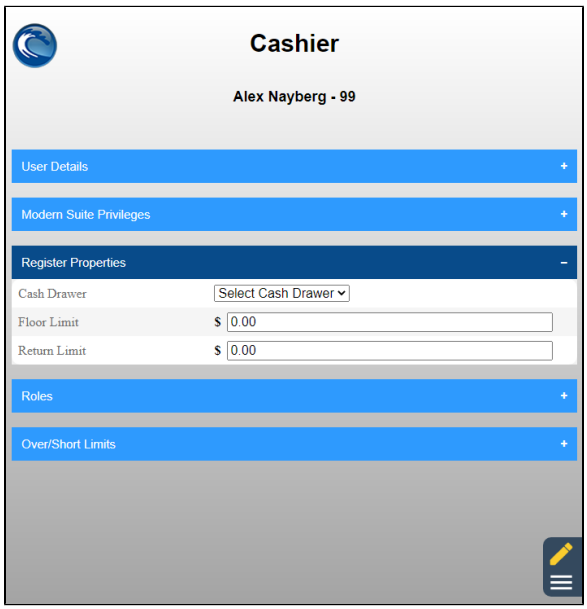
- **Add Alias**
- **Price Check**
- **Price Edit**
- **Price Edit and Label Print**
- **Edit Common Fields**
- **Stock Edit**
- **Promo Edit**

Please Note: **Quick Tasks** are independent from the regular privileges. For example, if the Price Edit Quick Task were enabled, the user would be able to use that specific Quick Task regardless of whether the Edit Items option was enabled in general.



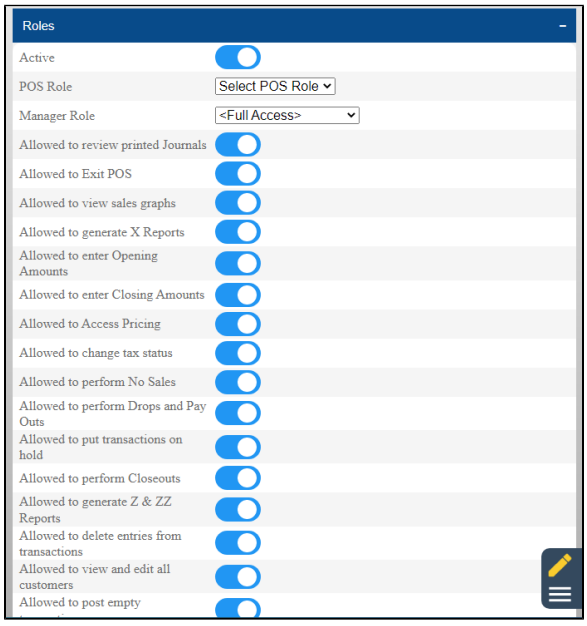
Register Properties:

- **Cash Drawer:** Select the cash drawer that the cashier will use.
- **Floor Limit:** Select the dollar limit for a transaction.
- **Return Limit:** Select the dollar limit for a return transaction.



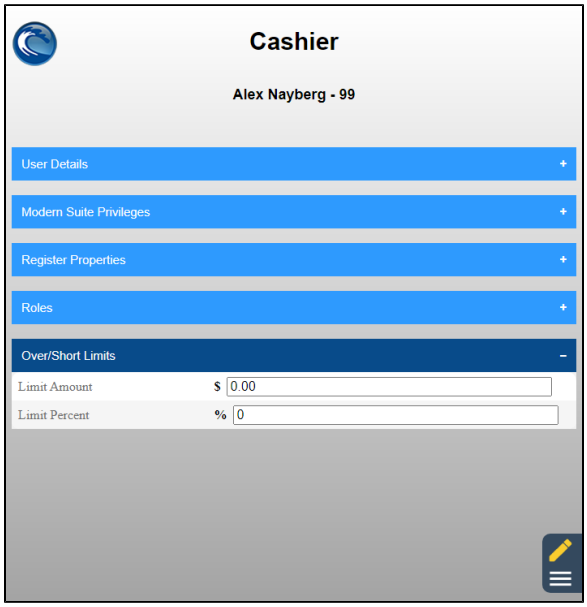
Roles:

This tab contains the same POS cashier permissions found in RMH Store/Central Manager.



Over/Short Limits:

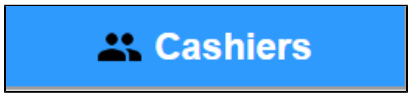
Just like in RMH Store/Central Manager; set the amount of over/short error allowed for the cashier when closing batches (generating Z or ZZ reports).



Create New Cashiers

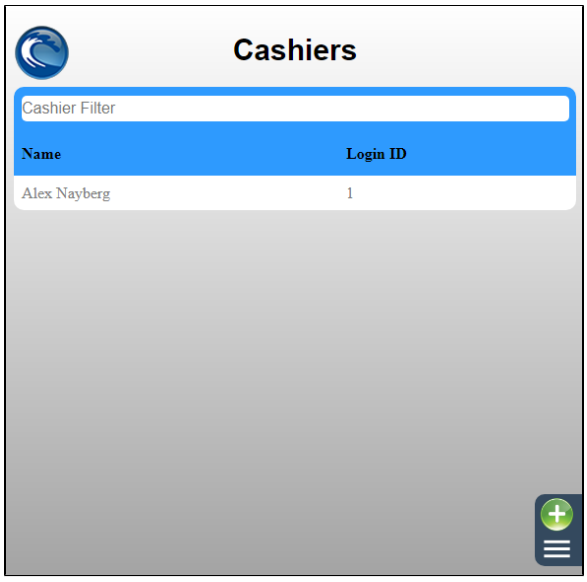
Step #1

To create a new cashier first click on the **Cashiers** button from the main menu.



Step #2

In the Cashiers window click on the green plus button at the bottom right of the screen.



Step #3

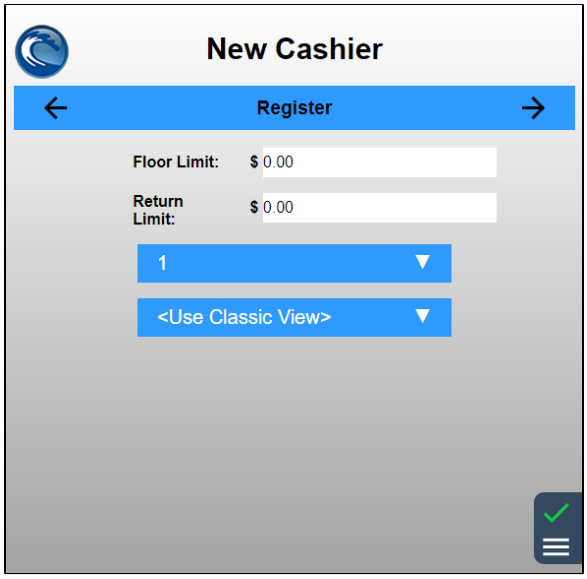
The New Cashier window has a series of tabs that can be viewed by clicking on the left and right arrow buttons at the top of the page.

In the User tab enter the new cashier's Login ID, User Name, Telephone number and e-mail address.



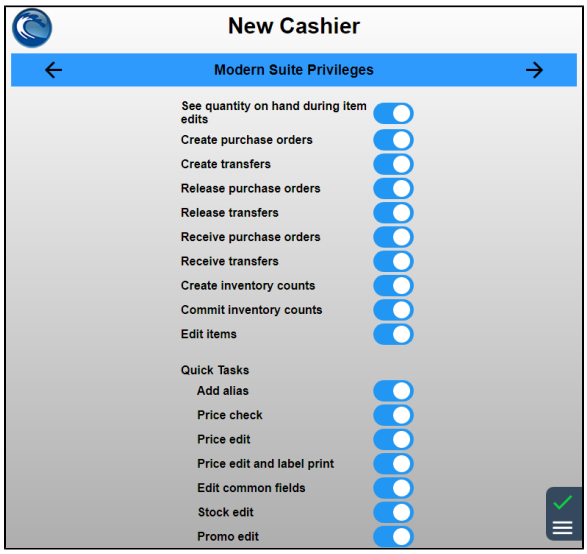
Step #4

In the Register tab enter the cashier's Floor Limit (dollar amount) and Return Limit (dollar amount), then the Cash Drawer selection.



Mobile Suite Privileges: Privileges specific to Modern Suite functionality.

Please note: A cashier with a Manager Role with **Full Access** (or equivalent) will already have full access to the functions outlined in this tab. This Privileges tab allows for a more granular approach to Modern Suite permissions for non-managers or people without full access rights.



- **See quantity on hand during item edits**
- **Create purchase orders**
- **Create transfers**
- **Release purchase orders**
- **Release transfers**
- **Receive purchase orders**
- **Receive Transfers**
- **Create inventory counts**
- **Commit inventory counts**
- **Edit items**

Quick Task Privileges:

Quick Tasks grant the user to use the various quick tasks. The following Quick Task options can be enabled/disabled:

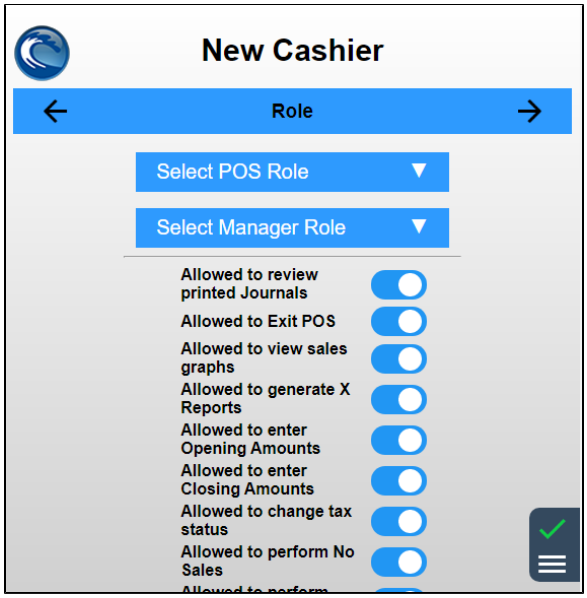
- **Add Alias**
- **Price Check**
- **Price Edit**
- **Price Edit and Label Print**
- **Edit Common Fields**
- **Stock Edit**
- **Promo Edit**

Please Note: **Quick Tasks** are independent from the regular privileges. For example, if the Price Edit Quick Task were enabled, the user would be able to use that specific Quick Task regardless of whether the Edit Items option was enabled in general.

Step #5

In the Role tab you can choose which POS Role or Manager Role the new cashier will have. Below that you can enable a series of permissions matching the permissions you would see in RMH Central Manager.

Please note that only a Manager can assign another person as a Manager and only an Administrator can assign another person as an Administrator.



Step #6

In the Over/Short Limits tab you can enter the dollar amount for the Limit Amount and Limit Percent.

After you have configured the different settings for the new cashier click on the **green check mark** button at the bottom right of the screen.



Step #7

This will take you to the Manage Sync screen. Here you can select which stores this new cashier can be synced up with.

From the drop down menu select the desired store and then click on the **Add** button.
If you need to remove a store sync simply click on the trash can button to the right of the store name.

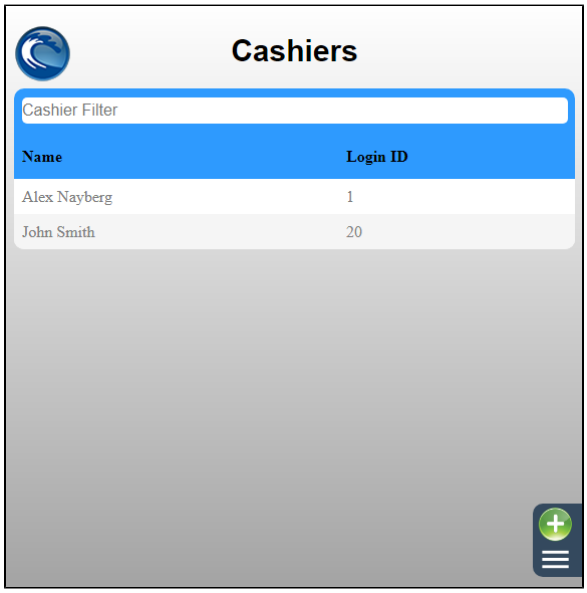
Finally, click on the **green check mark button** to save your sync settings.



Step #8

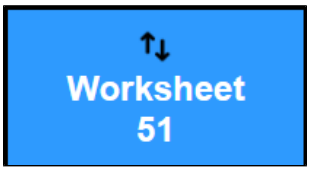
The newly created cashier will now be listed in the Cashiers window.

Click on the **Menu** button to return to the Main Menu or else log out of MSC.



Worksheet 51

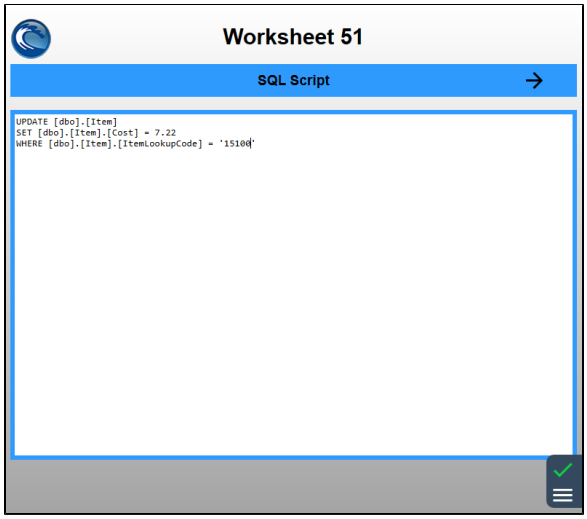
MS Worksheet 51 allows a user to run a SQL Script at selected Stores or All Stores. From the MSC menu, click on the Worksheet 51 button to continue.



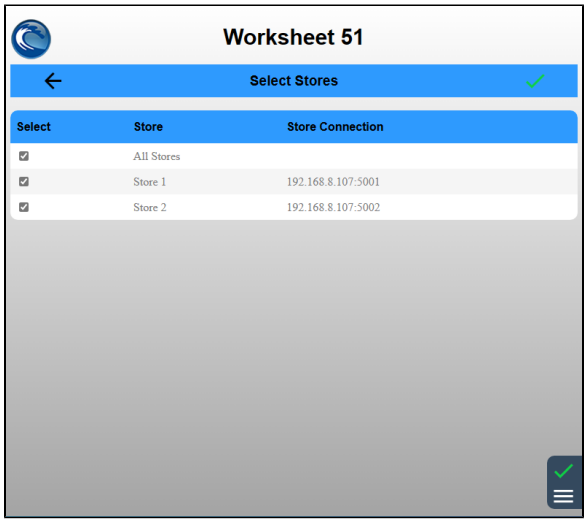
In the Worksheet 51 window you can type in the desired SQL script.

In the sample SQL script to the right, the item '15100' will have it's cost changed to 7.22.

Next click on the green arrow at the top right corner of the screen to choose which stores databases this script will be applied to.

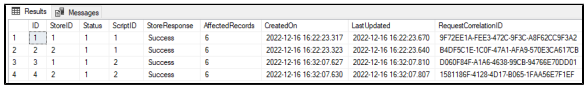


Once you have checked the boxes next to the desired stores, click on the green check mark at the bottom right of the screen to apply the changes.

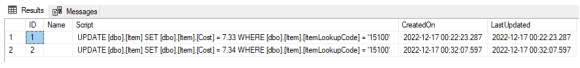


After the scripts have been applied to the store databases, you can view the Worksheet51 SQL tables to verify the data was updated correctly.

In the **Central database**, the **Worksheet51Log** table will show you the history of the worksheet scripts ran at each store.



Also you will see the **Worksheet51Script** table. This table will show you the exact scripts that were ran.



Finally, at the **Store database**, you will see a similar **Worksheet51Log** table which shows the history of the worksheet scripts ran against this specific store.

