Converting from version 5 to version 6

This document will take you through the process of converting from POS Pizza v5.x to version 6. Please read this document in its entirety before proceeding with the actual conversion process. The overall conversion process is not very difficult, but getting things right the first time saves you from a lot of frustration.

Things You should know

- POS Pizza 6 comes in 3 different variations compared to v5's single variation. There are 2 full versions (client-server and stand-alone) and a stand-alone free version. You can use the stand-alone free version right now to test converting your data and get an idea of how the new version functions before upgrading to the full version.
- You can install POS Pizza 6 on the same machines as POS Pizza 5 and they won't interfere with each other at all since they install to completely different locations, and work in different ways
- POS Pizza 6's database creation tool will convert data from a POS Pizza 5 backup file made from within v5's Management Utility Program. POS Pizza 5's current live data will not be altered in any way.

- POS Pizza 6 eliminates the old "Supervisor" and "Manager" password system used to access the Management Utility Program. Version 6 uses employee accounts to access every part of the program. Employee accounts are extremely flexible and give you complete control in version 6.
- An employee using the Management Utility Program in POS Pizza 6 can never edit his or her own account. See the "POS Pizza v6 Security" document for full details
- POS Pizza 6 does not require you to "Close Day" any longer. Each station is handled as a single unit so you can close and open each station independently of each other using the "Open/Close Shift" buttons inside of the Main POS Module. This may take a little getting used to at first, but most of our users greatly prefer this method over the "whole store" method used in previous versions of the software. This method holds each cashier more accountable for their own drawer. You can open and close shifts as often (or as little) as you like. Reports still view all data from all registers.
- POS Pizza 6 does not use a license system like the one used in version 5, so changing machines and managing your network are now easier than ever. No more expirations, no more renewals, no more contacting support every time a machine crashes. Just replace the computer, install the software on it, and you're good to go.
- In multi-user environments POS Pizza 6 uses a true client/server architecture. This means that you install server software on one machine, and clients on all of the others. No more drive mappings, or creating shortcuts on each workstation. This also makes remotely managing your system over the Internet possible without the use of any additional software or services.
- Single-station environments can use the client-server version on one station, or they can use the stand-alone edition for a simpler cleaner install. You get access to both versions when you purchase a license, and can use either version depending on what best meets your needs.
- Changing from one version of POS Pizza 6 to another is as easy as copying a single database file (or backup) from one computer (or folder) to another.
- POS Pizza 6 uses a single file for the entire database now. This file is an SQLite file which is an open-source database engine, so this means there are loads of utilities available throughout the internet that can access your database.
- POS Pizza 6 allows running more than 1 drivers console at a time

First Steps

Data Backup and Conversion

Before getting started you should decide which version of POS Pizza 6 that you will need. Most will choose the [CS] (Client-Server) version for the simple fact that they have more than 1 computer in their system.

1. Download and install the software using the "POS Pizza 6 Manager Docs" as your guide for the version that you will be installing. This process is fairly simple especially since you don't have to deal with drive mappings any longer.

2. Shut down any stations running version 5, and run daily maintenance.
3. On the machine where your server is located (or on your only machine if you installed one of the stand-alone versions) launch POS Pizza 5's Management Utility Program.
4. Select "File"
5. Select "Backup / Restore Data"
6. Keep the backup drive as C:
7. Click the "Backup" button
8. after your backup completes, close the backup utility
9. If you have launched the management utility here from POS Pizza, exit this node completely too, and re-launch the management utility directly. If there is no icon on your desktop for this then open "My Computer" and find your mapped drive "POSPizza on xxxxxxxx" and open it. Find the file called Manager.exe" and double-click it to launch it. If you don't see any network drives, then you may be able to find it on your Windows "Start" menu.
10. Now that you are in the management utility with everything else stopped, click on the "Maintenance" menu and select "Database Maintenance Tool"
11. Find the file called "PizzCust.PZ5" in the list (usually 2nd one down) and highlight it
12. Click the "Recover" button since we want to force a full recovery to ensure that your customer data is in good shape. The customer file is the most likely to become corrupted
13. Once this process ends, find the file "PizzPhones.PZ5" in the list (near the bottom)
14. Click the "Rebuild" button, and let it rebuild your phones file
15. After this completes, click the red "X" button to exit this tool.
16. Go to the "File" menu and select "Backup / Restore Data" once again
17. Leave the backup drive as C: and click "Backup"
18. Once this completes, exit the Management Utility

At this point you now have 2 backups made, one before the recover/rebuild process, and one after. The first backup was made primarily as a safety net in case something went wrong during the recover/rebuild process. Make a note of today's date. POS Pizza 5's backup files are named by the date and revision. So Jan 10, 2011's first backup would be called: **POS11011001.BKP**. The first 2 digits are the last 2 digits of the year, the next 2 are the month, the 2 after that the date, and the last 2 are the revision (or backup number for that day). You will use the highest numbered one for today's date in the next guide that can be found in the "POS Pizza 6 Manager Docs" on page 10. Go there now, and proceed with step 3 on that list, since we already covered the first 2. When you select the backup find the file located on the C: drive in a folder called **POSPZ_BACKUPS**. Continue with that guide now.

Checking the converted data

Now your data should all be converted and in POS Pizza 6, but there are some things that you will want to check and configure before using the system.

- Delivery Fees: POS Pizza 6 does not use delivery zones like version 5 did, so your delivery fees were NOT converted. You will need to create a simple rule to have a standard delivery fee, and

possibly later configure complex rules for a multiple fee structure. See the "Add a Delivery Charge" section of the "POS Pizza 6 Manager Docs" on pg. 36 for details.

- Local Machine Configs: POS Pizza 6 did not translate the local configs from version 5 because they were stored globally, and version 6 truly stores these locally. You will need to go to each machine and startup POS Pizza 5's Management Utility on the machine and copy its settings to the POS Pizza 6 Management Utility for local settings. Make sure that you select the correct machine in version 5 since you can see them all. POS Pizza 6 only sees the current machine when in its local config.

- Print Times: POS Pizza 6 now gives you complete control over when each of the 4 receipt printers will print (eg. Initial order entry, edit, and cash out). To make this the same as how version 5 worked, go into the management utility and select "Configure" -> "Global System Config" and then select the "Printing Options" tab. At the bottom of this page, check ALL 12 boxes and save. This will make it work exactly like version 5 did. You can always reconfigure this later. The settings on the top part of this page will have been imported from your original configuration.

These are the most important areas that the conversion process did not handle, so once these are changed, you may now want to take a look at the "new" features and configure them and tweak others to your tastes. Be sure to use the "POS Pizza 6 Manager Docs" for various tasks. Reading the document's headings will also give you a good idea of many of the new features that 6 has to offer.

Trouble Spots

These are the areas that are most likely to give you trouble while setting up POS Pizza 6.

- Network Firewall Settings: POS Pizza 6 is client-server so that means that no drives are shared between the client and the server. TCP/IP is the only thing that is used for the client to communicate with the server. Many firewalls can hinder this process or make certain things (like auto-detect) fail because they see it as some sort of threat. Make sure that you view the "Read Me" document that installed with your server and follow the steps in it regarding firewall settings. These are fairly easy and will save you loads of trouble later if followed correctly.

- Remote Access: Setting up remote access requires knowledge of router configurations and TCP/IP networks and port forwarding. All of the needed port information is in the "Read Me" document installed with your server. Step-by-step instructions can also be found in the "POS Pizza 6 Manager Docs" that will guide you (or a hired installer) through this process.

You may also want to search our forums for information about POS Pizza 6, since there is a lot of information there from other users. As always you can also contact Summit Computer Networks tech support department.

Good Luck! We are sure that you will really like POS Pizza 6's new features and functionality!