

Archive Agent Manual for V7

Last Updated on February 27, 2007

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Text Fonts and Symbols used in this manual

Special information in this manual is identified by the following kinds of formatting.

| Formatting convention | Type of Information |
|-----------------------|---------------------|
|-----------------------|---------------------|

| | |
|------------------|---|
| Bold type | Indicates text that you type or the name of a screen object such as a menu or button. |
|------------------|---|

| | |
|--------------------|----------------------------------|
| <i>Italic type</i> | Italics marks specialized terms. |
|--------------------|----------------------------------|

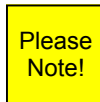
| Symbols used in the left margins | Meaning |
|----------------------------------|---------|
|----------------------------------|---------|



Help identifies where to look for help.



This marks Information of special importance.



Please read before continuing.



See this area to learn how to enter a Release Code to activate the software for the first time.



Explains information on a tool for recovering from a computer crash or accidental deletion.



STOP! Read the complete instructions before going any further.



This is used to list a series of options.

Using the mouse**What to do**

Left Mouse button

The left mouse button is the main button on most multi-button mice unless you configured it differently. It is used to Click, Double Click, and Drag.

Right Mouse button

The right mouse button is the secondary button. It is used to bring up a shortcut menu with Cut, Copy, Paste, Font, etc.

Click

Press and then immediately release the mouse button without moving the mouse.

Double Click

Point to something and quickly press and let up on the Left Mouse button.

Drag

Point with the cursor at what you want to move while holding down the left mouse button as you move the mouse.

For more information on using the mouse, see your Microsoft Word Manual.

V7 Archive Agent Help Files / Manual

Introduction

Overview

Version 7 Archive Agent is a complete file management tool designed to work in tandem with V7 Polling and V7 QuickBooks Interface. This software allows users to archive, restore, delete and e-mail from V7 software programs. V7 Archive Agent also allows users to merge V7 report data into their current V7 Polling software.

The Archive option will create, compress, and name files from the selected Log, Setup, Report, All Program, All Files, PLU/UPC Files and the QuickBooks Interface V3.

The Restore option will allow users to replace their current software files with ones from previously created archives. This option works with Setup, Report, All Program, All Files, Selected Program Files, PLU/UPC Files, and the QuickBooks Interface V3 archives.

The Delete option removes Log, All Report, and Select Reports from the selected Polling data directory for total file control.

The software also offers file transfer and importing options. The Merge area allows users to merge report data into their current V7 Polling database files. This option will merge report data from either All Files or Report Files archives. The software will read the files, check the date stamps on the reports and only merge in reports that are not currently contained within the data set. Users may also filter this data based upon date polled, poll type and poll area. The Merge option may also be used as a corporate polling solution. Individual sites can email in their report files and corporate can merge the data into their software for a complete view of all their stores' sales.

Help

The E-mail option allows users to e-mail Log, Setup, Report, All Program, All Files, PLU/UPC Files and the QuickBooks Interface V3 files to another location. The software can be configured to email the files directly to support@pcpoll.com for support issues or to another destination for backup purposes or corporate polling.

Getting Started

System Recommendations

System Requirements

- A PC capable of running a Window's Operating system preferably Win 2000, NT or XP
- Minimum 256 colors
- Minimum 800 x 600 resolution
- 256 MB of RAM
- Processor speed - Pentium 2 or above
- V7 Polling Package

System Recommendations

- Pentium 3/500 MHz or equivalent processor
- 20 GB hard drive
- 16 million colors video display
- Backup medium (ex: zip drive, CD-ROM drive, 3.5 inch floppy drive)

Backup System

For safety's sake, a system must be used to backup critical business data. V7 Archive Agent can be used to create compressed data backup files. It is highly recommended that users either manually or through the software, transfer these archives to an external location such as a network drive, zip drive or another computer location.



Getting Started

Installation Instructions

Please
Note!

If the v7install.exe file has been downloaded from the Internet, please search for the file name to locate it on your hard drive. If the install is from a CD, just click on the Version 7 Polling Install link. (**Note:** V7 Archive Agent is contained within the V7 Polling installation, however, the software must be purchased separately.)

The "Welcome" screen is then displayed recommending that all other running applications be closed before continuing with the Setup. Click **Next**.

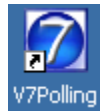
The next screen is a Registration Information screen. Please fill out all the entry areas with the appropriate company information.

Click **Next** to view the License Agreement screen. If you agree to the conditions listed, click **Accept**.

The following screen is the Readme Information. Please read over the text carefully before clicking **Next**.

Then, select a destination for the software. It is recommended that the suggested location not be altered unless absolutely necessary. Click **Next** to begin installing the software.

After the Setup is finished, click **Finish** on the final screen to complete the install. A V7 Polling icon will be placed on your desktop.



Now the program can be opened by double-clicking on the new icon and selecting Archive Agent from the Program Selector. You will be prompted to enter a release code.

| Archive Agent Release Code | |
|--|-------------|
| To obtain a release code you must contact your dealer or PC/POLL SYSTEMS. You may call 563-556-2323 or 410-268-0733 or EMAIL SALES2006@PCPOLL.COM or fax us at 563-556-0835. You need to provide the Machine Identification displayed below. If you are Emailing or faxing be sure and provide complete contact information. | |
| Machine Identification | |
| Code Version Date | Mar 1, 2005 |
| Date Range | |
| Serial Number | |
| Release Code | |
| <div style="text-align: center;"> <input type="button" value="Update Release Code"/> <input type="button" value="Help"/> <input type="button" value="Close"/> </div> | |
| <p>Before using this software please view our on-line tutorials at http://www.pcpoll.com/demo/v7_demo.htm</p> <p>Thank You!</p> <p>If you have any questions please feel free to email SUPPORT@PCPOLL.COM.</p> | |

To activate your software

Please email your **Machine Identification** number to PC/POLL SYSTEMS at sales2007@pcpoll.com for the most efficient way of obtaining the **Release Code**. In your email you should included your business name and the name of the cash register dealer you purchased the software from. If email is not available, call 563-556-2323 or fax 563-556-0835.

Someone from PC/POLL SYSTEMS will then generate a **Release Code** and email that code back to you. Enter the code and then hit the **Update Release Code** button. After the code has been entered and accepted by the program, hit the **Close** button to enter the software.

The **Machine Identification** is an automatically generated number that is unique to your PC. The PC/POLL SYSTEMS' staff must have that number in order to generate a release code.

The **Release Code** determines the **Serial Number** and **Date Range** within which the software can be used. The **Release Code** automatically updates this information; it cannot be edited. (Note: The Computer's Date and Time must be accurate in order for the release code to be accepted by the software.)

Please Note!

End-Users should always contact their dealers first with PC/POLL questions. If the dealer is unable to answer the question, support options are available. See [User Support Options](#) on page 8.

Getting Started



Support Options

- All PC/POLL SYSTEMS End-Users, who own Archive Agent, receive FREE UNLIMITED mail, fax, and email support if they have Archive Agent.
- Software support does not include cash register, installation, or basic computer usage support.
- All phone support needs to be prepaid.

Phone support prices are for 1 End-User at 1 PC/POLL SYSTEMS location. Extra charges apply for additional users and locations:

Level 1 Support

| Price | | Maximum No. of Hrs | \$/Hr |
|-------|----------------|--------------------|-------|
| \$ 25 | Per 15 Minutes | Unlimited | \$100 |
| \$150 | Per Week | 3 | \$ 50 |
| \$300 | Per Month | 10 | \$ 30 |
| \$450 | Per 6 Months | 15 | \$ 30 |
| \$900 | Per Year | 30 | \$ 30 |

PC/POLL SYSTEMS Contact Information:

PHONE: 563-556-2323
FAX: 563-556-0405
E-MAIL: support@pcpoll.com
MAIL: PC/POLL SYSTEMS
3162 Cedar Crest Ridge
Dubuque, IA 52003

To expedite the Support process, please include the following information:

- Your cash register dealer's company name
- The serial number of the software package
- The version number of the PC/POLL product
- The make and model of register you are using
- A screen print of any error messages that appear on your screen
- A description of what you were doing when you received the error
- A description of what you did after receiving the error message

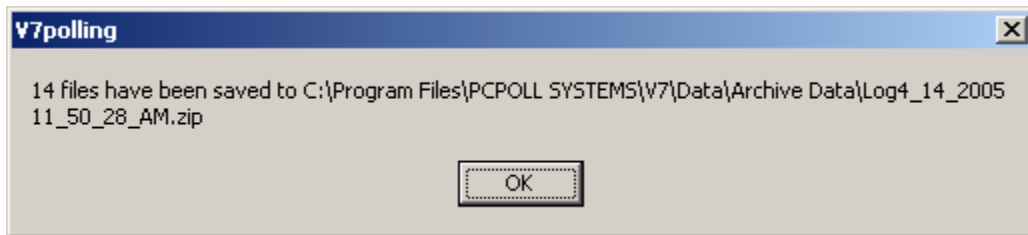
For more information on using the software, please refer to [General Information](#) on page 9.

General Information

Archive Menu

The Archive Menu allows users to create a compressed archive file of their V7 Polling Log, Setup, Report, All Program, All Files, and PLU/UPC information. This menu also allows users to archive data from the QuickBooks Interface V3. Users simply click on the area they want to save. As the files are saved the Item Progress area will flash. When the process is completed a message will be displayed with the name and location of the created file. (**Note:** All file names contain a date/time stamp to help users quickly identify their most recent archives.)

Please Note!



Log Files: The Log archive contains all History and Pending database files.

Setup Files: The Setup archive contains all Machine, Script, Schedule, Class and Store database and text files.

Report Files: The Report archive contains all AllPolls, Machine and Report database files.

All Program Files: The All Program archive contains all files found within the selected program data folder.

All Files: The All Files archive contains all database and text files from within the selected directory's programming and report data folders.

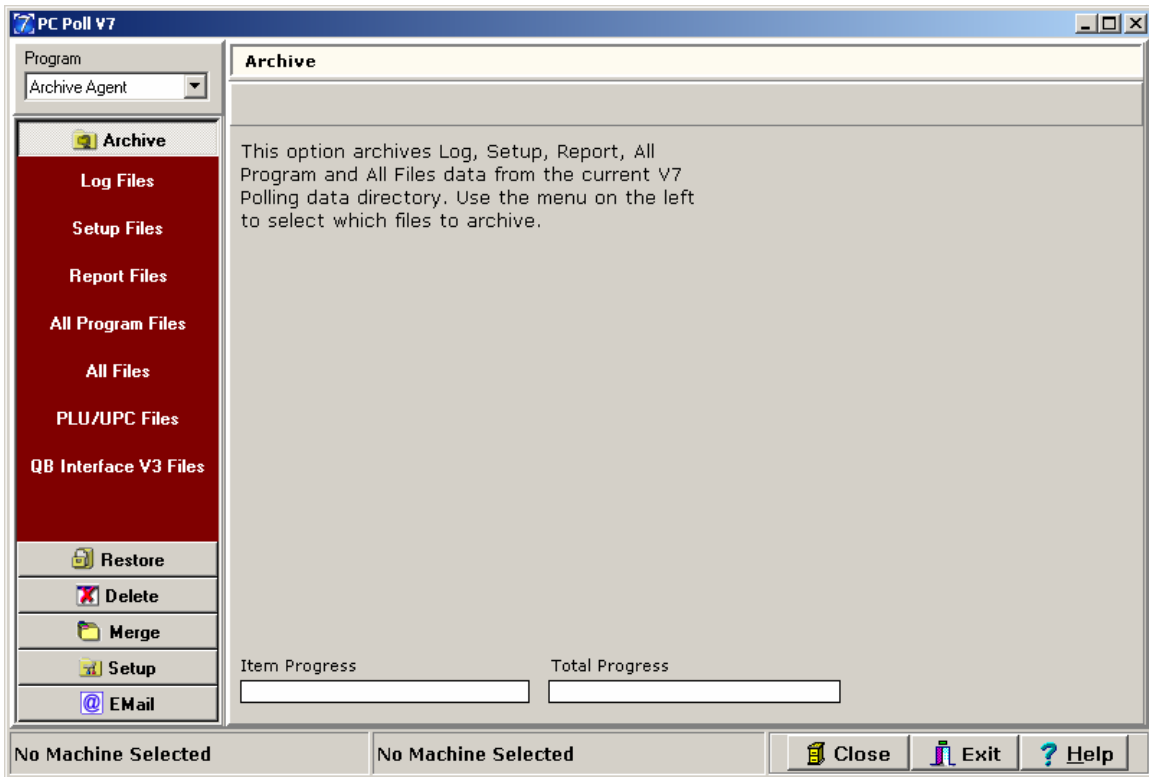
PLU/UPC Files: The PLU/UPC archive allows users to archive either all PLU/UPC program (not report) files contained within the selected Data Directory. Or users may custom select specific items to archive based upon the database's Program ID. The Program ID is determined by the user or dealer when V7 Polling is set up. It is usually the name of the machine or store used for polling. For more information on locating a Program ID, please contact your dealer or consult the V7 Polling Help Files.

To use the PLU/UPC archive, simply click on the PLU/UPC Files icon. A list of available Program IDs will be automatically obtained by V7 Archive Agent. Then either select the desired Program IDs to archive and click the **Archive Selected** button or click the **Archive All** button. The software will search the selected Data Directory's program files and create an archive containing all files containing either PLU or UPC within the file name. This archive option does not archive report files, only program databases.

QB Interface V3: The QuickBooks Interface archive contains all the created setup files. This option works with the QB Interface for V7 Polling.

To learn about the Restore section of this program, please see [Restore Menu](#) on page 11.

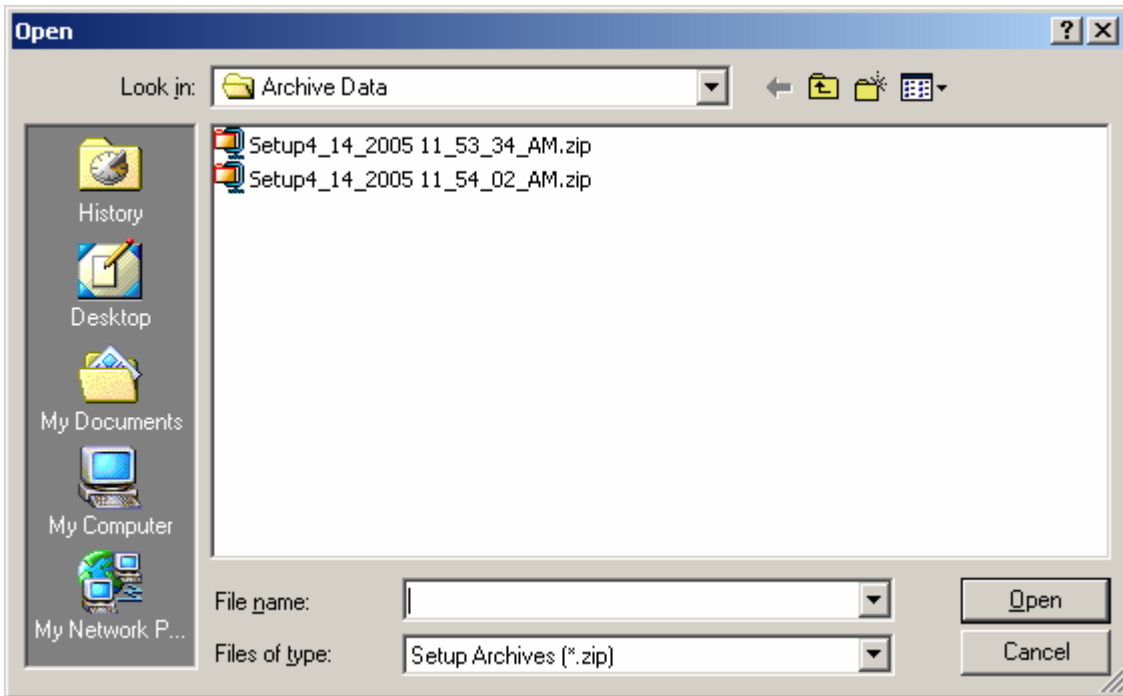
Archive Screen



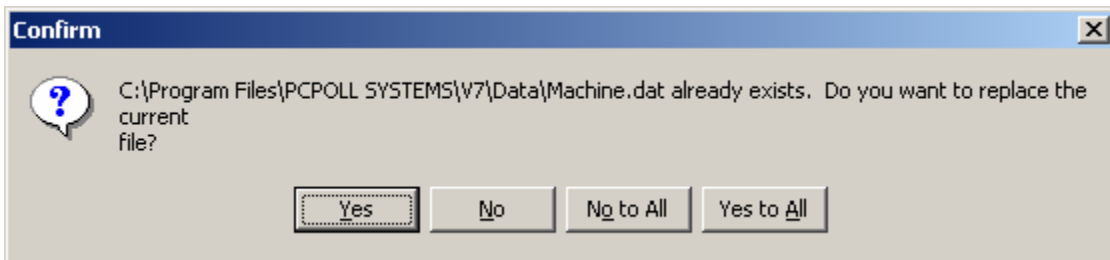
General Information

Restore Menu

The Restore Menu allows users to restore database and text files from previously created Setup, Report, All Program, All Files, PLU/UPC, and QuickBooks Interface archives. When each restore option is clicked, an Open file selection screen will appear to allow users to select from a list of previously created archives, specific to the selected option. For example, clicking on the All Program Files option will display a list of available All Program archives. As files are restored, the Item Progress and Archive Progress bars will flash. When the process is complete, a prompt will be displayed showing the number of restored files.



Setup Files: The Setup option restores all Machine, Script, Schedule, Store, and Class database and text files to the selected data directory. If files already exist, users will be prompted to do a replace.



Report Files: The Report option restores all AllPolls, Machine and Report database files to the selected data directory. Before the files are restored, all report files will be deleted in order to avoid data incompatibility.

All Program Files: The All Program option restores all files found within the selected program data folder to the selected data directory. If files already exist, users will be prompted to do a replace.

All Files: The All Files option restores all database and text files to the selected data directory's program and report data folders. Before the files are restored, all software files will be deleted in order to avoid data incompatibility.

Select Program Files: The Select Program Files option will restore select program data files. The **Get File List** button will bring up a list of previously created All Program and All Files archives. After an archive is selected, V7 Archive Agent will go through the compressed file and generate a list of available Program IDs. The **Restore Files** button will restore only the program maintenance files with the selected Program IDs to the selected data directory. If files already exist, users will be prompted to do a replace. (**Note:** Machine database files are not restored with this option.) See Select Program Files screen on page 13.

Please
Note!

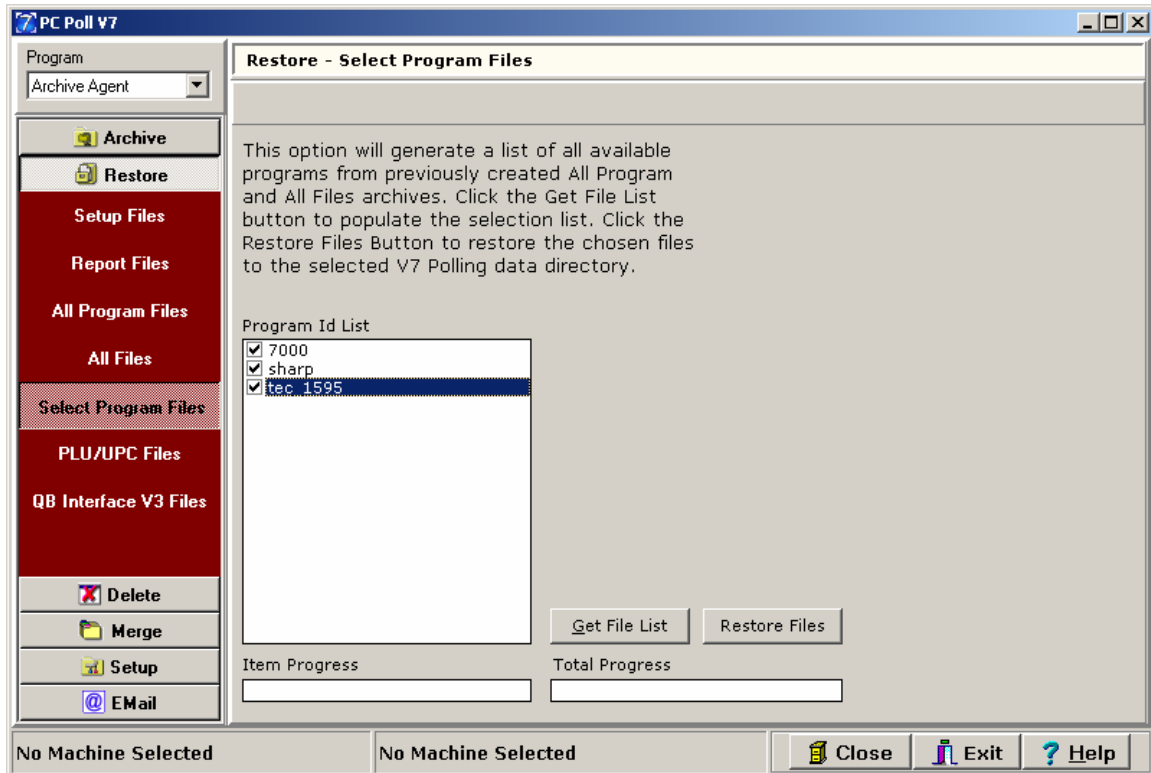
PLU/UPC Files: The PLU/UPC option works similarly to the Select Program restore. Users will need to click the **Get File List** button to bring up a list of previously created PLU/UPC archives. After an archive is selected, V7 Archive Agent will go through the compressed file and generate a list of available Program IDs. The **Restore Selected** button will restore only the PLU/UPC maintenance files with the selected Program IDs to the selected data directory. The **Restore All** button will restore all PLU/UPC files from within the archive. If files already exist, users will be prompted to do a replace. (**Note:** Machine database files are not restored with this option.)

Please
Note!

QB Interface V3 Files: The QuickBooks Interface option restores all created setup files to the current software location. Before the files are restored, all QuickBooks Interface files are deleted in order to avoid data incompatibility.

To learn about the Delete section of this program, please see [Delete Menu](#) on page 14.

Select Program Files Screen



General Information

Delete Menu

The Delete Menu allows users to delete Log, All Report, and Select Reports files from the selected data directory. This option is designed to help users manage the size of their V7 Polling directory. Prior to each delete, users will be prompted to confirm the procedure. After the software is done processing, a message will be displayed confirming the deletions.

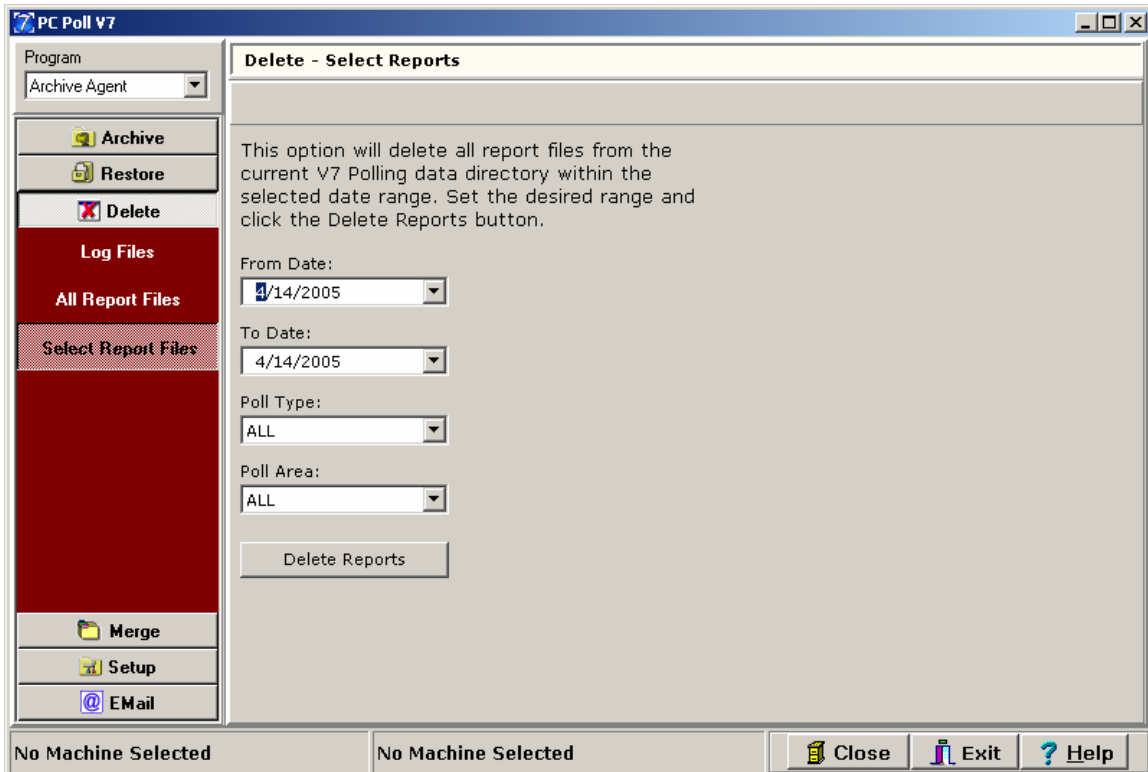
Log Files: The Log option deletes all History and Pending database files from the selected data directory.

All Report Files: The All Report option deletes all AllPolls and Report database files from the selected data directory.

Select Reports: The Select Reports option deletes only those reports that were polled between the Start and End Dates and/or of a selected Poll Type and Poll Area. The Poll Type refers to X (reading) or Z (clearing) reports. The Poll Areas 1-5 refer to buffers contained within the cash register. Most registers only have two buffers Daily (1) and Periodic (2). For more information on report types please consult a cash register dealer. The Delete Reports button will begin the deletion process.

To learn about the Merge section of this program, please see [Merge Menu](#) on page 15.

Select Reports Screen



General Information

Merge Menu

The Merge Menu allows users to merge report data from previously created All File and Report File archives into their current V7 Polling AllPolls area. The merge will extract the archive and add only the reports that are not currently in the AllPolls table to the V7 software. The new reports are added to the end of the reports table and from there users can view, print and even consolidate the data.

The Merge option can be used as a report recovery tool or as a corporate polling solution. As a recovery tool, users can return to a previously created archive and merge in any missing report data to help undo accidental user deletes or to recover from computer crashes. The Merge feature will check the date-time stamp on the reports and insert any missing reports back into the AllPolls database.

Recovery

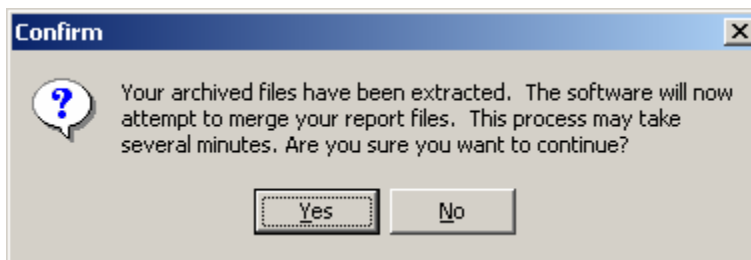
Tool

To learn more about corporate polling see [Corporate Polling](#) on page 26.

To use the Merge feature, simply click on the Merge tab of the software and then select the AllPolls/Reports icon.

Next an Open dialog box will appear and allow the user to select a previously created All Files or Report file archive. Find the desired archive and click the Open button.

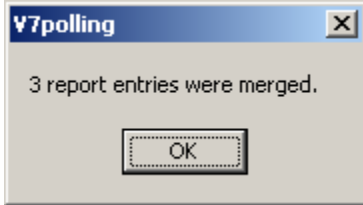
The software will then extract the archive's data into a temporary data folder. When all the files have been extracted the message below will appear.



Clicking **No** will cancel the merge. The software will then delete the extracted files.

When **Yes** is selected the software will begin reading the report files and comparing the archive's report date-time stamps with the data contained within the current V7 Polling AllPolls database. If a report is already in the AllPolls database it will be skipped. If it is missing it will be added to the table.

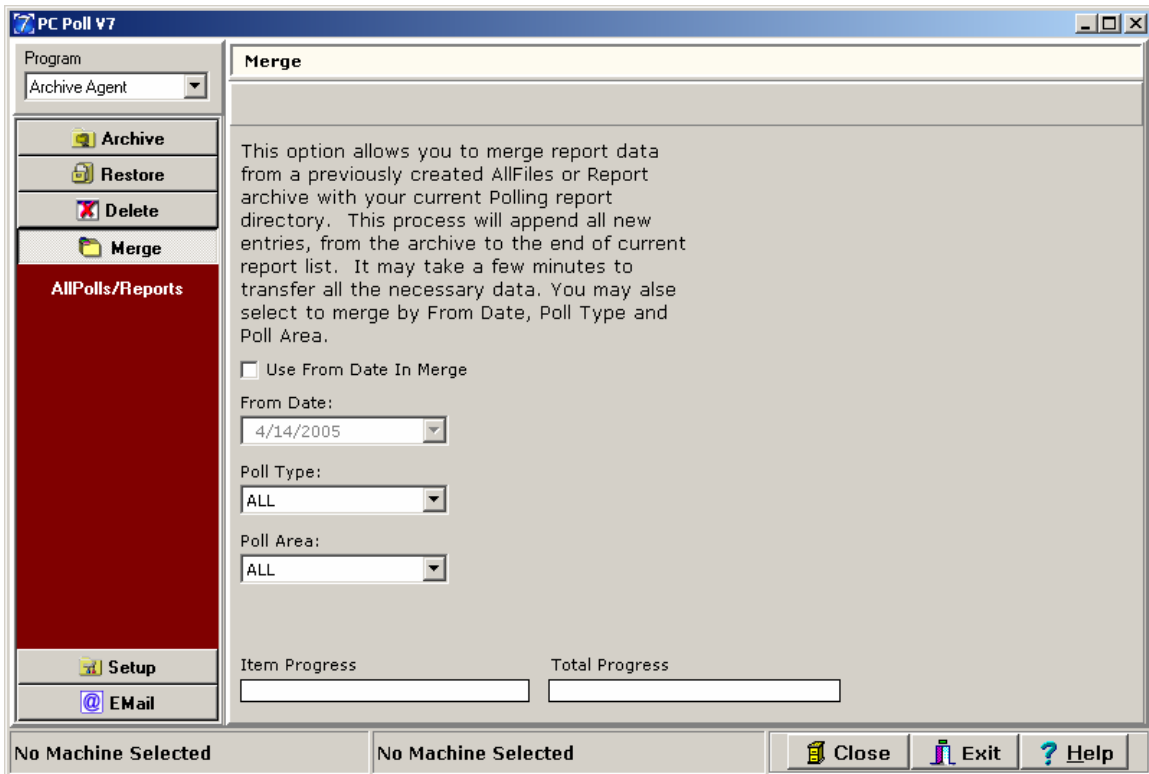
After the merge is completed Archive Agent will display a message stating the total number of files merged. Lastly the software will delete the extracted archive files.



The merge area also allows users to merge reports based upon report options. Users can select a From Date, Poll Type and Poll Area. To select a From Date check off the **Use From Date In Merge** option and select a starting date. All reports prior to the From Date will be automatically ignored. The Poll Type selection allows users to choose between X (readings), Z (clearings) or ALL (both X and Z) reports. The Poll Areas 1-5 refer to buffers contained within the cash register. Most registers only have two buffers Daily (1) and Periodic (2). For more information on report types please consult a cash register dealer.

To learn about the E-Mail section of this program, please see [E-Mail Menu](#) on page 20.

Merge Screen



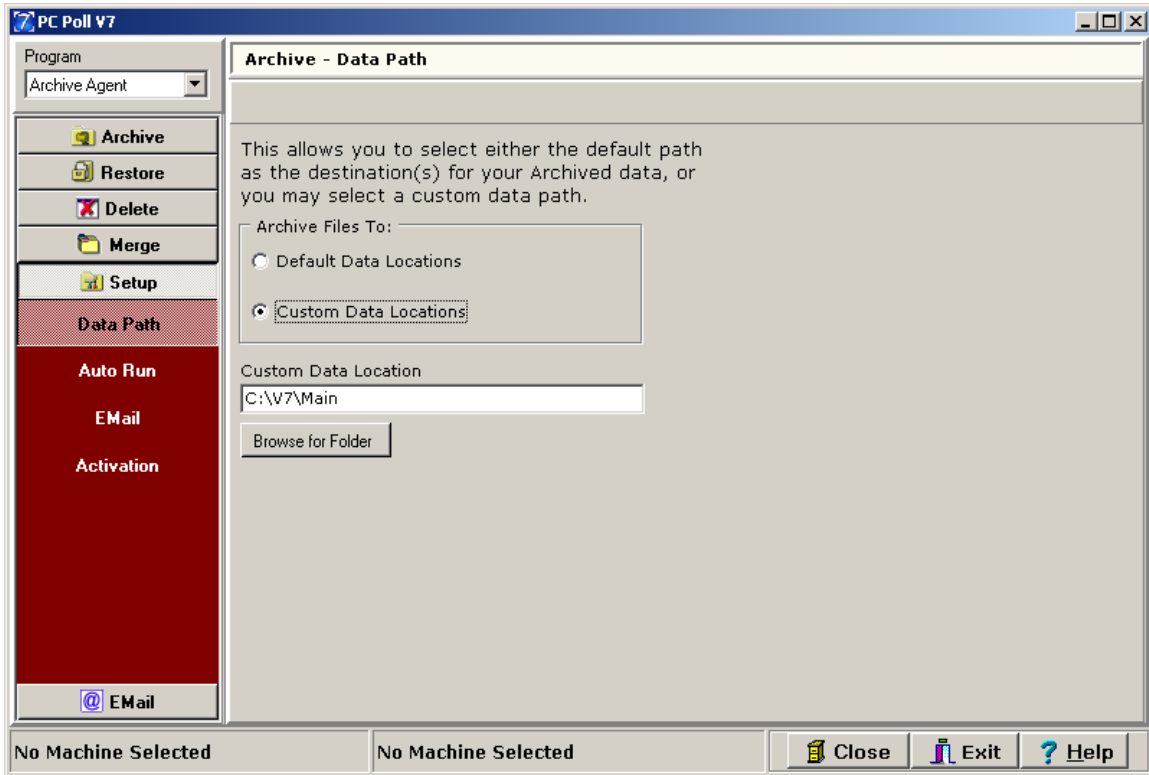
General Information

Setup Menu

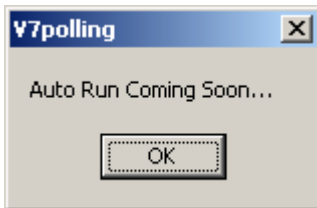
From within the Setup Menu users can set their archived Data Path, enter their Activation code and configure their EMail and AutoRun options (coming soon).

Data Path: The Data Path option allows users to customize the destination directory for archived files. By default the software will place the created archives within a subfolder of the current data path. If a Custom Data Location is used, all archives, including the QuickBooks Interface V3 files will be sent to the custom location. See also Default Data Locations Screen on page 19.

Data Path Screen



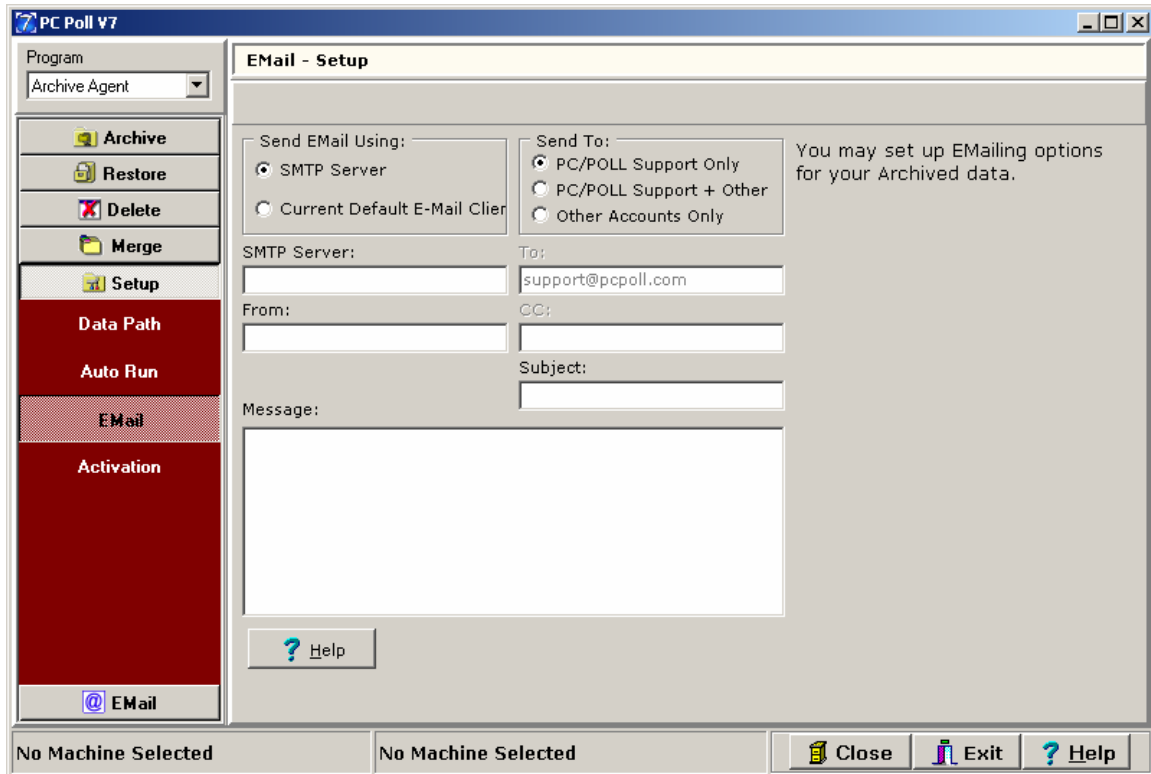
Auto Run Option: This feature is coming soon.



E-Mail Options: The E-Mail Options area allows users to configure and customize their e-mailing options. Archive Agent can be used to generate e-mails on demand via the e-

mail menu or automatically via the Auto Run area. For more information about e-mailing, see [E-Mail Menu](#) on page 20.

Email Setup Screen

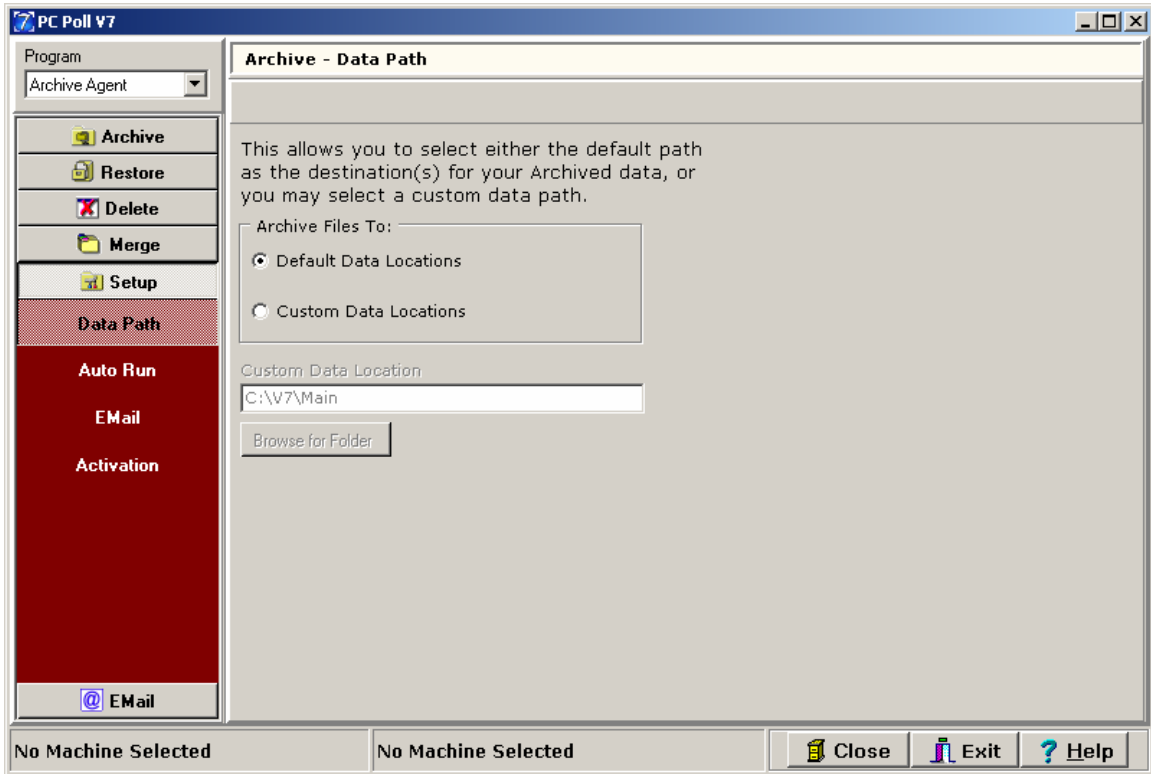


Activation: This button will display such system information as the Computer's Date, Machine Identification, Release Code, Date Range, and Serial Number. For more information about this see [Installation Instructions](#) on page 6.

To learn about the Archive section of this program, please see [Archive Menu](#) on page 9.

Setup Menu

Data Path: Default Data Locations Screen



General Information

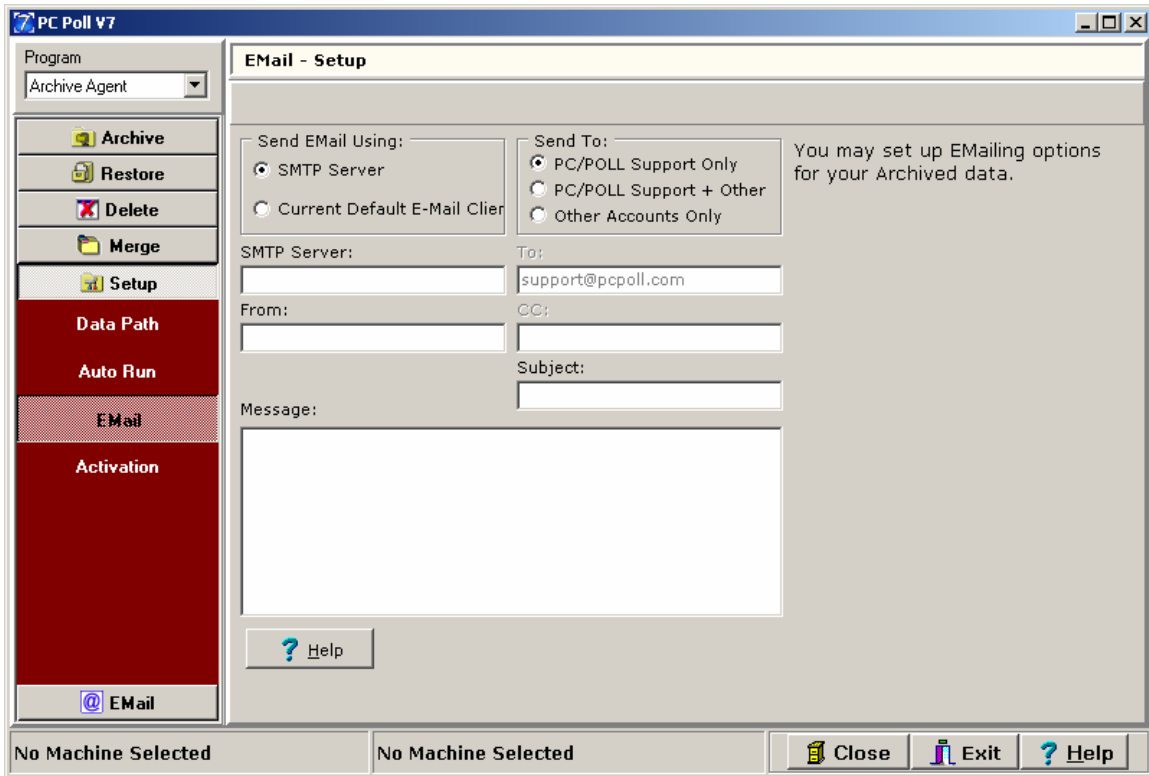
E-Mail Menu

The E-Mail Menu allows users to create and e-mail compressed archive files. Archive Agent can e-mail Log, Setup, Report, All Program, All Files, PLU/UPC Files, and QB Interface V3 files to a remote location for support, backup purposes or corporate polling. For a detailed listing of the files contained within each archive please see [Archive Menu](#) on page 10.



Before using the E-Mail menu, users will need to configure the E-Mail Options screen. This screen can be accessed via the Setup menu bar.

Email Setup Screen



On this screen, users will need to select a sending method: SMTP or Default Client. The SMTP option requires the user to enter in their **SMTP Server** (address) along with a **From** email address (the email address of the sender). This information is not required when using the Default Client. For more information about the sending options see [E-Mail Options Setup](#) on page 22.

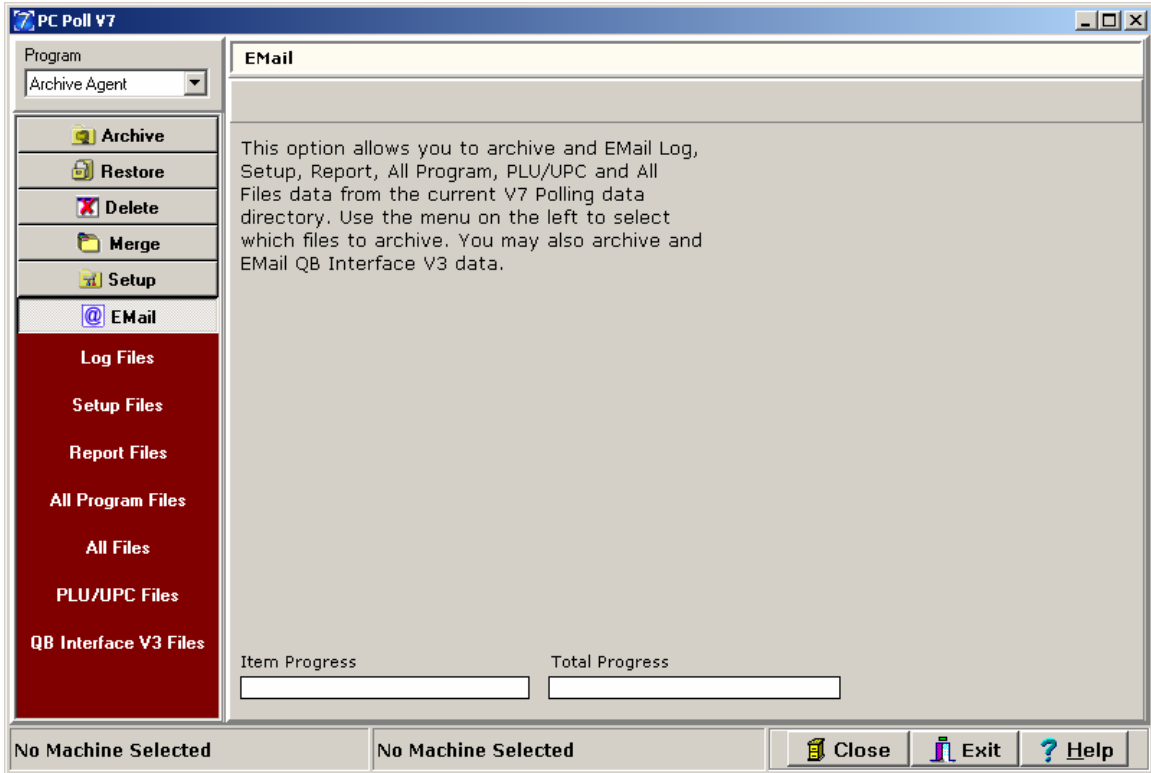


After the sending method is picked, users need to decide which of the 3 **Send To** options they wish to use. The 1st option will send the created archive directly to support@pcpoll.com. This feature allows users to directly email PC/POLL their files for support or repair purposes.

Email Option # 2

The 2nd option allows users to send the archive to both support@pcpoll.com and to another location of their choice. The second email address should be manually entered into the **CC** address line. With this option, users can send e-mails to both PC/POLL and to another location such as their cash register dealer.

Email Screen



Email Option # 2

The 3rd option allows users to customize both the **To** and **CC** areas and send messages to two custom locations. Users can also choose to only send the e-mail to only one location such as a corporate office. (If only one e-mail address is being used the address should be entered into the **To** area of the software.)

After the addresses are entered, users should enter a **Subject**, and if needed, a **Message**. Clicking the OK button will save these setting to the software.

After the E-Mail Options area has been configured, users can manually send e-mail archives.

To manually generate e-mails, simply go to the E-Mail tab and click on the desired area to archive. All option areas work similarly to the Archive section of the program.

After the archive has been created and e-mailed, the software will display the following message.

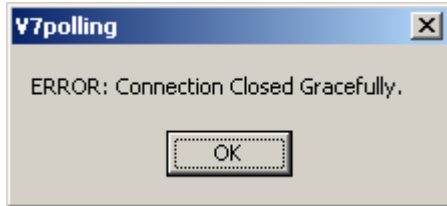


If the e-mail does not send successfully, users should verify their settings within the [E-Mail Options](#) area of the software. Other error messages are described in the [FAQ](#) section of this Help File.

[FAQ: Connection Closed Error](#) on page 23.

Frequently Asked Questions

Connection Closed Error



The Connection Closed message will appear if the software is unable to manually send an e-mail archive. Possible causes of the error include the following:

- The computer is not connected to the Internet
- The SMTP address is incorrect within the E-Mail Options area of the software
- A default email client (e-mail program) can not be found on the computer



E-Mail programs that are web based can not be used with V7 Archive Agent. Users need to have e-mail services setup with their Internet service provider. Please contact your provider if you have any questions. Your provider should be able to tell you if you have an SMTP address that can be used with V7 Archive Agent.

Frequently Asked Questions

E-mail Options Setup

To use V7 Archive Agent's E-mailing features, users will need to select and configure the E-mail Options area of the software. Users have two options for E-mailing: use their SMTP address or use their current E-Mail client. Below are details about both options.

Please read over this entire page before choosing which option best fits the computer's configuration.



Default E-mail Client

Using the current E-mail client is an easy way to use Archive Agent's e-mailing functionality. This option requires the user to have an email program such as MS Outlook, MS Outlook Express, or Mozilla ThunderBird installed on the same computer as V7 Archive Agent. When Archive Agent creates an e-mail, it will open the user's default e-mail client/program and have that program send the e-mail message. When the e-mail is actually sent out of the system depends on the configuration of the client program. Users will need to check their settings to see if the client program sends immediately when connected, checks every x minutes, etc. Please consult the help files that are included with the client program for more information.

Another benefit of using the default client is that the e-mail program is designed to work with firewall and proxy settings. If the computer requires proxy settings or must go through a firewall to send e-mail messages, it is recommended that the Current Default Client option be selected.

Please
Note!

Users should note that newer versions of default clients, such as the ones listed above, do have built-in security protection features that require the user to grant V7 Archive Agent access to the e-mail program. These prompts must be clicked manually by the user. If auto e-mailing options are needed, users should select and configure the SMTP Server option detailed below.

SMTP Server

Using the SMTP server option allows V7 Archive Agent to directly send email immediately from the software to the selected destination location. SMTP will create and send the e-mail immediately after the compressed file is created.

To find the computer's SMTP address users can either locate the information manually or contact their network administrator or Internet service provider. One of the simplest ways to locate the address manually is to look within the default e-mail client program. In order to use a program, such as Outlook, an SMTP had to have been entered at the time the software was installed and configured. For example, using Outlook 2000 users would open the software. Select **Tools | Accounts |** (select an account) **| Properties**. Within Properties there is a **Servers** tab and that displays a listing for Outgoing mail (SMTP): That SMTP address should be entered into V7 Archive Agent. The address may be a number or it could be text.

Example SMTP addresses:

192.168.1.27

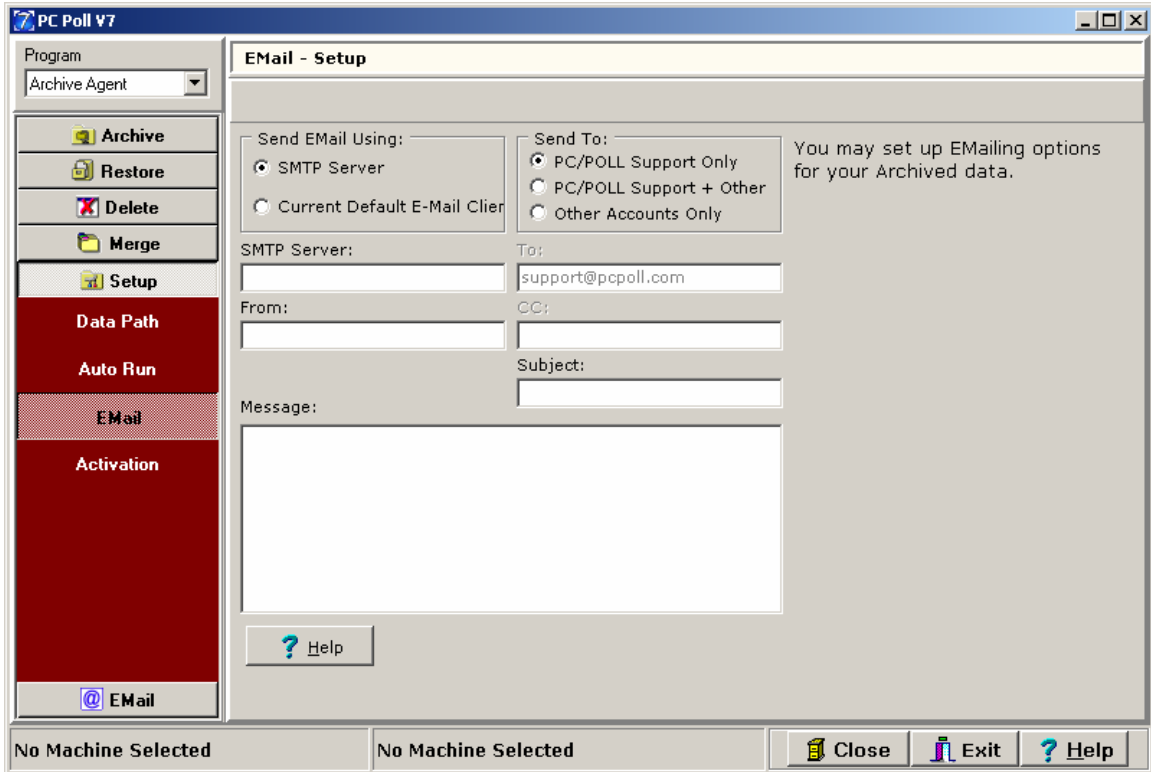
networkexpress.net

The SMTP option requires users to be connected before attempting to send e-mail messages. If an Internet connection can not be guaranteed, users should choose the Default Client option. The default option will create an e-mail and turn it over to the client program to send when the computer is connected to the Internet.

Please Note!

Users with firewall and proxy settings will need to verify that a direct SMTP address will work with their system. Please contact your network administrator if you have any questions on your computer configuration.

Email Setup Screen



Frequently Asked Questions

New
Feature

Corporate Polling

In addition to being a file management tool, V7 Archive Agent can also be a corporate polling solution. With V7 Polling, Archive Agent and an Internet connection, individual site locations can send report data back to the corporate office on a daily, weekly or monthly basis.

On the corporate side, there should be a viewing copy of V7 Polling and corporate copy of V7 Archive Agent.

Configuring the system is simple. V7 Polling should be setup to poll the individual site's registers on a regular basis. Next, V7 Archive Agent can be configured to email all the polled report files to a corporate location.

To configure Archive Agent to send e-mail messages see [E-Mail Menu](#) on page 18.

When the files arrive at corporate the attachments should be saved on a computer that has V7 Polling and Archive Agent installed. Next, open Archive Agent and merge the e-mailed archives into V7 Polling.

Learn how to merge data, see [Merge Menu](#) on page 20.

In addition to transferring report data, any of the V7 Archive Agent archives can be emailed to corporate or from corporate. For example, corporate could update a PLU/UPC file at their office and email that archived file to each of the individual locations. Then the individual sites could use Archive Agent's PLU/UPC restore option to update their V7 Polling software. Lastly, the file can be sent to the register through a previously scheduled V7 Polling calendar program send.

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