

shoper9

Tally

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Shoper 9 Diamond Installation Guide

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Contents of the CD



Welcome to Shoper 9 Diamond

Congratulations!! It is our pleasure to have you as a valued customer of Shoper 9 Diamond.

Shoper 9 Diamond pack will allow you to install Shoper 9 HO multiuser and Shoper 9 POS multiuser.

Shoper 9 Diamond Installation Guide will brief you on the prerequisites and deployment of Shoper 9 HO. It will also guide you through the installation process of Shoper 9 HO.

For instructions on the installation of Shoper 9 POS, refer to the document **Shoper 9 POS Installation & Setup** on the installation CD.

Use the help manual for a detailed write-up on features, functions and concepts. To know more about Updating & Validating License, Activating Additional Sites, etc. refer to the document **Shoper 9 License Management** on the installation CD.

Package Content

This Shoper 9 Diamond pack contains:

- ❑ Shoper 9 HO Multiuser & Shoper 9 POS Multiuser Program CD
- ❑ Shoper 9 Diamond Installation Guide
- ❑ Serial and Key label on the Installation Guide

Let's get started!



Installation Prerequisites

System Requirements

Shoper 9 Diamond permits a single installation of Shoper 9 HO Server and unlimited Shoper 9 HO Client installations. The system requirements for optimal performance of Shoper 9 HO on the server and clients are listed in the tables.

Server Configuration

Particulars	Configuration
Processor	Intel Xeon 3 GHz or greater
RAM	2 GB (4 GB for more than 50 Stores)
Hard Disk	160 GB (minimum), 10000 RPM, SCSI
Backup device	DAT Drive
Network	100 Mbps, Switched
Operating System	Windows 2003 Server (32 bit)*
Database Management System	SQL Server 2000/ 2005 Enterprise Edition
IP	Static IP address, if HTTP protocol is used
Internet	Leased line/ Broadband
Data Transfer	HTTP/ FTP Server/ E-mail (Outlook Express/ Microsoft Outlook)
Anti-Virus	Recommended
Firewall	Recommended**

** In the Firewall Exception, certain programs have to be included. Refer to www.tallysolutions.com for the program list. (Search for "Shoper 9 Firewall Exceptions")

Client Configuration

Particulars	Configuration
Processor	P-IV, 1.8 GHz
RAM	512 MB
Hard Disk space	40 GB
Network	100 Mbps, Switched
Printer	Network printer
Operating System	Windows XP Professional SP2 (32 bit)*
Anti-Virus	Recommended
Firewall	Recommended

*Microsoft Vista can be used with UAC turned off

Note: For detailed system requirements of various setup options, refer to the document **Shoper 9 Sizing**.

Setup Requirements

Database Management System

SQL Server has to be installed with Mixed Mode authentication. Create a user account (for example, ShoperAdmin) and assign an appropriate password (password cannot be blank). This user need not be an SQL Server administrator but should have rights to *Create DB*, *Backup*, *Restore* and *Bulk Insert*.

Note: SQL Server needs to be installed with the following settings

- *Mixed Mode authentication*
- *Case Insensitive*
- *Bulk Insert - Enabled*
- *ShoperAdmin login with a password assigned*

Data Communication

Data from remote locations is received using HTTP (Hyper Text Transfer Protocol), E-mail, FTP (File Transfer Protocol) or Direct Copy. Depending on the protocol used, the data communication prerequisites vary.

Online

- Through HTTP protocol using IIS.

Note: IIS needs to be installed, if online communication is used. Installation of IIS can be done before or after installing Shoper 9 HO. However, configuration of IIS for HO needs to be done after the installation of HO.

Refer to the Appendix for IIS configuration.

E-mail

- A POP3 mail account needs to be created.
- Mail server connectivity from the Shoper 9 Server.
- Outlook Express or Microsoft Outlook on the server to access the mail account. (One of these has to be the default mail client.)

FTP

- ❑ FTP Services on a web server. Separate FTP folders for inbound (to HO) and outbound (from HO) data.
- ❑ FTP Server connectivity from the Shoper 9 Server.

Direct Copy

- ❑ Connectivity of the Shoper 9 Server to the network.

Deployment Components

Shoper 9 HO is a client-server based software.

Base System

System Database

Shoper 9 HO maintains all relevant company details, user credentials, menu items list and user wise restrictions in this database.

Application Database

All relevant business data is maintained in the application database.

Optional Components

AST

AST (Advanced Stock Tracker) helps in replicating the databases of all branches/locations of the chain. The replicated data at HO will also serve as an additional backup in the event of a system crash somewhere in the chain. If AST is installed, the goods in transit can also be tracked. Additionally, the complete set of reports of any Point of Sale (POS) location or Distributor location can be generated at the central location.

EIS

EIS (Executive Information System) is an add-on module, which gives the user access to additional reports apart from the regular Sales, Stock, Cash and MIS reports that Shoper 9 offers. EIS reports allow you to drill down and generate graphical reports such as Pie Chart, Bar Chart, Line Chart and so on. A separate database is maintained for the purpose of EIS report generation.

Note: EIS is no longer in active maintenance or support as it is being deprecated. Future releases may have this removed completely.

Client

Additional terminals used to access the Shoper 9 HO Server from multiple locations.

Installation

Install **Shoper 9 HO** using Shoper 9 Diamond Installation CD or any other distribution media.

A user installing Shoper 9 HO on Windows should have administrator privileges on the local system.

Base System

Base System installation creates the databases and configures the Shoper 9 application server. It can either be a Typical installation or a Custom installation.

Note: Ensure that the SQL Server service is running at the time of installation.

Typical (Server & AST)

In a Typical installation, the HO application and AST would be installed. The process would install the application, create the system database, accept company details and company administrator details, and create the application database based on the company information. The **Share**, **In** and **Out** directories are created to store intermediary files, inbound data and outbound data respectively. Parameter template is selected and the required system parameter values and location types are set. It then prompts you for License Server installation or specification. After completing these steps, AST would be installed.

Steps

1. Insert the installation CD in the drive

AutoRun will start the installer automatically.

Alternatively, double click the **Shoper9Setup.exe** icon in the Shoper 9 Diamond installation source.

The **Welcome to Shoper 9 Setup** window is displayed.

Note: In case any component of Shoper is already installed, a corresponding message is displayed along with appropriate steps to be taken.

If you are uninstalling Shoper 9 HO Server components, follow the steps:

- i. Remove EIS, if installed
- ii. Remove AST, if installed
- iii. Remove Shoper 9 HO Server

2. Click **Next**

Microsoft Data Access Components (MDAC) are installed.

The **Choose the Product** window is displayed.

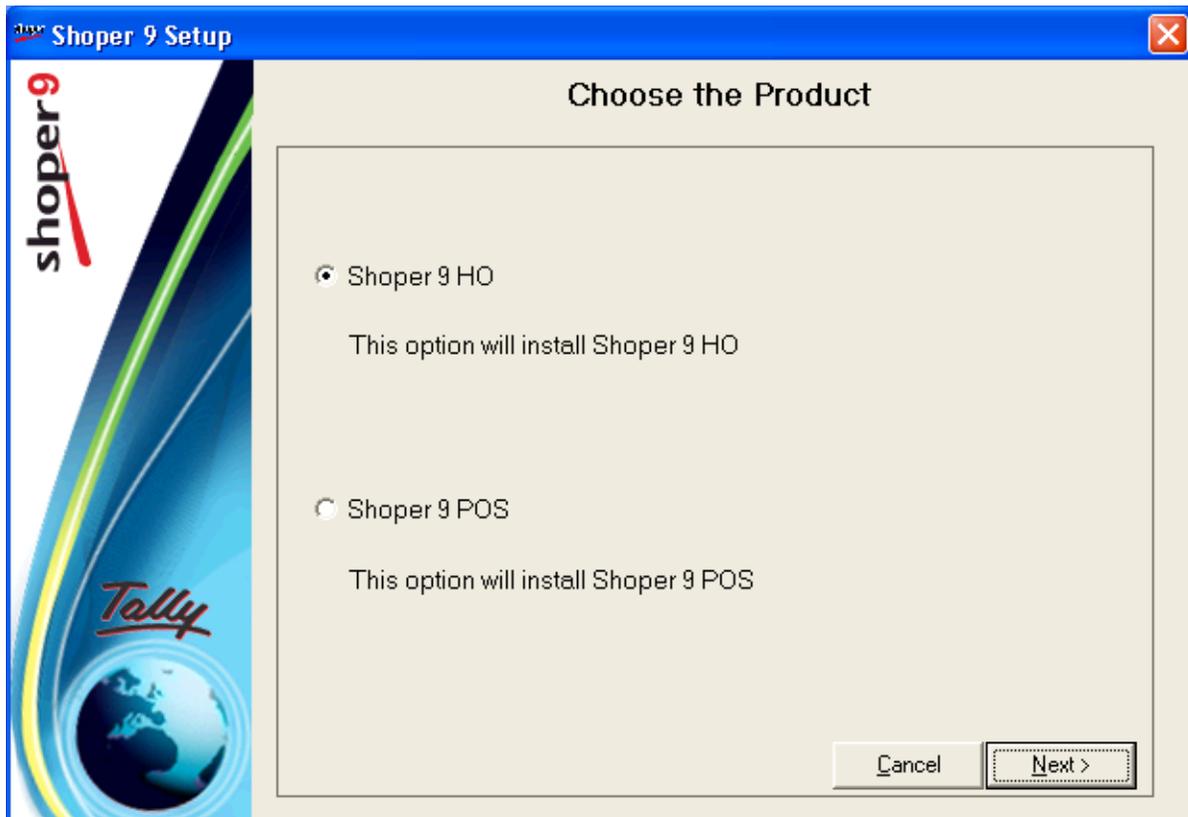


Figure 1. Choose the Product

Note: The **Cancel** option available at various stages of the installation process allows you to abort the installation, if required.

3. Select **Shoper 9 HO**

4. Click **Next**

The **Welcome to Shoper 9 HO Setup Wizard** window is displayed.

5. Click **Next**

The **Choose the Type of Installation** window is displayed.

6. Select **Base System**

7. Click **Next**

The **Test Database Connection** window is displayed.

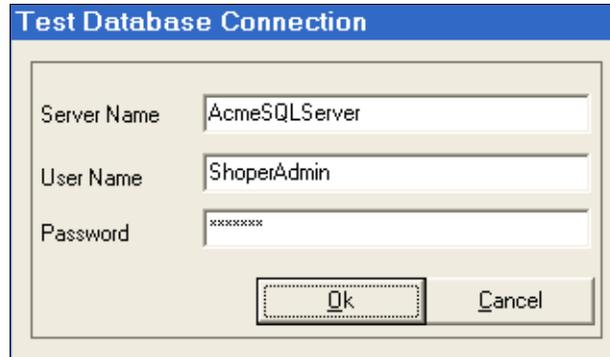


Figure 2. Test Database Connection

8. Enter the **SQL Server Name**, **User Name** (ShoperAdmin login created on SQL Server) and **Password**
9. Click **Ok**

A message **Database Connection Successful** is displayed, if the connection is successful.

***Note:** If the connection is not successful, a message **Database Connection Failed** is displayed. Click **OK** to close the message box. To continue, ensure that database server is accessible and user name & password are correct.*

10. Click **OK**

The **Base System Installation Type** window is displayed.

11. Select **Typical**
12. Click **Next**

The Shoper 9 HO Server - InstallShield Wizard window is displayed stating that **InstallShield Wizard is ready to install Shoper 9 HO Server on your computer**, while the InstallShield Wizard prepares the system for installation.

13. Click **Next**

The Shoper 9 HO Server - InstallShield Wizard displays the **Destination Folder** window. The default location for the destination folder is **<windows installation drive>:\Shopr9HO**.

Enter the folder name, or click Browse and select the required folder, if necessary.

It is recommended that you provide a shared folder where Shoper 9 HO application files are to be copied. Enter the folder name as a network path (for example, \\Acme-

Server\Shoper9HO\), even if it is on the local machine. This is the network path that needs to be specified as the Shoper 9 HO Server path during client installation.

Note: The folder has to be created before starting Shoper 9 installation, with full permission to **Everyone**. Installer cannot create a folder on a network share. If a local folder is specified, installer will create it, if it is non existent.

14. Click **Next**

The **Setup Status** is displayed while the InstallShield is configuring the server installation.

The Shoper 9 HO LiveUpdate window is displayed.

15. Select **Check for Updates**

It is recommended that you check for updates. This will look for patch updates on the website, and if available updates the patch.

Choose **Skip Updates** to avoid looking for patch updates.

16. Click **Next**

Once the download is completed, a message **Download of updates for Shoper 9 completed** is displayed.

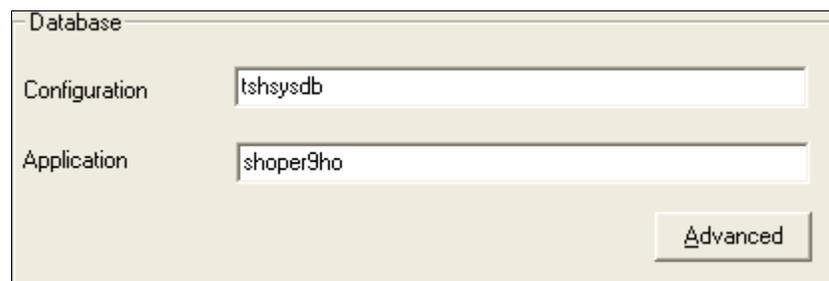
17. Click **OK**

Once the installation is complete, the **Shoper 9 HO System Configuration** window is displayed. The **Database Connection Information** provided earlier in the Test Database Connection window is already populated.

18. Enter/ change the server name, user name and password, if required

19. Click **Next**

The **Shoper 9 HO Database** window is displayed. The default names of the Configuration database and the Application database are displayed as **tshsysdb** and **shoper9ho** respectively.



The screenshot shows a window titled "Database" with a light beige background. It contains two rows of text labels and input fields. The first row has the label "Configuration" on the left and a text box containing "tshsysdb" on the right. The second row has the label "Application" on the left and a text box containing "shoper9ho" on the right. In the bottom right corner of the window, there is a button labeled "Advanced".

Figure 3. Shoper 9 HO Databases

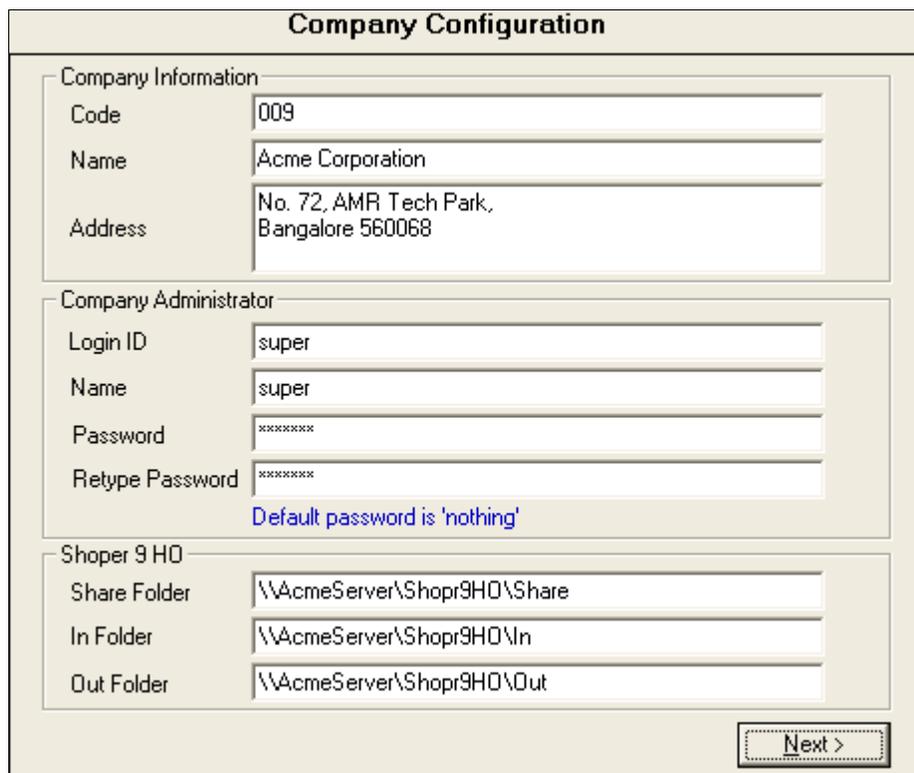
20. Change the database names, if required

For better disk space management, you may choose to write data files, log files and backup files in the desired path instead of the default path provided by SQL Server. You can do this by clicking **Advanced**. The **Advanced** window facilitating entry of the required file path is displayed. Make necessary changes and click **Ok** to accept the values in the Advanced window. If the database server path is different from the default one, you need to specify the path and ensure that the path is present.

Note: The database path needs to be a local path. If any problem is encountered while accessing the path provided in the Advanced window, then an error message **The database is being used/ Path is not valid** is displayed.

21. Click **Next**

The databases are created and the **Company Configuration** window is displayed with default values for **Company Administrator** and **Shoper 9 HO** folders.



The screenshot shows the 'Company Configuration' window with the following fields and values:

Company Information	
Code	009
Name	Acme Corporation
Address	No. 72, AMR Tech Park, Bangalore 560068

Company Administrator	
Login ID	super
Name	super
Password	*****
Retype Password	*****

Default password is 'nothing'

Shoper 9 HO	
Share Folder	\\AcmeServer\Shopr9HO\Share
In Folder	\\AcmeServer\Shopr9HO\In
Out Folder	\\AcmeServer\Shopr9HO\Out

Next >

Figure 4. Company Configuration

The purpose of the fields are as listed. These values can be changed as per your requirements.

Company Information

- **Code:** A three digit company code used for various input and output files in Shoper 9. Once allotted, it cannot be changed.
- **Name:** To be displayed as the name for the company.
- **Address:** To be used in various reports.

Company Administrator

- **Login ID:** To login to Shoper 9 application. The default value is **super**.
- **Name:** To be displayed as the name for the login ID. The default value is **super**.
- **Password:** Security for the login. The default value is **nothing**.

Shoper 9 HO

- **Share Folder:** Folder for log files and other temporary files. The default value is **<application folder>\Share**.
- **In Folder:** Shared folder for inward data. Files received from backend applications/ remote locations are stored here before they are loaded into Shoper 9 HO. The default value is **<application folder>\In**.
- **Out Folder:** Shared folder for outward data. This folder stores the data extracted from Shoper 9 HO, to be exported to the backend applications, remote chain stores and distribution centres. The default value is **<application folder>\Out**.

22. Enter the **Company Information**

23. Change Company Administrator and Shoper 9 HO folder details, if required

24. Click **Next**

***Note:** If you provide local paths, a message is displayed – **The specified path(s) is not a network path. Continue?** Click **No** and specify the network paths (even if they are on the local machine) and continue, as this is useful while installing client. Click **Yes** to continue as is.*

The **Apply Template** window is displayed. The default template selected is **General**.

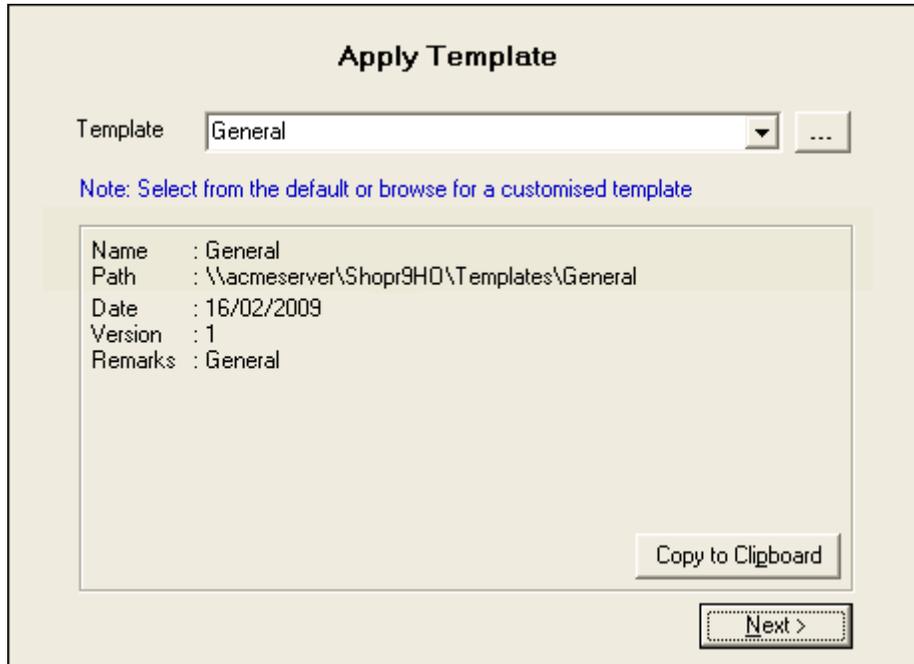


Figure 5. Apply Template

25. Change the template, if required

The selected template name, location where it is stored, date of creation, version and remarks are displayed.

26. Click **Copy to Clipboard** to save the details in a document for future reference

27. Click **Next**

The **System Parameters** window is displayed.

System Parameters		
	Description	Value
1	Basic Item Classification Parameters	
2	Caption for Item Classification1	Product
3	Caption for Item Classification2	Brand
4	Caption for Item Sub-Classification1	Style
5	Caption for Item Sub-Classification2	Shade
6	Item Size/Pack/UDM Caption	Size
7	Super Classification Parameters	
8	Item Super Classification1 Present Y/N	<input checked="" type="checkbox"/>
9	Item Super Classification1 Caption	Department
10	Item Super Classification2 Present Y/N	<input checked="" type="checkbox"/>
11	Item Super Classification2 Caption	Buyer
12	Item Analysis Code Parameters	
13	Item Analysis Code1 Used Y/N	<input checked="" type="checkbox"/>
14	Item Analysis Code1 Caption	Fibre
15	Item Analysis Code2 Used Y/N	<input checked="" type="checkbox"/>
16	Item Analysis Code2 Caption	Finish
17	Item Analysis Code3 Used Y/N	<input checked="" type="checkbox"/>
18	Item Analysis Code3 Caption	Colour Base
19	Item Analysis Code4 Used Y/N	<input checked="" type="checkbox"/>
20	Item Analysis Code4 Caption	Styling

Figure 6. System Parameters

28. Make changes, if required

To alter the parameters, click the cells in the column **Value**. Most of the parameters are either to select or set the captions for Basic Item Classification, Super Classification and Item Analysis Codes.

Note: Click **Back** to change the template selected.

29. Click **Next**

The **Location Types** window is displayed.

30. Make changes, if required

Click **Add** to include additional types of location to the list of default values. Enter the values in the empty line which is displayed at the end of the grid. If you want to delete a location type, select the respective line in the grid and click **Delete**. To cancel the changes made in the grid, click **Undo**.

31. Click **Next**

The **Shoper 9 HO Server Setup** window is displayed.

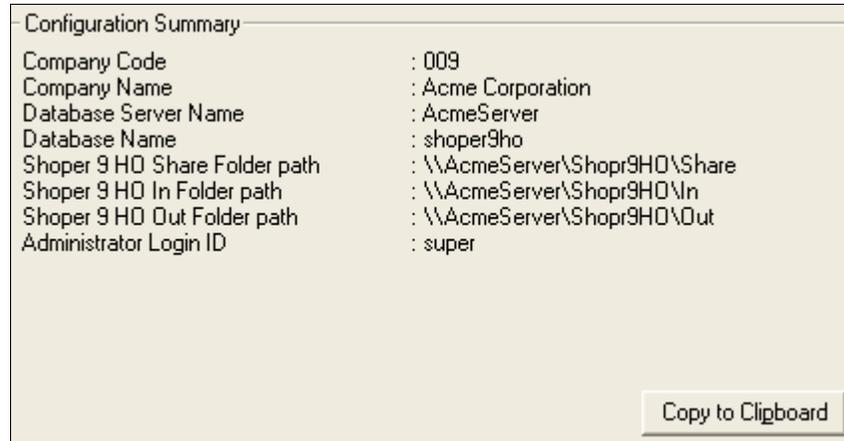


Figure 7. Shoper 9 HO Server Setup

32. Click **Copy to Clipboard**, to save the details in a document for future reference

33. Click **Finish**

The **Tally License Server - InstallShield Wizard** window is displayed.

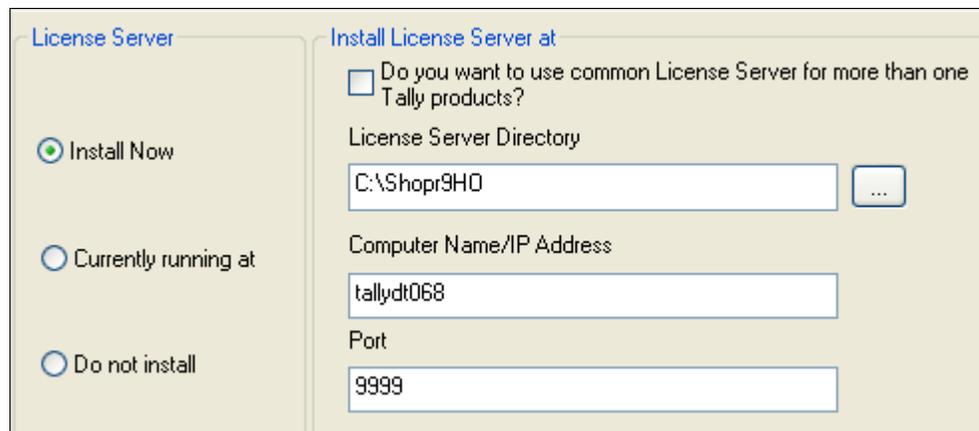


Figure 8. Tally License Server - InstallShield Wizard

34. Select **Install Now** under **License Server**

Note: If the option **Do you want to use common License Server for more than one Tally products?** is selected then **Shoper 9, Tally.ERP 9 and Tally.Developer 9** can be activated in the same License Server, if you have valid License for the products. By default the server installation path will be selected as **C:\TallyLicenseServer**, you can modify the path if required.

Note: In case you have a License Server already installed, start the server and choose **Currently running at**. In order to run Shoper 9 HO in evaluation mode, choose **Do not install**.

35. Enter the License Server details

36. Click **Next**

The License Server will be installed and the message **Tally License Server installed and started successfully** is displayed.

37. Click **OK**

Note: To know more about Updating & Validating License, Activating Additional Sites, etc. refer to the document **Shoper 9 License Management on the installation CD**.

The InstallShield will register the components and the **Installation Completed** window is displayed.

38. Click **Finish**

Shoper 9 HO Server installation is completed. The Shoper 9 HO AST - InstallShield Wizard window is displayed while the InstallShield Wizard is configuring the AST installation. On completion of this configuration, Shoper 9 HO Installation wizard is ready to install AST on your computer.

39. Click **Next**

The **Setup Status** window is displayed. After configuring AST, the **Installation Completed** window is displayed.

40. Click **Finish**

The Base System installation includes a group **Shoper 9 HO** under **Start > Programs**, and the application **Shoper 9 HO** in the group. A shortcut named **Shoper 9 HO** is also created and placed on the desktop. In case Tally License Server is installed on the same machine, a group **Tally License** under **Start > Programs**, and the application **Tally License Server** in the group are created.

Note: Additionally, Scheduler Service Starter, LiveUpdate components and UserManual also get added to the Shoper 9 HO group.

Client installation cannot be done on the system where Base System is installed, since Shoper 9 HO Base System installation configures the client too.

Shoper 9 HO can be invoked by choosing **Start > Programs > Shoper 9 HO > Shoper 9 HO** or clicking the shortcut **Shoper 9 HO** on the desktop.

Custom (Server, AST & EIS)

In a Custom installation, the HO application can be installed with or without AST and EIS. The process would install the application, create the system database, accept company details and company administrator details and create application database based on the company information provided. The Share, In and Out directories are created to store intermediary files, inbound data and outbound data respectively. Parameters template is selected and the required system parameters values and location types are set. After completing these processes, AST would be installed, if selected. In case you have chosen to install EIS, it will be installed after installing AST.

Steps

1. Follow steps 1 to 10 given in Typical installation
2. Select **Custom**
3. Click **Next**

The **Base System Installation** window is displayed.

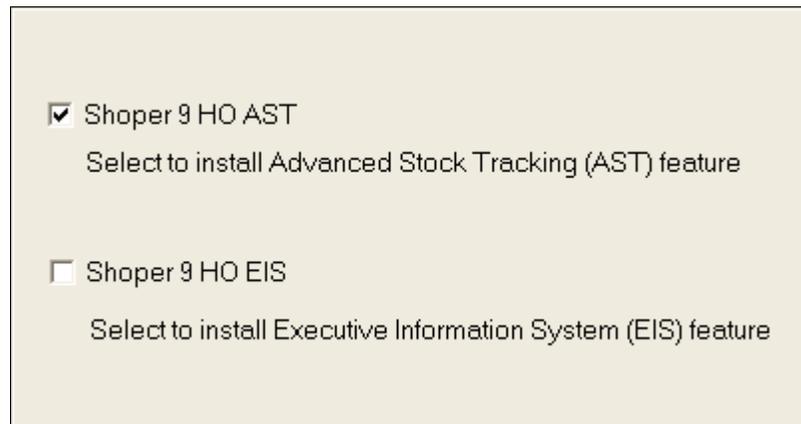


Figure 9. Base System Installation

4. Select **Shoper 9 HO AST** or both **Shoper 9 HO AST** and **Shoper 9 HO EIS**, if required

Shoper 9 HO EIS can be selected only if Shoper 9 HO AST is selected. However, Shoper 9 HO AST can be installed alone with the Base System. You may even avoid installing both.

5. Click **Next**

The Shoper 9 HO Server - InstallShield Wizard window is displayed while the InstallShield Wizard prepares the system for installation. Once it is done, Shoper 9 HO Installation Wizard is ready to install the Base System on your computer.

6. Follow steps 13 to 38 given in Typical installation

The Server installation is completed.

If you have selected **Shoper 9 HO AST** for installation, now Shoper 9 HO Installation wizard is ready to install AST on your computer.

7. Click **Next**

The Shoper 9 HO - InstallShield Wizard window is displayed while the InstallShield Wizard is configuring the AST installation. After configuring AST, the **Installation Completed** window is displayed.

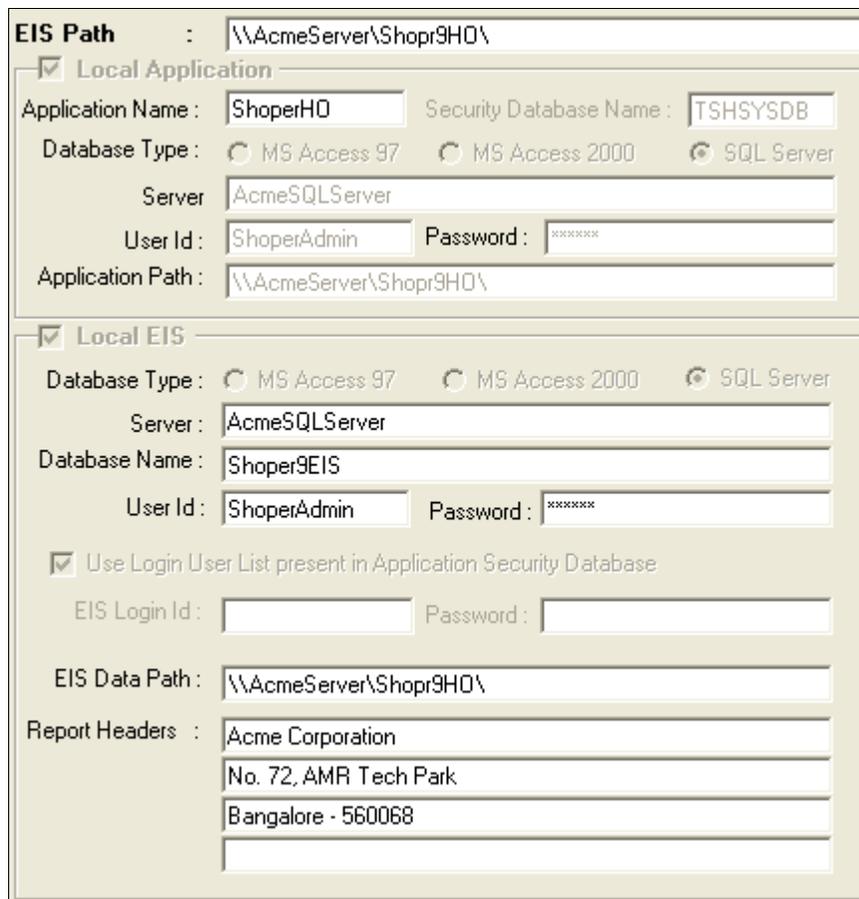
8. Click **Finish**

The AST installation is completed.

If you have selected **Shoper 9 HO EIS** for installation, then Shoper 9 HO Installation wizard is ready to install EIS on your computer.

9. Click **Next**

The Shoper 9 HO EIS - InstallShield Wizard window is displayed while the InstallShield Wizard is configuring the EIS installation. After configuring EIS, the EIS Setup window is displayed.



The screenshot shows the EIS Setup window with the following fields and options:

- EIS Path :** \\AcmeServer\Shopr9HO\
- Local Application**
 - Application Name : ShoperHO
 - Security Database Name : TSHSYSDB
 - Database Type : MS Access 97 MS Access 2000 SQL Server
 - Server : AcmeSQLServer
 - User Id : ShoperAdmin Password : *****
 - Application Path : \\AcmeServer\Shopr9HO\
- Local EIS**
 - Database Type : MS Access 97 MS Access 2000 SQL Server
 - Server : AcmeSQLServer
 - Database Name : Shoper9EIS
 - User Id : ShoperAdmin Password : *****
 - Use Login User List present in Application Security Database
 - EIS Login Id : Password :
 - EIS Data Path : \\AcmeServer\Shopr9HO\
 - Report Headers : Acme Corporation
No. 72, AMR Tech Park
Bangalore - 560068

Figure 10. EIS Setup

This window has two sections namely, **Local Application** and **Local EIS**. The **Local Application** section displays the Security (Configuration) Database Name, Database

Type, Server, User Id, Password and Application Path based on the information provided during the Base System installation.

10. Enter the information regarding the EIS database in the **Local EIS** fields as explained.

- **Database Type:** By default, SQL Server is selected.
- **Server:** Enter the SQL Server name.
- **Database Name:** Retain the default name displayed or alter as required.
- **User Id:** Enter the ID of the user who has rights to create a database on the SQL Server.
- **Password:** Enter the password to be used to open the EIS Database.
- **EIS Data Path:** Enter the path on the server where you want to store the EIS related data files.
- **Report Headers:** Enter the company name, address, TIN, contact details and other company related information in the space provided. This information will be printed on all the EIS reports.

11. Click **Save**

The **Installation Completed** window is displayed.

12. Click **Finish**

The **EIS** installation is completed.

Note: *If you choose to install only the Base System during a Custom installation, you may install AST and EIS later. In that case double click the **Shoper9Setup.exe** icon in the Shoper 9 Diamond installation source. Select AST or both AST and EIS and proceed. EIS can be selected only if AST is selected. However, AST can be installed alone. Remaining steps are the same as explained in Custom installation.*

If you have done a Typical Base System installation, only EIS will be available for installation.

Client

This process is carried out on all the nodes from where you need to access Shoper 9 HO. Client installation is done only on completion of the Base System installation on the server.

Note: Ensure the following on the server before the client installation starts:

- SQL Server service is running
- Shoper 9 HO Server is installed
- A user installing Client on Windows should have full control on the local system and have access to the application installation folder which is shared on the server

Steps

1. Insert the installation CD in the drive

AutoRun will start the installer automatically.

Alternatively, double click the **Shoper9Setup.exe** icon in the Shoper 9 Diamond installation source.

The **Welcome to Shoper 9 Setup** window is displayed.

2. Click **Next**

Microsoft Data Access Components (MDAC) are installed.

The **Choose the Product** window is displayed.

3. Select **Shoper 9 HO**

4. Click **Next**

The **Welcome to Shoper 9 HO Setup Wizard** window is displayed.

5. Click **Next**

The **Choose the Type of Installation** window is displayed.

6. Select **Client**

7. Click **Next**

The Shoper 9 HO - Client Setup window is displayed while the InstallShield Wizard prepares the system for installation. Once it is done, Shoper 9 HO Installation Wizard is ready to install the Client on your computer.

Note: If Shoper 9 HO Client is already installed, a message is displayed — **Shoper 9 HO Client is already installed.**

8. Click **Next**

The **Setup Status** is displayed while the InstallShield is configuring the client installation.

Once the configuration is completed and the software components get registered, the **Shoper 9 HO Client Configuration** window is displayed.

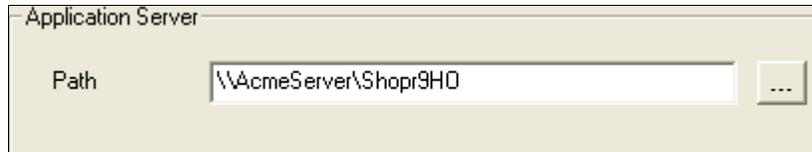


Figure 11. Shoper 9 HO Client Configuration

9. Specify the Shoper 9 Server path

Enter the network path of the server where the Base System is installed (for example, \\AcmeServer\Shopr9HO).

10. Click **Ok**

The **Installation Completed** window is displayed.

11. Click **Finish**

Client installation includes a group **Shoper 9 HO** under **Start > Programs** and the application **Shoper 9 HO** in the group.

Appendix

Configuring IIS for Shoper 9 HO

1. Double click the icon **ShoperHOIISConfig.exe** in the installation source
The **Shoper 9 HO IIS Configuration** window is displayed.
2. Click **Next**
The **Installation Completed** window is displayed.
3. Click **Finish**

The installer would set the following properties of the virtual folder **Polling**:

1. When connecting to this resource, the content should come from: **A share located on another computer**
2. Network Directory: **\\<machine name>\<Shoper 9 HO application path>\Polling**
 - **Read** and **Log visits** will be selected
3. The properties **AspBufferingLimit** and **AspMaxRequestEntityAllowed** are configured

Add the user **IUSR_<domain name>** or **IUSR_<pc name>** and give full permission to ensure that after synchronising with POS, the extracted data file (zip file) will be moved to backup folder.

To add this user,

1. Right click the Shoper 9 HO installation folder name, select **Sharing and Security** to open the Properties window
2. Select the **Sharing** tab
3. Select **Share this folder**
4. Click **Permissions** to open the Permissions window
5. Click **Add** to open the **Select Users, Computers, or Groups** window
6. Type **iusr** in **Enter the object names to select** and click **Check Names** to get the **IUSR_<domain name>** or **IUSR_<pc name>**

In case there is more than one object name starting with **iusr**, the **Multiple Names Found** window is displayed with the list of object names. Select the required object name from the list.

Alternatively, click **Advanced** to open an advanced **Select Users, Computers, or Groups** window. Click **Find Now** to get the list of object names in the window. Select the required object name from the list. Click **OK**.

7. Click **OK**



8. Allow **Full Control**
9. Click **OK**
10. Click **OK**

Contents of the CD

Shoper 9 Diamond Installer

- Shoper 9 HO
- Shoper 9 POS

Optional Components

- IIS Configuration Installer
- License Server Installer
- LiveUpdate Installer
- Tally.ERP 9 Installer
- TallyBridge Installer

Microsoft Installers

- SQL Server 2005 Express
- Windows Scripting
- SQL Redistributable
- MSI Utilities

Help

- Shoper 9 HO Release Notes
- Shoper 9 POS Release Notes
- Shoper 9 POS Installation & Setup
- Shoper 9 LiveUpdate
- Shoper 9 License Management
- Support Centre through Tally.ERP 9

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