gestix

Gestix — Multi-Store Upgrade Guide

For the Gestix administrator of an existing multi-store company

Gestix 7.2

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Moving shops set up with warehouses, document series and privilege profiles to Gestix 7.2 Stores.

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About this guide

This guide is for the Gestix administrator of a company that ran several shops before Gestix 7.2, each set up with its own warehouse, document series and privilege profile. Gestix 7.2 can turn that set-up into 7.2 **Stores**, in one step that you check and confirm. You do it once, after the upgrade.

What the rebuild does

For each shop it finds, Gestix proposes a Store with the shop's warehouse, its sales and return series, and one POS workstation. It then restricts the shop's privilege profile to that Store. You see everything in a preview first, and nothing changes until you apply it.

The rebuild never deletes anything. It does not change documents, document series, stock or the series that each profile may or may not use. A shop user sees the same series in the back office as before.

The steps

1. The notice at login: Gestix tells an administrator that Stores can be built.
2. Before you start: who applies it, a back-up, and the licence.
3. Checking the preview: the Stores proposed and the shops left out.
4. Choices in the preview: the incomplete Store, POS rights and the Store administrator.
5. Applying the rebuild: the confirmation and the result.
6. After the rebuild: checking the Stores, POS Store mode and the tills.

Gestix Technical Support can revert a rebuild by hand: see Reverting a rebuild.

> **Selling at the counter**
> For the cashiers' side of Stores, see the POS Quick User Guide.

The notice at login

When Stores can be built from your set-up, each administrator's login opens a dialog on the first screen:

Stores can be built from the existing warehouses and series: N (Administration > Stores)

N is the number of Stores that Gestix would create or complete.



The notice over the first screen: Cancel, or open the preview with Administration > Stores.

The notice is information only, and nothing has changed yet.

- **Administration > Stores** opens the Administration window at the rebuild preview.
- **Cancel** closes the dialog, and you carry on working as usual.

When it appears

The notice appears at every administrator login until the rebuild is applied or POS Store mode is switched on. Users who are not administrators never see it.

Gestix shows it when all of these apply:

- the licence includes the POS;
- POS Store mode is off;
- at least two physical warehouses each hold an enabled sales series;
- the rebuild has Stores to propose.

Before you start

Who applies the rebuild

An administrator applies the rebuild. If Gestix Technical Support does it for you, agree the choices in the preview with them first (see Choices in the preview).

The user who applies the rebuild becomes the **Administrator** of the new Stores. You can change it afterwards in each Store (Administration > Stores, Modify).

A back-up

The rebuild deletes nothing, and support can revert it by hand. Even so, take a back-up of the database first, or ask Gestix Technical Support to take one.

How Gestix recognises a shop

Gestix finds the shops from the series, not from the names or addresses. A shop is a physical warehouse that is the warehouse of exactly one sales series (Invoice/Receipt or Cash Sale) and exactly one return series (Credit/Return), both enabled, with documents already issued in the sales series. Its profile is the one privilege profile, other than an administrator profile, that may use only that shop's sales series.

A profile named after another shop is still linked to the shop whose series it uses. The preview shows each link, so check them there.

The other series of a shop

A shop usually has more series than these two, for example an Invoice series or an Order series used in the back office. They do not prevent Gestix from finding the shop: only the Invoice/Receipt, Cash Sale and Credit/Return series are counted.

After the rebuild, every customer series (sales, returns, invoices) whose warehouse is the Store's warehouse belongs to that Store:

- the shop's users keep using them, as before;
- a profile restricted to another Store cannot use them.

Logistic series, such as transfers, keep the rights they have today.

Series that belong to no shop

Series without a warehouse, or whose warehouse is not a shop's (for example, a head-office series used by the administrative staff), belong to no Store. The rebuild leaves them as they are:

- they do not prevent the rebuild, and they do not block POS Store mode;
- every profile that may use them today still may, including the profiles restricted to a Store;
- staff whose profile is not restricted to a Store keep every series they have today.

A warehouse that holds its own sales and return series, with documents issued, is proposed as a Store even when it is not a shop. Check the rows of the preview (see The Stores proposed).

The licence

The licence sets how many Stores you may have. The preview shows the count after the rebuild against the licence (see The licence count):

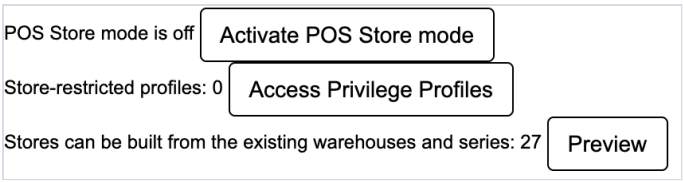
- if the rebuild would create more Stores than the licence allows, Apply is refused and nothing is changed;
- completing an existing Store or granting POS rights is never refused.

After the rebuild, Administration > Stores > New refuses a Store beyond the licence with "No more Locations available".

Checking the preview

Opening it

Open **Administration > Stores**, from the notice or from the Admin menu. While POS Store mode is off and there are Stores to propose, the page shows the line **Stores can be built from the existing warehouses and series: N**, with **Preview**.



Administration > Stores before the rebuild: POS Store mode off, no Store-restricted profiles, and the rebuild line with Preview.

Select **Preview**. Nothing changes until you select Apply.

The Stores proposed

The preview lists one row per Store, with:

- the Store's warehouse, sales series and return series;
- the shop's virtual warehouses (for example, warranty returns (RMA) or goods in transit), which are linked to the Store but are not its sales warehouse;
- the profiles to restrict to the Store;
- **New workstation** when the Store gets its first POS workstation;
- whether the row is a **New Store**, **Completes Store** (an existing incomplete Store takes this shop) or an **Existing Store**.

Store rebuild

Store	Warehouse	Default POS Sales Series	Default POS Return Series	Virtual warehouses
WH-01	WH-01	SALE-03	RET-02	VWH-01, VWH-02
WH-02	WH-02	SALE-04	RET-03	VWH-03, VWH-04

A detail of the preview: the first two rows, from Store to Virtual warehouses.

The whole table, with every Store proposed:

Store rebuild

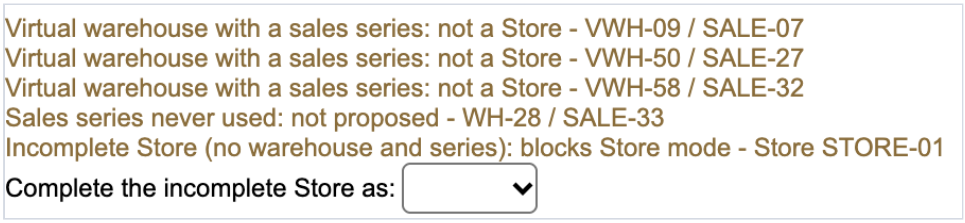
Store	Warehouse	Default POS Sales Series	Default POS Return Series	Virtual warehouses	Profiles restricted to the Store	POS Workstation	Action
WH-01	WH-01	SALE-03	RET-02	VWH-01, VWH-02	Profile 01	New workstation	New Store
WH-02	WH-02	SALE-04	RET-03	VWH-03, VWH-04	Profile 02	New workstation	New Store
WH-03	WH-03	SALE-06	RET-05	VWH-05, VWH-06	Profile 03	New workstation	New Store
WH-04	WH-04	SALE-05	RET-04	VWH-07, VWH-08	Profile 04	New workstation	New Store
WH-05	WH-05	SALE-08	RET-07	VWH-10, VWH-11	Profile 05	New workstation	New Store
WH-06	WH-06	SALE-09	RET-08	VWH-12, VWH-13	Profile 06	New workstation	New Store
WH-07	WH-07	SALE-10	RET-09	VWH-14, VWH-15	Profile 07	New workstation	New Store
WH-08	WH-08	SALE-11	RET-10	VWH-16, VWH-17	Profile 08	New workstation	New Store
WH-09	WH-09	SALE-12	RET-11	VWH-18, VWH-19	Profile 09	New workstation	New Store
WH-10	WH-10	SALE-13	RET-12	VWH-20, VWH-21	Profile 10	New workstation	New Store
WH-11	WH-11	SALE-14	RET-13	VWH-22, VWH-23	Profile 11	New workstation	New Store
WH-12	WH-12	SALE-15	RET-14	VWH-24, VWH-25	Profile 12	New workstation	New Store
WH-13	WH-13	SALE-16	RET-15	VWH-26, VWH-27	Profile 13	New workstation	New Store
WH-14	WH-14	SALE-17	RET-16	VWH-28, VWH-29	Profile 14	New workstation	New Store
WH-15	WH-15	SALE-18	RET-17	VWH-30, VWH-31	Profile 15	New workstation	New Store
WH-16	WH-16	SALE-24	RET-23	VWH-32, VWH-33	Profile 22	New workstation	New Store
WH-17	WH-17	SALE-20	RET-19	VWH-34, VWH-35	Profile 19	New workstation	New Store
WH-18	WH-18	SALE-19	RET-18	VWH-36, VWH-37	Profile 18	New workstation	New Store
WH-19	WH-19	SALE-21	RET-20	VWH-38, VWH-39	Profile 20	New workstation	New Store
WH-20	WH-20	SALE-22	RET-21	VWH-40, VWH-41	Profile 23	New workstation	New Store
WH-21	WH-21	SALE-23	RET-22	VWH-42, VWH-43	Profile 21	New workstation	New Store
WH-22	WH-22	SALE-25	RET-24	VWH-44, VWH-45	Profile 25	New workstation	New Store
WH-23	WH-23	SALE-26	RET-25	VWH-46, VWH-47	Profile 26	New workstation	New Store
WH-24	WH-24	SALE-28	RET-27	VWH-48, VWH-49	Profile 27	New workstation	New Store
WH-25	WH-25	SALE-29	RET-28	VWH-51, VWH-52	Profile 29	New workstation	New Store
WH-26	WH-26	SALE-31	RET-30	VWH-53, VWH-54	Profile 30	New workstation	New Store
WH-27	WH-27	SALE-30	RET-29	VWH-55, VWH-56	Profile 31	New workstation	New Store

The Stores proposed, one row per shop (an example with neutral names: warehouses WH-nn, virtual warehouses VWH-nn, series SALE-nn and RET-nn).

Check each row against the shops you know: the right warehouse, the right series and the right profile.

The shops left out

Below the Stores, the preview lists what it does not propose, one line each, as "text - warehouse / series":



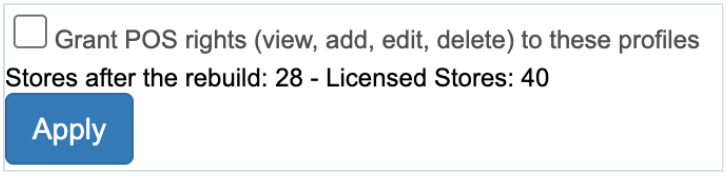
Lines below the Stores: three virtual warehouses with a sales series, a sales series never used, and the incomplete Store 1 with the choice to complete it.

Line	What it means
Virtual warehouse with a sales series: not a Store	A Store's sales warehouse must be physical. The location keeps working as before, without Store behaviour (for example, an online shop).
Sales series never used: not proposed	No document was ever issued in the shop's sales series.
Several sales series in the warehouse: not proposed	Gestix cannot tell which one is the shop's.
No return series: not proposed	The warehouse has no Credit/Return series.
Several return series: not proposed	Gestix cannot tell which one is the shop's.
Warehouse already belongs to another Store: left as it is	An existing Store already uses the warehouse.
No profile is limited to this shop: its Store stays open to every profile	The Store is created, but no profile is restricted to it.
Incomplete Store (no warehouse and series): blocks Store mode	An existing Store has no warehouse and series (see Choices in the preview).

To have a shop proposed, correct its set-up (for example, give it a return series), then open the preview again.

The licence count

The preview ends with **Stores after the rebuild: N - Licensed Stores: M**. N must not be more than M, or Apply is refused.



The end of the preview: the box to grant POS rights to the shop profiles listed above it (not ticked), the licence count and Apply.

Choices in the preview

Series that belong to no shop, such as head-office series, need no choice: the rebuild leaves them as they are (see Series that belong to no shop).

Completing an incomplete Store

A company that has used the POS may already have a Store without a warehouse and series, such as the default Store 1. The preview flags it ("Incomplete Store (no warehouse and series): blocks Store mode") and offers **Complete the incomplete Store as**, with the shops proposed.

- **Choose a shop:** the existing Store takes that shop's warehouse and series and keeps its workstation, instead of creating a new Store for the shop.
- **Leave it:** the Store stays incomplete. POS Store mode cannot be activated until you complete it in Administration > Stores (Modify).

POS rights for the shop profiles

To sell at a till, a shop user's profile needs rights on the POS. The preview lists the shop profiles that do not have them, under **Shop profiles without POS rights:**, with the box **Grant POS rights (view, add, edit, delete) to these profiles**.

- **Ticked:** Apply gives those profiles POS view, add, edit and delete. Their other rights stay as they are, and administrator profiles are never changed.
- **Not ticked (default):** no right is changed. Grant them later in Roles/Privileges. Until then, Administration > Stores shows "Shop profiles without POS rights: N", with Preview.

Leave the box unticked if your shops do not use the Gestix POS yet.

The Store administrator

The user who applies the rebuild becomes the Administrator of the new Stores. A Store that already exists keeps its own. If support applies the rebuild for you, change the Administrator of each Store afterwards, if needed.

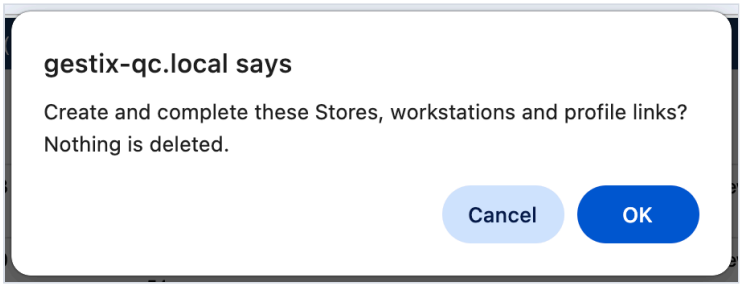
Applying the rebuild

Apply and confirm

At the end of the preview, select **Apply**. Gestix asks:

Create and complete these Stores, workstations and profile links? Nothing is deleted.

The question opens in a dialog of your browser, with OK and Cancel. Cancel leaves everything as it was.



The confirmation is your browser's own dialog (here Google Chrome on macOS): its look, its title and the labels of its buttons depend on the browser and its language.

Confirm. Gestix applies everything in one step: either all of it is applied, or nothing is.

What is created

- the new Stores, and the incomplete Store completed as the shop you chose;
- the link between each Store and its warehouses, virtual warehouses included;
- one POS workstation for each Store that has none;
- each shop profile restricted to its Store;
- POS rights for the shop profiles, only if you ticked the box.

What is never changed

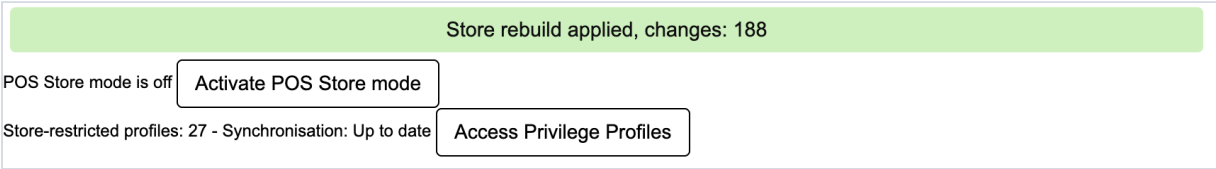
Nothing is deleted. Documents, document series, stock and the series that each profile is denied stay exactly as they were.

The result

The page then shows:

- **Store rebuild applied, changes: N**, the number of rows created or changed;
- **Store-restricted profiles: N - Synchronisation: Up to date**.

If an existing Store is still incomplete, it also shows **Store mode cannot be activated: the configuration is incomplete**.



The result: the number of changes, and the Store-restricted profiles with the synchronisation up to date.

The rebuild line is gone. A second rebuild proposes nothing.

The System Log

The System Log records the rebuild in one entry, with every change: each Store with its warehouse and series, each warehouse link, each workstation, each profile restricted, and each POS right granted.

If it is refused

- **"The Store rebuild could not be applied: nothing was changed"**: nothing was written. Open the preview again, and contact Gestix Technical Support if it happens again.
- **More Stores than the licence allows:** Apply is refused and nothing is changed.

After the rebuild

Check the Stores

Administration > Stores lists the Stores with their warehouse, series and Administrator. Open one to check it, and change its Administrator if needed (Modify).

In the back office, shop users see the same series as before.

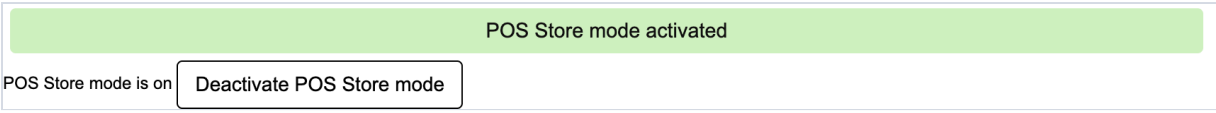
POS rights

If you did not tick the POS rights box, give the shop profiles POS view, add and edit in Roles/Privileges before they sell. Administration > Stores shows "Shop profiles without POS rights: N" until they have them.

Switch on POS Store mode

In Administration > Stores, select **Activate POS Store mode**. Gestix checks that every Store is complete, with a physical warehouse, a sales and a return series, and a workstation:

- **POS Store mode activated:** the Stores are in use;
- **Store mode cannot be activated: the configuration is incomplete:** complete the Store that is still missing its warehouse or series, then try again.



After Activate POS Store mode: "POS Store mode activated", and the button now reads Deactivate POS Store mode.

Bind each till

With Store mode on, each till device is bound once, by an administrator, to its Store's workstation. Until then the till shows the binding page, and no sale is possible. See For managers — Stores and workstations in the POS Quick User Guide.

A shop user sells only at a till of their own Store. At another Store's till, Gestix shows "Your privilege profile is not authorised for this Store".

New Stores later

Create a Store in Administration > Stores > New. It needs its own warehouse and series. A Store beyond the licence is refused with "No more Locations available".

Reverting a rebuild (support)

This page is for Gestix Technical Support. A rebuild is reverted by hand, and only before the new workstations have issued documents: a workstation that issued documents cannot be deleted.

What to revert

The System Log entry of the rebuild lists every row that it created or changed. Use it as the list of rows to revert.

Steps

1. Take a back-up of the database.
2. Switch POS Store mode off (Administration > Stores, Deactivate POS Store mode).
3. Delete the workstations that the rebuild created (`pos_workstation`).
4. Delete the Stores that it created (`pos_location`) and its profile restrictions (`sys_priv_store`).
5. Set the warehouse links back to 0 (`kwh_pos` in `stk_warehouse`).
6. Set the Store that it completed (Store 1) back to warehouse 1 and no series.
7. If POS rights were granted, set the POS rights of the listed profiles back (`p_j_v`, `p_j_a`, `p_j_e`, `p_j_d` in `sys_priv`).

The rebuild changed no document, series, stock or series denial, so nothing else needs reverting. The database schema is not changed either (`sys_priv_store` is created when first needed, as by the Store administration).