

Version 6 Update Instructions for Keystroke Classic and Pre-v5x Keystroke POS Installations

Preparing Your System for the Version 6x Update (from Version 4x)

Keystroke POS Version 6 contains significant new features designed to help you operate your business more efficiently and more profitably. Some of the new features require modifications to your data files. This includes transactions, databases, configuration settings, and various other supporting files such as Form Files that control of printed invoices, labels, and now reports. Most of the necessary file modifications will be performed by a built-in Data Conversion routine. This routine will run the first time Version 6 is launched with business data formatted for an earlier version.

It is very important to carefully follow these instructions to avoid unnecessary complications. Also, if your business relies on customizations such as modified Form Files, custom reports, MultiStore polling scripts, custom written integration utilities, etc., you will need to review and probably update such modifications in order for them to work properly with Version 6. While SBS has designed the software to provide for a smooth installation and Data Conversion, the number of variations in how the system is used may result in unexpected difficulties. For this reason, SBS strongly recommends you contact your local Authorized Dealer for assistance with this installation, especially if any customizations are being utilized, such as those described above.

WARNINGS

Running Multiple Versions of Keystroke POS (e.g., for evaluation or testing of v6)

Due to the functionality of the Windows Operating System Registry, the installation of Version 6 (even in an alternate directory) will disable your ability to run earlier versions of Keystroke POS on the same computer. Once you have updated data files to Version 6, the only method of reverting to a previous version is to uninstall Version 6, reinstall the previous software version, and restore data from a backup made prior to the Version 6 Data Conversion.

If you want to install and review Keystroke Version 6 before committing to updating your actual live business data, there are two options:

- 1) Install Version 6 on a separate computer that is independent from your live system, such as a home computer or laptop.

– OR –

- 2) After backing up data files, install and use Keystroke Classic (v4.21) in your current Keystroke POS program directory (typically C:\KEYSTROK), and then install Keystroke POS Version 6 into a different directory (such as C:\KEY6). Keystroke Classic is virtually identical to Keystroke POS v4.20, and since it does not require significant data file changes (for any version 3.0 or later), you can install and use Classic without the more significant Version 6 Data Conversion.

Keystroke Classic

While Keystroke POS and Keystroke Classic are very similar programs, each registers and uses different DLL filenames, so the two programs can be used on the same computer using different data. If you are currently running Keystroke “Classic”, you may install Keystroke POS v6 in an alternate directory/folder on the same computer. If you would like to install and test Version 6 with your business data, you may want to copy your current program and data to a new directory and install and run Version 6 in that directory. When you are ready to update your live system to Keystroke POS v6, simply follow these instructions to reinstall Version 6 over Keystroke Classic and convert your data files. **Warning:** If you use any custom programs, batch files, or data switches that may refer to the location of your live data, this should not be performed as it could result in extensive and unreparable data problems.

Older Versions Preceding v4.0

If you are presently running a version of Keystroke software earlier than 4.0 or if you have not updated your Keystroke software in over 10 years, **please call SBS at 800-275-4727 before proceeding.** The Version 6 Data Conversion routine will not convert data files formatted for earlier versions. Additional instructions are available for the necessary data conversion.

Read These Entire Instructions Before Installing Software

Before installing the Keystroke POS v6 software update, please thoroughly read these instructions and familiarize yourself with the software enhancements relative to the Keystroke software version you are currently using. If you have questions, please contact your local Authorized Keystroke Dealer or SBS at 800-275-4727 (Monday-Friday 8am-6pm Mountain Time).

Installation Procedures


If you are installing Keystroke on a network or in a chain of stores, or if your system utilizes customizations SBS strongly recommends that you hire the assistance of your local Keystroke dealer. They will be able to better handle any unforeseen circumstances and help to ensure a trouble free installation of this software update. Your dealer can also help you properly utilize the new Version 6 features so that your business can realize the benefits and purpose of this update.

Allow plenty of time for the installation, data conversion, and testing before you need to use the system in your actual business operation. Depending on the amount of data in your system and the performance of your computer(s), this process could take a few minutes to several hours. Rushing or interrupting the installation may lead to unnecessary difficulties, so it is recommended to start this procedure at the end of a business day as opposed to before business hours.

After reviewing any customization issues with your local Keystroke dealer, reading this document, and reviewing software changes relative to your current software version, follow these step-by-step instructions.

1. Close all sessions of Keystroke on all computers. The installation and data conversion process requires exclusive access to the program and data files. Inform anyone with access to any networked computers that the installation is taking place, and that no one should attempt to start the Keystroke program during the installation and data conversion process.
2. Make a complete and reliable backup of your Keystroke program and data files. This should include the \KEYSTROK directory and all sub-directories. As an added precaution in addition to your standard backup method, consider making a second backup copy using an alternate media or alternate device (e.g., use a second CD-R drive, and/or backup to a workstation's hard disk). Do not discard the latest pre-Version 6 CD or diskettes, in the very unlikely case you need to reinstall it.
3. **Installing Version 6 on a primary computer or file server:** Place the enclosed CD into the CD-ROM drive. The Keystroke Version 6 logo and several menu options will automatically display (unless Autorun is disabled on your system). Select Install Keystroke Point Of Sale.

If you have a floppy drive and a Version 6 License Disk, first insert the disk in your disk drive, then select Install Licensed System Using License Disk. If you do not have a floppy drive or a valid License Disk, select Install Licensed System Using Product ID. (A valid Product ID code will be required.) The default and recommended Install Folder (subdirectory) for Keystroke POS Version 6 is C:\KEYSTROK.

4. Follow the on-screen instructions to complete the installation.
5. If your business uses any of the utility programs included in the Keystroke User Bundle or MercuryPay Server integrated payment processing software, you will also need to install the updated versions of these programs. From the main screen of the CD, select Install Other Software then any appropriate program(s) to install. **Note:** To install updated versions of User Bundle utility programs, select Install Keystroke POS Integration Toolkit (a.k.a., Classic Utility Programs).
6. After installing all updated software on your primary computer or file server, start Keystroke as you normally do and follow the on-screen instructions to convert data files.
7. **Installing Version 6 on auxiliary workstations:** After completing the automated Data Conversion, you will also need to update each workstation from which Keystroke will be used. The easiest and recommended method to install Keystroke on auxiliary workstations is to run the SETUPWS.EXE program located in the program directory of the primary computer installation (e.g., F:\KEYSTROK\SETUPWS.EXE). The Client Installation option is recommended for most users.
8. **Testing:** It is a good idea to perform a few basic tests on critical elements of the system to be sure everything is working properly. For example, enter test transactions and print each type of form. Also, test hardware such as cash drawers, pole displays, scales, etc.
9. Explore the many new features of Keystroke POS Version 6 and discover new tools to help you run your business more efficiently and profitably! Press  to access the updated on-screen Help system.

**Miscellaneous Notes for Installations Updating
from Keystroke Classic or Versions of Keystroke POS Prior to v5x**

WARNING: If you are running Keystroke POS v3.10 or later but earlier than v4.0 (e.g., v3.21), you may install Keystroke Classic v4.21 or Keystroke POS v5.20 and launch the Keystroke DOS version to perform a preliminary Data Conversion, after which follow the enclosed instructions to install Version 6. If you are running a version of Keystroke POS earlier than v3.10, you will need to obtain further instructions from SBS.

DOS Compatibility – Version 6 no longer supports the DOS (16-bit) programs. All machines running Keystroke POS Version 6 must be a Windows 98SE machine or later (Windows XP, Windows 2000, Windows 2003). Any custom programming that relied on the older .EXE programs will now use updated 32-bit equivalents programs.

Cash Drawers – Due to significant changes in how multiple drawers are configured in Version 6, cash drawer configuration information is only updated from the primary configuration file KSCNF.DAT. Other multiple drawer setups will need to be re-configured. It is recommended to write down the cash drawer settings for each computer before installing Version 6 and converting the data.

Contact Database – The program will create a default Contact record for any Customer whose Shipping address is different from their Mailing address, and will place the Customer's Shipping Address fields on their new Contact record. Shipping Address fields have been removed from the main Customer database.

Sales Manager Parameters – Some parameters have been moved to the setup of individual Sales Transaction Types. The conversion program will maintain most original settings. You may want to review the settings for each active Transaction Type in the Configuration Manager-Settings-Sales Transactions function.

Transaction Types – the On Hold transaction type is now used in lieu of Layaway. You can change the default Quick Save and Quick Load back to Layaways if you wish.

Print Buttons – After converting the main data files, if you run the program again using a different forms file that is still in the old format, the program will automatically (and without telling you) convert it to the format for Version 6. However, in this case, the Print and Continue flag will be disabled on all Print Buttons stored in this file. It may be necessary to manually turn this setting back on in the Configuration Manager.

Labels and Price Tags – You may need to convert custom price tag Form Files using the provided CONVPTG.EXE program. This will convert individual v4.2x Price Tag files (.PTG) in the FORMS\ directory to the new v6x format (.TAG) in the REPORTS\ directory. As a temporary workaround you can also print price tags using the old format by selecting "Label Manager – v4.2" from the Custom Modules menu. See DOC\CONVPTG.DOC for more information on its use.

Custom Database Screen Files and Form Files – Custom Database Screen Files and Form Files are not fully converted. This is due to new capabilities of Version 6 which will likely provide a better solution than customizations made for earlier versions. Please contact your local Keystroke dealer for assistance with Customer Database Screen Files or Form Files.

Reports – The Report Manager now relies on a new software engine which utilizes customizable Report Forms (User Bundle license required to modify Forms). Standard Report Forms are available in Version 6 for most reports. As a temporary workaround, you can also print reports using the old report engine by selecting "Report Manager – v4.2" from the Custom Modules menu.

Report Forms – Forms are automatically converted to the new version as you use them, and not during the main data conversion. This allows you to copy in forms from older versions even after you have converted to the new version.

For a complete chronological listing of recent program changes, review the README.TXT on the Version 6 License Disk.

**If you have any questions or difficulties, please contact your local Authorized Keystroke Dealer
or call SBS at 800-275-4727 (Monday - Friday, 8am - 6pm Mountain Time)**