



SimpleEOD

Integration and Installation Guide

SimpleEOD is a Windows Service which automatically uploads end of day (EOD) data. The following guide contains integration and installation instructions intended for POS vendors.

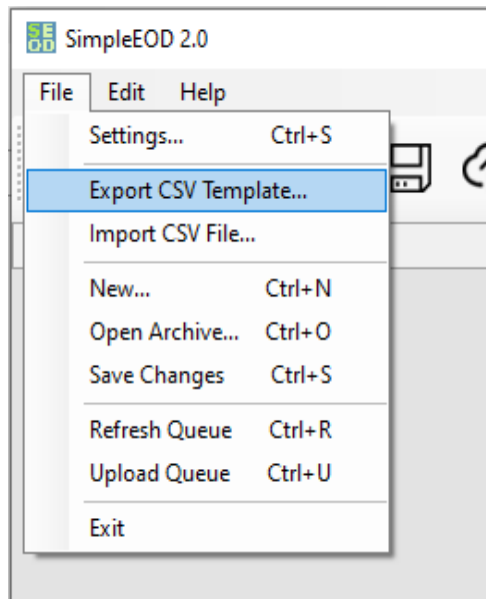
Saving EOD files

Your POS vendor must use the following strict guidelines when saving EOD data for SimpleEOD to upload.

- Use the CSV template (see CVS Template below) including the header row with exact spellings.
- Files are required to be named using US date format and underscores: `yyyy_mm_dd.csv`
- Only one store and one day are allowed per file.
- They can choose the directory files are saved to, then let SimpleEOD know where to find them within SimpleEOD settings (see Settings below).

CSV Template

The CSV template for the current installed version of SimpleEOD is included within the SimpleEOD software. Click the File menu and then click Export CSV Template.



Requesting Store Credentials

Each store will have their own username and password, which you will enter into SimpleEOD settings at each store. This will identify who they are when uploading data.

To request a new store, let us know the following:

- Store State (Example: WI)
- Store Group (This will be the title for stores run by the same person. Also used if only 1 store in the group. Example Waukesha County or Waukesha Group)
- Store Name (Typically named after the city. Example: Waukesha)
- Store Contact Person Full Name
- Store Contact Person Phone
- Store Contact Person Email
- URL to view this store's detailed reports
- URL to view this group's detailed reports

Installing SimpleEOD

SimpleEOD will need to be installed at each store on (ONE) Windows computer that has access to the CSV files that your POS will save at the end of each day.

Download the latest SimpleEOD Installer from:

https://www.nationalreports.org/SimpleEOD_Installer.zip

Extract and double click the downloaded file then follow instructions to install. After installing, a SimpleEOD icon will appear on your desktop. Double click to run SimpleEOD.

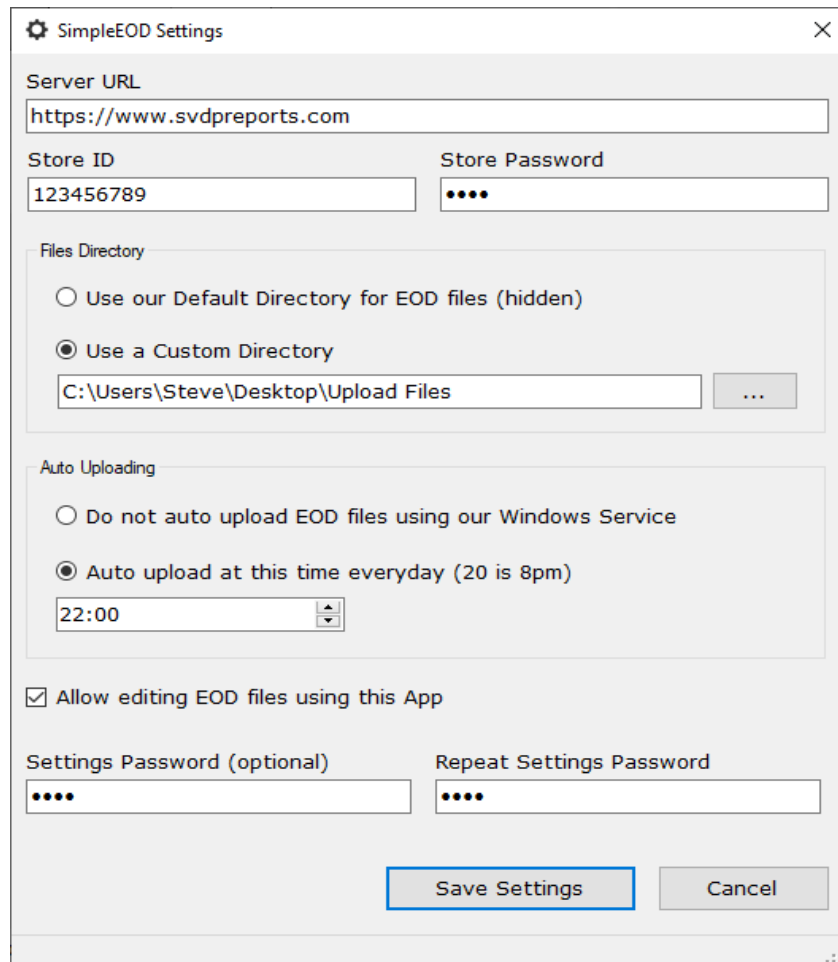
Settings



Settings will appear the first time running SimpleEOD and after clicking the Settings button on the top left of the main window.

Enter the store's credentials (DIFFERENT PER STORE).

- If SimpleEOD will auto upload CSV files saved by your POS, select "Upload at this time everyday..." The SimpleEOD Windows Service will run in the background without this desktop application being open.



The screenshot shows the 'SimpleEOD Settings' dialog box with the following fields and options:

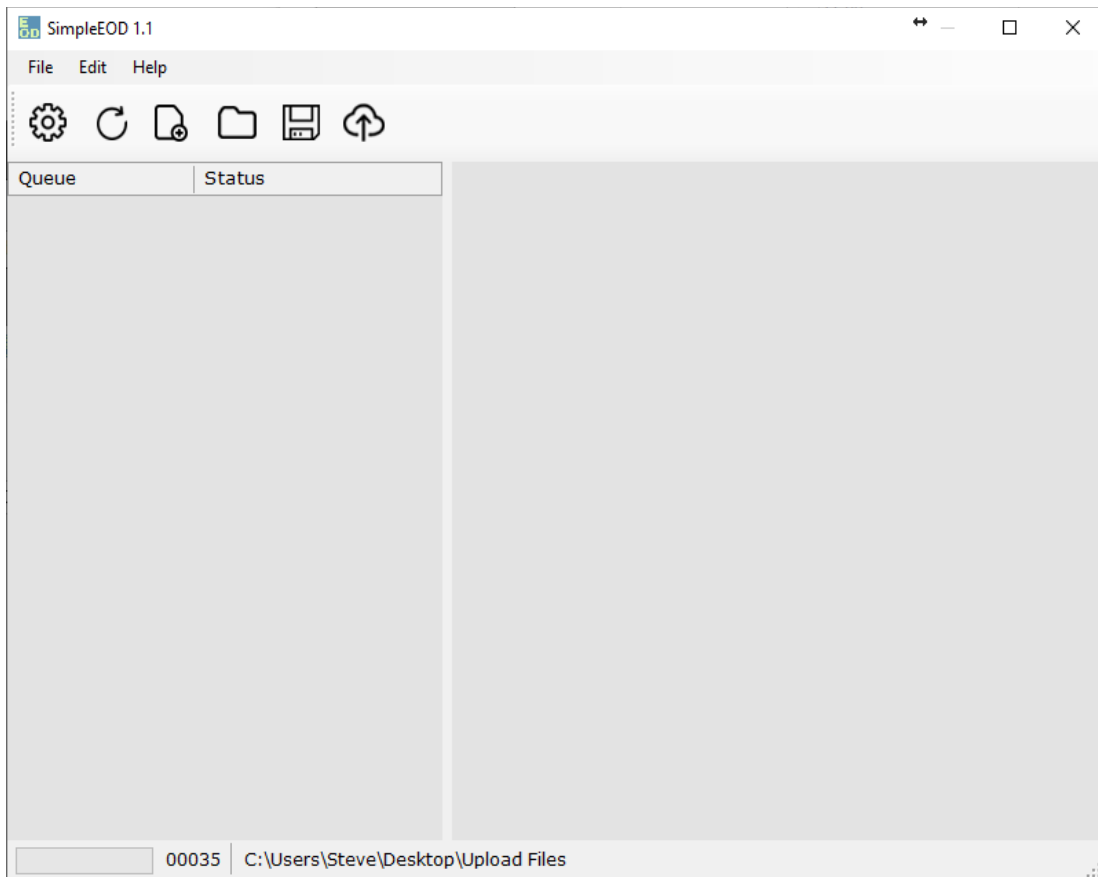
- Server URL:**
- Store ID:**
- Store Password:**
- Files Directory:**
 - Use our Default Directory for EOD files (hidden)
 - Use a Custom Directory
 -
- Auto Uploading:**
 - Do not auto upload EOD files using our Windows Service
 - Auto upload at this time everyday (20 is 8pm)
 -
- Allow editing EOD files using this App
- Settings Password (optional):**
- Repeat Settings Password:**
-

Manual Entry

The following instructions are for manual entry (not recommended).

The Main Window

The main window contains a Queue on the left, or a list of files waiting to be uploaded. It also contains a file viewer on the right, to see what is in your EOD file and/or edit before uploading.



Refresh Queue

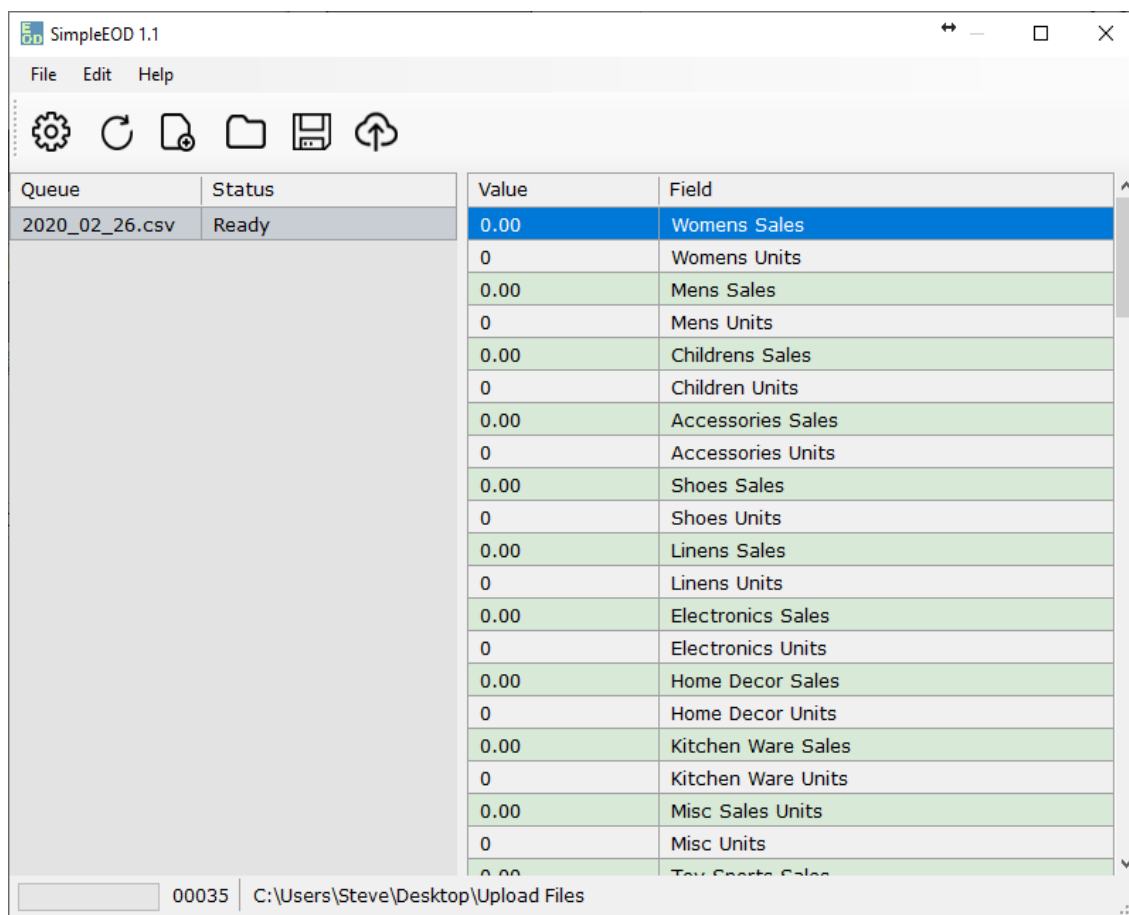
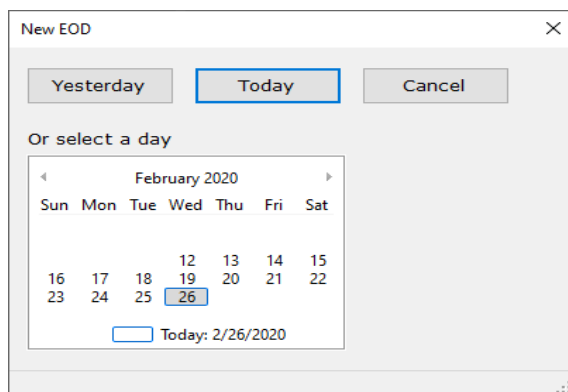


This button will refresh the list of files in the Queue.

New EOD



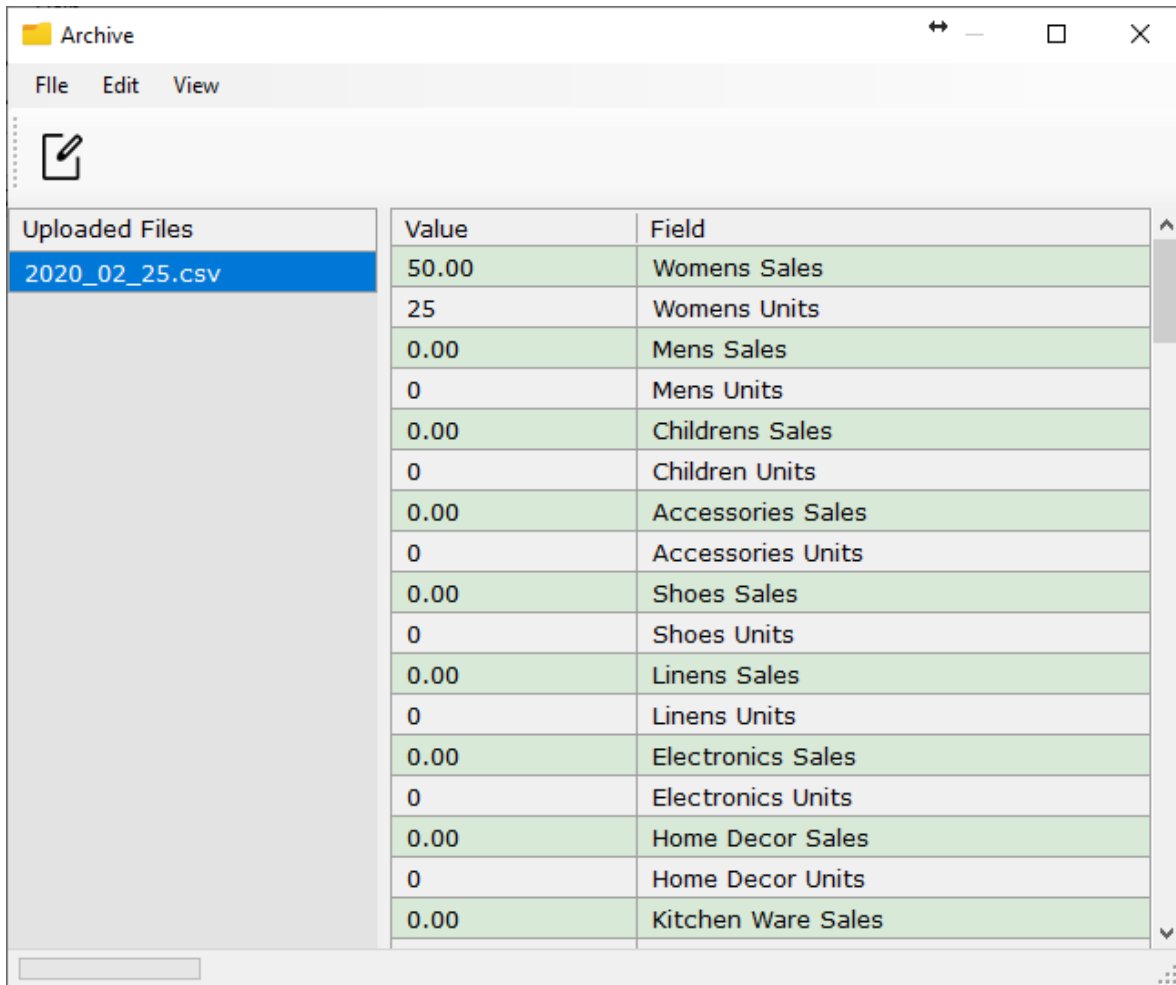
This button will create a new EOD file. Choose a date within 15 days. Next, you will see your new EOD file which you can edit using your number keypad.



Open Archive



This button will open a list of previously uploaded EOD files. If settings allow, you may click the edit button to make changes and re-upload.



The screenshot shows a window titled "Archive" with a menu bar containing "File", "Edit", and "View". Below the menu bar is a toolbar with a pencil icon. The main content area is divided into two sections. On the left, under the heading "Uploaded Files", there is a list with one item: "2020_02_25.csv", which is highlighted in blue. On the right, there is a table with two columns: "Value" and "Field". The table contains 18 rows of data, alternating between light green and light gray background colors. The data represents sales and units for various categories.

Value	Field
50.00	Womens Sales
25	Womens Units
0.00	Mens Sales
0	Mens Units
0.00	Childrens Sales
0	Children Units
0.00	Accessories Sales
0	Accessories Units
0.00	Shoes Sales
0	Shoes Units
0.00	Linens Sales
0	Linens Units
0.00	Electronics Sales
0	Electronics Units
0.00	Home Decor Sales
0	Home Decor Units
0.00	Kitchen Ware Sales

Save



This button saves changes to EOD files on your computer only. The file/s will still need to be uploaded. Entry errors will also be displayed after saving.

Upload Queue



This button will upload all files waiting in the Queue.

Questions

If you have any questions. Please contact us.