

Wasp

BARCODE TECHNOLOGIES

[Portal](#) > [Knowledgebase](#) > [Discontinued Products](#) > [QuickStore](#) > [QuickStore: How to install the second store for multi-location polling](#)

QuickStore: How to install the second store for multi-location polling

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The purchase of the Enterprise version of QuickStore, either outright or as an upgrade from Standard or Pro, comes with 2 store keys. Both keys will be needed when going through these steps, so if you don't have both keys, please contact Wasp to get the second key.

These steps assume the main store has already been set up and is in operation. If not, install the main store as normal, then follow these steps to add the second store.

Also, these steps are for setting up the polling by FTP. Setting up by network is slightly different, and the changes needed will be detailed below. Wasp does not provide the FTP service. There are programs available from other vendors to set up and host your own FTP site, your Internet Service Provider may include hosting an FTP site for you as an additional

service, or there are other sites in the internet that provide such hosting.

From the original store:

1. Go to Setup > Multi-Location Polling. Select the option for "This location will perform the polling operation and contact all remote locations". It will then allow you to enter the polling time, and tab 2 FTP Settings will become available.
2. On FTP Settings, check the box for "This location will use a FTP site to exchange information with other locations", then fill in the information for your FTP site and hit OK.
3. Go to Setup > Store > Add a New Store. For Type select Remote, then fill in the rest of the information for the second store on tabs 1 - 4.
4. On tab 5. Options, this can be a little confusing. These options are how you want to treat data for store 2 when accessing it from store 1. So, where it says "Create purchase orders for stock items for this store at this location", it means that if that box is checked, you will be able to create purchase orders for the second store when you are actually at the original store. If that box is unchecked, you won't be able to create the purchase orders for the other store.
5. On tab 6. Polling, for License Number enter the last 6 digits of your second store's license. Select FTP for the method, and it should show you the FTP information that was entered on step 2, but you will be unable to edit it from this screen. Click OK.
6. Setup > Store will now show This Location - Store Number 1 (1), and Remote Location - Store Number 2 (2).

From the new store:

1. If you have already installed the program at the second store and started using it without setting up the multi-location polling, any items that have been created or sales that have been entered will be invalid, so print out or otherwise save as much of that data as is needed. Then we will need to create a blank database. You can create a backup first from the File menu if desired.
2. To create the blank database, go to C:\WQS\Data and delete everything in that folder. When you open the program, it will ask if you want to restore a backup, register, run the demo, or exit. Select Register and call Wasp to register the second store's key.
3. As it prompts you through the store setup, enter the address and other information for store 1. This is to maintain consistency of which store is which number between the two locations. This will make more sense when you get to steps 6 and 7.
4. Go to Setup > Multi-Location Polling and select "This location is a remote location that will be polled". Again, you can enter the time for the batch process to run.
5. On tab 2 Send, you can decide how much information should be polled. On tab 3 Method, specify FTP and again enter the same FTP information as you did on step 2 from the original location. On tabs 4 and 5, they will default to receiving all information, but if you want to restrict some of the data, you can do so there.
6. Go to Setup > Store > Add a new store. This will open store settings for Store 2. Enter the second store's information, and leave type set to Local. Fill in the rest of the tabs as needed for that store. When you click OK, you will get a message that you are only licensed

for a single Local store. Click OK on that message.

7. Go to Setup > Store > This Location - Store Number 1 (1). Click the reset button and confirm that you are sure, then change Type to Remote. Setup > Store will now show Remote Location - Store Number 1 (1), and This Location - Store Number 2 (2), which is the mirror for what was shown at the original location.

To get the item information from from the original store to the new one, you will need to perform the initial batch operation.

1. At the original store, go to Activities > Daily Batch Update Process. On the Files tab, check the boxes to Send all inventory items and standards, and Send all users, alternate tax rates, and other setup lists. Check the other boxes as desired. On the Status tab, click Start. It will prompt to click Yes to begin polling at the time you specified in setup, or No for NOW.
2. At the second store, go to Activities, Daily Batch Update Process, and click Start. Again it will prompt Yes for the time, No for NOW.

Both stores will be unable to perform other operations while the polling operation is happening, which is why it is usually done after hours. Once it is complete, both stores will have the same assigned item numbers and customers. Only the original store is allowed to create new items or other records that have an assigned number, again to maintain the consistency of the records between the locations.

For normal polling operations:

At the end of the day, go to Activities > Daily Batch Update Process. It is usually not necessary to change any of the options for a normal polling operation, so you can just click Start. It will prompt Yes for the time that was set, or No for NOW. If you click Yes, it will go into a waiting to start status until time to begin transferring the files.

To set up the polling using Network rather than FTP:

If the two stores are set up so they can share files directly with each other, either by being on the same local network or by VPN or some similar method, you can use the Network method rather than FTP.

1. At the second store, go to Setup > Multi-Location Polling > 3. Method. Select Network. It will display the folder path that will be used for transferring files. By default, it is C:\wqs\data\transfer. If you've installed QuickStore to a different path, that will be reflected here. This path cannot be edited.
2. In Windows, navigate to the path given in step 1 and Share the folder, making sure to allow network users to change files in that folder.
3. At the original store, you will need to set up a mapped drive to the second store. It will be easiest if you map directly to the Transfer directory shared in step 2 above.
4. Go to Setup > Multi-Location Polling > 2. FTP Settings, and the "This location will use a FTP site to exchange information with other locations" should be unchecked.
5. Go to Setup > Stores > Remote Location - Store Number 2 (2). On tab 6. Polling, set method to Network. From this machine you will be able to edit the path for the Incoming and Outgoing files. If the mapped drive on step 3 was set directly to the Transfer directory

using drive letter Z for example, then you would enter Z:\ for both paths. If it was mapped to something else, like the root folder of the second store's hard drive, then you would need to enter the path for the transfer directory in that mapped drive, like Z:\wqs\data\transfer. There is a browse button there that can be used to locate the right folder, if necessary.

6. The actual polling operation proceeds as above.