Convert Point of Sale Enterprise database to Point of Sale Professional database

As Reckon has stopped releasing POS Enterprise from 2017 onwards, we have prepared the following guidance to help you convert the Enterprise database to a Professional database.

Option 1: You can start a new Point of Sale database (PDB file) on POS Professional. However please note that by doing this you will lose some information like transaction history, laybys, promotions, customer loyalty points, additional barcodes, Sales Rep access settings etc. that you may have in the old database. Information like customer's details (excluding Layby customers), stocks and inventory, etc. will remain, as they will be transferred from the Reckon Accounts company file.

Option 2: This option involves migrating all the data from your Enterprise database to a Professional database. Follow the below instructions.

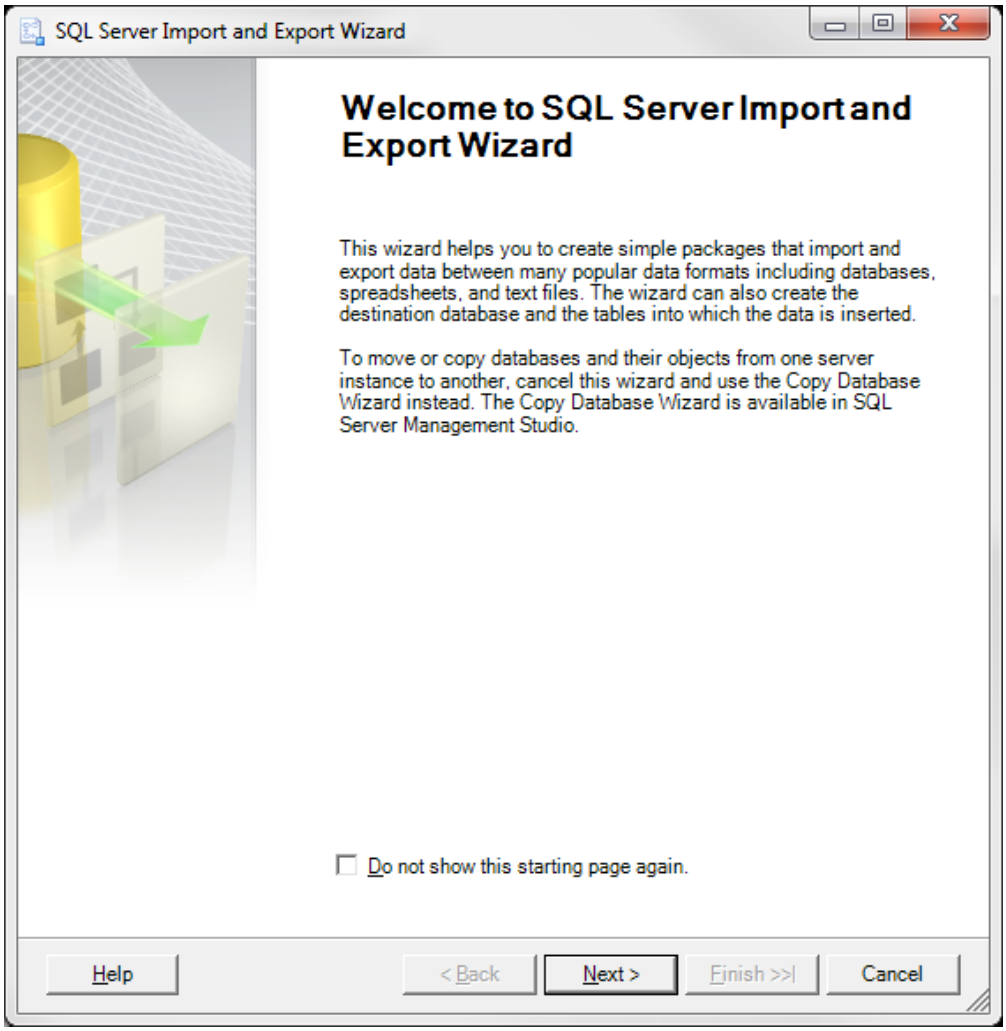
Requirements:

1) The existing POS Enterprise database.
2) Admin access to the PC and to the database
3) POS Professional 2017 and Reckon Accounts 2017
4) 32-bit version of **SQL Server import and export data wizard**. Most likely this is already installed with your SQL server installation.
5) **MSSqLToJet4.XML** file provided by us.
6) **EmptyQBPOS.PDB** file provided by us.

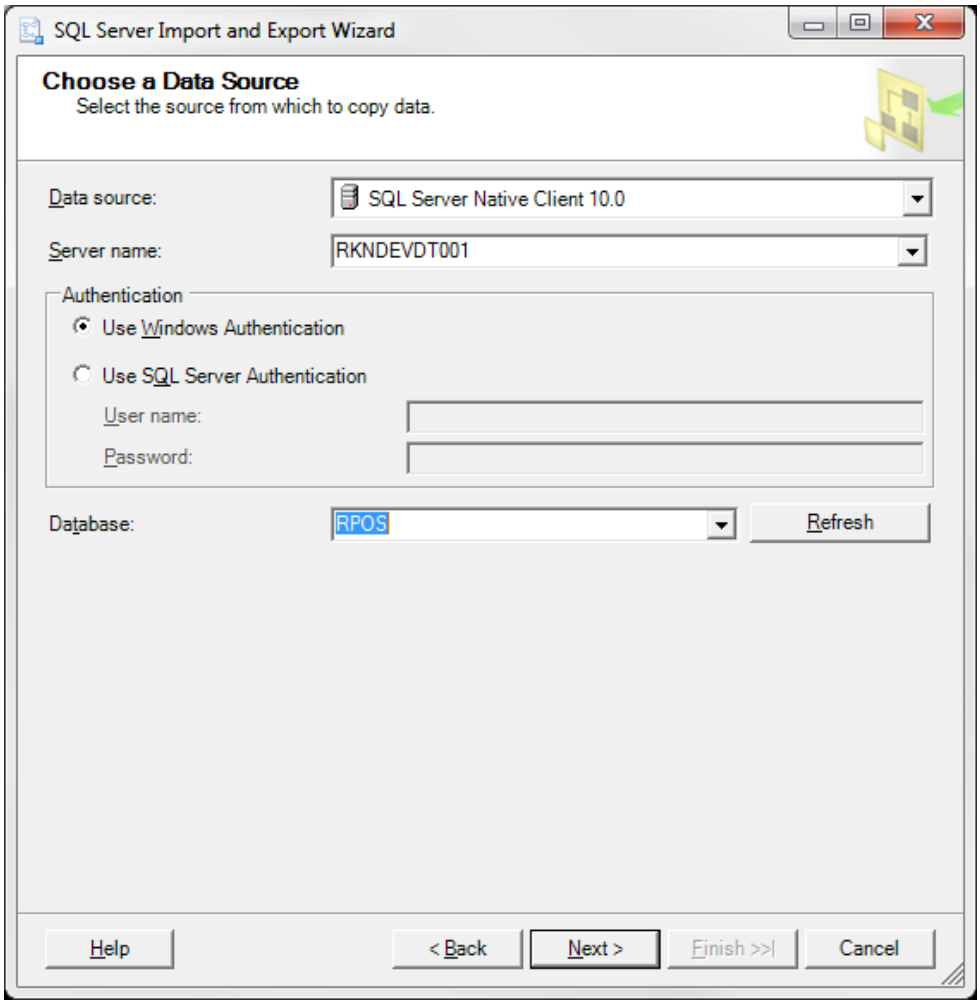
Detailed Steps:

1. Log on to the machine where you have SQL Server installed, if possible as the user who installed SQL Server
2. For the conversion, you need to use the 32-bit version of the SQL Server Import and Export Data wizard. Copy the MSSqlToJet4.xml file provided by Reckon to the following path and overwrite the existing file of the same name. You can check which version you have by going to the Programs list and finding the Import and Export Data option under Microsoft SQL Server 20xx:
    a. If using SQL Server 2008 R2, copy to C:\Program Files (x86)\Microsoft SQL Server\100\DTS\MappingFiles
    b. If using SQL Server 2014, copy to C:\Program Files (x86)\Microsoft SQL Server\120\DTS\MappingFiles
    c. From the Programs menu, under Microsoft SQL Server 2008 R2 (or 2014) select the Import and Export Data option. The following window appears. Click Next.

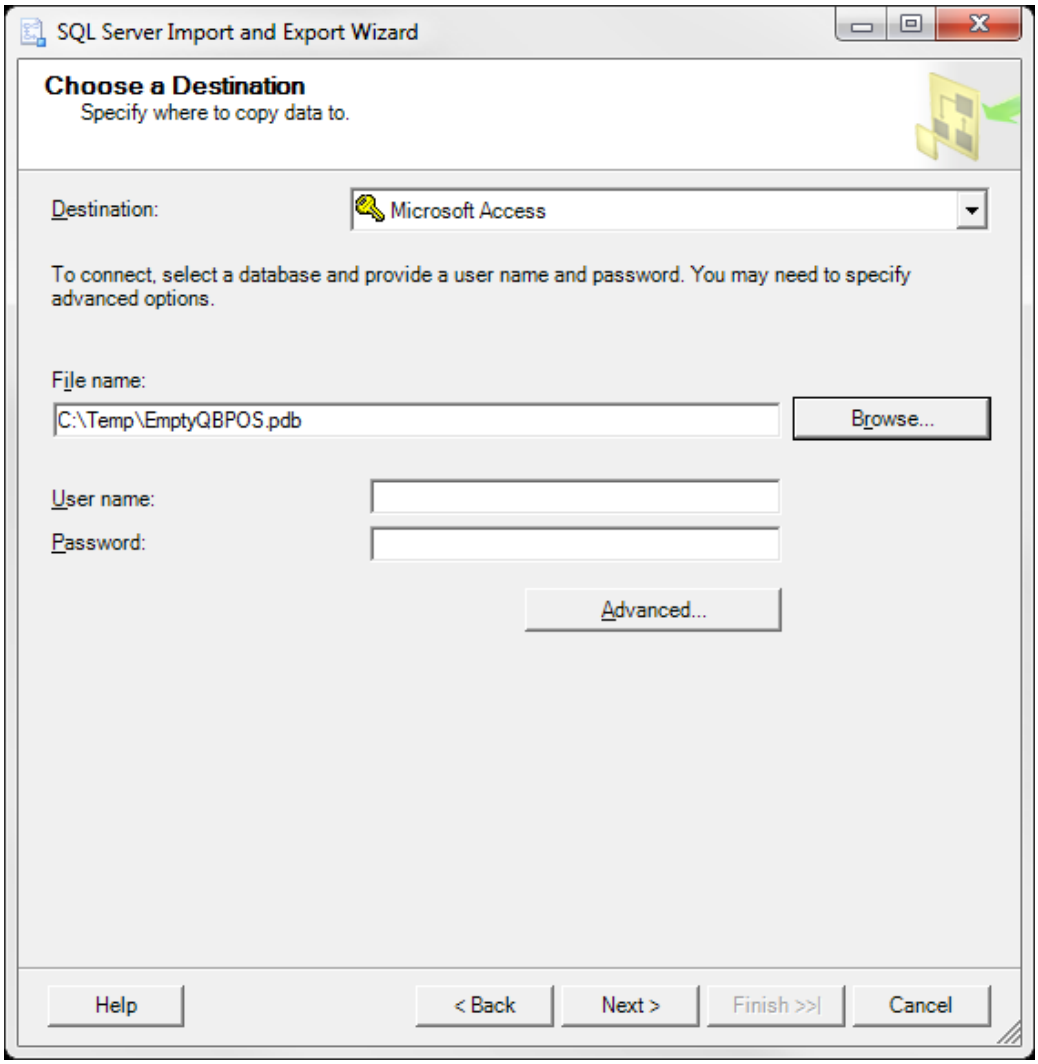
d.



3. On the 'Choose a Data Source' window:
    a. If using SQL Server 2008 R2 choose 'SQL Server Native Client 10.0'. If using SQL Server 2014 choose 'SQL Server Native Client 11.0'
    b. Enter the server name. This will usually be the machine name
    c. If logged on as the user who installed SQL Server, leave the Authentication set to 'Use Windows Authentication', else change it to SQL Server authentication and enter the 'sa' username and password.
    d. Set the database name to RPOS
    e. Click Next



4. On the 'Choose a Destination' window:
    a. Set the Destination to Microsoft Access (if using the SQL Server 2014 version, select 'Microsoft Access (Microsoft Access Database Engine)')
    b. Click Browse to locate the EmptyQBPOS.pdb file provided by Reckon. You will need to change the File Type selection from 'Microsoft Access Files (*.mdb)' to 'All files (*.*)'. Click Open when you have located the file.
    c. Leave the username and password fields blank.
    d. Click Next



5. Click Next on the 'Specify Table Copy or Query' window, with the 'Copy data…' option selected.

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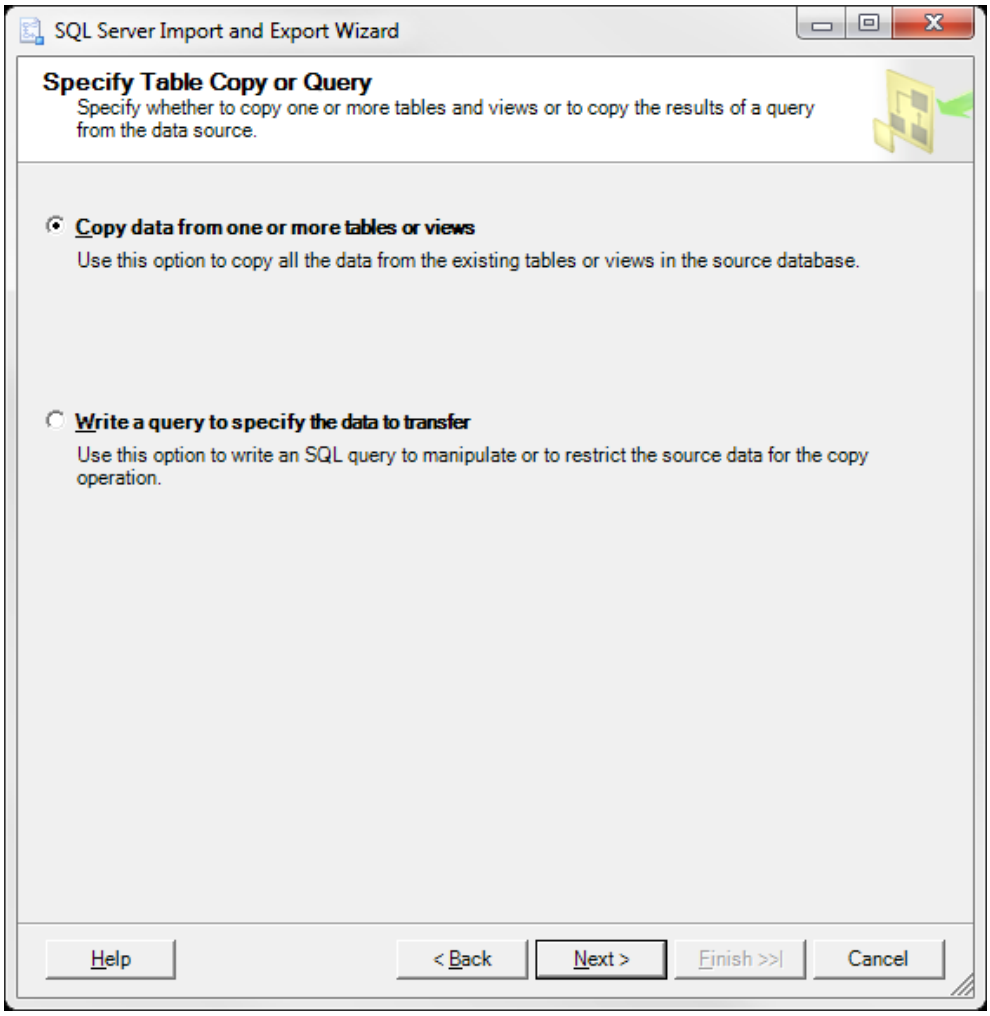
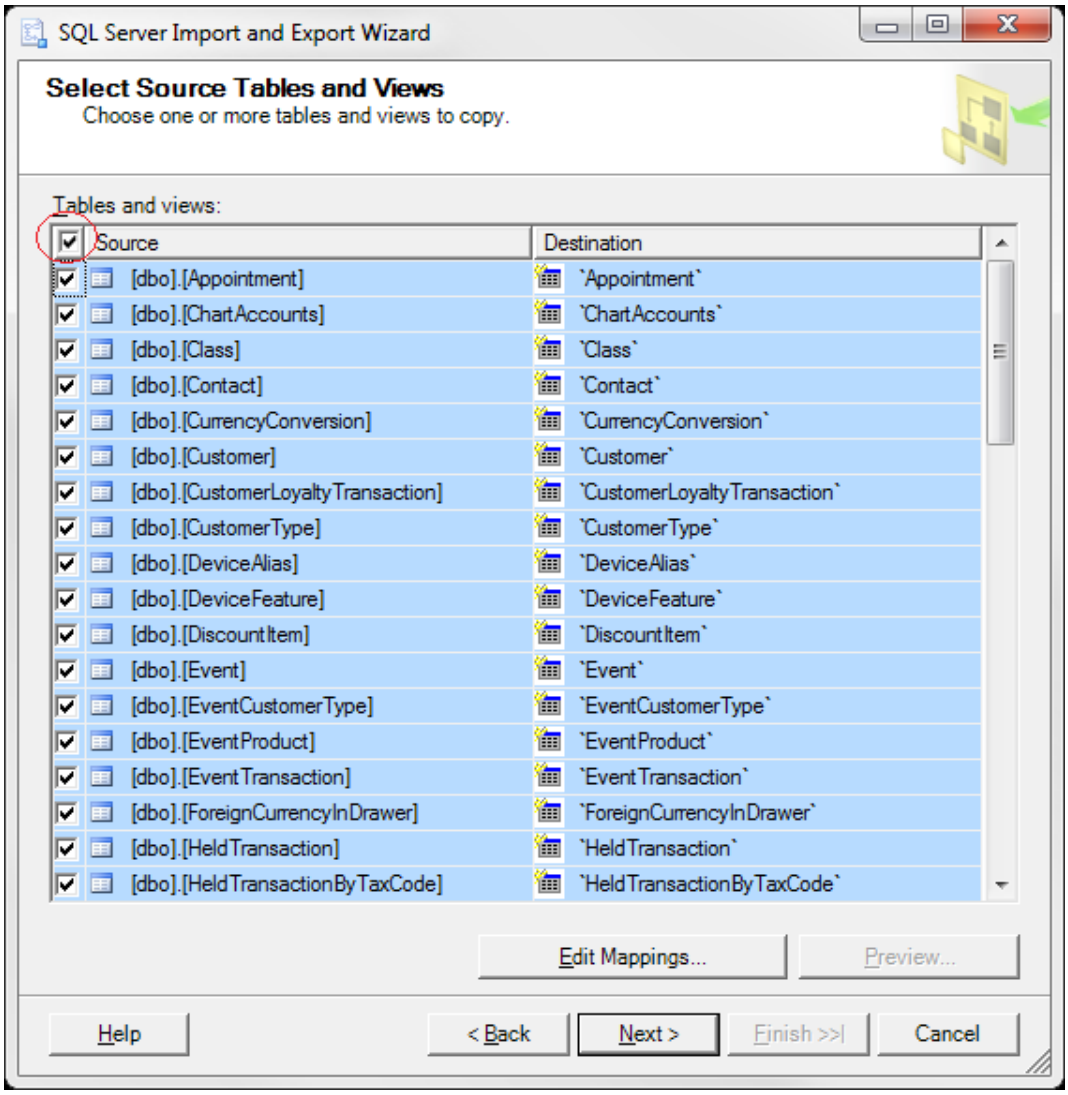
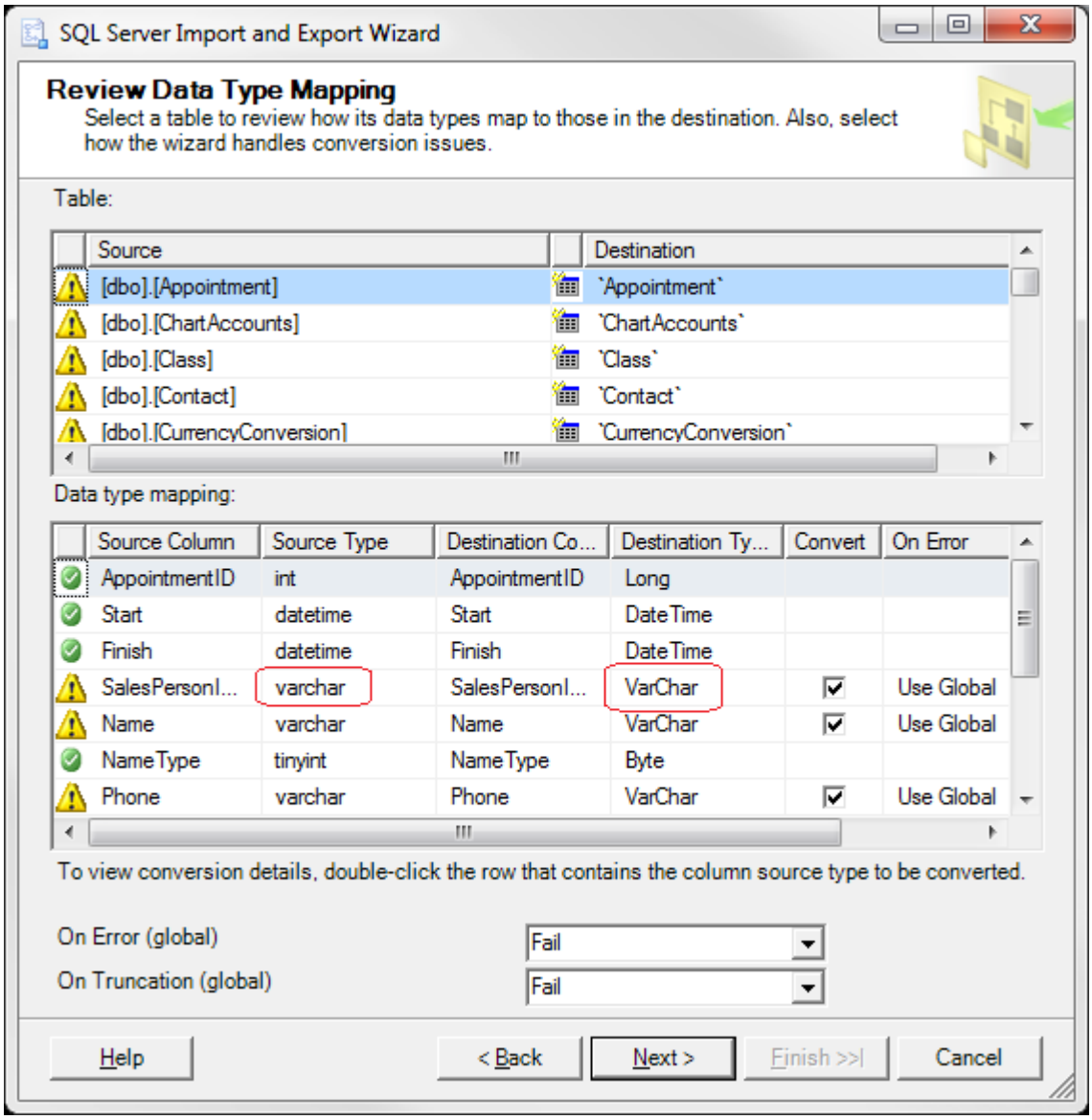


6. Click the checkbox in the table header to select the checkboxes in all rows. Click Next.



7. On the Review Data Type Mapping window, with the Appointment table selected in the top table, make sure that varchar types in the Data Type Mapping table map to VarChar in the destination.
    a. If so, click Next.
    b. If varchar map to Long Text, the MSSqlToJet4.xml file provided by Reckon is probably placed in the wrong location. Cancel the wizard and ensure that the file provided is placed in the correct location then go through the wizard again.


SQL Server Import and Export Wizard
Review Data Type Mapping
Select a table to review how its data types map to those in the destination. Also, select how the wizard handles conversion issues.
Table:
Source
Destination
[dbo].[Appointment]
`Appointment`
[dbo].[ChartAccounts]
`ChartAccounts`
[dbo].[Class]
`Class`
[dbo].[Contact]
`Contact`
[dbo].[CurrencyConversion]
`CurrencyConversion`
Data type mapping:
Source Column
Source Type
Destination Co...
Destination Ty...
Convert
On Error
AppointmentID
int
AppointmentID
Long
Start
datetime
Start
DateTime
Finish
datetime
Finish
DateTime
SalesPersonI...
varchar
SalesPersonI...
VarChar
Use Global
Name
varchar
Name
VarChar
Use Global
NameType
tinyint
NameType
Byte
Phone
varchar
Phone
VarChar
Use Global
To view conversion details, double-click the row that contains the column source type to be converted.
On Error (global)
Fail
On Truncation (global)
Fail
Help
< Back
Next >
Finish >>|
Cancel

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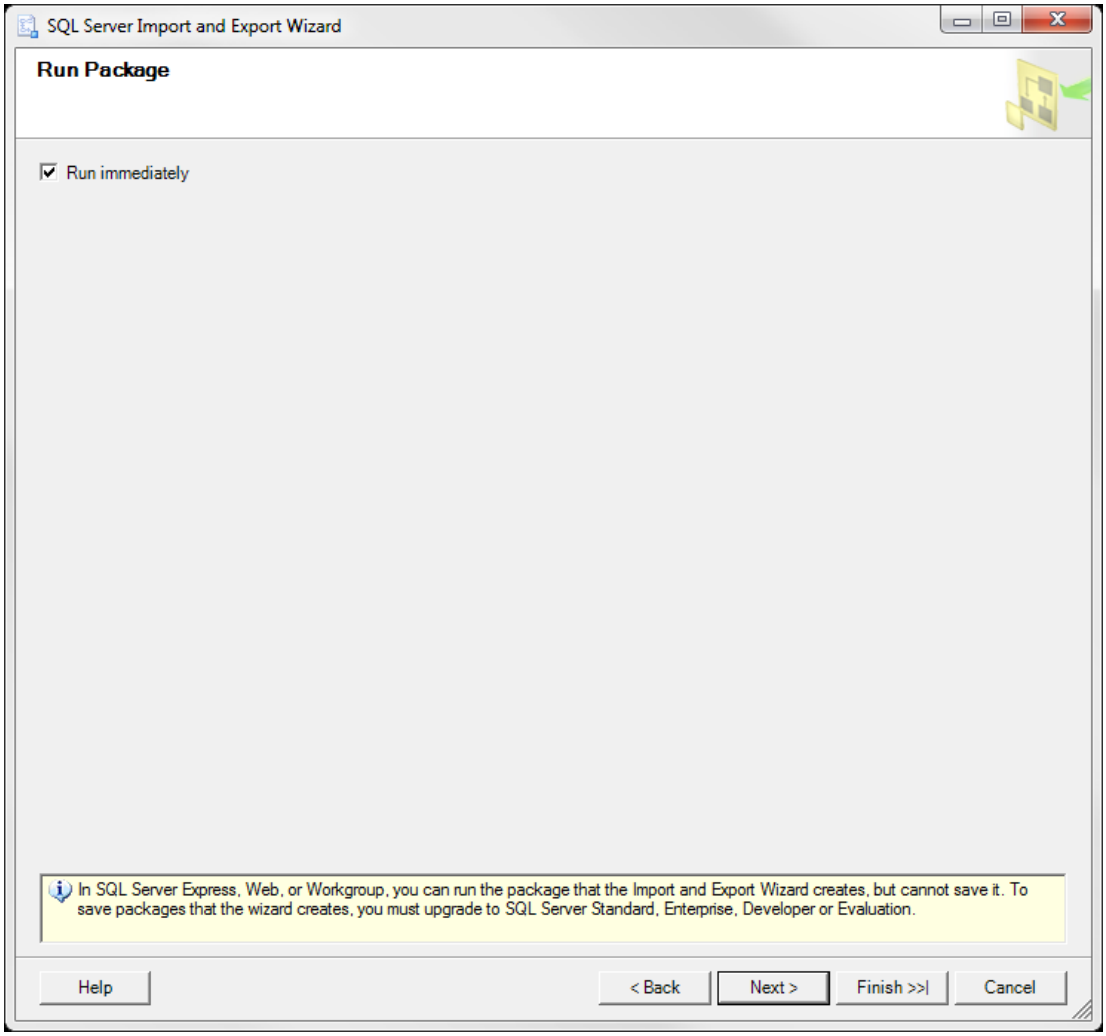
8. Click Next on the Run Package window, with the Run immediately option ticked.



9. Click Finish on the Complete the Wizard window.

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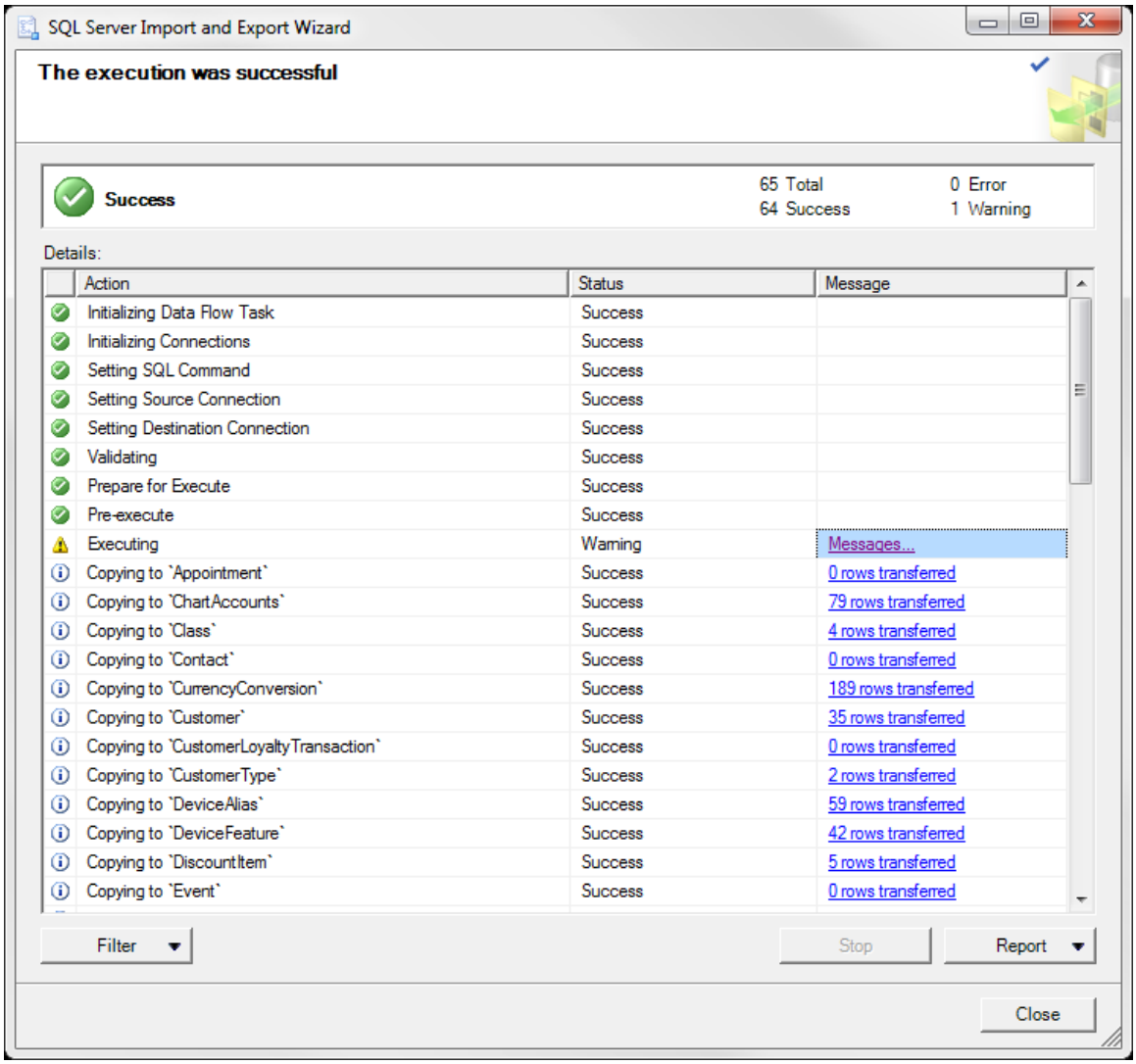
10.



There should not be any errors. The warning can be ignored. Many of the tables should show a number of rows transferred.

11. Close the wizard
12. Browse to the new database location and remove the word 'Empty' from its name, ie. rename to new POS database to QBPOS.pdb
13. Move the new database to the location where you want it to be when using Point of Sale. We recommend that this is on the main POS Terminal machine. The machine where the POS database is stored must be running whenever POS Administrator or POS terminals are running. You will need to specify this location when running the POS Administrator and POS Terminal First Use Wizards.
14. Run the new version of POS Administrator on the machine it is installed on. It will prompt you to upgrade the database. Click Yes
15. In the POS Terminal First Use Wizard for each terminal, specify the exact terminal name that was used in the previous version.

End of process.

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