

CounterPoint Shuttle FAQ & Best Practices

Mission: The Shuttle program for Retail Orbit integrates multiple POS systems with Retail Orbit so that data can be collected without having to several reports from the POS and manually upload the information. Each POS system is different, however, and that means that shuttle has to adjust (as best it can) to be able to obtain the data successfully from the POS. The purpose of this document is to outline some common questions that come up during the integration process so that you can better understand how it works, what to expect, and what practices you need to put in place in order for Shuttle to receive the best data possible.

Which version of Shuttle should be installed for this POS?

Shuttle version 1.6.0.8

Does this POS use a relational database? How does this affect Shuttle?

Yes. This means that when you make a change to an item (i.e., the department on the item), it automatically updates history in the POS with the changes you made. Therefore, if we repull the historical data, the changes will be reflected in Retail Orbit as well.

How does the department mapping work for this POS?

Department mapping is set in Shuttle. Shuttle will read all Category/Sub-Category codes from CounterPoint and provide a list in the "Map Classes" area of the program. Any new Category/Sub-Category codes that are read/removed will update that list only when Shuttle runs to start reading a time period. The mapping must be maintained inside the shuttle program.

Are there any character limitations that we need to be concerned with for Shuttle to work?

We highly recommend that Class Codes should be limited to Letters and Numbers with a length not exceeding 10 characters. Shuttle currently has the following limitations:

- Maximum Number of Characters: 20 (Please note that reporting can be thrown off if the combination of class code, class name, location name and category are too long).
- Characters Accepted: A-Z, 0-9, &, /, \$, +, -, #, <, > , ?
- Characters NOT Accepted: |, %, ' , ` , (comma)

Is Shuttle able to collect 24months of historical data, and if so, how is the historical inventory populated?

Yes, history can be obtained for 24months, however, Inventory and On Order values are not available during this process. To get the historic inventory values, we will need to run shuttle for the current month, and then calculate the historic inventory based on the transactions obtained during the history pull.

What options are available for collection of Markdown data?

Both POS markdowns and Permanent markdowns are available through this shuttle.

What dates are used when determining where to collect the Purchase Order data?

By default, it is the Delivery Date that is used to group the Purchase Orders by month, however, Cancel Date can also be used upon request

How far back do we collect data on Open Purchase Orders?

The CounterPoint Shuttle looks at the last 90 Days of Open Purchase orders from the past, as well as any future Orders for the next 12 Months (of course).

What stops shuttle from working properly with this POS?

This shuttle runs automatically every night using a Windows Shuttle Auto-Pilot Service. If the computer is then shuttle should run. Common reasons for shuttle to fail would include:

1. Internet cut out during the night.
2. Computer was turned off.
3. If there were department changes (DCS codes being added or removed), then this may stop shuttle from running automatically.
4. If the user that has the windows task was not logged into Windows.
5. Permissions. The windows user does not have privileges to run Shuttle, or start the Autopilot service
6. Firewall or Anti-Virus. These programs can block shuttle from running, you will want to make sure your system is configured to allow the Shuttle.UI.exe program to run.

Are there any other nuances with Shuttle that I need to be aware of for this POS?

Shuttle can only be installed on one computer, designed to be the database server, and such it is our recommendation to always install shuttle on the Server. **Category/Subcategory changes should be communicated with the support team in order to ensure there is no interruption in the nightly shuttle service.** We recommend periodic mapping reviews (once per month) to make sure all departments are mapped correctly. If you require assistance, a support agent would be more than happy to help, and a Shuttle Support appointment can be booked at retailorbit.setmore.com for a day/time that is convenient for you to allow our support team to remote access the computer.

If there is an issue, where do I get support?

The best place to start with support regarding the collection of data is to contact Retail Orbit support by email at support@retailorbit.com, by phone at 520-612-2001 or by appointment at retailorbit.setmore.com