

# QuickBooks 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 2.0.0.0. Only works with local QuickBooks installs, it will not work with QuickBooks POS online.

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

No. This means that when you make a change to an item (i.e., the department on the item), it will not update history in the POS with the changes you made. It also means that we are not able to update the history in Retail Orbit with any changes made to the current inventory.

## **How does the department mapping work for this POS?**

Department mapping is set in Shuttle. Shuttle will read all Department codes from QuickBooks and provide a list in the "Map Classes" area of the program. Any new Department 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?**

POS markdowns available for this shuttle.

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

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

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

The QuickBooks Shuttle looks at all Open Purchase orders from 30 day the past until 12 months in the future.

**What stops shuttle from working properly with this POS?**

This shuttle runs automatically every night using a Windows Task Scheduler. If the computer is on, and logged in, 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.
7. Too many QuickBooks tables are open. To resolve this, you may need to work with QuickBooks support to run their "Clean Company Data" utility. The client can run this on their own, however, they will need to be sure to do a backup of their database to a known location on the computer before running the QuickBooks tool.
8. If copying descriptions from a web location to the QuickBooks item, hidden characters can be copied causing Shuttle not to be able to read the inventory item (usually shows in QuickBooks as a ? in the description). **Best Practice** is to type any descriptions in, and not use copy/paste.

**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 QuickBooks server, and such it is our recommendation to always install shuttle on the Server. **Department 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](http://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](mailto:support@retailorbit.com), by phone at 520-612-2001 or by appointment at [retailorbit.setmore.com](http://retailorbit.setmore.com)