

XchangelT Link

Dear Newsagent, these instructions will help you install XchangeIT *Link*. They will assist you through each step, including preparing your computer, creating your new XchangeIT Link account, and installing the software.

If you need any additional help please email us at support@xchangeit.com.au.

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Step 1: Preparing Your Computer

Before You Start

XchangelT Link needs certain software to be installed on your computer to run. In particular, your operating system (Windows) needs to have the correct "Service Packs".



To check what kind of Windows and which Service Packs you have, do the following:

- 1. Right-click on the **My Computer** icon on your desktop. If you don't have a My Computer icon, click your **Start** button, you will find **My Computer** in the menu.
- 2. Left-click on **Properties**. The resulting window will tell you what kind of Windows and Service Pack you have.



The table below shows the different kinds of Windows and the required Service Pack. If you do not have the required Service Pack follow the instructions to upgrade

Windows	Service Pack	Upgrade
Windows 7	Service Pack 1	
Windows XP	Service Pack 2 (SP2)	Click the link to visit the Microsoft website where you will find the required Service Pack.
Windows Vista	Service Pack 1	Click the link to visit the Microsoft website where you will find the required Service Pack.
Windows 2003	Service Pack 3	

Other Software

We recommend that you have the following programs installed along with the recommended Service Packs.

- 1. Windows Installer 4.5 or higher
- **2.** .NET Framework 2.0 or higher

If you do not have this software, the installer will download it for you. If you have a dialup internet connection, this will take a lot of time.



Internet Browsers

- 1. You should have Internet Explorer 7 or 8 (IE7 or IE8) installed. To check your browser version, click the **Help** menu and select **About Internet Explorer**.
- 2. If you have Internet Explorer 6 (IE6) we highly recommend you upgrade to Internet Explorer 8
- 3. You can also use a recent version of Firefox.

This will enable you to use all the features of our new website.

IMPORTANT: Immediately before Installing

There are several things you should do to prepare for upgrading to XchangeIT Link:

- The quickest way to pay for XchangeIT Link (if you don't have enough time remaining in your existing XchangeIT account to pay for an entire term) is by credit card. Make sure you have your credit card handy.
- You will need to know your account numbers for your distributor accounts. These are usually printed on your paper invoices which come with your magazines. Be sure to use the "send-to" account number in the case of Gordon and Gotch or John Sands.
- <u>XchangelT Link will not run on Windows 95 or 98 0r Windows 2000</u>, as they are no longer supported by Microsoft. If you are in doubt, be sure to check what operating system you are going to install XchangeIT Link on.

If you need further help with preparation

- 1. Please contact XchangeIT on 1300 551 212, option 1.
- 2. You can email us at support@xchangeit.com.au



Step 2: Setting up your Owners Account and User Details

Creating the Owners Account

To start your XchangeIT Link account, visit the XchangeIT website at

http://www.xchangeit.com.au

Click the welcome banner below to get started.



You are now ready to create your Owners account.

Distributor Account Number Check		
Select Distributor	John Sands 🛛 🗸 🗸	
Account Number		Check

If you are unsure if someone has already
set up an XchangeIT account for you, the
best way to check is to use this form.
Enter an account number and it will tell
you if it is already in use.

Master Account I	nformation	
Trading Name:	Best Newsagency	Check Availability
Legal Name:	Best Pty Ltd	
ABN:	1223344545	Check Availability
Email:	mspong@xchangeit.com.au	
Phone:	02 9282 8125	
Address 1:	123 Excellent St	
Address 2:		
Address 3:		
Suburb:	Wunder Bar	
State:	NSW	
Postcode:	2000	
Country:	Australia 🗸 🗸	

You need to fill out the Master Account form with the details of the company which owns your store. The Check Availability links will check to make sure there is not already an Owners Account for your company.



User Details		
First Nome:	Corrold	
FIISLINAME.	Genalu	
Last Name:	Best	
Username:	bestnewsagent	Check Availability
Email:	mspong@xchangeit.com.au	
Phone:	02 9282 8125	
Password:	•••••	
Password Confirm:	•••••	
Security Question:	What colour is my cat Snowy?	
Security Answer:	Black	

Further down this page is the **User Details** form. You will need to enter your details as primary user of XchangeIT. If one of your staff uses XchangeIT, his or her details need to be entered here.

Please click the **terms and conditions** link to see the new rules (they open in a new window). Especially important are the sections regarding Account Categories and the new structured fee scale.

I am over 18 and have read and accepted XChangeIT's terms and	d conditions
	REGISTER

Once you have finished filling in this form, click the **Register** button.

When you have submitted the form successfully, you will see this message:



Soon you will receive an email containing the username and password which you entered into the form. Keep this email for future reference.



Step 3: Logging In and Setting Up Your Store

Your next step will be to log into your new XchangeIT user account, by entering the username and password which you chose, into the Username and Password fields in the top-right corner of the page.

username	······ >
	forgotten password?
bexcellent	••••••
	forgotten password?

Click the arrow button to log in.

Setting up your Store

Once you have logged in, you will see the following form:

Store Details	
Store Name:	Best Newsagency
ABN:	123456678899
	🗹 Copy phone and email from Owner's Account
E-mail Address:	best@xchangeit.com.au
Phone Number:	1234 5678
Broadband:	

Enter your store details in the fields. Note the **Copy** checkboxes; these will save you time! Because your company details are usually the same as your Store, ticking this box automatically copies the details from your Master and User accounts.

Postal Address	ì	Business Addr	ess
🗹 Copy Postal	address from Owner's Account	🗹 Copy Busine	ess address from Postal address
Address 1:	123 Excellent St	Address 1:	123 Excellent St
Address 2:		Address 2:	
Address 3:		Address 3:	
City:	Wunderbar	City:	Wunderbar
State:	NSW	State:	NSW
Postcode:	2000	Postcode:	2000
Country:	Australia	Country:	Australia 💌

Next, you need to select your point-of-sale system:



Your POS System	Your Membership Details
POS System: - Select POSSystem -	Category: Fee: Term: No Performance Cycles: Performance Obligations:

Click the pull-down menu and select your point-of-sale system from the list. Your membership Category depends on the capabilities of your point-of-sale system.

- "Retail and Distribution" means you sell magazines to customers, and also distribute magazines to subagents or other outlets
- "Distribution Only" means that you do not sell magazines directly to customers but redistribute them to other outlets. This means you do not use a barcode scanner for every sale.
- "With Retail" means you are a regular Newsagent store and you sell magazines directly to customers, scanning each one.

Once you have selected your point-of-sale, you will see your membership details, including the fee.

Your POS System	Your Membership Details	
POS System: Access POS	Category: Fee: Term: No Performance Cycl Performance Obligati that complies with i requirements (aka. Compliance Requir May 2009).	Introductory Membership \$200.00 186 es: 6 ons:Introductory Members must provide sales inventory data ntegrity, timeliness and continuity I,T,C). These are spelled out in rements for Newsagents (dated 1

- "Term" means the duration of your XchangelT account.
- "Performance Cycles" are part of the new XchangeIT terms and conditions. If your point-ofsale system is EDI compliant you need to provide sales data in order to maintain your category and fee.

Below this section is the Document Type selector. Please leave these settings on CSV, these settings are provided for future use only.

Now click the **Save** button. You should see the following message:



You will receive another email. Please keep this email! It contains the security token you need to set up your XchangeIT Link program. It will also have attached your invoice for your XchangeIT fee.

Note that this email will be sent to the Master Account's email address.



(If you lose your security token, don't worry. It can be resent by the XchangeIT Helpdesk. Contact the helpdesk using the instructions at the end of this document and they will resend it for you.)



Step 4: Paying Your Fee

If you are an existing user of XchangelT, and your existing XchangelT account has not expired, you have unused time in your old XchangelT account. XchangelT Helpdesk will transfer this value from your old account to your new one in the form of a credit note. You don't need to wait for this to happen. If you know you have value remaining in your old XchangelT account, skip this step and log back in the next day when the value will have been transferred.

If the remaining value in your existing XchangelT account was more than your first XchangelT Link fee, your account will be activated and you will be notified. If the remaining value was less then the cost of your next subscription, you will need to pay the balance. You can either pay for a full term and the credit note will be deducted from your next term, or you can wait for the credit note to be issued and pay afterwards.



If you are an existing user of XchangeIT, and your existing account has expired, you can proceed with paying your fee.



If you are a new user of XchangeIT, you can also proceed to paying your fee.

Billing

To get to the Billing section:

- If you have just logged back into the site, click **Account Maintenance** in the top-right of the page, and select **Billing & Payment**.
- If you are continuing on from setting up a store, click **Billing & Payment** in the menu on the left.

If you have had value credited from your old XchangelT account, you will see it as a Manual Credit which has been applied to your account. If the balance is a negative number, you don't need to pay anything!

Billir	ıg							?
ĺ	Showing	only open	transaction	15.				
Froi To (m Date: Date:							
				SEARCH				
Baland	ce: \$220.00							
	PAY							
	Date	Туре	Number	Detail	GST	Net Amount	Gross Amount	Due Date
<u>View</u>	04/05/2009	Invoice	1046	Introductory Membership 04/05/09 to 06/11/09	\$20.00	\$200.00	\$220.00	25/05/2009
						VIEV		WALL



If the balance is **not** negative, you will need to pay the balance to activate and use your XchangeIT account. Click the **Pay** button.

Paying by Credit Card

Payment		
Store Name: Balance:	Best Newsagency \$220.00	
Credit Card Details		
Card Type: Card Number: Name on Card: CW: Expiry Date:	-Select A Card-	Where is my CVV Number?
	SUBMIT PAYMENT	

You can pay immediately by credit card, similar to any online transaction.

Payment			
Credit Card A	opproved. Transaction number: 1047		
Store Name: Balance:	Best Newsagency \$0.00		

Once you have completed your payment by credit card, a receipt will be sent to you via email. Now is the time to set up your **Partnerships**.

Other Options

Instructions for paying by other means will be displayed on this page as well. It is possible to pay by cheque or bank deposit.



Step 5: Distributors and Services

Partnerships are your accounts with distributors, and **Services** are the different things which XchangeIT supplies. The Services you can use depend on the Distributor and on the point-of-sale you use.

Once you have completed your payment, click the **Distributors & Services** link in the menu on the left.

Partnership & Services					
Distributor: Gordon ar	Distributor: Gordon and Gotch (GG)				
Apply For Partnership: Account Number: Your Comments:	♥ 9999999 Please resend me the last week of edi data	<u>Check</u>			
Packages Available					
Package Name	Services In Package				
🗹 Essential Data	Sales Inventory Data Delivery Data				
Essential Returns	Returns Claims Returns Forms				

There is one section on this page for each distributor. For each distributor you have an account with, you need to enter your account number in the appropriate box, and select the services you want to use. Note the Check link – you can use this to check if your account number is already in use. The Comments field is for special requests - you might want to ask the distributor to resend your data which you received during the last week through the old XchangelT, through XchangelT Link.

Note: Gordon and Gotch – you will need to use your Send-To or Delivery account number, which is printed on your delivery invoices which come with your bundles of magazines.



When you have entered your account details for all distributors, click the Save Partnerships button. This will send your requests to the distributors.

If you had active partnerships in the old XchangeIT system, your partnerships will be made active in XchangeIT Link shortly. If you are a new customer to XchangeIT, it will take up to a day for your account to be set up and files to be sent for you.



Step 6: Installing the Client

Now you will need to install the XchangelT program.

Preparation

IMPORTANT: Did you remember to run your old XchangelT Newsagent program and download the last of your files? If not, do so now.

This is also a good opportunity to check your EDI **Source In** and **Source Out** settings. These are the locations where XchangeIT saves your files.

To check the old XchangeIT settings:

- 1. Run XchangelT by double-clicking **XchangelT Newsagent** or **XchangelT** on your desktop
- 2. Click the View menu, and select Configuration.
- 3. The settings are on this screen:

Source In	G:\edi_in
Source Out	G:\edi_out

Make a note of these settings, as you might need to change the XchangeIT Link settings so it will send your files to the same directories.

Installing

First, click the **Newsagent Client** link on the left of your browser.

From this page, you can download and install the XchangeIT client by clicking the **Download Client** link.

The **Folder Structure** settings control where XchangelT puts the files after it has downloaded them. Check to make sure these settings are the same as the ones from your old XchangelT program.



Client Config					
Store Name: Best Newsagency					
Download Client (You must install the Newsagent Client on your in-store					
Folder Structure					
SourceIn:	C:\Program Files\XchangelT\Sourc				
SourceOut:	C:\Program Files\XchangelT\Sourc				
Archive:	C:\EDI\archive				
Unsent:	C:\EDI\unsent				

You may need to change these settings in the following cases:

- Your point-of-sale is POS DOS, which reads files from your G drive
- Some POS Browser installations read files from a different location
- If you use Tower Retailer and your XchangeIT is NOT installed on your Master computer, the files might need to be sent to your N drive.
- If your XchangeIT is being installed on a Windows Vista computer.

You will not need to change the Archive and Unsent settings as they are new to XchangeIT Link.

Installing XchangeIT Link

Click the **Download Client** link.

Xchan	igelT Link - XchangelT Newsagent Client	From this page you can download no only the XchangelT Link installer, but also the software requirements you	
		may need to run the program	
Name:	XchangeIT Newsagent Client	may need to run the program.	
Version:	1.0.35.1	If you are unsure, the best procedure	
Publisher:	XchangeIT Link	browser will ask if you want to run or	
The followin	g prerequisites are required:	save the installer – select Run .	
∍ .NET	Framework 2.0 (x86)		
≌ Winde	ows Installer 3.1		
The followi	ing prerequisites are required but <u>wont</u> be installed automatically:		
For Wind	lows 2000 users:		
≥ SP4 is	a prerequisite. You can download this service pack from here.		
Secur	ity update needs to be downloaded. You can download this from $\underline{\text{here}}.$		
For Wind	lows XP users:		
≥ SP2 is	a prerequisite. You can download this service pack from <u>here</u> .		
For Wind	lows Vista users:		
⊻ SP1 is	a prerequisite. You can download this service pack from \underline{here} .		
If these con Otherwise, (nponents are already installed, you can <u>launch</u> the application now. click the button below to install the prerequisites and run the application.	← Click INSTALL	
BACK	INSTALL	13	



The installer will download the software from the site.

(0%) Installing XchangelT Newsagent Client	_ 🗆 🔀
Installing XchangeIT Newsagent Client This may take several minutes. You can use your computer to do other tasks during the installation.	Ŷ
Name: XchangeIT Newsagent Client	
From: xchangeit.uat.datacomrelate.com.au	
Downloading: 6.69 KB of 3.34 MB	
	Cancel

Depending on your browser and operating system there may be other windows asking if you want to run or install the software. Click **OK** or **Yes** of asked.

Newsagent Client Terms & Conditions		
TERMS AND CONDITIONS	^	
Thank you for choosing XChangeIT Newsagent Client. Please read the following terms and condtions carefully.		
This SOFTWARE PRODUCT is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties, This SOFTWARE PRODUCT is licensed, not sold. End User License Agreement This End User License Agreement (TEULA [®]) is a legal agreement between you (either an individual or a single entity) and !!YOUR COMPANY!! with regard to the copyrighted Software (herein referred to as "SOFTWARE PRODUCT" or "SOFTWARE") provided with this EULA. The SOFTWARE PRODUCT includes computer software, the associated media, any printed materials, and any "online" or electronic documentation. Use of any software and related documentation ("Software") provided to you by !!YOUR COMPANY!! in whatever form or media, will constitute your acceptance of these terms, unless separate terms are provided by the software supplier, in which case certain additional or different terms may apply. If you do not agree with the terms of this EULA. If you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA. If you do not agree with the terms of the SUFTWARE PRODUCT, you.		
Eligible Licensees. This Software is available for license solely to SOFTWARE owners, with no right of duplication or further distribution, licensing, or sub-licensing. IF YOU DO NOT OWN THE SOFTWARE, THEN DO NOT DOWNLOAD, INSTALL, COPY OR USE THE SOFTWARE, 2. License Grant. !!YOUR COMPANY!! grants to you a personal, non-transferable and non-exclusive right to use the copy of the Software provided with this EULA. You agree you will not copy the Software except as necessary to use it on a single computer. You agree that you may not copy the written materials accompanying the	~	
I Agree Decline		

You will need to agree to the Terms and Conditions.



CONNECT TO Gateway	Welcome <activation required=""> # <activation required=""> \$ LOG Tuesday, 7 July 2009 2:29:24 PM</activation></activation>
MY HOME XCHANGEIT CENTRAL LOCAL DOCUMENTS & CONFIGURATION) LOG Tuesday, 7 July 2009 2:29:24 PM
Connect To Gateway File Notes	Tuesday, 7 July 2009 2:29:24 PM
Connect To Gateway File Notes	
Headlines	Get Latest
Welcome to the Newsagent Client! Please use the security token and sto this application. Click OK to go to the activation screen.	ore number in the activation email to activate
Statu	

Congratulations! You have now installed XchangeIT Link.



Step 7: Setting Up the Client

Now that you have installed the software, you need to tell it which newsagency it is working for.

When you click the **OK** button in the welcome message, the XchangeIT Client will take you to the Configuration screen.

△ XchangelT Newsagent Client	
X A IT XCHANGEIT	Welcome <activation required=""> # <activation required=""> v1.0.35</activation></activation>
MY HOME	
General Distributors Schedules	
Folders	
Source In	
Source Out	
Archive	
Unsent	
General Configuration	
Store Number	
Log Folder	C:\Documents and Settings\mspong\Local Settings\Apps\2.0\LLGX4V3
Name Walkatta UDI	
Control Cito Dublic UD	http://xchangeit.uat.datacomrelate.com.au/publicpages/newsagent-cl
Central Site Public ORL	[http://xchangeitcs.uat.uatacomrelate.com.au/central/csPublicservice/cs
Name Name of the store.	Activation Panel Use this panel to activate the client.
Store Number: Security Token:	xctivate

Now you need to enter your Store Number and Security Token, which you received in an email when you created your store, in Step 3. It will look like this:

Details of the Store are as follows:

- Store Number: **1002**
- Store Name: Best Newsagency
- Security Token: FPLUJHWR

Type the Store Number into the Store Number box, and copy and paste the Security Token into the Security Token box. Then click the Activate button.

XchangelT Newsagent Client		
٩	This client has been activated successfully. Click OK to download latest configuration.	
	ОК	

Click OK, and the client will download your settings from the central site. This will include your EDI directories, your Distributor partnerships, and your other settings.



Step 8: Using XchangelT

Full instructions for using XchangeIT can be downloaded from the front page of the XchangeIT website. Here are some introductory tips.

This screenshot shows the XchangeIT programs MY HOME tab. When your first install XchangeIT Link, the boxes will be blank, but after some use you will see messages similar to below.

Welcome Matthew Hosted 1 # 2013	2 0.33		
Monday, 22 June 2009 1:40:59 F	M		
Connect To Gateway			
Headlines Distributor: <all distributors=""></all>			
Get Latest			
Note Group: <all groups="" note=""></all>			
The distributor Gordon and Gotch has updated			
the status of your partnership and/or services to the following: • Partnership Active • Approved Services: Returns Claims Returns Forms Delivery V GG: This file passes all integrity tests.			
Status > GG: An identical file was previously uploaded. [22/06/2009 1:33:48 PM]			
1:34 PM: Internet connection detected. 1:34 PM: Connecting to distributor Gordon and Gotch 1:34 PM: No new files received. (test_good.RTD). [22/06/2009 1:33:29 PM]			
1:39 PM: Detecting internet connection > GG: Returns Claims data uploaded 1:39 PM: Connecting to distributor Gordon and Gotch (Test_3_non_fatal.RTD). [22/06/2009 1:33:28 1:39 PM: No new files received. PM]			
GG: This file fails basic integrity tests.	~		

The boxes are:

- Connect To Gateway Clicking the Receive button will immediately connect to the selected distributor. You will not need to do this normally as XchangeIT Link automatically connects and downloads files.
- **Headlines** Headlines are communications from magazine distributors, the XchangeIT central site, and the XchangeIT helpdesk. They are like short emails that tell you the status of your account, your distributor accounts and any other information you need.
- **Status** This box displays the immediate status of XchangeIT Link. It will tell you when the program is uploading and downloading files.
- File Notes File Notes are sent from distributors. They give you a record of your EDI traffic. You will receive file notes associated with EDI files. They will tell you if the file was successfully sent or received, and if there were any problems with the data in your Sales Inventory data or Return Claims.

You will also notice that there is a new icon in your System Tray, in the bottom-right corner of your computer screen:

This is your XchangeIT program running in the background. ►

🔼 🏝 🖸 🕄 💔 🗞 🛄 2:31 PM



You can close the main XchangelT window, and the program will continue to run and download files. You can open the main window again by clicking on this icon.

Updating Your Configuration

Your XchangeIT Client updates its settings automatically every day. However, if you have just installed XchangeIT and requested partnerships with the distributors, you will want to manually check and see if your settings have been updated.

Click the **CONFIGURATION** tab in the top row, and then the **Distributors** sub-tab.

△ XchangeIT Newsagent Client			
X A IT XCHANGEIT	Welcome Best Newsagency # 1002		
MY HOME I XCHANGEIT CENTRAL I COCAL DOCUMENTS 1 🛞 CONFIGURATION 1 🕞 LOG			
General Distributors Schedules			
Gordon and Gotch			
Distributor Account Number	99999		
Distributorship Code	GG		
DistributorshipID	1dc6f1f2-a16b-4c28-9803-ef24b67cc459		
Elevated Duration(mins)	1.5		
Elevated Polling Rate(secs)	30		
Gateway URL	http://xchangeitdg2.uat.datacomrelate.com.au/Gateway		
Name	Gordon and Gotch		
Normal Polling Rate(secs)	300		
Distributorships List of distributorships.			
Update Configuration Reset Headlines updated.			

Here you can see your distributor accounts. To check if they have been changed, click the **Update Configuration** button. <u>Be Careful</u> not to click the Reset button, as this will delete your account settings. If you click Reset, contact the XchangeIT Helpdesk and they will resend your security token and instructions for resetting your client.

Contacting the Helpdesk

- To contact the Helpdesk, call 1300 551 212 and select option 1.
- Emails can be sent to support@xchangeit.com.au



Reinstalling the Client

If you need to reinstall XchangeIT, the following steps are required:

1. Check that the XchangeIT Newsagent Client is not running

If the XchangeIT Newsagent Client icon (blue triangle) appears in the task bar, right click on the icon and choose the EXIT option. This should remove the icon from the task bar.

2. Uninstall XchangeIT Link

Click START button -> Control Panel -> Add or Remove Programs Find XchangeIT Newsagent Client and select Click the Change/Remove button and uninstall the program Click here for support information. To change this program or remove it from your computer, click Change/Remove. Change/Remove

3. Reinstall XchangeIT Link

Refer page 13 Installing XchangeIT Link, click the Download Client link.

4. Contact the Helpdesk if a new security token is required to activate the XchangeIT application.