

Migrating to XchangeIT *Link*

Dear Newsagent, these instructions will help you move from using the old XchangeIT program, to using 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

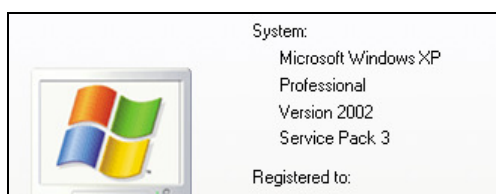
Before You Start

XchangeIT 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 2000	Service Pack 4 (SP4)	Click the link to visit the Microsoft website where you will find the required Service Pack.
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 95 or 98	XchangeIT Link will not work on these systems, because they are no longer supported by Microsoft. It is recommended that you upgrade to Windows XP.	

Other Software

The following software is installed by the XchangeIT installer .

1. Windows Installer 3.1 or higher
2. .NET Framework 2.0

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.
- XchangeIT Link will not run on Windows 95 or 98, 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.
- **NOTE:** Make sure to start your old XchangeIT program one last time and click the Dial or Connect button. This is so it can download the last remaining data which might be waiting on the old servers. (If you forget to do this we can resend the data for you, but there will be a delay.)

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

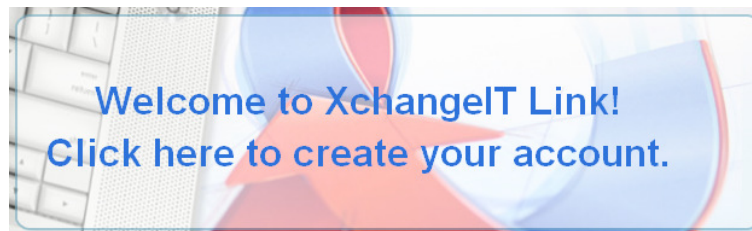
Step 2: Setting up your Owners Account and User Details

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	<input type="text" value="John Sands"/>
Account Number	<input type="text"/>
<input type="button" value="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 Information	
Trading Name:	<input type="text" value="Best Newsagency"/> <input type="button" value="Check Availability"/>
Legal Name:	<input type="text" value="Best Pty Ltd"/>
ABN:	<input type="text" value="1223344545"/> <input type="button" value="Check Availability"/>
Email:	<input type="text" value="mspong@xchangeit.com.au"/>
Phone:	<input type="text" value="02 9282 8125"/>
Address 1:	<input type="text" value="123 Excellent St"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
Suburb:	<input type="text" value="Wunder Bar"/>
State:	<input type="text" value="NSW"/>
Postcode:	<input type="text" value="2000"/>
Country:	<input type="text" value="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 Name:	<input type="text" value="Gerrald"/>
Last Name:	<input type="text" value="Best"/>
Username:	<input type="text" value="bestnewsagent"/> Check Availability
Email:	<input type="text" value="mspong@xchangeit.com.au"/>
Phone:	<input type="text" value="02 9282 8125"/>
Password:	<input type="password" value="••••••"/>
Password Confirm:	<input type="password" value="••••••"/>
Security Question:	<input type="text" value="What colour is my cat Snowy?"/>
Security Answer:	<input type="text" value="Black"/>

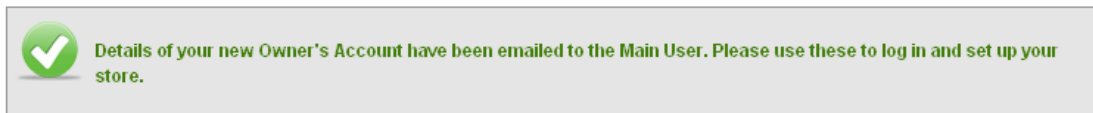
Further down this page is the **User Details** form. You will need to enter your details as primary user of XchangeIT. If one of your staff uses XchangeIT, his or her details need to be entered here.

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.

<input type="checkbox"/> I am over 18 and have read and accepted XChangeIT's terms and conditions
<input type="button" value="REGISTER"/>

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

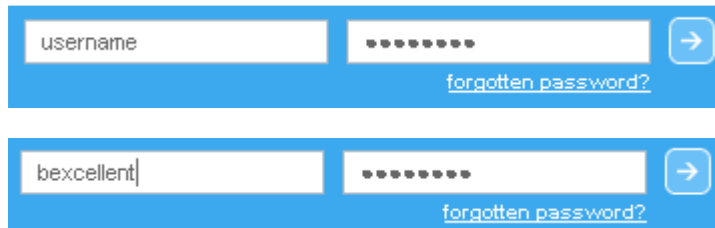
When you have submitted the form successfully, you will see this message:



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.



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:	<input type="text" value="Best Newsagency"/>
ABN:	<input type="text" value="123456678899"/>
	<input checked="" type="checkbox"/> Copy phone and email from Owner's Account
E-mail Address:	<input type="text" value="best@xchangeit.com.au"/>
Phone Number:	<input type="text" value="1234 5678"/>
Broadband:	<input checked="" type="checkbox"/>

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	Business Address
<input checked="" type="checkbox"/> Copy Postal address from Owner's Account	<input checked="" type="checkbox"/> Copy Business address from Postal address
Address 1: <input type="text" value="123 Excellent St"/>	Address 1: <input type="text" value="123 Excellent St"/>
Address 2: <input type="text"/>	Address 2: <input type="text"/>
Address 3: <input type="text"/>	Address 3: <input type="text"/>
City: <input type="text" value="Wunderbar"/>	City: <input type="text" value="Wunderbar"/>
State: <input type="text" value="NSW"/>	State: <input type="text" value="NSW"/>
Postcode: <input type="text" value="2000"/>	Postcode: <input type="text" value="2000"/>
Country: <input type="text" value="Australia"/>	Country: <input type="text" value="Australia"/>

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

Your POS System	Your Membership Details
POS System: <input type="text" value="- Select POS System -"/>	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: <input type="text" value="Access POS"/>	Category: Introductory Membership Fee: \$200.00 Term: 186 No Performance Cycles: 6 Performance Obligations: Introductory Members must provide sales inventory data that complies with integrity, timeliness and continuity requirements (aka. I,T,C). These are spelled out in Compliance Requirements for Newsagents (dated 1 May 2009).

- **“Term”** means the duration of your XchangeIT account.
- **“Performance Cycles”** are part of the new XchangeIT terms and conditions. If your point-of-sale 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:

Account Maintenance ?


Details of your new Store have been emailed to the Main User. Please use the Maintenance menu to pay your membership fee and install the Newsagent Client.

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 XchangeIT, and your existing XchangeIT account has not expired, you have unused time in your old XchangeIT account. XchangeIT 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 XchangeIT 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 XchangeIT account was more than your first XchangeIT Link fee, your account will be activated and you will be notified. If the remaining value was less than 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.

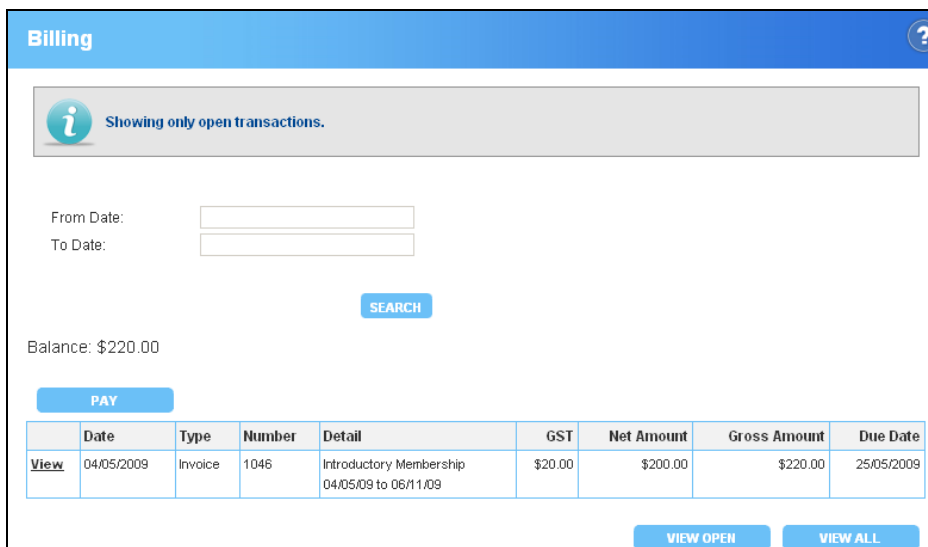
- ▶ If you are an existing user of XchangeIT, and your existing account has expired, you can proceed with paying your fee.
- ▶ If you are a new user of XchangeIT, you can also proceed to paying your fee.

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 XchangeIT 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!



Billing

Showing only open transactions.

From Date:

To Date:

SEARCH

Balance: \$220.00

PAY

	Date	Type	Number	Detail	GST	Net Amount	Gross Amount	Due Date
View	04/05/2009	Invoice	1046	Introductory Membership 04/05/09 to 06/11/09	\$20.00	\$200.00	\$220.00	25/05/2009

VIEW OPEN **VIEW ALL**

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: Best Newsagency
Balance: \$220.00

Credit Card Details

Card Type:

Card Number:

Name on Card:

CVV: Where is my CVV Number?

Expiry Date: /

SUBMIT PAYMENT

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

Payment

 **Credit Card Approved. Transaction number: 1047**

Store Name: Best Newsagency
Balance: \$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 and Gotch (GG)

Apply For Partnership:

Account Number: [Check](#)

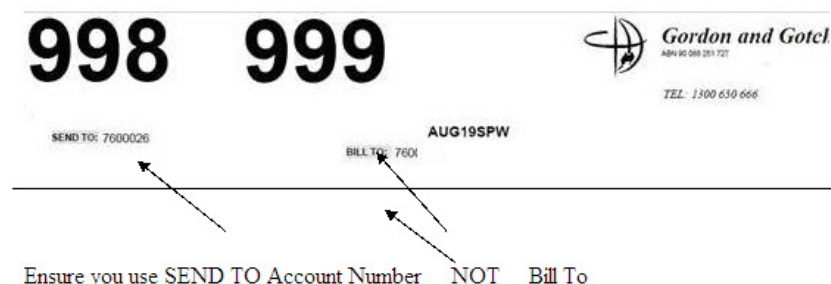
Your Comments:

Packages Available

Package Name	Services In Package
<input checked="" type="checkbox"/> Essential Data	Sales Inventory Data Delivery Data
<input checked="" type="checkbox"/> 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 XchangeIT, through XchangeIT 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 XchangeIT program.

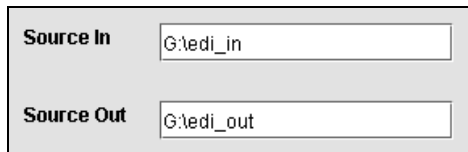
Preparation

IMPORTANT: Did you remember to run your old XchangeIT 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 XchangeIT by double-clicking **XchangeIT Newsagent** or **XchangeIT** on your desktop
2. Click the **View** menu, and select **Configuration**.
3. The settings are on this screen:



The screenshot shows a configuration dialog box with two text input fields. The first field is labeled "Source In" and contains the text "G:\edi_in". The second field is labeled "Source Out" and contains the text "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 XchangeIT puts the files after it has downloaded them. Check to make sure these settings are the same as the ones from your old XchangeIT program.

Client Config

Store Name: Best Newsagency

Download Client (You must install the Newsagent Client on your in-store PC.)

Folder Structure

SourceIn:

SourceOut:

Archive:

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.

XchangeIT Link - XchangeIT Newsagent Client

Name: XchangeIT Newsagent Client

Version: 1.0.35.1

Publisher: XchangeIT Link

The following prerequisites are required:

- ↳ .NET Framework 2.0 (x86)
- ↳ Windows Installer 3.1

The following prerequisites are required but wont be installed automatically:

For Windows 2000 users:

- ↳ SP4 is a prerequisite. You can download this service pack from [here](#).
- ↳ Security update needs to be downloaded. You can download this from [here](#).

For Windows XP users:

- ↳ SP2 is a prerequisite. You can download this service pack from [here](#).

For Windows Vista users:

- ↳ SP1 is a prerequisite. You can download this service pack from [here](#).

If these components are already installed, you can [launch](#) the application now. Otherwise, click the button below to install the prerequisites and run the application.

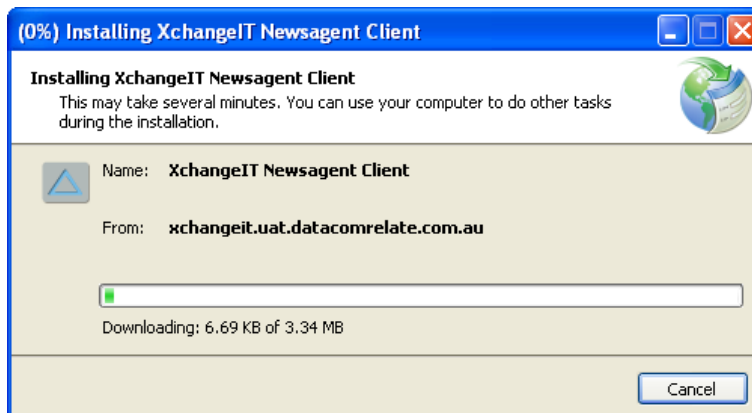
BACK
INSTALL

From this page you can download not only the XchangeIT Link installer, but also the software requirements you may need to run the program.

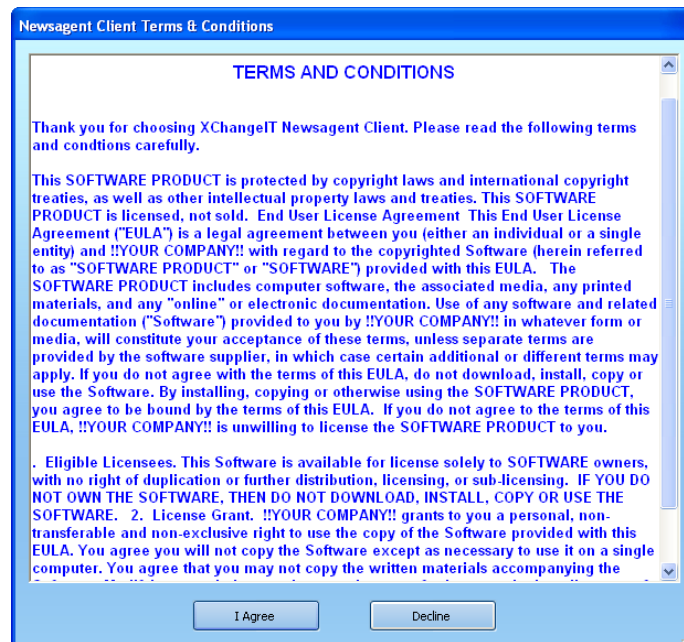
If you are unsure, the best procedure is to click the **INSTALL** button. Your browser will ask if you want to run or save the installer – select **Run**.

← **Click INSTALL**

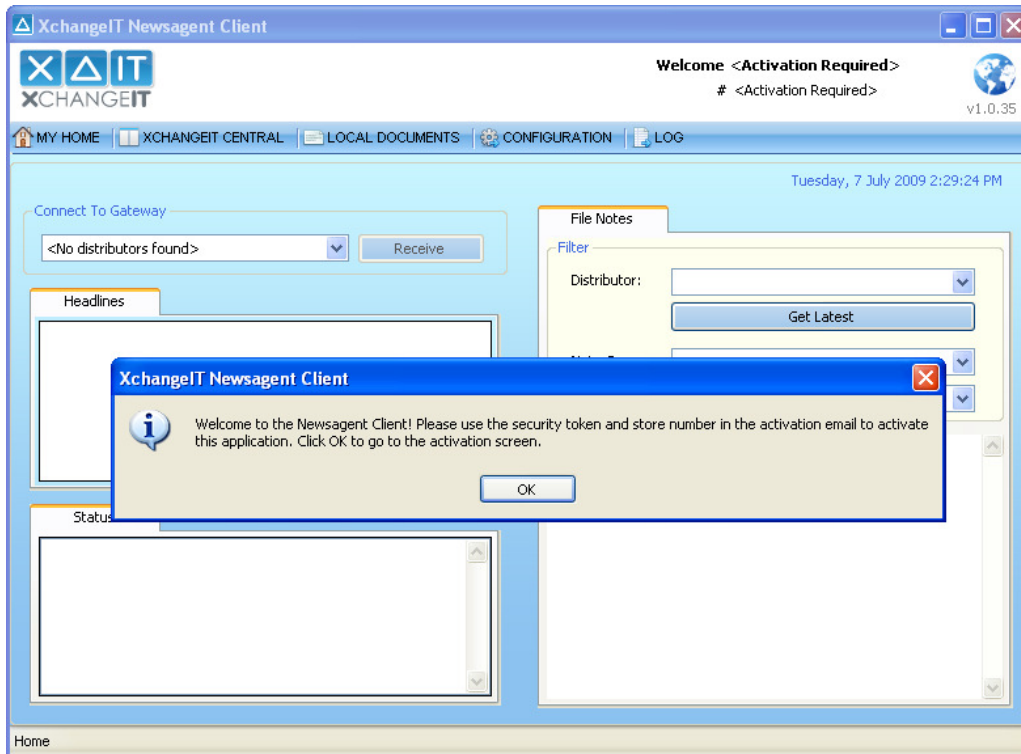
The installer will download the software from the site.



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** if asked.



You will need to agree to the Terms and Conditions.

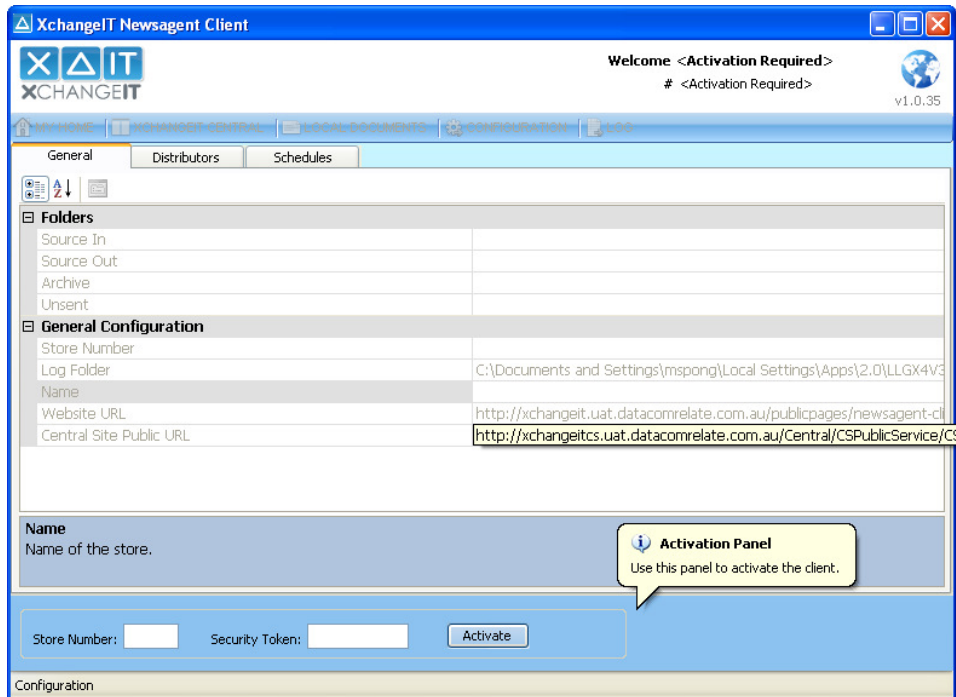


Congratulations! You have now installed XchangeIT Link.

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.

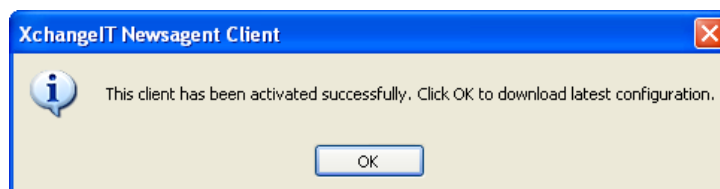


Now you need to enter your Store Number and Security Token, which you received in an email when you created your store, in Step 3. It will look like this:

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.

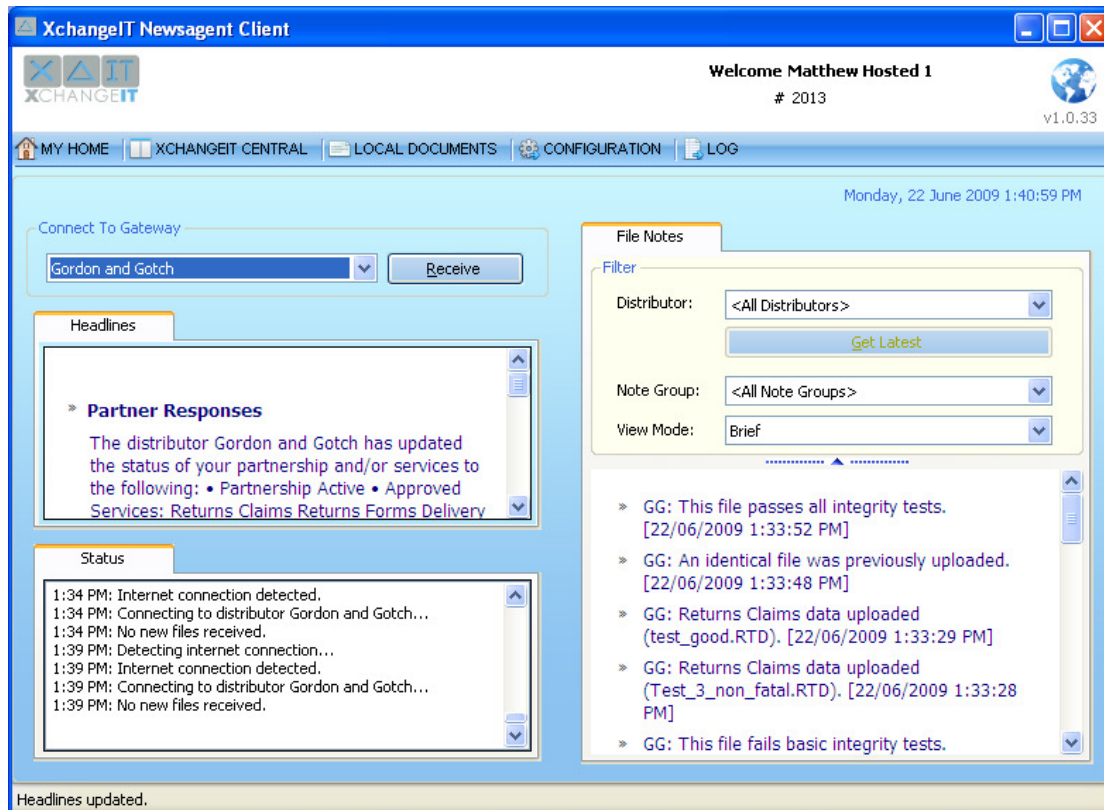


Click OK, and the client will download your settings from the central site. This will include your EDI directories, your Distributor partnerships, and your other settings.

Step 8: Using XchangeIT

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.



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. ►

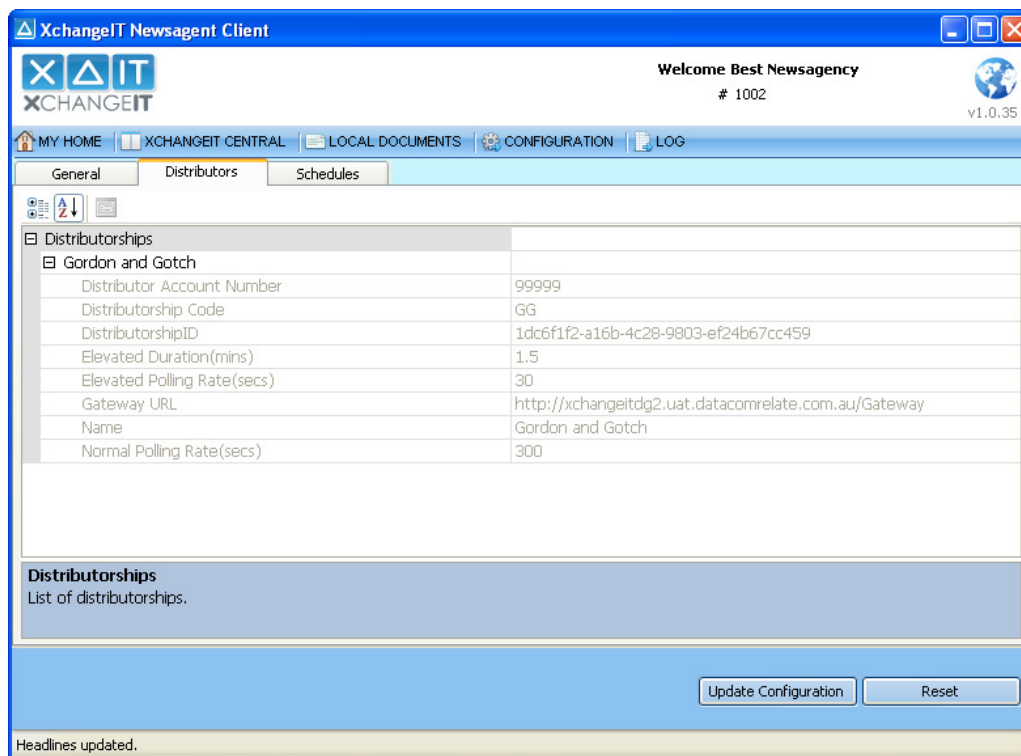


You can close the main XchangeIT window, and the program will continue to run and download files. You can open the main window again by clicking on this icon.

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.



Here you can see your distributor accounts. To check if they have been changed, click the **Update Configuration** button. *Be Careful* 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

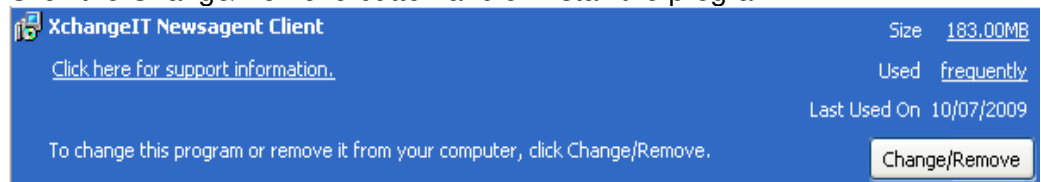
If you need to reinstall XchangeIT, the following steps are required:

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



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.