Getting Started Entering Your Data in RetailEdge

Getting Started · https://retailedge.com/docs/getting-started-entering-your-data-in-retailedge

The demo program is a real copy of RetailEdge, with limitations on the number of sales transactions you can enter (100) before it will no longer allow you to enter information.

If you have purchased RetailEdge and want to start entering data, here is what you need to do.

Before Doing Anything Make a Backup

Before you get started, you should make a RetailEdge backup of whichever database you are in. A RetailEdge backup takes a snapshot of all the files in the database and compresses it into a single file. You can do this by choosing **Backup** > **Backup** from the **Tools** menu. If you need to go back to that point, you can restore in the backup and start again. In addition, if you want to move the entire dataset from one database (e.g., RetailEdgeData) and restore it into another (e.g., RetailEdgeData_Train), you can use a backup to do this.

The Three RetailEdge Databases

The RetailEdge program comes with three (3) databases:

1. **RetailEdgeData_Demo** (the database RetailEdge is pointing to by default when you download the demo). The demo database is pre-populated with data to allow you to view inventory, customer and sales history for different businesses.
2. **RetailEdgeData_Train**, and
3. **RetailEdgeData**.

Starting With the Right Database

When you are ready to start entering data, you should switch to one of the blank databases. To switch to a **blank database**, select **Settings > Server Connection** from the RetailEdge **Tools** menu and change the DB Name to either **RetailEdgeData** (Live Database) or **RetailEdgeData_Train** (Training Database).

It is important to note that data in each database is separate and will not automatically move to another database. If you want to move all your data from one database to another, you would do this by making a backup of one database and restoring it into another database.

Using the Training Database (RetailEdgeData_Train)

Entering data in the training database is useful if you are:

Importing Existing Data. If you are planning on importing your existing inventory items or customers, you should do this first in the Training Database. This will prevent you from populating your real RetailEdgeData database with bad data.

Testing Sales with your Data. If you are testing out sales transactions, you should do this in the Training Database since we don't allow deletion of sales for security reasons. If you create sales in your live database (RetailEdgeData), there is no way to get rid of this data.

Using the Live Database (RetailEdgeData)

If you think you are ready to enter real data (workstation information, location information, tax rates, etc.) then you should do this in the RetailEdgeData database.

Printing Labels. Once you have entered some items into RetailEdge and you want to print labels do this in the real database. RetailEdge creates a random Item ID when creating an item that is used for the label's barcode. So, you should only do this from your real database.

Changing Location Information. If you want to set up your location information, just modify the existing location information in the database. Do not create new locations unless you truly have more than one location.

Testing or Training Employees

If you want to you to test (e.g., new discount rules) with your “real” data or train new employees, at any time you can simply make a backup of the RetailEdgeData Database (Tools > Backup > Backup) and restore it into the Training database (Tools > Backup > Restore).

Note: RetailEdge makes it easy to know which database you are in by displaying on the main screen "Training Database" when you are in the Training Database and "Sample Database" when in the Demo Database.