

For clients integrating the AscendRMS POS system with Ascent360, Ascent360 will establish queries that regularly deliver customer and transaction information to Ascent360. This article serves as an overview to the integration configuration and provides troubleshooting steps should the integration encounter any issues.

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Remote Desktop Connection

To complete the configuration, an Ascent360 Team Member will coordinate with you to establish a remote desktop connection and setup the queries in your AscendRMS instance. Because transaction information is distinct between store locations (AscendRMS instances), Ascent360 will need to complete the configuration for each store.

Query Configuration

During the configuration, Ascent360 will query your AscendRMS instance to product **4 distinct reports**:

- Historical Customer Information (all customers from all time)
- Historical Transactions Information (3 most recent years of transactions)
- Incremental Customer Information (customers created in the last 14 days)
- Incremental Transaction Information (transactions created in the last 7 days)

Ascent360 will generate one-time files for the historical information and populate the Ascent360 database; for the incremental information, Ascent360 will save 2 queries (one for customers and one for transactions) and configure the queries to deliver a .csv file nightly to an SFTP folder. Once the queries are configured, you will see the following appear under the "My Queries" header in the Reports section:

- *Ascent360_Incremental_Customers*
- *Ascent360_Incremental_Transactions*

Incremental files are delivered to the Ascent360 FTP using client-specific FTP user credentials created on your behalf.

Please do not alter the FTP address, username, password, or other sending details for the above queries without

assistance from Ascent360.

Troubleshooting

Verify Configuration

- Open "Reports" in AscendRMS
- Scroll down to the "My Queries" section; double-click either the customers or transactions query.
- Across the top of the query, select "Delivery"

The following settings are required for Ascent360 to successfully ingest a file sent from AscendRMS:

- Delivery Frequency: **Nightly**
- Delivery Time: **10PM MT**
- **Do not change the set Username & Password**
- Host: **sftp://ftp.ascentcrm.com**
- Port: **22**
- Protocol: **SFTP**
- Deliver As: **.csv**

Manually Send a File

Occasionally, the delivery process for incremental files will time out. If Ascent360 detects a lapse in file delivery for incremental customers or transactions, an Ascent360 team member will reach out and request that you manually send a file to Ascent360. To do so, please follow the below process:

- Open "Reports" in AscendRMS
- Scroll down to the "My Queries" section; double-click either the customers or transactions query.
 - *Ascent360_Incremental_Customers*
 - *Ascent360_Incremental_Transactions*
- Across the top of the query, select "Delivery"
- On the delivery configuration window, select "Test Delivery".
 - **You will not immediately receive confirmation of the file delivery.** Please click "Test Delivery" only once. Once complete, notify the Ascent360 team for confirmation.

If the lapse in files received by Ascent360 is less than 7 days for Transactions or 14 days for Customers, no other steps are needed to catch the data up. If the lapse in data is greater than 7 or 14 days, Ascent360 will provide additional steps to help reconcile this gap.

Remove Queries

If you need to remove the Ascent360 queries in your Ascend instance for any reason, follow these steps:

- Open "Reports" in AscendRMS
- Scroll down to the "My Queries" section
- Right-click or open the *Ascent360_Incremental_Customers* or *Ascent360_Incremental_Transactions* query and delete the query. This will remove the queries from your Ascend instance and cancel any future deliveries via SFTP related to these queries.