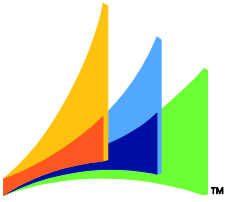
Microsoft®

Getting Started Guide



Microsoft Dynamics™
Retail Management System
Store Operations

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Part number: X13-35082-01

Publication date: November 2006

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Welcome

Microsoft Dynamics™ Retail Management System Store Operations includes all the tools you need to accomplish your retail point-of-sale and back-office tasks. It consists of three components:

- Store Operations Administrator is a program for creating and connecting to the store database, configuring registers, and doing database administrative tasks, such as creating backups and running database queries.
- Store Operations Manager is a convenient and central location for managing your inventory, employees, and store information. Use it to generate reports and purchase orders, receive inventory, and reconcile physical inventory counts.
- Store Operations POS is the point-of-sale screen cashiers use to process transactions and returns, look up items and customers, add new items and customers, and do other daily point-of-sale tasks.

When you install Store Operations, all three components are installed.

What's new

SQL Server Express is included

Microsoft SQL Server 2005 Express Edition (SQL Server Express) is included on your Store Operations CD. The maximum database size has been increased to 4 GB, the workload governor that was present in SQL Server 2000 Desktop Edition (MSDE 2000) has been removed, and overall server performance has been enhanced.

Improved matrix item support

Create and manage matrix items with ease. Use dimension sets to quickly load frequently used dimensions, such as sizes and colors.

More discount options

Both Mix and Match and Buy X, Get Y for Z discounts are now available on either a unit price or percentage discount basis.

No more copy protection devices (dongles)

Use an Internet connection or the telephone to activate the software.

Address verification system

Cashiers can now record customer address information when manually entering credit card data. This could reduce the fees charged by the acquiring bank.

Search by supplier

Locate items and add them to purchase orders using supplier reorder numbers.

Export purchase orders and inventory transfers

Send your order documents to other programs or in e-mail.

Batch label printing for received items

Print labels for the exact quantities of items received in each shipment of goods.

Support for Microsoft Dynamics GP and QuickBooks 2006

Integrate Store Operations with these popular accounting packages.

Additional device support

The Ingenico 6550 payment terminal is now supported.

Where to find more information

Online Help

See online Help in Store Operations POS and Store Operations Manager for more information about Store Operations and complete step-by-step instructions.

In many parts of Store Operations, Help is context sensitive, providing detailed explanations of the specific controls and options you see on the screen.

To open Help in Store Operations POS

- Press F1.

To open Help in Store Operations Manager

- On the Help menu, click Microsoft Store Operations Manager Help.

  Or

- Press F1.

Web

For product information about Microsoft Dynamics RMS and other Microsoft retail software, please visit the Microsoft Dynamics Retail Management System (RMS) Web site at www.microsoft.com/msrms

For information about other Microsoft Dynamics business and accounting software, visit the Microsoft Dynamics™ Web site at www.microsoft.com/dynamics

Microsoft support services

Get technical support for Microsoft Dynamics Retail Management System (RMS) at the product support Web site, www.microsoft.com/dynamics/support. For telephone support for U.S. customers, please call 888-477-7877.

For the latest news about Microsoft Dynamics RMS, visit the Using Microsoft Dynamics Retail Management System Web site at http://www.microsoft.com/msrms/customer

Also, you can find additional product support information at the Microsoft Help and Support Web site at http://support.microsoft.com

Maintenance plans

Your Microsoft Dynamics RMS maintenance plan gives you access to Microsoft CustomerSource, product newsgroups, Knowledge Base articles, and other exclusive Internet offerings. For information about continuing support options, see http://www.microsoft.com/dynamics/support

Microsoft CustomerSource

CustomerSource is a Microsoft Web site that provides Microsoft customers around-the-clock access to support resources and a multitude of tools to improve their business processes and practices. Site access is available to Microsoft customers currently on a service plan at https://mbs.microsoft.com/customersource

Microsoft Certified Partners

You can also take advantage of an ongoing relationship with a Microsoft Certified Partner who understands the unique service needs of your business. To find a partner near you, visit the Microsoft Dynamics RMS Web site at http://www.microsoft.com/msrms

Introducing Store Operations

You can set up Microsoft Dynamics Retail Management System Store Operations on one computer or on multiple computers. The arrangement you choose depends on how many computers you have in your store and how you intend to use them.

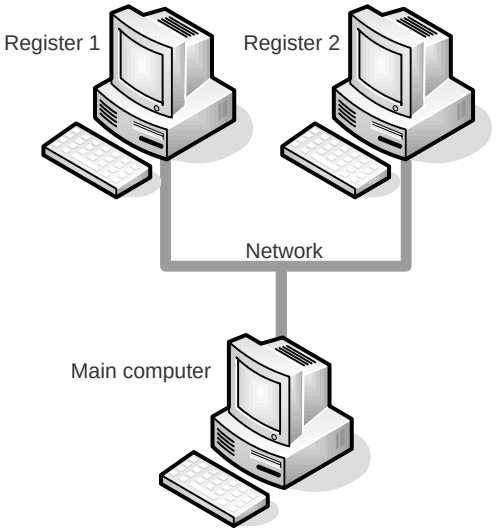
The one-computer store

If your store has only one computer, that computer will be used for both management and point-of-sale tasks. It will also have the store database—the file where Store Operations keeps your store's information.

The multiple-computer store

In a multiple-computer store, you designate one computer as your *main computer*, which is often set up in a back office and used for management tasks. The other computers can be used as *register computers* for ringing up sales or for other purposes, such as processing mail-order sales.

Note Your store's network must be functioning properly for you to install and use Store Operations on multiple computers.



The computer that holds the store database is referred to as the *database server*. The main computer can – but is not required to – act as the database server. The other computers in your store will communicate with the main computer and the database server through your network.

Note You can install Store Operations Manager on additional computers without additional licenses. However, you must purchase one license for each computer where you want to run Store Operations POS.

Installing Store Operations

Before you install

The following information will help you maximize the efficiency and stability of your Store Operations installation. Review these requirements and guidelines prior to installing Store Operations on your computer.

- Install an edition of Microsoft SQL Server. SQL Server Express Edition 2005 (SQL Server Express) with Service Pack 1 (SP1) is provided with your Store Operations software, or you can separately purchase the Standard or Enterprise Edition of SQL Server 2005 with SP1. Store Operations will also work with the Standard or Enterprise Edition of SQL Server 2000 with SP4, or with SQL Server 2000 Desktop Edition (MSDE 2000) with SP4.
- For successful database communications, all machines must be using the same network protocols. The Microsoft Dynamics RMS installation program enables the TCP/IP and Named Pipes protocols by default. If your database server computer is using a protocol other than TCP/IP or Named Pipes, you will need to enable the protocols you want to use. To enable new protocols on any computer where Store Operations is installed, use Client Network Utility (on the Start menu, point to Microsoft Dynamics RMS, and then click Client Network Utility). For more information, click Help in the utility.

  To enable new protocols on the database computer if Microsoft Dynamics RMS is not installed there, use SQL Server Configuration Manager for SQL Server 2005 or Client Network Utility for SQL Server 2000. For more information, see "Configuring Client Network Protocols" in SQL Server 2005 Books Online.
- You must use Store Operations Administrator to create and configure your database *before* you can run Store Operations Manager or Store Operations POS.
- For information on quickly setting up the Store Operations database, see “Setting up Store Operations.”

System requirements

The following system requirements are needed to run Store Operations:

- PC with a Pentium 600 MHz or higher processor (1 GHz recommend)
- Microsoft Windows Vista, Windows XP Home or Professional Edition with Service Pack (SP) 2 or later, Windows Server 2003 with SP1 or later, Windows 2000 with SP4 or later, or Windows Embedded for Point of Service
- Minimum 192 megabytes (MB) of RAM (512 MB or higher recommended)
- Approximately 50 MB of available hard disk space for the Store Operations application files (will vary depending on the configuration and location of database files)
- A CD-ROM drive
- VGA (1024x768) or higher resolution monitor
- Microsoft SQL Server 2005 Express Edition (SQL Server Express) with SP1 or later [SQL Server Express with SP1 is included]

  -or-

  Microsoft SQL Server 2005 Standard or Enterprise Edition with SP1 or later [available separately]

  -or-

  Microsoft SQL Server 2000 Desktop Engine (MSDE 2000) with SP4 or later [available separately]

  -or-

  Microsoft SQL Server 2000 Standard or Enterprise Edition with SP4 or later [available separately]
- Microsoft Mouse or compatible pointing device

Additional items or services required to use certain features

- Payment processing requires additional services and may require additional hardware
- Touch screen monitor
- OPOS-compatible hardware: receipt printers, cash drawer, MICR, MSR, pole

display, weigh scale, signature capture device, scanner

- Internet access (may require payment of a separate fee to a service provider, and local and/or long distance telephone charges may apply)

Activating Store Operations

Activation reduces software piracy by authenticating your software as a genuine, fully licensed copy. You will need a separate copy of the software for each computer where you want to run Store Operations POS. When you first run Store Operations POS, you will be prompted to activate the software.

Activation is not required on back-office computers where you only want to run Store Operations Administrator and Store Operations Manager.

If you ever need to reinstall Store Operations on the same computer where it was installed previously, you will need to activate the software again. Usually, you can use the same product key you used before.

If you have an Internet connection, you can quickly and easily activate Store Operations over the Internet. Otherwise, you can activate the software by telephone.

1 Start Store Operations POS.

   The Activation Wizard starts.

2 Follow the instructions in the Activation Wizard.

Microsoft SQL Server

Microsoft SQL Server is a client-server database management system. Solutions based on SQL Server are highly scalable, from a single processor laptop and a database maximum size of two gigabytes (2 GB) to a cluster of servers that can comfortably manipulate multi-terabyte databases and thousands of users. Unlike file-based databases, client-server database engines manage read-write operations to the database, enabling them to handle many more concurrent users and vastly greater amounts of data. Microsoft SQL Server is offered in different editions based on database size, number of users, and hardware requirements.

SQL Server 2005 Express Edition (SQL Server Express) is a fully SQL Server-compatible database engine that supports multiple concurrent users and can be used with databases of up to 4 GB in size. SQL Server Express is provided free of charge with Store Operations and will be installed during Store Operations

installation unless an existing instance of another SQL Server product is present.

If you need to store more than 4 GB of data, you will need to purchase the Standard or Enterprise Edition of SQL Server 2005.

Note Be sure to make a note of the user name and password you define when you set up SQL Server.

Do not change your computer name after SQL Server has been installed on the machine. SQL Server uses the computer name internally; if you change the computer name, SQL Server detects a different name and generates an error message. If this happens, you will need to run SQL Server Setup again.

SQL Server can operate in one of two security (authentication) modes: Windows authentication or SQL Server authentication. SQL Server authentication is much easier to manage than Windows authentication, which uses domain user and group accounts. For example, a single SQL Server user name and password can be created for all Store Operations computers, rather than creating all the necessary Windows domain user and group accounts. Also, Windows authentication is available only when all of your computers are part of a Windows domain.

You will need to use SQL Server authentication with Microsoft Dynamics RMS.

Note You can find information about SQL Server security updates at the Microsoft SQL Server Web site, www.microsoft.com/sql

Installing Store Operations

There are two steps to installing Store Operations. Each step is described in detail below.

Step 1 Install, configure, and test POS hardware

Step 2 Install Store Operations

Note For information about how to uninstall Store Operations, see "Uninstall Store Operations" in Store Operations Manager Help.

Step 1 Install, configure, and test POS hardware

Store Operations has incorporated OLE for Point of Sale (OPOS) standards, so

you can easily use many OPOS-compatible POS hardware devices, minimizing software maintenance and upgrade costs.

You can connect one or more POS hardware devices to your computer; for example, a cash drawer, receipt printer, bar code scanner, check reader (MICR), PIN pad, line display, magnetic stripe reader (MSR), or signature capture device.

Store Operations will work with Windows printers or OPOS-compatible printers. Some printers may not be able to utilize all Store Operations features (for example, label graphics).

You should obtain the OPOS service objects from your hardware manufacturer and install them on each POS register. Make sure that you configure Store Operations accordingly. See "Setting Up Store Operations" for more information.

Recognizing that you may currently use older or specific POS devices that do not have OPOS service objects, we have included some OPOS service objects on your Store Operations CD.

While you can add and remove POS hardware at any time, installing your devices before installing Store Operations can make the installation process go more smoothly.

Note You can find a current list of compatible hardware (Hardware Compatibility List) at the Microsoft Retail Management System Web site at www.microsoft.com/msrms.

A Microsoft Certified Partner can also provide POS hardware devices that the partner has determined to be compatible with Store Operations.

You might find that other POS hardware devices work with Store Operations, but Microsoft recommends using devices that are known to be compatible.

To install POS hardware devices

1 Connect each POS hardware device and install the OPOS software according to the manufacturer's instructions.

Note Whether you connect the device first or install the software first varies by the device and manufacturer.

Typically, the device's manufacturer provides OPOS software and configuration software on a CD that accompanies the device.

Some POS hardware devices can be connected to a second device, which is then connected to the computer. For example, you can connect:

- A cash drawer, line display, or MICR/printer to the computer or to a receipt printer.
- An MSR (magnetic stripe reader) or PIN pad to the computer or to a signature capture device.

Notes

If you use more than two or three of these secondary connections, some of your devices might not work properly.

Make sure you connect each device using the proper cable.

When connecting a device to the computer, make sure to use the appropriate port on the computer, according to the manufacturer's instructions.

2 Configure and test each device according to the manufacturer's instructions before using it with Store Operations.

Note For more information about connecting, installing, and configuring compatible POS hardware, contact your Microsoft Certified Partner.

Installing POS hardware correctly is essential if it is to work properly with Store Operations.

Step 2 Install Store Operations

To install Store Operations

1 Insert the Store Operations CD in your computer's CD drive.

Note Install Store Operations on the local computer, not on a remote computer over a network.

If the installation program doesn't start automatically, use Windows Explorer to view the contents of the Store Operations CD, and then double-click **Autorun.hta**.

2 Click **Before you install** and read the Readme document for the most up-to-date information about installation, new features, documentation, bug fixes, and product support.

3 Click **Install Store Operations** and follow the instructions in the Installation Wizard.

Note As Store Operations finishes installing, it will look for Microsoft SQL Server 2000 or MSDE 2000. If it finds an instance of either software, it will not install or reinstall MSDE 2000.

Network installation

For successful database communication, all machines must be using the same network protocols. The Microsoft Dynamics RMS installation program enables the TCP/IP and Named Pipes protocols by default. If your server uses a different protocol, use the Client Network Utility to enable the protocol you want to use. The Client Network Utility is available on the Start menu in the Microsoft Dynamics RMS program group. For more information, click the Help button in the utility.

Note If you want to enable TCP/IP on your server instead and you are running SQL Server 2005, use the SQL Server Configuration Manager. For SQL Server 2000, the Client Network Utility is available in the Microsoft SQL Server program group on the Start menu. For more information, see "Configuring Client Network Protocols" in SQL Server 2005 Books Online.

Windows Firewall

Because of the security features in Windows XP Service Pack 2, if you install Microsoft Dynamics RMS on a computer that is remote from SQL Server, you must set up the Windows Firewall to allow your server to communicate with Microsoft Dynamics RMS. If you will be running Microsoft Dynamics RMS Headquarters in conjunction with Store Operations, you must also set up the Windows Firewall to allow communication between Headquarters Client and Headquarters Server.

For detailed instructions for setting up the Windows Firewall for network installation, see Microsoft Knowledge Base article 884102, “How to configure Retail Management System programs for use with Windows XP Service Pack 2,” available at http://support.microsoft.com.

Setting up Store Operations

Once you have installed Store Operations, you need to set up your store database. You can choose “Express setup” or “Complete setup.” If you choose "Express setup," you will restore a ready-made sample database that provides essential information for a fictitious store. You can use this sample database to practice Store Operations tasks and become familiar with the software. If you choose “Complete setup,” you will create a database from scratch and begin using Store Operations in your daily operations.

Express setup

Use the following four steps to quickly get the sample Store Operations database up and running. Each step is described in detail below.

Step 1 Start Store Operations Administrator and connect to the database server

Step 2 Create the sample database

Step 3 Configure the sample database

Step 3 Start Store Operations Manager or POS

Note For a description of the contents of the sample database, see "Using the sample database" in "Complete setup" later in this book.

Step 1 Start Store Operations Administrator and connect to the database server

You need to connect to the database server before you can create your Store Operations database or use any of Store Operations Administrator's database and query commands. For a complete overview of the entire setup and configuration process, refer to the “Complete setup” section.

Note Your database server must be running before you can connect to it. For information about starting the server automatically, see "Microsoft SQL Server" in "Installing Store Operations" earlier in this book.

To start Store Operations Administrator and connect to the database server

1. Click **Start**, point to **Programs**, point to **Microsoft Dynamics RMS**, and then click **Store Operations Administrator**.
2. On the **File** menu, click **Connect**.
3. In the **Server** box, enter or select the name of the server running SQL Server. If the current computer is the database server, you can enter (local) in this box.
4. Under **Connection Information**, select **Use SQL Server authentication**, and then enter your SQL Server user name and password.
5. Click **OK**.

Step 2 Create the sample database

Use the Create Database Wizard in Store Operations Administrator to create the sample database. This is done by restoring the backup of the database that is provided in your C:\Program Files\Microsoft Retail Management System\Store Operations\DBFiles directory.

To create the sample database with the Create Database Wizard

1. On the **Database** menu, click **Create**.
2. On the **Welcome** page, click **Next**.
3. On the **Database Size** page, type a name for the sample database, such as MySampleDb, and then click **Next**.
4. On the **Database Growth** page, click **Next**.
5. On the **Populate Database** page, click the **Browse** button, and then double-click the **DBFiles** folder.
6. Select the **Rmssample.bck** file, click **Open**, and then click **Next**.
7. On the final wizard page, click **Finish**, and then click **OK** in both completion messages.

Step 3 Configure the sample database

Once the sample database is created, you can configure it with the settings that allow Store Operations Manager and POS to connect to the database.

To configure the sample database

1 On the **File** menu, click **Configuration**.

2 In the **Server name** box, type the name of the server where the sample database is stored. If you are running SQL Server and Store Operations on the same computer, you can use the default (local) as your server name.

3 In the **User name** and **Password** boxes, type your SQL Server logon credentials.

4 In the **Database** box, type the name of the database you just created.

5 To make sure that Store Operations will successfully connect to your new database, click **Test Database Connection**. When Store Operations notifies you that the database was successfully connected, click **OK**.

6 To save the configuration settings, click **OK**.

Step 4 Start Store Operations Manager or POS

When you create a database, a default account is automatically set up to allow you to log on and perform the initial setup. This account's user ID is "1" and its password is "password". Use this account ID and password to log on.

Note To ensure database security, Microsoft recommends that you change the password for this account once you have logged on.

To start Store Operations Manager or POS

1 Click **Start**, point to **Programs**, point to **Microsoft Dynamics RMS**, and then click **Store Operations Manager** or **Store Operations POS**.

2 In the **User ID** box, enter "1".

3 In the **Password** box, enter "password".

4 Click **OK**.

Note Use the Help files that accompany Store Operations Manager and POS to assist you in using Store Operations. To access online Help, either click Contents from the Help menu in Store Operations Administrator or press F1 in Store Operations POS.

Complete setup

There are five main steps to setting up Store Operations.

Step 1 Connect to the database server

Step 2 Create the store database

Step 3 Configure the store database for each register

Step 4 Set up appropriate EDC software

Step 5 Set up hardware devices connected to registers

Step 1 Connect to the database server

You need to connect to the database server before you can create your Store Operations database or use any of the database and query commands in Store Operations Administrator.

To connect to the database server

1 Make sure the database server is running, and then, on the **File** menu in Store Operations Administrator, click **Connect**.

2 In the **Server** box, type or select the name of the server where your Store Operations database is located. If the database is on the current computer, you can enter (local) in this box.

3 Under **Connection Information**, select **Use SQL Server authentication**., and then enter your SQL Server user name and password.

4 Click **OK**.

Note After your database is created, you can also connect to your database in the Connect to Server dialog box. This is done by selecting your database in the Database box. Note that you can only access the list of databases after you've entered your user name and password.

Step 2 Create the store database

Store Operations databases are created by restoring from backup files included with your software. You can choose to restore either the sample database or a blank database. The sample database contains information for a fictitious store. It can be used for practice or cashier training, or you can modify it for use as your store database. With a blank database, you must enter information from scratch.

Using the sample database

With the sample database, you can practice using Store Operations without affecting your actual store data. You can also use it later when training cashiers. In it, you will find inventory and sales data for a store named Tailspin Toys. This database includes:

- Store-wide parameters
- Security level structure
- Detailed property information for the different types of items (standard, matrix, assembly, kit, lot matrix, and so on)
- Department and category structure

- Item and sales tax structure
- Cashiers, sales reps, suppliers, and customers
- Tender types and currencies
- Detailed information for registers, line display messages, net display channels, custom POS buttons, and receipt formats
- Open, closed, and partial purchase orders and inventory transfers
- Receipts, journals, and reports

If you want to use some of the information and settings in the sample database, you can modify the sample database and make it your own. Use Store Operations Manager to add, delete, or change information to make the database relevant to your business. Once you are satisfied with your database changes, you can quickly prepare the database to go live by using the Delete Transactions command in Store Operations Administrator to delete all of the practice sales transactions, purchase orders, inventory transfers, and customer purchase history.

For step-by-step instructions for creating the sample database, see "Express setup" earlier in this book.

Creating the database from scratch

A blank database contains only the basic structure of the Store Operations database. You will need to use Store Operations Manager to enter your inventory items, departments, categories, employees, and other information.

To create a blank store database

1. On the **File** menu in Store Operations Administrator, click **Connect**. Specify your server and user names and password, and then click **OK**. If you cannot connect, make sure that your database server is running.
2. On the **Database** menu, click **Create**.
3. On the **Welcome** page, click **Next**.
4. On the **Database Size** page, type a name for your database, enter an initial size for the database, and then click **Next**.
5. On the **Database Growth** page, specify how the database file should grow, and then click **Next**. In most cases, you can accept the defaults.

6 On the **Populate Database** page, click the **Browse** button to locate the backup file of the blank database.

Note This database is stored in the DBFiles folder on the CD-ROM or in your installation directory.

7 Select the **rmsdb.bck** file, click **Open**, and then click **Next**.

8 On the final wizard page, click **Finish**, and then click **OK** in both completion messages.

Step 3 Configure the store database for each register

After you have created your database, you can use the Configuration command to set up each point-of-sale register in your store with the proper database information. This enables communication between your registers and the store database.

1 On the **File** menu in Store Operations Administrator, click **Configuration**.

2 In the **Server name** box, type the name of the server where your store database is located. If the database is on the current computer, you can type (local) in this box..

3 In **User name** and **Password** boxes, type your SQL Server logon credentials.

4 In the **Database** box, type the name of your store database.

5 To make sure that Store Operations will successfully connect to the specified database, click the **Test Database Connection** button. When Store Operations notifies you that the database was successfully connected, click **OK**.

6 Use the tabs to enter any register-specific information, and then click **OK** to save your settings.

7 Repeat this procedure on any other registers in your store.

Step 4 Set up appropriate EDC software

Store Operations interfaces with electronic draft capture (EDC) software to process credit and debit card transactions. Store Operations creates a request file that the EDC verification software then picks up to process its information. The payment processor tells Store Operations if the transaction was approved or not.

Credit card transactions can be processed in Store Operations using one of these programs:

- Preferred acquirer credit/debit card processing software
- ICVerify for Windows (up to and including version 2.5)
- PC-Charge (up to and including version 5.1)
- Atomic Authorizer
- WinTI/European EFT

For debit card transactions, use your acquiring bank's credit/debit card processing EDC software.

Setting up EDC software to work with Store Operations is complex. Many parties must be coordinated before you can properly process credit and debit card transactions. Microsoft suggests having a Microsoft Certified Partner assist you in setting up and configuring payment processing. For detailed instructions on setting up specific EDC software, refer to Store Operations Administrator Online Help.

Step 5 Set up hardware devices connected to registers

After configuring and testing each of your hardware devices, you need to set up each device on the register on which it will be used.

Note The following procedure describes configuring a scale; the steps for setting up other peripherals will be similar.

To set up a hardware device

1 Open Store Operations Manager and log on. If you haven't yet set up your own user accounts, you can enter "1" in the **User ID** box and "password" in the **Password** box.

2 On the **Database** menu, point to **Registers**, and then click **Register List**.

3 Select the applicable register, and then click **Properties**.

4 Click the applicable peripheral tab (for example, **Scale** tab).

5 Select the option that enables the device (for example, **Scale is enabled for this register**).

6 In the **OPOS device name** field, enter the name of the device (for example, "Berkel Scale 1").

Note The name you enter here should match the one you entered in the **OPOS Device Name** field in the **OPOS Service Settings** dialog box when you configured your service object.

7 Click **OK** to save the information.

Using Store Operations Manager and POS

Using Store Operations for the first time

For information about activating Store Operations, see “Activating Store Operations.”

Starting and exiting Store Operations Manager

To start Store Operations Manager

1 Click **Start**, point to **Programs**, point to **Microsoft Dynamics RMS**, and then click **Store Operations Manager**.

2 Type the user ID and password provided to you by your Store Operations administrator. The user ID will be used by the system to validate the password and to determine your rights for accessing the data stored in the database. To run the Manager program, you must log in with a user account that has been granted manager rights.

Note When a Store Operations database is created, a default user account is automatically set up to allow you to log on and perform initial database setup. The user ID for this account is "1" and its password is "password". After you set up your database, change the password for this account.

To exit Store Operations Manager

- On the **File** menu, click **Exit**.

Starting and exiting Store Operations POS

To start Store Operations POS

1 On the Windows **Start** menu, point to **Programs**, point to **Microsoft Dynamics RMS**, and then click **Store Operations POS**.

2 Type the user ID and password provided to you by your Store Operations administrator. The user ID will be used by the system to validate the password and to determine your rights for accessing the data stored in the database.

Note Store Operations creates a default user account with the ID number "1" and password "password". Use this combination to initially log on to Store Operations POS.

To exit Store Operations POS

1 Tender or cancel the current transaction (if any).

2 Press **Esc**, and then click **Yes** to confirm that you want to close Store Operations POS.

Note Only cashiers who have the privilege to exit Store Operations POS will be able to complete this procedure.

Appendix A – Glossary

bar code

A code that can be read by a scanning device, usually composed of vertical bars of varying width and spacing. The bars that make up the bar code represent a series of numbers.

cash drawer

A *cash drawer* is connected to the register computer or printer by a cable. The drawer opens automatically at the end of a transaction.

category

A *category* is a group of inventory items within a department. For example, if a music store has departments like Jazz, Country, Classical, and so on, the Jazz department might have categories for artists, such as Miles Davis, Ray Charles, Wynton Marsalis, and so on.

code

Most of the information you create and manage in Store Operations is assigned *codes*. For instance, you will set up codes for each of your departments. These lookup codes must be unique numbers or abbreviations that will help you identify similar information.

database

Your *database* is the behind-the-scenes file that Store Operations uses to store, group, and manage your store information. Store Operations does all your database administration for you. You rarely need to work with the database directly.

department

A *department* is a group of inventory items within a store. For example, a sporting goods store might have departments for soccer, tennis, and so on.

employee

Employees include any person who will be using Store Operations. For this reason, store owners, store managers, and associates are all considered employees.

hardware device

In this book, a *hardware device* is a peripheral device attached to a register for a specific retail task. Hardware devices can include cash drawers, receipt printers, bar code scanners, check readers (MICR devices), PIN pads, line display devices, magnetic stripe readers (MSRs), or signature capture devices.

item

An *item* is a product or service that you sell in your store.

line display device

A *line display device* is a hardware device connected to the register that displays messages to customers. You can specify these messages in Store Operations Manager. Also known as *pole display device*.

magnetic stripe reader (MSR)

This POS hardware device reads the magnetic stripe on the back of a credit or debit card.

main computer

In a multiple-computer store, *main computer* refers to the computer where you first installed Store Operations. This computer often holds your database and store information. If so, it can also be referred to as the *database server*.

The main computer might be set up in a back office — out of sight of customers — rather than being operated as a register. It can then be used for managerial tasks such as ordering and receiving.

In a store that has only one computer, that computer is the main computer.

See also *register*

MICR device

Commonly called a *check reader*, this device is connected to the register and reads the account number and other information on checks. MICR stands for *magnetic ink character recognition*.

OPOS

OPOS is a software standard for POS hardware devices. OPOS stands for OLE (Object Linking and Embedding) for Point of Sale.

PIN pad

A *PIN pad* is a POS hardware device for entering personal identification numbers (PIN) for debit cards.

receipt printer

A printer designed for printing receipts, typically using 4-inch roll paper and printing in 40 column format.

register

Because both Store Operations components are installed when Store Operations is installed, any computer where Store Operations is installed can be considered a *register*.

In this book, *register* is typically used to differentiate point-of-sale computers from the back-office computer. These computers can also be referred to as "clients."

See also *main computer*

scanner

A device connected to the computer that scans and reads bar codes.

signature capture device

An electronic pad that credit card customers sign with a stylus in lieu of signing a paper receipt.

supplier

Suppliers are the companies and organizations that supply your inventory.

tender type

Tender types are the forms of payment that are accepted in your store, such as cash, check, MasterCard, and VISA.

Appendix B – Accessibility products and services

Microsoft is committed to making its products and services easier for everyone to use. The following topics provide information about the features, products, and services that make Microsoft® Windows® more accessible for people with disabilities:

- Accessibility features of Windows
- Documentation in alternative formats
- Customer service for people with hearing impairments
- For more information

Note The information in this section may apply only to users who license Microsoft products in the United States. If you obtained this product outside of the United States, you can use the subsidiary information card that came with your software package or visit the Microsoft Accessibility Web site at www.microsoft.com/enable for a list of Microsoft support services telephone numbers and addresses. You can contact your subsidiary to find out whether the type of products and services described in this section are available in your area. Information about accessibility is available in other languages, including Japanese and French.

Accessibility features of Windows

The Windows operating system has many built-in accessibility features that are useful for individuals who have difficulty typing or using a mouse, are blind or have low vision, or who are deaf or hard-of-hearing. The features are installed during Setup. For more information about these features, see Help in Windows and the Microsoft Accessibility Web site at www.microsoft.com/enable.

Free step-by-step tutorials

Microsoft offers a series of step-by-step tutorials that provide detailed procedures for adjusting the accessibility options and settings on your computer. This information is presented in a side-by-side format so that you can learn how

to use the mouse, the keyboard, or a combination of both.

To find step-by-step tutorials for Microsoft products, visit the Microsoft Accessibility Web site at www.microsoft.com/enable.

Assistive technology products for Windows

A wide variety of assistive technology products are available to make computers easier to use for people with disabilities. You can search a catalog of assistive technology products that run on Windows at the Microsoft Accessibility Web site at www.microsoft.com/enable.

If you use assistive technology, be sure to contact your assistive technology vendor before you upgrade your software or hardware to check for possible compatibility issues.

Documentation in alternative formats

If you have difficulty reading or handling printed materials, you can obtain the documentation for many Microsoft products in more accessible formats. You can view an index of accessible product documentation on the Microsoft Accessibility Web site at www.microsoft.com/enable.

In addition, you can obtain additional Microsoft publications from Recording for the Blind & Dyslexic, Inc. (RFB&D). RFB&D distributes these documents to registered, eligible members of their distribution service. For information about the availability of Microsoft product documentation and books from Microsoft Press, contact:

Recording for the Blind & Dyslexic, Inc.
20 Roszel Road
Princeton, NJ 08540

Telephone number in the United States: (800) 221-4792
Telephone number outside the United States and Canada: (609) 452-0606
Fax: (609) 987-8116

Visit the Recording for the Blind & Dyslexic Web site at www.rfbd.org.

Note that Web addresses can change, so you might be unable to connect to the web sites mentioned here.

Customer service for people with hearing impairments

If you are deaf or hard-of-hearing, complete access to Microsoft product and customer services is available through a text telephone (TTY/TDD) service:

- For customer service, contact Microsoft Sales Information Center at (800) 892-5234 between 6:30 A.M. and 5:30 P.M. Pacific Time, Monday through Friday, excluding holidays.
- For technical assistance in the United States, contact Microsoft Product Support Services at (800) 892-5234 between 6:00 A.M. and 6:00 P.M. Pacific Time, Monday through Friday, excluding holidays. In Canada, dial (905) 568-9641 between 8:00 A.M. and 8:00 P.M. Eastern Time, Monday through Friday, excluding holidays.

Microsoft Support Services are subject to the prices, terms, and conditions in place at the time the service is used.

For more information

For more information about how accessible technology for computers helps to improve the lives of people with disabilities, see the Microsoft Accessibility Web site at www.microsoft.com/enable.

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