

INSIGHTS

Microsoft Dynamics™ Retail Management System Store Operations

Making Store Operations run smoothly

PART 1:

Store Operations POS—Setup and Operations

Take advantage of all that Retail Management System Store Operations POS can offer. Just follow these simple tips and tricks compiled by the Microsoft® Retail Team.

Setting Up Electronic Draft Capture (EDC)

- Be sure to mark the **Verify via EDC** checkbox for Credit & Debit cards! There is no way to recover the lost credit card sales if this is unmarked when no approvals are received.
- Test your set up. After setup, be sure to do a test a transaction (ex:\$1.00) and settlement to ensure there are no errors. If you are using debit card, be sure to test a debit card transaction and settlement too.
- Debit Card problems? Make sure you've entered the correct Sharing Group value in the EDC configuration. Check with your bank to ensure the proper Sharing Group value is being used.
- Settle up nightly. Remember to settle the EDC batch nightly after the store has closed. Settlement must be completed before the merchant can receive their funds.
- Handling "Technical Errors". If on settlement you get a "Technical Error", take the last 4 digits of the credit card plus the approval code from the Electronic Draft Capture Detailed Report, and call the bank for manual settlement or troubleshooting.
- Use unique merchant accounts for multiple locations. When installing Store Operations at multiple locations, make sure you obtain and setup unique merchant accounts.
- New with V2 of Retail Management System, Address Verification System (AVS): Cashiers can now record customer address information when manually entering credit card data. This could reduce the fees charged by the acquiring bank.
- Get more help. Additional information on setting up the EDC feature can be found in KB #890083.

Setting Up and Troubleshooting Hardware

- Test first in the "Ole for Point of Sale" (OPOS) drivers. Make sure the unit tests successfully in OPOS before setting it up in Retail Management System. If the device doesn't work in OPOS, it won't work in Point of Sale.
- Use Notepad to test scanners. If a USB/PS2 MSR or scanner isn't working in POS, try swiping or scanning with the device in Notepad. If it doesn't work in Notepad, it won't work in POS.
- Printer problems? Ensure no other drivers are using the same port as the printer and try enabling the "Share OPOS Printer with Other Applications" option in the Manager's Configuration window.

- New in V2! Now POS includes improved support for multi-function payment peripherals (combo MSR, PIN pad, signature capture). Ingenico i6550 was tested.

Time-saving Shortcuts

- Don't want to type in exact amount due when tendering? Press the **+** key to use the auto tender shortcut.
- To add multiple quantities of the same item to one line of the transaction, enter the quantity followed by the ***** key, then scan/enter the item. (e.g. **5 * 11200** would add the R/C Glider with a quantity of 5 to the transaction.)
- Add the same item to multiple lines of the transaction by pressing the **+** key to automatically add the previous item to subsequent lines.
- Quickly delete the last item entered on a transaction with the **-** key on the numeric keypad.
- Delete any item in a transaction by highlighting it and pressing the spacebar.
- Automate common cashier routines. Use KB #869896 to record a macro to automate processes like applying a 10% discount.

Troubleshooting Tips

- Does the Store Operations POS hang during or at the end of a transaction? Begin troubleshooting by disabling all hardware and add each device back one at a time until the problem occurs again. Most hanging issues are caused by hardware conflicts.
- Gather the information to help diagnose errors at the Store Operations POS:
 - At what point in the transaction does the error occur?
 - Does the error happen on all registers?
 - Does it happen with all tenders?
 - Does the error occur for a Windows® Admin and Non-Admin user?
 - Are there any third-party products installed?

Miscellaneous Tips

- Want to print a Gift Receipt? Download the custom format from the Reports Library, then assign the format to the second receipt printer and prompt the cashier to print it.
- Having a Sidewalk Sale or going on the road for a convention? Use KB #836403 to setup and use Offline mode in Store Operations POS.
- Add frequent items to a transaction with the touch of a button. Use KB #836446 to create a custom POS button for commonly sold items.

PART 2:

Store Operations Manager — Setup and Operations

Ensure that you are getting the most out of Store Operations Manager. Follow these best practices and helpful advice from the Microsoft Dynamics Retail Team.

Integrations

- Primary integration options to Store Operations:
 - Microsoft Small Business Financials 8.0/9.0: GL only
 - Microsoft Dynamics GP 8.0/9.0/10.0: GL only
 - QuickBooks 2003 later: GL & Vendor Bills
 - Microsoft Office Small Business Accounting 2006: GL & Vendor Bills
- Integration options to Headquarters:
 - Microsoft Small Business Financials 8.0/9.0: GL only
 - Microsoft Dynamics GP 8.0/9.0/10.0: GL only
 - Microsoft Dynamics GP 8.0/9.0/10.0: GL, RM, and POP
- Download the Microsoft Dynamics GP/Microsoft Small Business Financials integrations here:
 - PartnerSource | Downloads & Updates | Product Releases | Retail Management
- For the GL based integrations, avoid common mistakes when mapping GL accounts in Manager:
 - Avoid duplicate mappings. For example, do not assign accounts to both **Sales: Total** and **Sales: Total + Tax**.
 - Assign a Tax Rounding account.
- Troubleshoot unbalanced entry errors by examining export file and adding up Debits/Credits to find the amounts missing and/or double posted. For a sample mapping, see KB #862481.

Better Inventory Management

- As a best practice, before entering or importing items, setup an organized department and category structure for reporting and inventory management.
- Inactivate items instead of deleting them to maintain historical accuracy and reporting.
- When using Headquarters, be sure all new items are created at Headquarters and then downloaded to the stores using Worksheet 250 or 260. Also use the custom security options to disable Store Operations users' ability to create new Centrally Maintained Data.
- For three decimal point pricing, setup the item as a Gasoline type.
- For items that are sold individually as well as packaged, use KB #869706 to set up a Parent/Child relationship.
- Easily process mass updates to the item database with the Excel-like features in the Inventory Wizard.
- New in V2 - 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.
- New in V2 - 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.

Label Printing and Printers

- The label features in Store Operations are designed to work with Cognitive, Zebra, Eltron, and most Windows compatible full-page printers.
- The Label Designer & Print Preview works only with Avery label formats. Other label formats must be manually programmed if changes are necessary and cannot be edited or previewed in Manager. Other label formats must also be printed using Generic Text printer drivers.

Using Purchase Orders

- New features with V2 include:
 - Add items on the fly when creating or receiving a PO.
 - New Export options include Excel, Word, and Internet Explorer.
 - Print labels for the quantities you received on individual receipts.
 - Add or receive items by their Reorder number, alias, or item lookup code.
 - New printed purchase order format makes matrix items more organized and readable. This format is easily customizable using the XSLT style sheet.

Miscellaneous Tips

- Review the Manager Configuration Options tab to customize and control the workflow of the store. If the option is unclear, highlight the option and view the snippet that details the selection to the right.
- Don't forget to enable Global Customers in Manager's Configuration window if using Headquarters.
- Can't find the report you want? Check out the custom reports and receipts available on the Retail Management System Reports Library at: <https://mbs.microsoft.com/customersource/support/downloads/reportslibrary/rms/ModifiedReports/>

PART 3:

Store Operations Administrator

Keep Store Operations running at peak performance with valuable insider advice and tips from the Microsoft Retail Team.

Microsoft SQL Server™ and Database Operations

- Use SQL Server Express with Microsoft Dynamics Retail Management System 1.3 or 2.0 and take advantage of a higher database size capacity (4 GB) and no performance governor.
- New in V2, you can install/upgrade to SQL Server Express during the Microsoft Dynamics Retail Management System V2 installation.
- Free up disk space. The **Delete Transactions** feature of Administrator removes **ALL** historical sales/ordering data, while KB #872372 explains how to remove data by batch.
- Find Store Operations tables fast. Execute the statement **sp_help** in Store Operations Administrator for a list of tables, or refer to KB #869720 for a link to the database schema.
- Use the **Check** and **Reindex** options in Administrator to potentially diagnose or eliminate database related errors.
- Always use a strong **'sa'** password. Blank or weak **'sa'** passwords can be a security issue and lead to potential outside attacks.
- Make backups every day! Use SQL Server 2000/2005's backup scheduler, a third-party application, or KB #836406 to automate the backup process for the Store Operations database.

Configuration Settings

- Ensure all computers with Store Operations installed are assigned a unique register number.
- When using Headquarters, enter the address and port of the Headquarters Client on the HQ Client tab in the Store Operations Administrator Configuration window. This will enable the **Check Stores** button and allow the Remote Payment feature to download account receivable data from Headquarters at the POS.
- Remember: the configuration settings entered in Store Operations Administrator are **NOT** stored in the database, but rather in the Windows Registry. Windows users without proper permissions may not be able to edit or save changes to the Windows Registry.