Microsoft Dynamics® POS 2009

Getting Started

installation and setup

Contents

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Welcome

Welcome

Microsoft Dynamics POS 2009
Power, ease-of-use, and flexibility for retailers

Microsoft Dynamics® POS 2009 provides independent retailers with an affordable, easy-to-use, and powerful point-of-sale solution.

Retailers can use Microsoft Dynamics POS to serve customers effectively, maintain tight control over business performance, and keep pace with competitors. Microsoft Dynamics POS can help you:

- Get up and running quickly with intuitive wizards for setting up the store, importing information, creating purchase orders, managing inventory, updating prices, and other tasks.
- Manage and track inventory, customers, and suppliers efficiently.
- Manage both front-office retail operations and back-office accounting with a true solution suite.
- Automate transaction processing start-to-finish.
- Deliver professional, personalized service to improve customer satisfaction, market more effectively, and expand sales reach.
- Analyze sales information and make confident decisions based on flexible, real-time reports.
- Manage store and employee information to help protect sensitive information, reduce shrinkage and fraud, and manage employees more effectively.

Microsoft Dynamics POS is a single program with two views.

- **POS View** is the point-of-sale screen cashiers use to process transactions and returns, look up items and customer information, receive inventory, and do other daily register tasks.
- **Manager View** is a convenient and central location for managing inventory and store information; for example, creating reports and purchase orders, receiving inventory, and managing customer and employee information.

When used with Intuit QuickBooks, retailers can automate accounting with inventory management and other day-to-day, retail business processes.

Microsoft Dynamics POS works with many popular POS hardware devices, such as cash drawers, receipt printers, and bar code scanners.

Getting started – the big picture

Here is the path to getting up and running with Microsoft Dynamics POS, so you can quickly start ringing up sales:

1. Make sure the computers, network, and POS hardware devices have been set up. See your Microsoft Certified Partner and page 7.

2. Install Microsoft Dynamics POS. See page 6.

3. Start Microsoft Dynamics POS and complete the startup wizards. See page 20.

4. Set up the store in Microsoft Dynamics POS. See page 22.

Start ringing up sales.
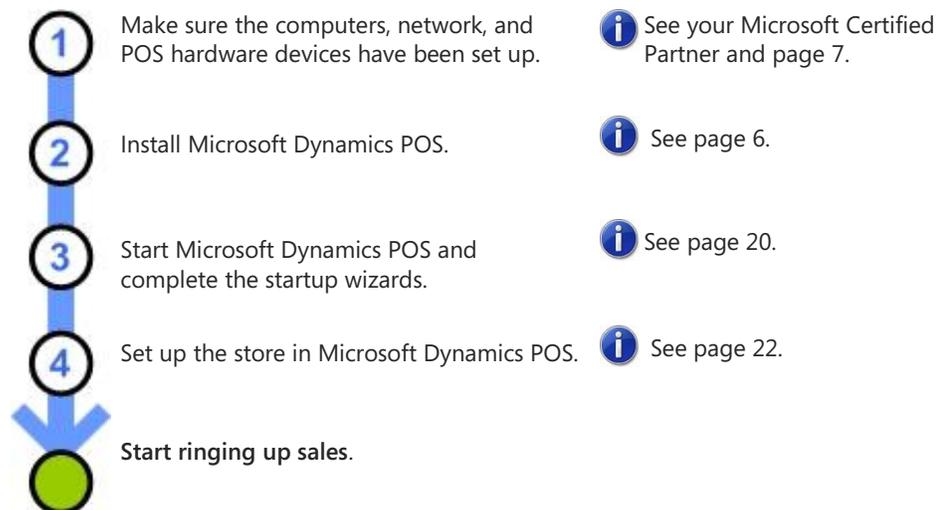
Set up POS hardware
Use new or existing devices to help automate the store

You can connect one or more point-of-sale (POS) hardware devices to the computer; for example, a cash drawer, receipt printer, bar code scanner, customer-facing payment terminal, check reader (MICR), PIN pad, line display, magnetic stripe reader (MSR), or signature capture device.

Set up POS hardware

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

1   Connect each POS hardware device and install the device's software according to the manufacturer's instructions. Typically, the device's manufacturer provides configuration software on a CD that accompanies the device.

Some devices work with Microsoft Dynamics POS simply by connecting them to the computer – no software or setup required.

Note

- Whether you connect the device first or install the software first varies by the device and manufacturer.
- 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. You can also connect an MSR (magnetic stripe reader) or PIN pad to the computer or to a signature capture device.
- Make sure you connect each device to the proper port using the proper cable.

2   If necessary, download and install the device's OPOS service objects from the device manufacturer's Web site. (OPOS is a Windows interface standard for POS hardware.)

Note

- Review the system requirements and setup instructions before downloading.
- Microsoft recommends installing Common Control Objects whenever you install an OPOS hardware device. Installing a new device's OPOS software can sometimes overwrite previously installed Common Control Objects.

3   Configure and test each device according to the manufacturer's instructions before using it with Microsoft Dynamics POS.

IMPORTANT

Installing POS hardware correctly is essential if it is to work properly with Microsoft Dynamics POS. See your Microsoft Certified Partner for assistance.

More information

- *Tutorial* : "Setting Up POS Hardware" ▶ C:\Program Files\Microsoft Dynamics - Point of Sale\en-US\Help\Hardware_Demo.exe

Welcome

Find more information
Get to know Microsoft Dynamics POS 2009

See online Help in both POS View and Manager View for more information about Microsoft Dynamics POS and complete step-by-step instructions. In addition, many other informative resources are available to assist you.

Manager View Help

Manager View Help is a complete guide to using Microsoft Dynamics POS as a whole and Manager View in particular.

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

* On the **Help** menu, click **Microsoft Dynamics POS Help**.

  -or-

  Press F1.

  -or-

  On the toolbar, click the Help button 🔵.

POS View Help

Your guide to using every feature of POS View, POS View Help is context sensitive in many places, providing detailed explanations of the specific controls and options you see on the screen.

* Press F1.

  -or-

* Click the Help button on the left side of POS View.

  🔵

Manager's Guide

The Manager's Guide provides an overview of the features and capabilities of Manager View. The Manager's Guide (in PDF format) can be read on screen or printed for easy reference.

> ℹ️ You can find the Manager's Guide in this folder: C:\Program Files\Microsoft Dynamics - Point of Sale\en-US\Help\
>
> If you are new to Microsoft Dynamics POS, get acquainted by looking through the first two chapters, "First steps" and "Basic settings."

Cashier's Guide

The Cashier's Guide provides an overview of the features and capabilities of POS View. The Cashier's Guide (in PDF format) can be read on screen or printed for easy reference.

> ℹ️ If you are new to Microsoft Dynamics POS, get acquainted by looking through the first two chapters, "First steps" and "Sales transactions."

Quick Reference card

Microsoft Dynamics POS includes a Quick Reference card for cashiers (in PDF format) that can be printed for easy reference. The card provides keyboard shortcuts and step-by-step instructions for common POS View tasks.

Tutorial

"Setting Up POS Hardware" can assist you in connecting and setting up point-of-sale devices, such as a receipt printer and scanner.

- In the C:\Program Files\Microsoft Dynamics - Point of Sale\en-US\Help\ folder, double-click **Hardware_Demo.exe**.

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 POS Web site at http://www.microsoft.com/pos .

On the Web

You can find information about Microsoft Dynamics POS 2009 at the Microsoft Dynamics Web site, including product information, updates, tips for retailers, demos, customer stories, and additional training.

> http://www.microsoft.com/pos

Community

The active newsgroup community is a great way to share information and learn from other retailers using Microsoft Dynamics POS.

> Discussions in Microsoft Dynamics – Microsoft Dynamics POS

Microsoft product support

Business Ready Enhancement Plan

Your Microsoft Dynamics POS Business Ready Enhancement Plan provides a number of exciting benefits:

- Version upgrades and product updates
- Service packs and hot fixes
- Access to CustomerSource and the Microsoft Knowledge Base
- Unlimited online training
- Lifecycle support (see http://support.microsoft.com/lifecycle)
- Protected list price

The phone number for the support line is 1-888-477-7877.

> For more information, contact your Microsoft Certified Partner or see http://www.microsoft.com/dynamics/support .

Microsoft Services Premier Support

Microsoft Services Premier Support is also available.

> For more information, see http://www.microsoft.com/services/MicrosoftServices/srv_premier.aspx .

Professional Paid per Incident Support

Finally, you can obtain Professional Paid per Incident support.

> For more information, see http://support.microsoft.com/?LN=en-us&scid=gp;en-us;offerprophone&x=9&y=13 .

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.

> Information (and site access for Microsoft customers currently on a service plan) is available at http://www.microsoft.com/dynamics/customersource.mspx .

Product information

> For product information about Microsoft Dynamics POS and other Microsoft retail, business, and accounting software, visit the Microsoft Dynamics Web site at http://www.microsoft.com/dynamics/default.mspx .

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# Installation

Before you install
Prepare to install Microsoft Dynamics POS 2009

You can set up Microsoft Dynamics POS 2009 on one computer or on multiple computers. The arrangement you choose depends on how many computers you have in the store and how you intend to use them.

Installing on one or more computers

If the 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 Microsoft Dynamics POS keeps the store's information.

In a multiple-computer store, you designate one computer as the main computer, which is often set up in a back office and used for management tasks. The other computers can be used as point-of-sale registers.
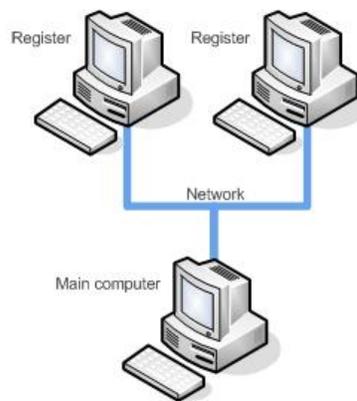
Only the main computer will contain the store database. The other computers will communicate with the main computer through the network.

Note

You must purchase one copy of Microsoft Dynamics POS for each computer on which you want to install the program and use POS View.

You can install the same copy of Microsoft Dynamics POS on additional computers without activating the software if you only want to use Manager View. For example, you might want to install Microsoft Dynamics POS on a computer in the back office and use Manager View to receive and manage inventory.

Microsoft SQL Server

Microsoft SQL Server® 2008 Express Edition is installed along with Microsoft Dynamics POS, and a new instance is created.

To install Microsoft Dynamics POS on more than five registers, Microsoft recommends using Microsoft SQL Server 2008 rather than Microsoft SQL Server 2008 Express Edition, which is included with Microsoft Dynamics POS.

If you want to use an existing instance of Microsoft SQL Server, see your Microsoft Certified Partner for special instructions in the *Microsoft Dynamics POS 2009 Implementation Guide for PCI Compliance*.

Using Microsoft Dynamics POS on multiple computers with Windows Vista and Windows Server 2008

If Microsoft Dynamics POS is installed on more than one computer using Windows Vista® or Windows Server® 2008, the LocalAccountTokenFilterPolicy must be turned off.

For more information and complete instructions, see this [Microsoft Knowledge Base article](#).

Open ports for database communication

If the store has more than one computer using Microsoft Dynamics POS, these ports must be opened in the firewall to facilitate database communication:

- The TCP port that SQL Server is listening on. For MSPOSInstance, the default port is 1976. For other SQL Server installations, the default port is 1433.
- TCP ports 139 and 445.
- UDP ports 137 and 138.

The ports need to be opened only on the main computer.

The instructions below are for Windows Firewall. If you are using a third-party firewall, consult the firewall documentation for information about opening the ports.

Note

When you enable File and Printer Sharing in Windows, Windows Firewall is automatically opened to ports 137, 138, 139, and 445.

In most cases, open the SQL Server listening port for the local subnet only. If computers on other subnets need access to the database, change firewall settings. For Windows Firewall, you can change the scope of the selected exception by clicking **Edit** and then **Change scope**.

Open Windows Firewall in Windows Vista or Windows Server 2008

1 Log on to the main computer as a Windows Administrator.

2 Click **Start**, and then click **Control Panel**.

3 If needed, switch to Classic View, and then double-click **Network and Sharing Center**.

4 Turn on **Network discovery**, **File sharing**, and **Printer sharing**. For each, click the down-arrow at right, select the **Turn on**... option, and then click **Apply**.

5 Click the **Back** button to return to **Control Panel**, and then double-click **Windows Firewall**.

6 Click **Allow a program through Windows Firewall**.

7 On the **Exceptions** tab, click **Add port**.

8 In the **Name** box, type a name for the port that SQL Server is listening on, such as "POS listening port".

9 In the **Port** box, type the port number.

10 Make sure **TCP** is selected, and then click **OK**.

11 Verify that the **File and Printer Sharing** check box is selected, and then click **OK**.

Open Windows Firewall in Windows XP

1 Log on to the main computer as a Windows Administrator.

2 On the **Start** menu, click **Control Panel**.

3 If needed, switch to Classic View, and then double-click **Windows Firewall**.

4 On the **Exceptions** tab, click **Add Port**.

5 In the **Name** box, type a name for the port that SQL Server is listening on, such as "POS listening port".

6 In the **Port** box, type the port number.

7 Make sure **TCP** is selected, and then click **OK**.

8 Select the **File and Printer Sharing** check box, and then click **OK**.

Using Microsoft Dynamics POS with Microsoft Windows XP

When using Microsoft Dynamics POS on computers using Microsoft Windows® XP, run Microsoft Dynamics POS as an Administrator to complete any of the following tasks:

- Create, duplicate, or delete an employee
- Change an employee's password, ID, or role
- Create, back up, or restore the store database
- Change the database connection settings

To run Microsoft Dynamics POS as an Administrator

1 Close Microsoft Dynamics POS.

2 On the **Start** menu, point **Programs** or **All Programs**, point to **Microsoft Dynamics POS 2009**, and then right-click **Microsoft Dynamics POS 2009**.

3 Click **Run as administrator**.

4 If necessary, enter the credentials of an account in the Administrators group.

Using Microsoft Dynamics POS with Intuit QuickBooks

If you plan to use Microsoft Dynamics POS with Intuit® QuickBooks, install QuickBooks and set up the company file before you set up Microsoft Dynamics POS to share accounting information.

Upgrading from a previous release of Microsoft Dynamics POS

You can upgrade from Microsoft Dynamics – Point of Sale 2.0 to Microsoft Dynamics POS 2009. If you have an earlier release of Microsoft Dynamics – Point of Sale, you must first upgrade to release 2.0.

Note

- If you are upgrading from a previous release of Microsoft Dynamics POS, Microsoft recommends that you see your Microsoft Certified Partner for assistance. If you are using a version of Microsoft SQL Server other than Express Edition, see the *Microsoft Dynamics POS 2009 Implementation Guide for PCI Compliance*, for more information.

Before installing Microsoft Dynamics POS 2009, complete the following prerequisites:

- Close all transaction batches by running a Z report on each register.
- Settle all credit card transactions. Otherwise, you will not be able to settle those transactions.
- If any employee is using "Cashier" or "Supervisor" as his employee ID, change the ID to something else.
- Make a backup of the store database and store it somewhere other than the installation folder for Microsoft Dynamics – Point of Sale.
- Uninstall Microsoft Dynamics – Point of Sale 2.0 without removing the store database. See for more information.

Keep in mind that all registers in the store must be running the same release of Microsoft Dynamics POS.

Upgrading from Microsoft Dynamics RMS

For information about migrating a Microsoft Dynamics Retail Management System (RMS) Store Operations database into Microsoft Dynamics POS 2009, see your Microsoft Certified Partner.

More information

- *Microsoft Dynamics POS 2009 Implementation Guide for PCI Compliance* ▶ C:\Program Files\Microsoft Dynamics - Point of Sale\ en-US\Help\POS2009_PADSS_IG.pdf
- *Microsoft Dynamics POS Web site* ▶ http://www.microsoft.com/dynamics/pos

Install Microsoft Dynamics POS 2009 on the main computer
The Installation Wizard and startup wizards are your guides

There are four main steps to installing Microsoft Dynamics POS on the main computer. Each step is described in detail below.

Overview

Step 1   Install Microsoft Dynamics POS

Step 2   Complete the startup wizards

Step 3   Enter basic information about the store

Step 4   Specify the POS hardware you want to use

Note

- If you're installing Microsoft Dynamics POS in a multiple-computer store, first install Microsoft Dynamics POS on the main computer that will have the store database, and then install Microsoft Dynamics POS on additional register computers. For more information, see "Installing Microsoft Dynamics POS on additional computers."
- Install Microsoft Dynamics POS on the local computer, not on a remote computer over a network.
- You must have an Internet connection to download the installation files.
- If you close the install screen during installation, the installation will be interrupted, and you might have to uninstall Microsoft .NET Framework 3.5 SP1 before you can restart the installation.

Step 1   Install Microsoft Dynamics POS

1   Log on to the main computer as a Windows Administrator.

2   Visit the Microsoft Dynamics POS 2009 download page on CustomerSource or PartnerSource.

3   Click **Download**, and then specify a location for the download file.

   The file, **MSDPOS2009-enUS.exe**, is downloaded to the folder you specified.

4   After downloading, double-click the file.

   Microsoft Dynamics POS displays the installation screeen.

Note

On the installation screen, under **Resources**, you can view or print these additional documents and other resources:

- *Manager's Guide*
- *Cashier's Guide*
- *Quick Reference* card
- *Setting up POS Hardware* tutorial

After installation, you can find these resources here: C:\Program Files\Microsoft Dynamics - Point of Sale\en-US\Help

5   Under **Install**, click **Microsoft Dynamics POS 2009**, and then follow the on-screen instructions.

6   At the end of the Installation Wizard, click **Finish** to close the wizard.

Step 2   Complete the startup wizards

1 Start Microsoft Dynamics POS. On the **Start** menu, point to **Programs** or **All Programs**, point to **Microsoft Dynamics POS 2009**, and then click **Microsoft Dynamics POS 2009**.

   The first time you start Microsoft Dynamics POS, the program starts the **Getting Started Wizard**. Follow the on-screen instructions.

2 When the wizard asks if you want to use a new store database or an existing one, select **I want to create my new store database on this computer**.

3 The **Create Store Database Wizard** starts. When it asks what kind of database you want to create, select one of the following.

   - **Create a new blank database**.

   -or-

   - **Use a sample database**.

   Should you create an empty store database or a sample store database?

   You can use a sample database to practice using Microsoft Dynamics POS. Also, the sample information can serve as a guide for entering the store's own information. With an empty store database, you enter all of the store's information from scratch.

4 Type a name for the store database.

   The store database name is limited to 50 characters and cannot contain any of these characters: ~ ! ` % ^ * _ ( ) - + = ? , . < > /

IMPORTANT

Write down the database name and computer name and keep it in a safe place. For example, you can print this page and write the information in the space provided below.

You will need this information to install Microsoft Dynamics POS on additional computers. You can also find this information in Microsoft Dynamics POS. In Manager View, on the **Help** menu, click **About Microsoft Dynamics POS**.

To find the computer name in Windows XP, right-click the **My Computer** icon on the Desktop and click **Properties**.

To find the computer name in Windows Vista, on the **Start** menu, click **Control Panel**, and then double click **System**.

Database name:

Computer name:

5 Click **Next** to create the store database. Then click **Finish** to close the wizard.

   If you created a sample database, the **Create Password Wizard** starts so you can create passwords for the sample employees in the sample database.

Step 3   Enter basic information about the store

1 The **Store Setup Wizard** starts automatically.

   The Store Setup Wizard is an easy way to enter basic information about the store, such as sales tax and employee information, so you can quickly get started ringing up sales.

Note

Before you can use Microsoft Dynamics POS, you must complete the Store Settings Section of the Store Setup Wizard to create an employee ID and password for the store owner, as well as enter other basic information about the store.

2 To continue with the Store Setup Wizard now, click **Next** and follow the on-screen instructions. To set up the store later, click **Cancel** – Microsoft Dynamics POS will close.

3   The Store Setup Wizard will ask you to create an employee ID and password for the store owner.

For example, if the computer has been set up to enforce strong passwords, passwords might need to contain certain characters, such as numbers, uppercase and lowercase letters, and punctuation.

IMPORTANT

Write down the employee ID and password for the store owner in a safe place. For example, you can print this page and write the information in the space provided below.

You will need this information to log on to Microsoft Dynamics POS and use the program. If you lose this information, you will need to re-install Microsoft Dynamics POS.

Employee ID:

Password:

4   At the end of the **Store Settings** section of the Store Setup Wizard, click **Finish** to close this section of the wizard.

Microsoft Dynamics POS closes the Store Settings section of the wizard and displays the **Store Setup Wizard** checklist.

5   You have completed the minimum required to start and use Microsoft Dynamics POS. The other sections of the wizard are optional.

For example, select **Employees** if you want to enter basic information about the store's employees. Each employee who uses Microsoft Dynamics POS must have an employee ID and password. You can also enter this information later in Manager View.

Select **Inventory** if you want to enter basic information about the store's inventory. You can create departments and categories to help organize the store's inventory, as well as enter information about the store's suppliers.

6   Click **Close** to close the Store Setup Wizard and start the **Activation Wizard**.

Complete the Activation Wizard, using the product key that was provided to you by your Microsoft Certified Partner.

7   Click **Finish** to close the Activation Wizard and start Microsoft Dynamics POS.

Step 4   Specify the POS hardware you want to use

1   The first time you start Microsoft Dynamics POS and whenever you start Microsoft Dynamics POS after adding or removing hardware devices, Microsoft Dynamics POS will display a list of hardware devices installed on the computer. This message confirms that Microsoft Dynamics POS recognizes the hardware; you are not required to use all the listed devices with Microsoft Dynamics POS.

2 After you dismiss the hardware list, Microsoft Dynamics POS displays the **Register Properties** dialog box.

The list of **Available devices** shows the devices currently installed on the computer.

- Select a device and use the arrow buttons to move the devices you want Microsoft Dynamics POS to use to the **Selected devices** list.

When you add a printer to the **Selected devices** list, Microsoft Dynamics POS displays the **Printer Properties** dialog box for that printer. If you have other programs on the computer that use this printer, select the **Share printer with other programs** check box.

More information

- *Getting Started*, page 20 ▶ "Start or exit Microsoft Dynamics POS"
- *Getting Started*, page 21 ▶ "Activate Microsoft Dynamics POS"
- *Getting Started*, page 22 ▶ "Roadmap: Quickly set up the store"
- *POS View Help* ▶ "Switch between POS View and Manager View"
- *Microsoft Certified Partners* ▶ see special instructions in the *Microsoft Dynamics POS 2009 Implementation Guide for PCI Compliance*

Install Microsoft Dynamics POS 2009 on additional computers
The Installation Wizard and startup wizards are your guides

In a multiple-computer store, you designate one computer as the main computer, which is often set up in a back office and used for management tasks. This computer will have the store database and is also referred to as the "server." Additional computers can be used as register computers for ringing up sales and can be referred to as "clients."

Overview

There are four main steps to installing Microsoft Dynamics POS on each additional computer you want to use in the store. Each step is described in detail below.

Step 1   Install Microsoft Dynamics POS

Step 2   Connect to the store database

Step 3   Assign a register number

Step 4   Specify the POS hardware you want to use

Note

- If you're installing Microsoft Dynamics POS in a multiple-computer store, first install Microsoft Dynamics POS on the main computer that will have the store database, and then install Microsoft Dynamics POS on additional register computers. For more information, see "Installing Microsoft Dynamics POS on the main computer."
- Install Microsoft Dynamics POS on the local computer, not on a remote computer over a network.
- You must have an Internet connection to download the installation files.
- If you close the install screen during installation, the installation will be interrupted, and you might have to uninstall Microsoft .NET Framework 3.5 SP1 before you can restart the installation.

Step 1   Install Microsoft Dynamics POS

1   Log on to the additional computer as a Windows Administrator.

2   Visit the Microsoft Dynamics POS 2009 download page on CustomerSource or PartnerSource.

3   Click **Download**, and then specify a location for the download file.

   The file, **MSDPOS2009-enUS.exe**, is downloaded to the folder you specified.

4   After downloading, double-click the file.

   Microsoft Dynamics POS displays the installation screeen.

Note

On the installation screen, under **Resources**, you can view or print these additional documents and other resources:

- *Manager's Guide*
- *Cashier's Guide*
- *Quick Reference* card
- *Setting up POS Hardware* tutorial

After installation, you can find these resources here: C:\Program Files\Microsoft Dynamics - Point of Sale\en-US\Help

5 Under **Install**, click **Microsoft Dynamics POS 2009**, and then follow the on-screen instructions.

6 At the end of the Installation Wizard, click **Finish** to close the wizard.

Step 2   Connect to the store database

1 Start Microsoft Dynamics POS.

Microsoft Dynamics POS starts the **Getting Started Wizard**. Follow the on-screen instructions.

2 When the wizard asks if you want to use a new store database or an existing one, select **I already have a store database**.

Microsoft Dynamics POS displays the **Change Database Connection** dialog box.

3 In the **Computer name** box, type the name of the computer that has the store database; for example, "MainComputer".

Note

- To find the computer name of the main computer, click **Start**, next right-click **My Computer**, click **Properties**, and then click the **Computer Name** tab. You can also find this information in Microsoft Dynamics POS on the main computer. In Manager View, on the **Help** menu, click **About Microsoft Dynamics POS**.
- Do not use "(local)" for the computer name.

Microsoft Dynamics POS contacts the main computer and displays the **Server Administrator** dialog box.

4 Enter an Administrator user name and password for the computer with store database.

Microsoft Dynamics POS displays the **Select Database** dialog box.

5 In the **Database name** box, select the name of the database that is currently being used by Microsoft Dynamics POS on the main computer.

Note

For notes about the database name that you used for the main computer, see page 11. You can also find the database name in Microsoft Dynamics POS on the main computer. In Manager View, on the **Help** menu, click **About Microsoft Dynamics POS**.

Microsoft Dynamics POS connects to the selected database and displays the **Finish** page of the Getting Started Wizard.

6 Click **Finish** to close the Getting Started Wizard and start the **Activation Wizard**.

Complete the Activation Wizard, using the product key that was provided to you by your Microsoft Certified Partner.

7 Click **Finish** to close the Activation Wizard.

Step 3   Assign a register number

After the Activation Wizard closes, Microsoft Dynamics POS displays the Logon screen.

1 Log on to Microsoft Dynamics POS with the employee ID and password you created when you installed Microsoft Dynamics POS on the main computer.

Note

For notes about the employee ID and password that you created when you installed Microsoft Dynamics POS on the main computer, see page 12.

Microsoft Dynamics POS asks if you want to assign register number 1 to this computer.

2 Click **No**.

Microsoft Dynamics POS asks if you want to change the register number of this computer.

3 Click **Yes**.

Microsoft Dynamics POS displays the **Add New Register** dialog box.

4 Click **Use the next available register number**.

-or-

To assign a different register number, click **Use the number specified below**, and then type the number.

Note

Each installation of Microsoft Dynamics POS must have a unique register number.

Step 4   Specify the POS hardware you want to use

1 Whenever you start Microsoft Dynamics POS after adding or removing hardware devices, Microsoft Dynamics POS displays a list of devices installed on the computer. This message simply confirms that Microsoft Dynamics POS recognizes the hardware.

Note

If you connected and installed a POS hardware device that does not appear in this list, check the following points and then restart Microsoft Dynamics POS. Make sure:

- The cable is connected properly to the computer and to the device.
- The software for the device is installed properly.
- The device is configured according to the manufacturer's instructions.

2 After you dismiss the hardware list, Microsoft Dynamics POS displays the **Register Properties** dialog box.

The list of **Available devices** shows the devices currently installed on the computer.

- Select a device and use the arrow buttons to move the devices you want Microsoft Dynamics POS to use to the **Selected devices** list.

When you add a printer to the **Selected devices** list, Microsoft Dynamics POS displays the **Printer Properties** dialog box for that printer. If you have other programs on the computer that use this printer, select the **Share printer with other programs** check box.

Note

If you want to keep electronic copies of receipts, select either the **Save electronic copies of receipts** check box in the **Register Properties** dialog box or the **Save receipts to database** check box in the **Printer Properties** dialog box. If you select both check boxes, Microsoft Dynamics POS will keep two electronic copies of receipts.

More information

- *Getting Started*, page 20 ▶ "Start or exit Microsoft Dynamics POS"
- *Getting Started*, page 21 ▶ "Activate Microsoft Dynamics POS"
- *Getting Started*, page 22 ▶ "Roadmap: Quickly set up the store"
- *POS View Help* ▶ "Switch between POS View and Manager View"
- *Microsoft Certified Partners* ▶ see special instructions in the *Microsoft Dynamics POS 2009 Implementation Guide for PCI Compliance*

Uninstall Microsoft Dynamics POS 2009

Easily repair or remove Microsoft Dynamics POS

Uninstalling Microsoft Dynamics POS will permanently remove Microsoft Dynamics POS from the computer. After removal, Microsoft Dynamics POS will no longer be available for use. You can also repair the Microsoft Dynamics POS program files.

When you uninstall Microsoft Dynamics POS, the store database is not removed. This means that you can safely uninstall and reinstall Microsoft Dynamics POS for troubleshooting purposes without harming or changing the store information.

Tip

If you want to uninstall Microsoft Dynamics POS for troubleshooting, first try using the Installation Wizard to repair the program files before you uninstall the program.

Follow the steps below, but in Step 6, click **Repair** instead of **Uninstall** in Windows Vista, or click **Change** instead of **Remove** in Windows XP. In the Installation Wizard, select **Repair**.

Uninstall Microsoft Dynamics POS without removing the store database

1 Back up the store database, and then copy the backup (.bck) file to a location other than the hard drive.

2 Exit Microsoft Dynamics POS, including all Help windows.

3 Click **Start**, and then click **Control Panel**.

4 If needed, switch to Classic View.

5 Double-click **Programs and Features** (Windows Vista) or **Add or Remove Programs** (Windows XP).

6 Click **Microsoft Dynamics POS 2009**, and then click **Uninstall** or **Remove**. Follow the instructions on the screen.

7 If you want to reinstall, see your Microsoft Certified Partner for specific instructions.

Completely uninstall Microsoft Dynamics POS

These steps assume a standard installation of Microsoft Dynamics POS. If you are using SQL Server 2005 or an instance of SQL Server 2008 other than the SQL Server 2008 Express instance that was included with Microsoft Dynamics POS, the steps to uninstall will vary. Contact a Microsoft Certified Partner for assistance.

1 Back up the store database, and then copy the backup (.bck) file to a location other than the hard drive.

2 Exit Microsoft Dynamics POS, including all Help windows.

3 Click **Start**, and then click **Control Panel**.

4 If needed, switch to Classic View.

5 Double-click **Programs and Features** (Windows Vista) or **Add or Remove Programs** (Windows XP).

6 Uninstall (Remove) these programs:

- **Microsoft Dynamics POS 2009**

- **Microsoft .NET Framework 3.5 SP1**

- **Microsoft Primary Interoperability Assemblies 2005**

- **Microsoft Visual C++ 2005 Redistributable**

- **OPOS Common Control Objects 1.9.000**

- **Microsoft POS for .NET 1.12**

- **Microsoft Report Viewer Redistributable 2008 SP1**

- **Microsoft SQL Server 2008**

Click **Remove**, and then click **OK** in the **Setup Support Rules** dialog box if all tests passed.

Select **MSPOSINSTANCE**, and then click **Next.**

Click **Finish**.

Note

Do not remove other instances of Microsoft SQL Server that you might have installed on the computer. You can remove all features of the instance.

7 If you do not have any instances of Microsoft SQL Server 2008 installed other than MSPOSINSTANCE, click **Microsoft SQL Server Native Client**, and then click **Remove**.

8 In Windows Explorer, delete this folder:

c:\Program Files\Microsoft Dynamics – Point of Sale

IMPORTANT

Deleting this folder might send your customized report, receipt format, import settings, and other files to the Recycle Bin.

Note

The folder listed above is the default location of the Microsoft Dynamics POS program files. If you specified a different location during installation of Microsoft Dynamics POS, the path to this folder will vary.

3

Start the program and set up the store

Start and exit Microsoft Dynamics POS

Quickly start ringing up sales

Before you can start Microsoft Dynamics POS, your name, employee ID, and password must have been set up in the Store Setup Wizard or in Manager View.

Start Microsoft Dynamics POS

1 On the **Start** menu, click **Programs** or **All Programs**, click **Microsoft Dynamics POS 2009**, and then click **Microsoft Dynamics POS 2009**.

2 In the **Logon** dialog box, type your employee ID and password.

Tip

If you are logging on using a touch-screen, press the touch-screen keyboard button to display the touch-screen keyboard.

Microsoft Dynamics POS starts in POS View (unless you skipped activation). Employees who have permission can switch to Manager View by clicking the Manager View tab.

Note

- The passwords in Microsoft Dynamics POS must comply with the current Windows security settings on the computer or network. If an account lockout policy is in place, you will not be able to log on after a certain number of failed attempts. In that event, contact your network administrator to have your user account unlocked.

- If you want to access POS View, you must activate the software. For more information, see "Activate and register Microsoft Dynamics POS" on page 21.

- If you are using Windows XP, consider starting Microsoft Dynamics POS as an Administrator. See below.

Start Microsoft Dynamics POS as an administrator

- On the **Start** menu, click **Programs** or **All Programs**, click **Microsoft Dynamics POS 2009**, right-click **Microsoft Dynamics POS 2009**, and then click **Run as administrator**.

Exit POS View and Microsoft Dynamics POS

- Press **F6** (Tasks), and then press **8** (Exit).

  -or-

- Click the Exit button on the left side of POS View.

Note

Depending on your employee role settings, you might not be able to exit Microsoft Dynamics POS.

Switch between POS View and Manager View

- Click the Manager View or POS View tab.

More information

- *POS View Help* ▶ "Start or exit Microsoft Dynamics POS"
- *Manager View Help* ▶ "Start Microsoft Dynamics POS"

Activate and register Microsoft Dynamics POS

Authenticate your copy of Microsoft Dynamics POS

Activation reduces software piracy and ensures that Microsoft's customers receive the product quality they expect by authenticating your software as a genuine, fully licensed copy. Registration ensures that your product support is accurate and up-to-date.

Activation and registration

If you have an Internet connection, you can quickly and easily activate and register Microsoft Dynamics POS over the Internet. Otherwise, you can activate the software by telephone.

Each copy of Microsoft Dynamics POS can only be activated on a single computer, so you will need a separate copy of the software for each computer where you want to use Microsoft Dynamics POS. Activation and registration are required.

Note

The one exception to the activation requirement is that you are allowed to install and use Microsoft Dynamics POS on a back-office computer without activating, provided that computer will not be used to process transactions. You will not be able to access POS View. You can choose this option in the Activation Wizard.

If you ever need to reinstall Microsoft Dynamics POS 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.

Registration ensures that Microsoft Product Support has accurate, up-to-date information to assist you and ensures that you receive your product support information promptly.

Activate and register Microsoft Dynamics POS when first starting the program

1   Start Microsoft Dynamics POS.

    After the startup wizards, Microsoft Dynamics POS starts the **Activation Wizard**.

2   Follow the instructions in the wizard to activate and register the program.

    You will need the product key that was provided by your Microsoft Certified Partner.

Activate and register Microsoft Dynamics POS later

1   In Manager View, on the **Help** menu, click **Activate Dynamics POS**.

2   Follow the instructions in the wizard.

    Depending on your activation status, the **Activation Wizard** will prompt you to enter the product key or select an activation method.

More information

- *POS View Help* ▶ "Start or exit Microsoft Dynamics POS"
- *Manager View Help* ▶ "Activate Microsoft Dynamics POS"

Roadmap: Quickly set up the store
Get started quickly with the startup wizards

The first time you start Microsoft Dynamics POS, a series of short wizards walk you through specifying initial settings. You can then begin ringing up sales right away, while specifying more detailed settings later as time permits.
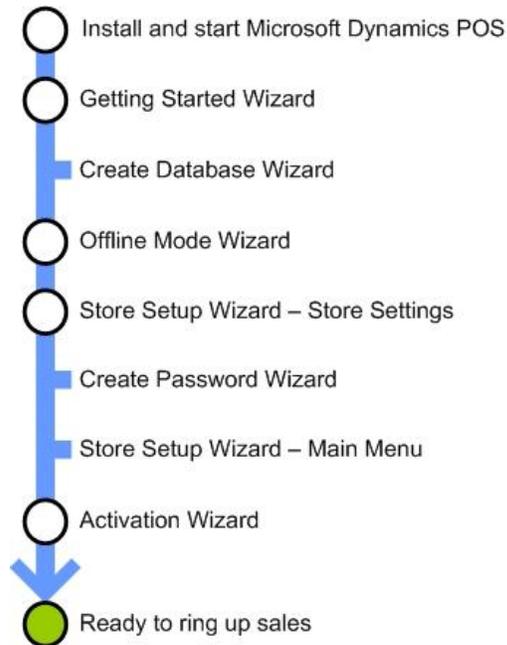
Setting up the store in Microsoft Dynamics POS

Before you can start ringing up sales, you need to tell Microsoft Dynamics POS a few things about the store, such as the sales tax, the employees who will be using Microsoft Dynamics POS, and so on.

The Store Setup Wizard makes getting started with Microsoft Dynamics POS quick and easy. You can enter just enough information to start ringing up sales right away. Later, as time allows, you can enter more of the store information.

Getting Started Wizard

In this required wizard, you:

- Agree or disagree to the terms of license agreement.
- Specify whether you want to create a database or connect to one you already have.
- Indicate whether or not you want to participate in the Customer Experience Improvement Program.

Create Database Wizard

If you chose to create a new database, Microsoft Dynamics POS displays the Create Database Wizard to help you create an initial store database.

You can create a blank database or you can start with one of two sample databases included with Microsoft Dynamics POS; one for a fictitious toy store and the other, for a fictitious coffee shop.

Each sample database includes inventory, employees, customers, task pads, extensive settings, and examples of various features as they would be set up in typical stores.

Offline Mode Wizard

This required wizard can help you set up offline mode, which you can use to keep the store operational during network downtime.

Store Setup Wizard – Store Settings

If you chose to create a new database, The Store Setup Wizard helps you specify a few important settings, such as sales tax and payment methods.

Create Password Wizard

If you chose to create one of the sample databases, Microsoft Dynamics POS displays the Create Password Wizard to help you create temporary passwords for the sample employees in the database.

Store Setup Wizard – Checklist

From the Store Setup Wizard's Checklist, the wizard can help you set initial settings for basic store information, employees, importing existing items or customers, creating departments and categories, and sharing information with accounting programs.

Tip

You can also start the Store Setup Wizard in Manager View later from the Settings menu.

Activation Wizard

In this required step, use the Activation Wizard to activate and register Microsoft Dynamics POS. You must activate the program to be able to use it.

Checklist for quick store setup

Use this checklist to make sure you have specified the minimum store settings to start ringing up sales. You can specify most of the basic settings in the Store Setup Wizard.

❏   Owner information

❏   Basic store information

❏   Employees

❏   Payment methods

❏   Sales taxes

❏   Registers and hardware

Install Microsoft Dynamics POS, specify register settings, and set up POS hardware on each register in a multiple-computer store.

❏   Items

Cashiers can add items as they are sold to inventory at the registers. Or you can import an existing item list.

More information

- *Getting Started* ▶ "Activate and register Microsoft Dynamics POS"
- *Manager View Help* ▶ "Set up the store"
- *Manager View Help* ▶ "Learn to use Manager View"
- *Manager View Help* ▶ "Frequently asked questions about store setup and management"

Checklist: Complete store setup
A comprehensive plan for store productivity

You can use this comprehensive checklist to make sure you are taking full advantage of all the powerful features in Microsoft Dynamics POS. Set up the store information in the order shown, since setting up some features depends on others. Minimum required information

You must enter the following information before you can begin performing sales transactions.

You can specify the basics of most of this information in the Store Setup Wizard. Later, you can specify more detailed information in Manager View.

❑ Owner information (in the Store Setup Wizard)

An employee ID and password for the store owner is required and must be specified in the Store Setup Wizard the first time the wizard is run.

❑ Store information (in the Store Setup Wizard or Manager View)

The store name, address, and contact information. Depending on other settings, this information can appear on receipts, reports, or other documents.

❑ Employee information (in the Store Setup Wizard or Manager View)

You can specify basic employee information in the Store Setup Wizard.

❑ Payment methods (in the Store Setup Wizard or Manager View)

Specify the forms of payment accepted by the store, such as cash, check, and so on.

❑ Sales tax (in the Store Setup Wizard or Manager View)

Specify different sales taxes and individual tax authorities, such as state, county, or city (in Manager View). Specify a single sales tax (in the Store Setup Wizard).

❑ Register connection with the store database (when starting Microsoft Dynamics POS on each register).

In a multiple-computer store, it's important to make sure each register connects to the store database, has a unique register number, and journals receipts properly.

❑ Inventory items (in Manager View)

You can create the items manually or import item information from a text file with the Import Wizard.

Tip
You can also create your inventory by adding items at the register as you sell them.

Additional store information

Depending on the needs of the store, the following information is optional and can be entered in Manager View at any time.

Registers and hardware

❑ Receipt formats

Create your own receipt formats or use the two pre-set formats included with Microsoft Dynamics POS.

❑ Task pads

Define custom task pad buttons, so the POS View screen works the way you do, tailored for your most common tasks and functions.

❑ Line display messages

Define custom messages for a line display.

❑ Accounting integration

Exchange accounting information with Intuit QuickBooks.

❑ Payment processing

Set up credit card, debit card, gift card, and check transaction processing.

Inventory

Although optional, specifying as much of the following information as possible will make entering or importing inventory information easier and faster.

❑ Departments and categories (in the Store Setup Wizard or Manager View)

Create departments and categories to organize the store's inventory.

❑ Suppliers (in the Store Setup Wizard or Manager View)

You can specify information about your suppliers manually or import the information from a text file with the Import Wizard.

❑ Item and preset discounts

Set up discounts for specific items and define preset discounts that you can apply to items or transactions at the register.

❑ Item messages

Create messages for cashiers about specific items.

Customers

❑ Customers

You can specify information about your customers manually or import the information from a text file by using the Import Wizard.

❑ Customer discounts

Specify discounts for specific customers.

More information

- *Manager View Help* ▶ "Set up the store"
- *Manager View Help* ▶ "Learn to use Manager View"
- *Manager View Help* ▶ "Frequently asked questions about store setup and management"

4

Frequently asked questions

FAQ: About getting started
Find answers to common questions

Can I download Microsoft Dynamics POS and then install it on several computers in the store?

Yes, but you must purchase a separate product key for each computer on which you install Microsoft Dynamics POS.

There is an exception to this: You can install the program on another computer without a license if you only intend to use Manager View.

More information
See "Activate and register Microsoft Dynamics POS" in the previous chapter.

Can I use my existing installation of Microsoft SQL Server instead of the Express Edition that is installed with Microsoft Dynamics POS?

Yes, as long as it is Microsoft SQL Server 2005 or later. However, there are special installation instructions.

More information
See your Microsoft Certified Partner.

What information do I need to have ready before I install Microsoft Dynamics POS and set up my store?

You will need basic information about the store and the computers and software you use.

More information
See "Before you install" and "Roadmap: Quickly set up the store" earlier in this manual. Your Microsoft Certified Partner might have additional requirements.

How do I get my store's inventory information into Microsoft Dynamics POS – do I have to enter the items one by one?

You can use the Import Wizard to import a text file with the inventory information.

If you are moving inventory from Microsoft Dynamics RMS to Microsoft Dynamics POS, your Microsoft Certified Partner has specialized tools for migrating store information, including inventory information.

More information
For details about importing, see "About importing information" in Manager View Help.

For details about moving from Microsoft Dynamics RMS, see your Microsoft Certified Partner.

How do I uninstall Microsoft Dynamics POS?

You might need to uninstall several programs when you uninstall Microsoft Dynamics POS, depending on whether or not you are planning to reinstall the program.

More information
See "Uninstall Microsoft Dynamics POS" in Manager View Help.

5
Accessibility

Accessibility Products and Services from Microsoft

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 website 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 website.

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, see the Microsoft Accessibility website.

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 website.

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 website.

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 from within the United States: (800) 221-4792

Telephone number from outside the United States and Canada: (609) 452-0606

Fax: (609) 987-8116

Recording for the Blind & Dyslexic website

Web addresses can change, so you might be unable to connect to the website or 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 AM and 5:30 PM 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 AM and 6:00 PM Pacific Time, Monday through Friday, excluding holidays. In Canada, dial (905) 568-9641 between 8:00 AM and 8:00 PM 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.

More information

- For more information about how accessible technology for computers helps to improve the lives of people with disabilities, see the Microsoft Accessibility website.