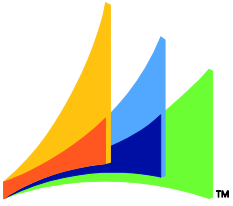
Microsoft®

Getting Started Guide



Microsoft Dynamics™
Retail Management System
Headquarters

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Contents

Welcome 3
- What's new 3
- Microsoft support services 4

Getting started 5
- Headquarters components 5
- Before installing Headquarters 6
- Installing Headquarters 10
- Practicing with the sample database 12

Bringing stores online 15
- Getting ready 15
- Creating the Headquarters database 19
- Defining and exporting stores 20
- Setting up stores 24
- Initiating communication 27
- What's next 31

Using Headquarters Administrator 32
- Configuring Headquarters 32
- Maintaining the Headquarters database 35

Using Headquarters Server 43
- Configuring Headquarters Server 43
- Monitoring communication 43

Using Headquarters Client 45
- The client window 45
- Configuring the connection 46
- Setting logging options 46
- Managing log files 47

Appendix A - Accessibility products and services 49

Index 53

Welcome

Welcome to Microsoft Dynamics™ Retail Management System Headquarters. With Headquarters, you can control and manage inventory at each store and for your entire business; control pricing, sales, and promotions; speed up purchase ordering and item transfers; and generate detailed active reports.

What's new

SQL Server Express is included

Microsoft SQL Server 2005 Express Edition (SQL Server Express) is included on your Headquarters 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.

Automatic Headquarters item cost management

The new "Calculate HQ Item Cost as weighted average" configuration option delegates cost management to the stores. Headquarters displays the organization-wide cost for an item.

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

Getting started

Before you can use Headquarters to manage your retail store enterprise, you must first install the software, set up your database, and deploy your stores

Headquarters components

Installed on a computer at the head office, Headquarters ties all the data from all your stores together. You can use it to set policies and procedures for each store to follow and to enforce those rules for the entire retail enterprise. Headquarters includes four separate components:

- **Headquarters Administrator** — Use Headquarters Administrator to create your Headquarters database and bring your stores online. You can connect to the database server, create databases, run database queries, upgrade the database, and back up data.
- **Headquarters Server** — Headquarters Server is installed on a machine at the head office and manages the exchange of data between the Headquarters database and remote stores. It listens for incoming messages from remote stores, processes and stores the data in the Headquarters database, and forwards Headquarters data to remote stores as directed by means of Headquarters worksheets.
- **Headquarters Client** — Headquarters Client enables remote stores to communicate with the head office database. Headquarters Client is installed at each remote store, where it can automatically initiate connections to the head office based on a schedule specified in Headquarters Manager. Headquarters Client sends the information from the store's Store Operations database via the Internet or virtual private network (VPN) to Headquarters Server, which then passes the information on to the Headquarters database.
- **Headquarters Manager**— Headquarters Manager controls and tracks inventory at every store in the enterprise. For centrally managed operations, use Headquarters Manager to manage a master inventory database for the enterprise and transfer that data to remote stores. This allows all your stores to maintain consistent stock identification.

This book discusses in detail the features and settings in Headquarters Administrator, Headquarters Server, and Headquarters Client. Once Headquarters and your databases are set up, consult the Headquarters *User's Guide* for information about Headquarters Manager.

Before installing Headquarters

The following information will help you maximize the efficiency and stability of your Store Operations installation. Carefully review these guidelines.

System requirements

The system requirements for Headquarters are:

- PC with a Pentium 600 MHz or higher processor (1 GHz recommend)
- Microsoft 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 Vista Business
- Minimum 192 megabytes (MB) of RAM (512 MB or higher recommended)
- Approximately 50 MB of available hard disk space for the Headquarters 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-

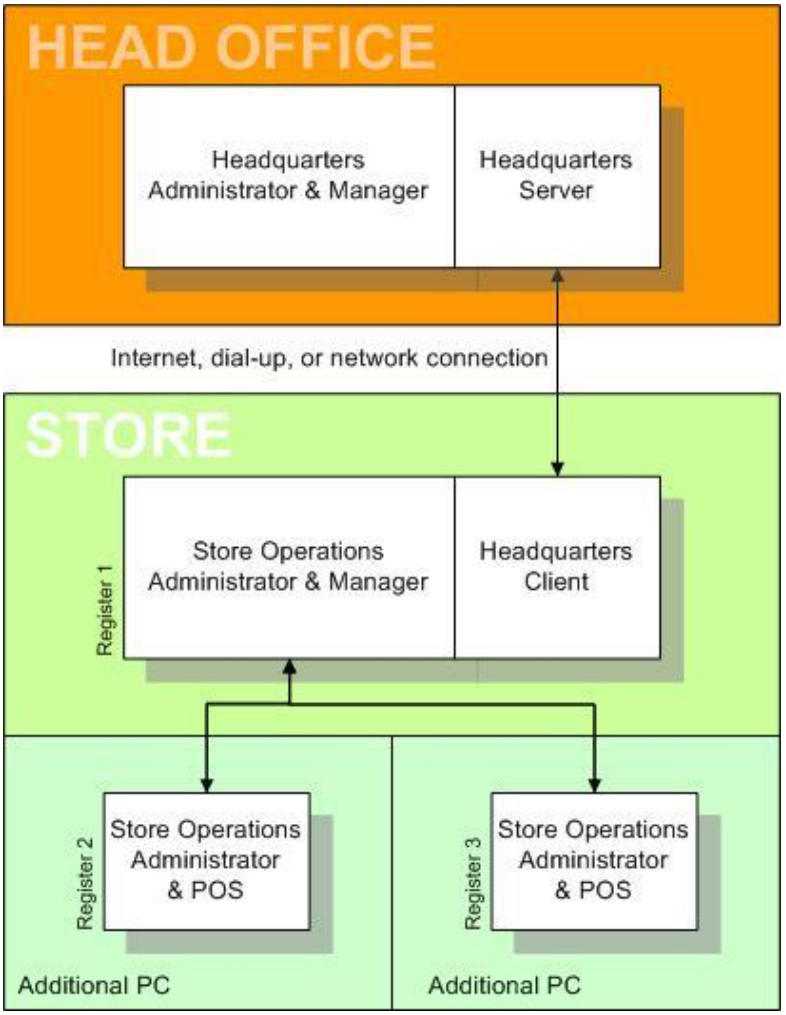
  Microsoft SQL Server 2000 Desktop Engine (MSDE 2000) with SP4 or later [available separately]

  -or-

  Microsoft SQL Server 2000 Standard or Enterprise Edition with SP4 or later [available separately]
- Microsoft Mouse or compatible pointing device
- To send and retrieve data to stores running Microsoft Dynamics RMS Store Operations you will need communication equipment (modem, Internet connection, VPN, ISDN, WAN, etc.)

Typical deployment

The following diagram shows a typical deployment, suggesting which Microsoft Dynamics RMS components to install on your organization's computers.



Activating Headquarters

Activation reduces software piracy by authenticating your software as a genuine, fully licensed copy. You will need to purchase one copy of Headquarters for each store that will connect to the Headquarters database. When you first run Headquarters Client at the store, you will be prompted to activate the software.

Note Activation is not required to run Headquarters Administrator, Headquarters Server, or Headquarters Manager, so you can install Headquarters on as many machines as you want at your Headquarters location.

If you ever need to reinstall Headquarters 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 Headquarters over the Internet. Otherwise, you can activate the software by telephone.

1 Start Headquarters Client.

   The Activation Wizard starts.

2 Follow the instructions in the Activation Wizard.

Database-specific installation tips

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 upon 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 Headquarters and will be installed during Headquarters 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.

The term SQL Server is used in this book to refer to any edition of SQL Server.

Keep the following notes in mind when installing and setting 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 Headquarters 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.

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

- Like many Windows applications, the more RAM you have on your PC, the faster SQL Server will run. You should never have less than 192MB of RAM on any PC running SQL Server.

Note See the ReadMe file accompanying this release for the latest Microsoft SQL Server security updates. You can find more information about SQL Server security updates at the Microsoft SQL Server Web site, www.microsoft.com/sql

Installing Headquarters

1 Insert the Headquarters CD in your computer's CD drive.

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

2 Click **Before you install**, and then read the guidelines and information in the ReadMe file.

3 Close the ReadMe file, and then click **Install Headquarters**.

Note If you are installing Headquarters Client at a store, select **Install Headquarters Client**, and then follow the on-screen instructions.

4 In the **Setup Type** box, select **Headquarters Manager and Server** if you plan to run the Headquarters Server and Headquarters Manager on the same computer. If you are installing Headquarters Server on a computer of its own, select **Headquarters Server Only**.

5 Follow the on-screen instructions.

Client Network Utility

For successful Headquarters 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. You must also set up the Windows Firewall to allow Headquarters Client and Headquarters Server to communicate with each other.

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.

Practicing with the sample database

You can use the sample database to get acquainted with the features in Headquarters. The following procedures will help you connect to the database server, create the sample Headquarters database, and perform some basic tasks in Headquarters Manager.

Note For more complete information about using Headquarters Manager, see Headquarters Online Help or the Headquarters *User's Guide*.

To set up the sample database

1. On the **File** menu in Headquarters Administrator, click **Connect**.
2. In the **Server** box, enter the name of the server where you want the sample database to be located. To create the database on the local computer, type (local) in this box.
3. In the **User name** and **Password** boxes, enter valid SQL Server logon credentials for the database server.
4. Click **OK**.
5. On the **Database** menu, click **Create**, and then click **Next**.
6. On the **Database Size** page, type a name for the sample database, and then click **Next**.
7. On the **Database Growth** page, click **Next** to accept the default values.
8. On the **Populate Database** page, click the **Browse** button, double-click the **DBFiles** folder, select the **Rmshqsample.bck** file, click **Open**, and then click **Next**.
9. On the final wizard page, click **Finish**, and then click **OK** in both completion messages.
10. On the **File** menu, click **Configuration**.
11. Enter the server, logon credentials, and name for the sample database you just created, and then verify the accuracy of the information you entered by clicking **Test Database Connection**. When the database connects successfully, click **OK** to save the configuration settings.

To log on to Headquarters Manager

1 Start Headquarters Manager.

2 Type "administrator" in the **User ID** box and "password" in the **Password** box, and then click **OK**.

To view an item record

1 On the **Database** menu, click **Items**.

2 Select an item, and then click **Properties**.

Note If you want to make changes to the item properties, you will need to enter maintenance mode (on the File menu, click Maintenance Mode). Changes made while in maintenance mode will not be downloaded to stores until the appropriate worksheets are issued.

To generate a report

You can use the reports in Headquarters to monitor your entire organization. You can customize each report to make it more meaningful for your organization. You can also view properties for a specific record from within a report.

1 On the **Reports** menu, point to **Items**, click **Snapshot Store Quantity List**, and then click **OK**. Take note of the information provided by the report.

2 Click and drag the **Store** heading in the report until a line appears between the **LookUp Code** and **Description** columns, and then release the mouse button. Take note of the information provided by the report.

3 Move the mouse over the item lookup code for the Football until the pointer turns into a magnifying glass, and then double-click the lookup code.

To issue a worksheet

Worksheets are used to send or request store information. You can use Worksheet Style 250, described in this example, to make changes to those item properties that should be identical organization-wide, such as item lookup codes and descriptions.

1 On the **Worksheets** menu, click **Style 250: Update Inventory – Items**.

2 On both the **Select Stores** and **Enter Title and Effective Date** pages, click **Next**.

3 On the **Select Items** page, click **All**, and then click **Next**.

4 Click **Finish**.

5 In the **Worksheet – Update Inventory – Items** workpad, click the **Contents** tab and review the list of items.

6 Click **Approve**.

To view worksheet status and history

The Worksheet Status window opens automatically whenever Headquarters Manager is started. The flag color next to a listed worksheet shows the status of that worksheet.

1 In the folder list, click **All styles**.

2 On the toolbar, click the green flag to show completed worksheets in the list.

3 Double-click a worksheet, and then click the **History** tab.

Bringing stores online

In this section, we'll cover the processes for getting ready to create the Headquarters and store databases, creating and configuring the Headquarters database, defining and exporting stores, and setting up Headquarters/store communication. Plan carefully to make sure that your databases contain complete information; it will save you a lot of time in the long run.

Getting ready

The most efficient method of implementing Headquarters begins with time spent working in Store Operations. When you deploy Headquarters, you will need two store databases, the master store database and the template store database.

Creating the master store database

The *master store database* is a store database that will become the basis of your Headquarters database. For that reason, it should contain all of the *centrally maintained data* for your entire retail enterprise. Centrally maintained data includes:

- Items (except quantity, price, cost, and reorder information)
- Departments and categories
- Suppliers
- Sales and item taxes
- Item messages
- Tender types and currencies
- Reason codes
- Shipping carriers
- Account types
- Discount schemes and weekly sales schedules
- Global customers

All stores will be required to use the same naming and numbering schemes for these record types.

If you have stores that are already running Store Operations, you might be able to use a copy of an existing store database as the master store database, but keep in mind that it will need to be modified, perhaps extensively, so that it contains information for all of your stores.

If you don't have any stores already running Store Operations, you will need to create the master store database from scratch, as described in the following procedure. Creating the database itself will only take a few moments, but be sure to allow sufficient time for entering complete and accurate data into the database. The more complete the master database is, the more successful your Headquarters implementation will be, and the fewer synchronization problems you will experience later on.

To set up the master store database from scratch

1 Open Store Operations Administrator.

2 On the **File** menu, click **Connect**, and then specify your server and logon information. If you cannot connect, make sure that your database server is running.

3 On the **Database** menu, click **Create**, and then use the **Create Database Wizard** to create your master store database. In the wizard, select the **rmsdb.bck** blank database file – located in the **DBFiles** folder in your Store Operations installation directory – as the basis of the master store database. For detailed wizard instructions, see "Deployment Guide" in Store Operations Administrator Online Help.

4 On the **File** menu, click **Configuration**, and then, on the **Database** tab, enter the connection information for the database you just created. Click **Test Database Connection** to make sure that you have entered the correct information.

5 Open Store Operations Manager and log on by typing "1: in the **User ID** box and "password" in the **Password** box.

6 Set up your departments, categories, suppliers, items, sales and item taxes, and other data that will be used by all stores. For more information, see "Setting up your Store Operations database" in Store Operations Online Help.

Creating the template store database

The *template store database* is a database that contains the *store-specific data* that will be the same at all (or most) stores in your organization. This common store-specific data might include:

- Register and peripheral hardware information
- Store configuration settings
- Security levels and settings
- Receipt formats
- Custom keyboards
- Custom POS buttons
- Net display channels
- Pole display messages

Note While it might be possible to use the master store database as the template store database, you should keep in mind that these two databases serve very different purposes. The master store database is intended to provide complete centrally maintained data for inclusion in the Headquarters database, while the template store database is intended to provide standardized store-specific data for inclusion in the store databases.

If you have stores that are already running Store Operations, you might be able to use a copy of an existing store database as the template store database, provided most or all of the store-specific data in the database is applicable to most or all of your stores.

If you don't have any stores already running Store Operations, you will need to create the template store database from scratch, as described in the following procedure.

To set up the template store database from scratch

1. Open Store Operations Administrator.
2. On the **File** menu, click **Connect**, and then specify your server and logon information. If you cannot connect, make sure that your database server is running.
3. On the **Database** menu, click **Create**, and then use the **Create Database Wizard** to create your template store database. In the wizard, select the **rmsdb.bck** blank database file – located in the **DBFiles** folder in your Store Operations installation directory – as the basis of the template store database. For detailed wizard instructions, see "Deployment Guide" in Store Operations Administrator Online Help.
4. On the **File** menu, click **Configuration**, and then, on the **Database** tab, enter the connection information for the database you just created. Click **Test Database Connection** to make sure that you have entered the correct information.
5. Open Store Operations Manager and log on by typing "1" in the **User ID** box and "password" in the **Password** box.
6. On the **File** menu, click **Configuration.** Set up the basic store-wide parameters. Include all pertinent store information that will be common to all stores in the enterprise, such as the tender types, store account policies, and inventory methods. Use the **Options** tab to set up your store policies and operating procedures. For more information, click the **Help** button in the dialog box.
7. On the **File** menu, point to **Security**, click **Set Security** to put the system into Security mode, and then set up security as described in "Setting up security structure" in Store Operations Online Help.
8. On the **Database** menu, use the commands on the **Registers** submenu to set up register and hardware settings, receipt formats, custom POS buttons and keyboards, pole display messages, and net display channels. For more information, see the relevant topics in "Working with your database" in Store Operations Online Help.

Creating the Headquarters database

With the master store and template store databases prepared, you are ready to create the Headquarters database. This is where the time you spent in Store Operations will really pay off.

To create the Headquarters database

1. Open Headquarters Administrator.
2. On the **File** menu, click **Connect**, and then specify your server and logon information. If you cannot connect, make sure that your database server is running.
3. On the **Database** menu, click **Create**.
4. On the **Welcome** page of the Create Database Wizard, click **Next**.
5. On the **Database Size** page, enter a name and initial size for the database you are creating, and then click **Next**.
6. On the **Database Growth** page, specify how the database file should grow, and then click **Next**. In most cases, you can accept the defaults.
7. On the **Create Database** page, click the **Browse** button, and then navigate to the **DBFiles** folder in your Headquarters installation directory. Locate and select the backup file of the blank database, **rmshqdb.bck**, click **Open**, and then click **Next**.
8. On the final wizard screen, click **Finish**. After you click **OK** twice, your new database will be the current database in Headquarters Administrator (shown in the status bar at the bottom of the window).

To import the master store database into the Headquarters database

1 Make sure both the blank Headquarters database and the master store database are on servers that are accessible by Headquarters Administrator.

2 On the **Database** menu in Headquarters Administrator, click **Import Store Operations Data**, and then click **Yes**.

2 In the **Store Operations Database** window, select the server where the master store database is located, enter the appropriate logon information for the server, select the database, and then click **OK**.

3 When Headquarters asks if you want to continue, click **Yes**. Depending on the size of your database, it may take several minutes for all of the data to be imported. When Headquarters notifies you that the import was successful, click **OK**.

To configure the Headquarters database

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

2 On the **Database** tab, make sure the information in the **SQL Server name**, **User name, Password**, and **SQL Database** boxes is correct for your Headquarters database.

3 To make sure that Headquarters will successfully connect to the specified database, click **Test Database Connection**.

4 Use the **Settings**, **Paths**, and **Templates** tabs to configure your Headquarters database, and then click **OK**. For more information about these tabs, see "Using Headquarters Administrator" later in this book.

Defining and exporting stores

Now that your Headquarters database exists and is configured, you can create a record there for each of your stores. This process is called *defining stores*. Next, you will export a store database for each of your stores that is not already running Store Operations. Note that you must define each store in Headquarters Manager regardless of whether Store Operations is already in use at the store, but you will only export a database for a store if it doesn't yet have a Store Operations database.

To define stores in Headquarters Manager

1. Open Headquarters Manager.
2. In the **Login** window, type "administrator" in the **User ID** box and "password" in the **Password** box. After you log on, you must change the password for this default account.
3. On the **File** menu, click **Maintenance Mode**. When Headquarters asks you to confirm that you want to enter this mode, click **Yes**.
4. On the **Admin** menu, click **Stores**.
5. Click **New** to define a new store, and then, on the **Welcome** page of the **New Store Wizard**, click **Next**.
6. On the **Store Identification Number and Name** page, enter your store information, and then click **Next**.

Note It is very important to assign a unique store ID to each store.

7. On the **Store Address and Telephone Numbers** page, enter your store information, and then click **Next**.
8. On the **Copy from Existing Store** page, select a store from which to copy profile information, such as the connection schedule, item quantity, and sales tax information. If you are defining your first store, leave <none>, and then click **Next**.
9. On the **Connection Schedule** page, select the store's connection schedule, and then click **Next**.

Note Microsoft recommends staggering connection schedules so that stores connect to Headquarters at different times.

10. On the **Quantity and Reorder Information** page, specify the initial item quantity (entering zero is typical), layaway commitment quantity, reorder point, and restock level for the store, and then click **Next**.

Note These settings are applied to all items, as initial values only. You can make item-by-item changes later or update these values by means of worksheets issued to stores.

11 On the **Sales Tax Information** page, click the **New Sales Tax** box, select a sales tax from the list to specify the initial sales tax setting for the items in the store, and then click **Next**.

12 If all the store information is correct, click **Finish**. Headquarters will create a profile for the store using the information you provided.

13 In the **Store Properties** dialog box, review the information on the **Location** tab, and then click the **Connection Schedule** tab. Make any desired changes to the connection schedule, choose the connection method, and define the password for Headquarters Client. Click **Retry Logic** to specify how Headquarters Client will handle connection failures. Click **OK** to save changes.

Note Be sure to make a note of the password you enter on the **Connection Schedule** tab. You will need to enter this password again when you configure Headquarters Client at the store.

14 Repeat this procedure for any other stores you wish to create.

To export store databases for stores that are not yet running Store Operations

1 Open Headquarters Administrator.

2 On the **File** menu, click **Connect**, select the server where your *Headquarters* database is located, enter your logon information, and then select your Headquarters database. If you cannot connect, make sure that your database server is running.

3 On the **Database** menu, click **Export**.

4 On the **Welcome** page of the Export Database Wizard, click **Next**.

5 On the **Select Destination Store** page, select the store you want to create a new database for, and then click **Next**.

6 On the **Select Template Database** page, click **Connect**. Select the server where the template store database is located, enter your logon information, select the template store database, and then click **OK**. When your database information is displayed in the **Server** and **Database** boxes, click **Next**.

7 On the **Create New Store Database** page, click **Create**, specify the server where you want the new store database to be created, enter your logon information, and then click **OK**.

8 On the **Welcome** page of the Create Database Wizard, click **Next**.

9 On the **Database Size** page, enter a name and initial size for the new store database, and then click **Next**.

10 On the **Database Growth** page, specify how the store database should grow, and then click **Next**. In most cases, you can accept the defaults.

11 On the final page of the Create Database Wizard, click **Finish**. When Headquarters notifies you that the database was successfully created, click **OK**. At this point, you have specified the template store database and created a blank database for one new store.

12 Back in the **Export Database Wizard**, review the location and name of the new Store Operations database, and then click **Next**.

13 On the **Copy Template Data** page, click **Copy**, and then click **OK** in the **Copy Database** dialog box. The wizard will copy the common store-specific data from the template store database into the new store database. This process may take a few minutes. When it is complete, click **Next**.

14 On the **Export Database** page, click **Export**. The centrally maintained data in your Headquarters database will be exported to the store database you just created. When the process is complete, click **OK**, and then click **Next**.

15 On the **Backup New Store Database** page, you can choose to create a backup of your new store database, or click **Next** to continue.

   If you are moving your database from one server to another and want to delete the original, select the **Delete store database after backup is successful** check box.

   To back up the new store database, click **Backup**, specify the location and name of the backup file, and then click **Save**. When Headquarters notifies you that the backup is complete, click **OK**, and then click **Next**.

16 Confirm the summary export information, and then click **Finish**.

17 When Headquarters asks if you have other stores to export, click **Yes** to avoid having to select the template store database for subsequent exports. If you don't want to export other stores at this time, click **No**.

Note The template store database selected in the Export Database Wizard is stored in memory until Headquarters Administrator is closed or the computer is disconnected from the database. If you want to choose a different template store database for subsequent exports, disconnect, reconnect, and then run the wizard again.

Setting up stores

Once databases exist for all of the stores in the enterprise, you need to set up the stores. This involves performing these tasks at each store:

- **Restoring the store database.** This step is required only for stores that are not yet running Store Operations.
- **Entering or revising the store's locally originated data using Store Operations Manager.** *Locally originated data* is the information maintained by the store, such as cashiers, sales reps, local customers, and certain item properties (regular price, price levels, sale prices and dates, costs, quantities, tax code, reorder information, and serial numbers).

Note For a store where Store Operations is already in use, you may also need to revise the unique names, numbers, and lookup codes of centrally maintained records. These names, numbers, and codes must match those in the Headquarters database.

- **Entering accurate inventory information into the store database.** Any inaccuracies in the store's item quantities will be passed on to the Headquarters database. For this reason, it is important to perform a physical inventory count using the features in Store Operations Manager, and then enter correct item quantities into the store database.
- **Configure Headquarters Client.** Headquarters Client is a program, installed at each store, that handles communications with the Headquarters database. It exchanges information with Headquarters Server by means of your Internet, dial-up, or network connection.

To restore store databases for stores that are not yet running Store Operations

1 At the store, open Store Operations Administrator.

2 On the **File** menu, click **Connect**, and then enter the server name and logon information for the computer that holds the backup (.bck) file for the exported store database.

3 On the **Database** menu, click **Create**, and then follow the instructions in the wizard.

To enter or revise the locally originated data at each store

1 Open Store Operations Manager.

Note You can log on the first time using the default logon account by typing "1" in the **User ID** box and "password" in the **Password** box. After you log on, you should change the password for employee 1.

2 As needed, use the lists accessed via the **Database** menu to revise your store's locally originated data. This is also a good time to make any needed changes to the store-specific data inherited from the template store database, such as pole display messages, receipt formats, register configuration, and so on.

Note Take care not to modify any centrally maintained data except to make it match the information in the Headquarters database. Any inconsistencies could lead to communication problems later on.

For detailed instructions on making changes to a store database, see "Setting up your Store Operations database" in the *Store Operations User's Guide*.

To enter accurate item quantities into the store database

1 On the **Inventory** menu in Store Operations Manager, click **Physical Inventory**, and then click **New**.

2 In the **Create Physical Inventory Count** dialog box, click **OK**. (To learn more about the options in this dialog box, click **Help**.)

3 Enter a reference number and description for this count.

4 To print a count sheet, click **Print**.

5 To enter a counted quantity, click the box in the appropriate row of the **Counted** column, and then type the quantity.

6 When all counted quantities have been entered, click **Calculate**. If there are discrepancies you want to resolve, click **Recount**, enter corrected quantities, and then click **Calculate** again.

7 When all discrepancies have been resolved or verified as accurate and you are ready to modify the quantities in the database to match your count sheet, click **Commit**, and then click **Yes**.

To configure Headquarters Client at each store

1 Open Headquarters Client and, if necessary, activate the software.

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

3 On the **Database** tab, specify the server, logon information, and name of the Store Operations database for this store, and then make sure that Headquarters Client will successfully connect to the specified store database by clicking **Test Database Connection**.

4 On the **HQ Server** tab, enter the address of the computer where Headquarters Server is running. You can also enter a Web site address.

5 In the **Port** box, enter a number between 34000 and 35000. This port must be identical to the port you define in Headquarters Server. If you are using a firewall to access the Internet for communications with Headquarters, make sure the SOCKS protocol using the port you selected is allowed to pass through the firewall.

6 In the **Password** box, if required, enter the password Headquarters Client must supply in order to connect to Headquarters Server.

Note This password was set at the head office in Headquarters Manager when you defined the store. To look up this password, open Headquarters Manager, click **Stores** on the **Admin** menu, select the applicable store, click **Properties**, and then click the **Connection Schedule** tab.

7 If you are sure that Headquarters Server is running, click **Test Network Connection**. If Headquarters Server is not running when you click this button, Headquarters Client will notify you that the server could not be contacted.

8 If you will be using a dial-up connection, use the **Connection** tab to create a new connection or select an existing connection, and then enter the appropriate logon information.

9 Use the **Schedule**, **Options**, and **HQ Client** tabs to modify other client settings as needed. Usually, you can accept the default settings on these tabs. For more information, see "Using Headquarters Client" later in this book.

Initiating communication

Before stores can communicate with Headquarters, you must perform the following tasks:

- **Configure Headquarters Server.** Enter settings in Headquarters Server that will enable it to connect to the Headquarters database and communicate with Headquarters Client at each of the stores.
- **Synchronize store IDs.** Whenever a new store is created, Headquarters automatically issues Worksheet Style 101: Synchronize Store Database. This worksheet synchronizes the internal reference numbers, or index, of the store and Headquarters databases. However, it will only run successfully if the store IDs assigned in the Headquarters database match the store IDs in the actual store databases.

Note Worksheet 101 does not modify values either at Headquarters or at the store, and it does not adjust any item properties. It simply gives Headquarters and the store the same index number.

- **Issue the first data upload worksheet.** Worksheet Style 401: Request Data Upload is the primary communications worksheet. Typically, this worksheet is processed automatically, with no user intervention required, at each of a store's scheduled connections. It effects the transfer of most of the data exchanged between Headquarters and the stores, including the upload of sales data, customer information, purchase orders, and inventory transfers and the download of interstore transfers and new global customers. You have the option to upload the data that has been created or modified after a certain date and time.

  You must manually create and issue the first Worksheet 401. As it is processed by each store, a new Worksheet 401 is automatically issued and approved, with an effective date set to coincide with the store's next scheduled connection.

- **Request and commit inventory counts for stores already running Store Operations.** If you have any stores that have already been running Store Operations – that is, stores for which you did not export a new store database – the Headquarters database will not initially contain any inventory information for those stores. To get this inventory information into the Headquarters database, you will need to issue an extra worksheet, Worksheet Style 501: Request a Full Item Count, which uploads an item quantity list for each store selected in the worksheet. After the worksheet has been processed by all of your pre-existing stores, run the Inventory Wizard, Task 190: Perform Full Item Count Reconciliation, in order to commit the stores' quantities to the Headquarters database.
- **Connect and process worksheets.** At each store, connect to Headquarters and process the worksheets you've issued. You will probably want to connect manually, since this initial connection is part of the deployment process rather than a regular scheduled connection.

To configure Headquarters Server

1 At Headquarters, open Headquarters Server.

2 On the **File** menu, click **Stop**. The server cannot be configured while it is running.

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

4 On the **Database** tab, specify the server, logon information, and name of the Headquarters database, and then make sure that Headquarters Server will successfully connect to the specified database by clicking **Test Database Connection**.

5 On the **HQ Server** tab, enter a port number between 34000 and 35000. This port must be identical to the port you define in Headquarters Client. If you are using a firewall to access the Internet for communications with the stores, make sure the SOCKS protocol using the port you selected is allowed to pass through the firewall.

6 On the **File** menu, click **Start**.

To synchronize store IDs

1 At Headquarters, open Headquarters Manager and log on. On the **Admin** menu, click **Stores**. Select the store in question, and then click **Properties**. Note the number defined in the **Store ID** box on the **Location** tab.

2 At the store, open Store Operations Manager and log on. On the **File** menu, click **Configuration**, click the **Multi-Store** tab, and then make sure the store ID shown matches the one defined in Headquarters Manager. If it does not, change it, keeping in mind that each store in the enterprise must have a unique store ID.

3 Repeat for each of the stores in your organization.

Note Once Worksheet 101 has been processed (this happens automatically during the initial communication with the store), the store IDs in the Store Operations databases cannot be modified.

To issue the first data upload worksheet

1 At Headquarters, open Headquarters Manager and log on.

2 On the **Worksheets** menu, click **Style 401: Request Data Upload**.

3 On the **Select Stores** page, click **All**, and then click **Next**.

4 On the **Enter Title and Effective Date** page, type a title for the worksheet (if desired), select the date and enter the time when you want the worksheet to become effective, and then click **Next**.

5 Click **Finish** to issue the worksheet.

6 Review the worksheet contents, make any desired changes to the title, effective date, from date, or stores list, and then click **Approve**.

Note In the Worksheet Status window, blue flags indicate worksheets that have been approved for processing. After the worksheets are successfully completed, the flags turn green. If no worksheets are listed in the window, click the All Styles folder. To update the information in the Worksheet Status window, click the Refresh Data button on the toolbar.

To request item counts for stores already running Store Operations

1 Open Headquarters Manager and log on.

2 On the **Worksheets** menu, click **Style 501: Request a full item count**.

3 Follow the wizard prompts, selecting only those stores that were running Store Operations prior to implementation of Headquarters, and then click **Finish** to issue the worksheet.

Note The data upload for Worksheet 501 will take some time; it is best to schedule the worksheet during non-peak hours.

4 Review the worksheet contents, and then click **Approve** to approve the worksheet for processing.

To connect each store to Headquarters and process worksheets

1 At Headquarters, open Headquarters Server, and then start the server by clicking **Start** on the **File** menu.

2 At each store, open Headquarters Client and click **Connect** on the **Server** menu, or click the **Connect** button on the toolbar.

3 Review the log for any warnings or errors.

Tip If the error "Message contained an invalid Store ID / Password. Message was not accepted" appears in the Headquarters Client window, make sure that the store ID number for each store is the same in Headquarters Manager (located at the head office) and Store Operations Manager (located at the store). For more information, refer to "To synchronize store IDs" above.

To commit item counts for stores already running Store Operations

1 At Headquarters, open Headquarters Manager and log on.

2 In the **Worksheet Status** window, confirm that Worksheet 501 was processed successfully by all pre-existing stores. Successfully completed worksheets are marked with green flags.

3 On the **File** menu, click **Maintenance Mode**, and then click **Yes**.

4 On the **Wizards** menu, click **Inventory Wizard**.

5 On the **Select Inventory Task** page, select **Task 190: Perform Full Item Count Reconciliation**, and then click **Next**.

6 On the **Compare Item Count** page, select the first of your stores that were already running Store Operations (that is, select a store that already had a Store Operations database), click **Next**, and then click **Finish**.

7 In the **Inventory Wizard Workpad** window, review the item quantities in the **New HQ Qty** column and make any desired changes, and then click **Commit**.

8 Repeat steps 4 through 7 for each of your other stores that were already running Store Operations.

What's next

With your databases and communication software set up, you are ready to begin using Microsoft Dynamics RMS for the daily operations of your retail enterprise. For information about using Headquarters Manager, see Headquarters Online Help or the Headquarters *User's Guide*. For information about using Store Operations Manager and Store Operations POS, see Store Operations Online Help or the Store Operations *User's Guide*.

The remainder of this book goes into more detail about using Headquarters Administrator, Headquarters Server, and Headquarters Client. Help files for each of those programs are also available; they can be opened from the program's Help menu.

Using Headquarters Administrator

"Bringing stores online" describes the basics of configuring your Headquarters installation. In this section, we'll cover the remaining configuration settings in Headquarters Administrator and describe how to use Headquarters Administrator to maintain the Headquarters database.

Configuring Headquarters

The settings in Headquarters Administrator control the way Headquarters Manager accesses database and other information. You need to configure these settings for each Headquarters workstation. The database name and location settings should be duplicated on each workstation, but logo, file, and template locations can vary from one workstation to the next.

Providing connection information to Headquarters Manager

Settings in Headquarters Administrator provide the information Headquarters Manager needs to connect to the Headquarters database.

Note If you only have one Headquarters workstation and you followed the instructions in "Bringing stores online," you have already completed this task.

To provide connection information to Headquarters Manager

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

2 On the **Database** tab, enter the name of the server where the Headquarters database is located, valid SQL Server logon credentials for that server, the name of the Headquarters database, and the amount of time, in seconds, that Headquarters should attempt to connect to the database before it times out.

3 To confirm that you've entered accurate connection information, click **Test Database Connection**.

4 Click **OK**.

Setting the Headquarters logo location

You can supply a logo that will appear on your Headquarters reports.

To set the Headquarters logo

1. On the **File** menu in Headquarters Administrator, click **Configuration**.
2. Click the **Settings** tab.
3. In the **HQ logo filename** box, type the location and name of your Headquarters logo, or click the **Browse** button to select it.
4. Click **OK**.

Setting file locations

Headquarters uses the path settings in Headquarters Administrator to find and save the files used in day-to-day operations. You can enter path settings for each of these types of files:

- Custom definition files for standard reports
- Custom definition files for Crystal Reports
- Pictures (other than the Headquarters logo) that are used by Headquarters
- Add-ins (third-party software or custom programs and tools) that should appear on the Utilities menu in Headquarters Manager

Note Use Windows Folder Options to define what action Windows should take when files are opened that have the extensions used by your add-ins.

To set file locations

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

2 Click the **Paths** tab.

3 In each of the boxes, click the **Browse** button to navigate to the folder where your files will be stored, such as C:\Program Files\Microsoft Retail Management System\Headquarters\AddIns.

If the folder exists, select it, and then click **OK**.

If the folder does not exist, select the directory where you want the new folder, click **Make New Folder**, type the folder's name, press ENTER, and then click **OK**.

4 Click **OK**.

Setting template locations

You can also use Headquarters Administrator to set the locations of the templates used for purchase orders, inventory transfers, and account statements. These settings are especially helpful when accessing templates that are written in foreign languages.

To set template locations

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

2 Click the **Templates** tab.

3 In each of the boxes, click the **Browse** button to navigate to the folder where your templates will be stored, such as C:\Program Files\Microsoft Retail Management System\Headquarters\ReceiptTemplates.

If the folder exists, select it, and then click **OK**.

If the folder does not exist, select the directory where you want the new folder, click **Make New Folder**, type the folder's name, press ENTER, and then click **OK**.

4 Click **OK**.

Maintaining the Headquarters database

Headquarters Administrator offers a number of tools for maintaining your Headquarters database.

Connecting to a database

Headquarters Administrator should already be configured so that Headquarters Manager is able to connect to the Headquarters database automatically. Within Headquarters Administrator, however, you will need to use the Connect command to manually connect to the database server in order to use the program's database and query commands. Once connected, you can use the Select command to quickly connect to a different database.

To connect to the database server

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

2 In the **Server** box, enter or select the name of the SQL Server where your database is located.

3 Under **Connection Information**, select the appropriate authentication method (SQL authentication is preferred), and then enter a valid logon name and password.

4 In the **Database** box, select your database. You can only access the list of databases after you've entered your logon information. If you have not created your database yet, clear this box.

5 Click **OK**.

To select or connect to a different database

1 With a connection to the database server already established, click **Select** on the **Database** menu.

2 Select the database that you want to connect to, and then click **OK**.

3 When Headquarters informs you that your database is the currently selected database, click **OK**.

Backing up the Headquarters database

You should regularly back up your Headquarters database to safeguard critical data. The more frequently you back up, the more data you will be able to retrieve and restore in the event of a system failure or natural disaster.

A *backup* is a copy of one or more files on your computer. Typically, a backup contains everything you need to restore a program or database. When you back up a database, you make a copy of the database on another computer or device. Microsoft recommends keeping your backup files at a different physical location than your database server.

For Headquarters installations that use SQL Server Express or MSDE 2000, Headquarters Administrator includes a backup utility that you can use to back up and restore your database.

Notes If you are using a server edition of SQL Server, Microsoft recommends using SQL Server 2000 Enterprise Manager or SQL Server 2005 Management Studio to set up a maintenance schedule for backing up the database, and to restore the database if that becomes necessary. For more information, refer to the *SQL Server Books Online*.

The locations of the Headquarters database and your backup need to be accessible by both Headquarters Administrator and SQL Server; otherwise, you cannot create, back up, or restore the database. The paths to these devices should be the paths as seen by SQL Server.

To back up the Headquarters database

1. In Headquarters Administrator, use the **Connect** command on the **File** menu to connect to the database that you want to back up.
2. On the **Database** menu, click **Backup**.
3. In the **Save As** dialog box, select the drive and folder where you want to save the backup file.
4. In the **File name** box, enter a name for the backup file.
5. In the **Save as type** box, select **Backup files (*.bck)**.
6. Click **Save**.

Tip Use the universal naming convention (UNC) instead of drive letters. For example, \\dbserver\backup\ is a valid path for both machines; whereas mapped drives may only pertain to a local machine.

To restore the Headquarters database

1. In Headquarters Administrator, use the **Connect** command on the **File** menu to connect to the database server where you want to restore the database.
2. On the **Database** menu, click **Create**.
3. On the **Welcome** screen of the **Create Database Wizard**, click **Next**.
4. On the **Database Size** screen, enter a name and initial size for the database you are creating, and then click **Next**.
5. On the **Database Growth** screen, specify how the database file should grow, and then click **Next**. In most cases, you can accept the defaults.
6. On the **Create Database** screen, click the **Browse** button to locate the backup (.bck) file, select the file, click **Open**, and then click **Next**.
7. On the final wizard screen, click **Finish**.

Deleting a database

If a database is damaged or becomes obsolete, you can remove it from your server by first selecting the database and then deleting it.

Note Use extreme caution when you delete a database. This is a permanent operation. Once a database is deleted, it cannot be retrieved except by restoring from a backup. Any data added or updated since the last backup will be lost.

To delete a database

1 Close Headquarters Manager on all workstations.

2 In Headquarters Administrator, use the **Connect** command on the **File** menu to connect to the database server that holds the database that you want to delete.

3 On the **Database** menu, click **Select**.

4 In the **Select Database** window, select the database you want to delete, and then click **OK**. When Headquarters notifies you that your database is the currently selected database, click **OK**.

5 Make sure the database shown in the status bar at the bottom of the Headquarters Administrator window is the database that you want to delete.

6 On the **Database** menu, click **Delete**.

7 When Headquarters warns you that you are about to permanently destroy your database, click **Yes** to continue.

8 When Headquarters warns you that deleting a database is an irreversible operation, click **Yes** to continue.

Reindexing the database

Over time, a database's tables and indexes can become unsynchronized. If you experience slow database performance or unusual errors, you can reindex the database. Reindexing should not be necessary more than a few times each year.

To reindex the database

1 In Headquarters Administrator, use the **Connect** command on the **File** menu to connect to the database that you want to reindex.

2 On the **Database** menu, click **Reindex**.

3 When Headquarters asks if you want to continue, click **Yes**.

Checking the database

You can use Headquarters Administrator to troubleshoot any database errors or problems you encounter. When you check your database, Headquarters analyzes the allocation and structural integrity of all the objects in the database. Headquarters does not fix any errors; it will only notify you of existing problems so that you can quickly find possible solutions.

Note If Headquarters finds any errors in the database, they should be addressed by someone with experience in SQL Server and database programming. Any errors in modifying the database can cause the Headquarters software to be inoperable.

For more information about checking databases, see "DBCC CHECKDB (T-SQL)" in *SQL Server 2000 Books Online*.

To check the database

1 In Headquarters Administrator, use the **Connect** command on the **File** menu to connect to the database that you want to check.

2 On the **Database** menu, click **Check**.

3 When Headquarters asks if you want to continue, click **Yes**.

4 When Headquarters notifies you that DBCC execution is complete, click **OK**.

Changing collation

The physical storage of character strings in SQL Server is controlled by *collations*. A collation specifies the bit patterns that represent each character and the rules by which characters are sorted and compared.

When you create a Headquarters database from the blank or sample database on the CD-ROM, its collation is set to SQL_Latin1_General_CP1_CI_AS, the default for U.S. English installations. If your SQL Server default collation is other than U.S. English, you must change the Headquarters database collation to match your SQL Server setting.

While earlier versions of SQL Server supported only one collation for each instance of SQL Server, SQL Server 2000 and SQL Server 2005 support databases that have different collations on the same server. When you install an instance of SQL Server, you can specify the default collation for that instance during setup. The default collation for the instance also becomes the default collation of the system databases: master, model, tempdb, msdb, and Distribution. Most organizations use U.S. English and the same collation for all of their SQL Server databases, thereby eliminating all collation compatibility issues.

To change collation

1. In Headquarters Administrator, use the **Connect** command on the **File** menu to connect to the database that you want to modify.
2. On the **Database** menu, click **Change Collation**.
3. In the **New Collation** box, select the new collation for the current database, and then click **OK**.
4. When Headquarters asks if you want to proceed, click **Yes**.

Issuing queries

Headquarters Administrator lets you make direct queries to the SQL Server in order to view data from selected tables and columns. You can enter queries in a full-text window, execute SQL statements, and view the results in a display window.

Note This feature is intended for troubleshooting and diagnostic purposes only and should not be used for normal operations. It is designed only for experienced users in SQL Server and database programming. Any errors in modifying the database can cause Headquarters to be inoperable.

Queries are SQL scripts constructed using Transact-SQL (T-SQL) statements. These scripts are stored as files, usually with the *.sql extension. Whenever you run a query, you make a specific request for information from the SQL Server database. You can then retrieve, modify, or delete data. For example, this SQL query:

SELECT * FROM Item WHERE Quantity > 0 and Cost > 10

requests all records in which the quantity field has a value greater than 0 and the cost field has a value greater than 10.

To create and run a new query

1 On the **Query** menu in Headquarters Administrator, click **New**.

2 On the **SQL** tab, type the T-SQL script.

3 Click the **Run** button. The results of your query are displayed in the **Result** tab.

To save a new query so it can be used more than once

1 Make the **Query** window the active window by clicking in the title bar.

2 On the **File** menu, click **Save As**. (If you are saving changes to an existing query, you can click **Save** and skip the remaining steps.)

3 Browse to the folder where you want to save your query.

4 In the **File name** box, type a name for the query.

5 In the **Save as type** box, select **SQL Files (*.sql)**.

6 Click **Save**.

To open a saved query

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

2 In the **Open** dialog box, locate and select the query file you want, and then click **Open**.

Using Headquarters Server

Headquarters Server exchanges data between headquarters and remote stores. It listens for incoming messages, processes and saves data in the Headquarters database, and forwards Headquarters data to remote stores as directed by worksheets that you issue in Headquarters Manager.

You can use Headquarters Server to configure and monitor the server side of Headquarters communication.

Configuring Headquarters Server

For information about configuring Headquarters Server, see "Initiating communication" in "Bringing stores online," earlier in this book.

Monitoring communication

In Headquarters Server, you can view the state of the server connection and see what stores are currently connected to Headquarters. Available controls let you start and stop the server, configure the server to start automatically, and set the refresh rate (the frequency with which the information in the window is updated).

To start or stop the server

On the **File** menu, click **Start** or **Stop**.

- or -

On the toolbar, click **Start** or **Stop** .

To start the server automatically when Headquarters Server is opened

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

2 On the **Options** tab, select the **Autostart Headquarters Server** check box.

3 Click **OK**.

To change the refresh rate

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

2 On the **Options** tab, enter the new refresh rate, in milliseconds.

3 Click **OK**.

Using Headquarters Client

Headquarters Client enables your remote stores to communicate with the Headquarters database. It is installed at each of your stores and sends information from the store's Store Operations database to Headquarters Server by means of an Internet, dial-up, or network connection. As discussed in "Bringing stores online" earlier in this book, you can set up a connection schedule so that Headquarters Client will connect to Headquarters automatically.

Before you can run Headquarters Client, you will need to activate the software. Follow the instructions in the Activation Wizard.

The client window

The Headquarters Client window displays information about the connections attempted, the type of information exchanged with Headquarters Server, and any errors that were encountered. The toolbar in the window allows you to perform common tasks quickly and easily. The toolbar buttons are described in the following list.

Button	Purpose
	Open log file
	Save log file
	Export log file
	Print log file
	Connect to Headquarters server
	Disconnect from Headquarters server
	Edit configuration
Debug Mode	Running in debug mode (only displayed when debug mode is activated)

Configuring the connection

For information about configuring the connection in Headquarters Client, see "Initiating communication" in "Bringing stores online," earlier in this book.

Setting logging options

Headquarters Client provides options that let you control what information appears in the communication log, both on screen and in the HQClient.log file.

To display error messages in the log

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

2 On the **Options** tab, select the **Display error messages as they occur** check box.

3 Click **OK**.

To enter debug mode and log debug messages

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

2 On the **Options** tab, select the **Log debug messages** check box.

3 Click **OK**.

Note In debug mode, Headquarters Client will display detailed logs that may help you to troubleshoot connection issues or problems. While in this mode, the words 'Debug Mode' appear in red on your toolbar and messages with the debug icon will appear in the log.

Managing log files

The event descriptions that appear in the Headquarters Client window are also written to the HQClient.log file, typically located in C:\Program Files\Microsoft Retail Management System\Headquarters Client. The size of this file can be limited by setting a smaller maximum size for the log file. When the size limit is reached, the older entries in the log file will be removed to make room for new entries.

There are three ways to preserve older log files. One is to save a copy of HQClient.log at any desired time. When you want to view this older log file, you can open it in Headquarters Client, as described below. The second option is to periodically export the log file to a text file. These text files are in a columnar format that is easy to read in Notepad, Microsoft Office programs, or other software. Finally, you can print the log file and save it in your files.

To set the maximum size of the log file

1 On the **File** menu in Headquarters Client, click **Configuration**.

2 On the **Options** tab, type a new maximum size for the log file. The size must be at least 1MB.

3 If you entered a smaller size than the current size, click **Yes** when Headquarters Client warns you that historical data may be lost.

4 Click **OK**.

To save the log file

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

2 Browse to the folder where you want to save the log file, type a name for the file, and then click **Save**.

To open a different log file

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

2 Browse to the folder where the log file is located, select the file, and then click **Open**.

Note Opening a different log file does not change which log file Headquarters Client writes to. Communication events that occur while the alternate log file is open will still be written to the default log file, C:\Program Files\Microsoft Retail Management System\Headquarters Client\HQClient.log.

To export a log file to a text file

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

2 Browse to the folder where you want the new text file to be created, type a name for the text file, and then click **Save**.

3 Click **OK** when Headquarters Client informs you that the file was successfully exported.

To print the current log file

Open the log file that you want to print, and then, on the **File** menu, click **Print**.

Appendix A – 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

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

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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:

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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.

Index

A

accessibility products and services 49
account statements template 34
activating Headquarters 8
add-ins location 33
Administrator *See* Headquarters Administrator
analyzing databases 39
approving worksheets 14, 29, 30
assistive technology products 50
authentication 9
automatically starting Headquarters Server 44
available hard disk space 6

B

backing up
  exported store databases 23
  Headquarters Client log files 47
  Headquarters database 36
Backup command, Headquarters Administrator 37
bringing stores online 15
buttons, Headquarters Client 45

C

centrally maintained data 14, 15, 23, 25
Change Collation command, Headquarters Administrator 40
changing database collation 40
changing databases 35
Check command, Headquarters Administrator 39
checking the Headquarters database 39
Client *See* Headquarters Client
Client Network Utility 11
communications
  configuring Headquarters Client 26
  configuring Headquarters Server 28
  initiating 27
communications (*continued*)
  network protocols and 11
  port numbers 26, 28
  processing worksheets 30
  requesting data upload from stores 27, 29
  requesting item counts from existing stores 28, 30
  system requirements 6
  Windows Firewall and 11
communications server *See* Headquarters Server
components of Headquarters 5, 7
computers
  deployment diagram 7
  names 9
  system requirements 6
Configuration command
  Headquarters Administrator 20, 32
  Headquarters Client 26, 46, 47
  Headquarters Server 28, 44
configuring Headquarters 20, 32
configuring Headquarters Client 26
configuring Headquarters Server 28
Connect command, Headquarters Administrator 35
Connect command, Headquarters Client 30
connecting to Headquarters Server 30
connecting to the Headquarters database 35
connection schedules 21, 22
connections
  configuring 26, 28
  dial-up, creating or selecting 27
  network protocols and 11
  scheduling 21, 22
  setting up 26, 27, 28
  system requirements 6
  Windows Firewall and 11
copy protection devices 3
counts, physical inventory 25, 28, 30

Create Database Wizard, Headquarters Administrator 19
creating backups 23, 36
creating databases
  Headquarters database 19
  master store database 15
  sample Headquarters database 12
  template store database 17
creating queries 41
creating worksheets *See* issuing worksheets
Crystal Reports definition files 33
customer support 4, 51
CustomerSource 4

D

data, types of
  centrally maintained data 15
  locally originated data 24
  store-specific data 17
data upload from stores, requesting 27, 29
database engines *See* Microsoft SQL Server
database server
  See also Headquarters Server *and* Microsoft SQL Server
  connecting to 35
  naming, UNC 37
  network protocols and 11
  starting 28
databases
  collations 40
  exported *See* exported store databases
  Headquarters 19
  master store database 15
  new store databases 22
  queries *See* queries
  sample Headquarters database 12
  size of 9, 19
  template store database 17
DBCC CHECKDB 39
debug mode, Headquarters Client 46
defining network protocols 11
defining stores 20
Delete command, Headquarters Administrator 38
deleting Headquarters databases 38
deployment diagram 7
dial-up connections 6, 27
direct queries *See* queries
disabilities, products and services for users with 49
disk space 6
documentation
  described 31
  in alternative formats 50
dongles 3

E

errors, checking the Headquarters database for 39
errors, displaying in Headquarters Client 46
executing queries 41
Export command, Headquarters Client 48
Export Database Wizard, Headquarters Administrator 22
exported store databases
  backing up 23
  centrally maintained data in 23
  restoring 25
  store-specific data in 23
exporting log files, Headquarters Client 48
exporting store databases 22

F

file locations
  logo 33
  report definition files, pictures, and add-ins 33
  templates 34
finding information using queries 41
finding problems in databases 39
firewalls 11
flags in Worksheet Status window, Headquarters Manager 14, 29
full item count reconciliation 28, 30

G

generating reports (practice task) 13
getting started 5
growth, database 19

H

hard disk space 6
hardware requirements 6
Headquarters
  See also Headquarters Administrator; Headquarters Client; Headquarters Manager; *and* Headquarters Server
  accessibility 49
  activation 8
  Client Network Utility and 11
  components 5, 7
  connection schedules 21, 22
  file locations 33
  initiating communication 27
  installing 10
  introduction 3, 5
  logo, entering location of 33
  practice tasks 12
  product support 4, 51
  sample database 12
  system requirements 6
  template locations 34
  what's new 3
  Windows Firewall and 11
Headquarters Administrator
  backing up the database 36
  changing database collation 40
  checking the database 39
  configuring the database 20, 32
  connecting to the database server 35
  creating the Headquarters database 19
  creating the sample database 12
  deleting a database 38
  description 5
  exporting store databases 22
  importing the master store database 20
  installing 10
Headquarters Administrator (*continued*)
  reindexing the database 39
  restoring the database 37
  running queries *See* queries
  specifying file locations 33
  specifying templates 34
  specifying the Headquarters logo 33
Headquarters Client
  activation 8
  configuring at each store 26
  connecting to Headquarters Server 30
  debug mode 46
  description 5
  managing log files 47
  overview 45
  processing worksheets 30
  setting logging options 46
Headquarters database
  backing up 36
  checking 39
  collation 40
  configuring 20, 32
  connecting to 35
  creating 19
  deleting 38
  importing master store database into 20
  maintenance 35
  queries *See* queries
  restoring from a backup 37
  sample database, creating 12
Headquarters Manager
  See also Headquarters User's Guide
  database connection information for 32
  defining stores 21
  description 5
  installing 10
  logging on 21
  practice tasks 12
  reconciling item counts 28, 30
  requesting data upload from stores 27, 29
  requesting item counts 28, 30
  store passwords 26
  synchronizing store IDs 27, 29
  worksheets *See* worksheets

Headquarters Server
configuring 28
connecting to 30
description 5
installing 10
overview 43
refresh rate 44
starting the server 28, 30, 43
stopping the server 43
help
accessibility products and services 49
documentation in alternative formats 50
online Help files 31
product support 4, 51
history, worksheet 14
HQClient.log 46, 47

I

identifying the Headquarters database for Headquarters Manager 20, 32
IDs, store 21, 27, 29, 30
IDs, user 9, 16, 21
Import Store Operations Data command, Headquarters Administrator 20
importing master store database into Headquarters 20
indexes, database 39
initial item quantities 21
installing Headquarters
deployment diagram 7
instructions 10
system requirements 6
installing Microsoft SQL Server 9
integrity of databases, analyzing 39
Internet connections 6
invalid store IDs or passwords 30
inventory counts 25, 28, 30
inventory transfers template 34
Inventory Wizard, Headquarters Manager 28, 30
ISDN connections 6
issuing queries 41
issuing worksheets
practice task 14
requesting data upload 27, 29
requesting item counts from existing stores 28, 30
synchronizing store IDs 27, 29
item quantities
initial values in Headquarters database 21
requesting from existing stores 28, 30
updating at stores 25
items, viewing (practice task) 13

L

LAN connections 6
layaway commitment quantities 21
licensing 8
local area network connections 6
locally originated data 24, 25
log files, Headquarters Client
exporting 48
managing size and location of 47
opening 48
printing 48
saving 47
setting logging options 46
logging on
default Headquarters account 21
default Store Operations account 16
Microsoft SQL Server authentication 9
practice task 13
logo, Headquarters 33

M

maintaining the Headquarters database 35
maintenance mode 13, 21, 30
Manager *See* Headquarters Manager
manual connection to Headquarters 30
master store database
creating 15
importing into the Headquarters database 20
memory requirements 6, 10

Microsoft Dynamics RMS Headquarters
See Headquarters
Microsoft product support 4, 51
Microsoft SQL Server
authentication 9
computer names and 9
description 9
editions 6, 9
installation notes 9
queries *See* queries
RAM recommendation 10
support for SQL Server Express 3
system requirements 6
Microsoft Windows
accessibility features 49
system requirements 6
modes
authentication modes 9
debug mode, Headquarters Client 46
maintenance mode 13, 21, 30
MSDE 2000 3, 6

N

Named Pipes 11
names
computer 9
database server 37
UNC 37
user 9, 16, 21
network connections 6
network protocols 11
network setup
Client Network Utility 11
Microsoft SQL Server notes 9
Windows Firewall 11
New command, Headquarters Administrator 41
new features 3

O

online Help 31
Open command, Headquarters Administrator 42
Open command, Headquarters Client 48
opening log files, Headquarters Client 48
opening queries 42
operating systems 6
orders template 34

P

passwords
default Headquarters account 21
default Store Operations account 16
Microsoft SQL Server authentication 9
store 26, 30
pending worksheets, processing 30
phone support 4, 51
physical inventory counts 25, 28, 30
picture locations
general 33
logo 33
port numbers 26, 28
practicing Headquarters tasks 12
Print command, Headquarters Client 48
printing log files, Headquarters Client 48
problems, checking the Headquarters database for 39
processing worksheets 30
processor requirements 6
product support 4, 51
profiles, store 21, 22
protocols, network 11
purchase orders template 34

Q

quantities
initial values in Headquarters database 21
requesting from existing stores 28, 30
updating at stores 25
queries
creating and running 41
opening saved queries 42
overview 41
saving 42

R

RAM requirements 6, 10
reconciling item counts for existing stores 28, 30
Recording for the Blind & Dyslexic 50
refresh rate, Headquarters Server 44
Reindex command, Headquarters Administrator 39
reindexing the Headquarters database 39
remote connections
  Client Network Utility 11
  universal naming convention and 37
  Windows Firewall and 11
removing Headquarters databases 38
reorder points 21
reporting database errors 39
reports
  definition files 33
  generating (practice task) 13
  logo for 33
requesting data upload from stores 27, 29
requesting item counts from existing stores 28, 30
restock levels 21
restoring exported store databases 25
restoring the Headquarters database 37
results of queries, viewing 41
Retail Management System Headquarters *See* Headquarters
rmshqdb.bck 19
rmshqsample.bck 12
running queries 41

S

sales taxes 22
sample database
  collation 40
  practicing with 12
sample query 41
Save command, Headquarters Client 47
Save commands, Headquarters Administrator 42
saved queries, opening 42
saving copies of the Headquarters database 36
saving log files, Headquarters Client 47
saving queries 42
scanning for database errors 39
schedules, connection 21, 22
scripts *See* queries
security
  adding security levels to the template store database 18
  authentication 9
  default passwords 16, 21
  Microsoft SQL Server updates 10
  store passwords 26
Select command, Headquarters Administrator 35, 38
selecting Headquarters database 35
Server *See* Headquarters Server
server names 37
service plans 4
setup
  bringing stores online 15
  configuring Headquarters Client 26
  configuring Headquarters Server 28
  configuring Windows Firewall 11
  creating the Headquarters database 19
  creating the master store database 15
  creating the sample Headquarters database 12
  creating the template store database 17
  defining and exporting stores 20
  deployment diagram 7
  initiating communication 27
  installing Headquarters 10
  installing Headquarters Client 10
  installing Microsoft SQL Server 9
  running Client Network Utility 11
  setting up stores 24
size, database 9, 19
size limit, Headquarters Client log file 47
software requirements 6
.sql query files *See* queries
SQL Server *See* Microsoft SQL Server

staggered connection schedules 21, 22
Start command, Headquarters Server 28, 30, 43
starting Headquarters Server 28, 30, 43
statements template 34
status, worksheet 14, 29
Stop command, Headquarters Server 43
stopping Headquarters Server 43
store databases
  creating master store database 15
  creating template store database 17
  exported *See* exported store databases
  exporting 22
  importing the master store database into Headquarters 20
  uploading data from 27, 29
store IDs 21, 27, 29, 30
Store Operations Administrator
  creating the master store database 16
  creating the template store database 18
  restoring exported store databases 25
Store Operations Manager
  logging on 16
  physical inventory counts 25
  revising locally originated data 25
  viewing or changing store IDs 29
store passwords 26, 30
store profiles 21, 22
stores
  connection schedules 21, 22
  counting physical inventory 25, 30
  defining and exporting 20
  IDs 21, 27, 29, 30
  initiating communication 27
  installing Headquarters Client 10, 26
  passwords 26, 30
  profiles 21, 22
  requesting data upload from 27, 29
  requesting item counts from existing stores 28, 30
  setting up 24
  updating data for 25
store-specific data 17, 23, 25
structural integrity of databases 39
support services 4, 51
switching between databases 35
synchronizing store IDs 27, 29
system databases, collation 40
system requirements 6, 11

T

tables, database 39
TCP/IP 11
technical support 4, 51
telephone support 4, 51
template store database
  clearing from memory 24
  creating 17
  loading into exported store databases 22
  revising data inherited from 25
  switching to another 24
templates location 34
text files, exporting Headquarters Client log files as 48
text telephone service 51
toolbar, Headquarters Client 45
Transact-SQL 39, 41
transfers template 34
troubleshooting
  Headquarters Client connections 46
  Headquarters database issues 39
T-SQL 39, 41
TTY/TDD service 51
tutorials for setting accessibility options 49
types of data
  centrally maintained data 15
  locally originated data 24
  store-specific data 17

U

UNC (universal naming convention) 37
uploading data from stores 27, 29
user IDs 9, 16, 21

V

viewing items (practice task) 13
viewing query results 41
virtual private network connections 6
VPN connections 6

W

WAN connections 6
what's new 3
wide area network connections 6
Windows *See* Microsoft Windows
Windows authentication 9
Windows Firewall 11
workload governor 3
worksheets
  issuing (practice task) 14
  processing 30
  requesting data upload 27, 29
  requesting item counts from existing stores 28, 30
  status 14, 29
  synchronizing store IDs 27, 29
  viewing history (practice task) 14
  viewing status (practice task) 14
writing queries 41