POS software: Microsoft Dynamics - Point of Sale FAQ

Q: I only have one retail store. I'd like to use a computer and software, but don't know if Microsoft Dynamics –Point of Sale is a good fit.

A: Point of Sale is built specifically for the single-store retailer or retailers with a group of independently operated stores. However, if you have specific requirements for inventory types, such as matrix or weighted, Microsoft Dynamics Retail Management System (RMS) may be a better choice for you. Evaluate which point of sale solution is right for you.

Point of Sale can run on any Microsoft Windows-based computer—laptop or desktop—provided it meets the minimum requirements for installation and operation. Learn more about minimum system requirements and see a listing of compatible hardware providers. Also learn about complete software/hardware solutions from leading providers.

Q: I currently use a cash register to track my sales and store cash. Does Point of Sale work with my cash register or would I need to replace it?

A: Point of Sale does not run on traditional cash registers. The application is installed on a Windows-based computer with point-of-sale peripherals attached via the available ports on the computer. (It does not run on Apple computers.) Cashiers or sales associates ring up orders and tender sales with Point of Sale, but the solution also does much more. Point of Sale helps you automate inventory and purchasing management, track and maintain detailed customer information, analyze sales information, connect with accounting…and that's just the start! Learn more about the features and benefits of Point of Sale.

Q: Other than the software, what additional equipment will I need to purchase?

A: Minimum requirements include a PC with a Pentium lll 1.2 GHz or faster processor, as well as a standard keyboard, mouse, monitor, and CD-ROM drive. For more details, see the system requirements. Most point-of-sale (POS) registers using Point of Sale also have a standard 40-column receipt printer, a scanner to read barcodes, a cash drawer to store cash and various tenders, and a pole display to let the customers view and verify the item prices and transaction total.

Other hardware available for use with Point of Sale include full-page printers, magnetic stripe readers, magnetic ink character recognition readers, signature capture device, personal identification number (PIN) pads for accepting debit cards, touch screen monitors, and dual display monitors.

To find out more, check the hardware compatibility list, which specifies manufacturers and models of each type of device that is known to work with Point of Sale. Most of these POS devices require an OLE for retail POS (OPOS) driver to properly communicate with the software solution. Contact the hardware manufacturer to inquire about the availability of OPOS drivers for a specific type of peripheral. Learn more about purchasing complete hardware/software bundles.

Q: I have a PC that runs the Microsoft Office system and my accounting software. Can I use this computer, and will Point of Sale work with my other software?

A: Yes on both counts. Point of Sale integrates with Microsoft Office Word and Microsoft Office Excel. For example, you can export working reports into Office Excel for further data analysis, or use Office Word to do a mail merge of customer information stored in your Point of Sale database for targeted marketing campaigns.

And with our latest release, Point of Sale now includes Microsoft Office Accounting Professional 2007 at no additional charge, providing you with a true solution suite that connects your retail and accounting information and processes. You can also exchange sales and inventory information with Intuit QuickBooks if you are currently using it for accounting processes.

Q: Can I buy and install Point of Sale myself?

A: Yes. You can purchase Point of Sale directly from Best Buy and CompUSA. You can also purchase your solution from a wide network of Microsoft partners. Learn more about how you can purchase Point of Sale.

If you're looking for an all-in-one solution, you can easily purchase a complete hardware and software bundle from leading technology and financial services providers for as low as $2,499 with flexible financing options. Learn more about hardware and software bundles.

Q: How long will it take me to learn to use Point of Sale and to teach my employees to use it?

A: Based on reports from customers and Microsoft partners, it generally takes anywhere from 15 to 30 minutes to train cashiers and employees. If they need to learn all the features of Point of Sale, it could take a day or two of working with the system to get a good feel for it. Point of Sale includes online tutorials and a "practice mode" option designed to help first-time users learn the system quickly.

Training time may also depend on whether you've used a POS system before. For example, if you are stepping up from using a manual cash register and paper ledgers, then it may take a little longer.

Q: How long will it take me to load my store information into Point of Sale?

A: If you already have your inventory information in either Office Excel or an accounting package, you simply need to export that to an Office Excel compatible format and then import it into Point of Sale. If you currently store your information manually, then you will need to enter it, but you can do that either all at one time or as needed on an item by item basis.

Q: I have multiple registers in my store. Do I need to enter my inventory information once for each register?

A: No. You can have multiple registers connected and sharing the same data. A very typical configuration is to have the Point of Sale software running on each cash register and then have the Manager software running on a back office computer—all networked together using the same data.

Q: Can I customize the application?

A: Yes. You can add custom buttons and images to the POS screen, display your store name and logo, and choose the graphics, fonts, and colors that work best for your business. You can also customize receipts and bar code labels to meet your individual requirements.

Q: What types of reports are available within the application?

A: Point of Sale offers customizable reports for sales, customers, taxes, orders, and more. Reports can be filtered, grouped, and sorted by any field in the report window. Also, columns can be hidden or displayed

so that users see only the data that matters to them. Reports can be exported to Office Excel, e-mail messages, HTML, XML, and other formats, too.

Q: What types of transactions can I perform at the POS?

A: The POS application supports returns, voids, and regular sales.

Q: Can I integrate my current credit card processing system with Point of Sale?

A: In most cases, yes. Point of Sale gives you the flexibility to maintain your existing banking relationships or select a new one from a wide range of supported banks. Learn more about merchant services.

Q: Do I *have* to accept credit or debit cards to use Point of Sale?

A: No. Point of Sale also works with cash or check tenders and still provides full inventory tracking.

Q: I'd like to offer gift cards to my customers. Does Point of Sale support gift card programs?

A: Yes. If you choose First Data as a merchant services provider, you can quickly enable gift card processing, set up a personalized program, and then issue, track, and redeem cards while working within Point of Sale.

Q: Can I verify checks using Point of Sale?

A: Yes. If you choose First Data as a merchant services provider, you can verify checks at the point of sale using a magnetic ink check reader (MICR) and accept them as payment within Point of Sale.

Q: Can the system automatically create purchase orders?

A: Point of Sale can automatically create purchase orders at a user's request based on reorder information or sales history. Users can also build their own purchase orders for specific departments, categories, suppliers, and other purposes.

Q: Is there a limit to the number of items, customers, suppliers, and other data that I can input?

A: Point of Sale does not impose any limits on the number of items, customers, and other data entries. Provided there is enough disk space on the server, Point of Sale can support an unlimited number of data entries.

Q: How is the software licensed?

A: Point of Sale is licensed by number of active POS registers. Therefore, if a client has five computers in a store, with only three being used as active POS registers, only three licenses are required.

Q: What type of security is offered in Point of Sale?

A: Point of Sale offers RoleTailored security. There are seven different levels of security that allow you to customize the security settings of your store. This RoleTailored security functionality allows you to control your cash, employees, and business better. For example, only those with Owner or Manager roles are able to log on and run the Point of Sale Manager program.

Q: What kind of inventory tracking does Point of Sale feature?

A: Among many other powerful features, Point of Sale uses automated inventory tracking. You can simplify manual stock counts with automated inventory tracking for both standard and serialized inventory types. You can also quickly and accurately calculate how much inventory you need to replenish.

If you require more complex inventory types such as kit, assembly, matrix, lot matrix, voucher, non-inventory, or weighed—then Microsoft Dynamics Retail Management System (RMS) is the right product for you.

Q: Will my customers notice anything different at the register?

A: Yes. Your customers will be impressed with the level of detail and speed of check-out you'll now be able to provide them through Point of Sale. They'll get immediate access to detailed product information, personalized information about their previous purchases and payments, and account information.

With quick information about customers' buying histories at your fingertips, you'll be able to generate copies of old receipts and suggest relevant up-sells, sale items, and volume discounts. Plus, by providing

all of your employees with standardized POS tools that offer the immediate access to detailed product information, you give your customers consistent and personalized information.

Q: I want to improve our store's marketing campaigns. Can Point of Sale help?

A: Yes. You can use Point of Sale to provide customer-specific pricing and special discounts for frequent shoppers.

Use the data in Point of Sale to build a mail merge in Microsoft Office Word or Microsoft Office Excel for customer mailings and advertisements. Track your customers' purchase histories to learn their buying habits and deliver personalized service that will keep them coming back for more.