INNOVATE

Microsoft Dynamics
Retail Management System

Microsoft Dynamics Retail Management System Features List

For retail organizations looking to drive success, Microsoft Dynamics™ Retail Management System (RMS) offers an easy-to-use, flexible solution that helps you manage operations and performance across all your stores and at the head office. Designed to meet changing business needs, this powerful software package delivers the investment protection of a solution that can be adapted to meet the unique requirements of your retail environment. Microsoft Dynamics RMS is sold as two separate modules—Microsoft Dynamics RMS Store Operations and Microsoft Dynamics RMS Headquarters.

Microsoft Dynamics Retail Management System Store Operations

Microsoft Dynamics RMS Store Operations can be run as a stand-alone application in individual stores and connected to the head office via Microsoft Dynamics RMS Headquarters. Along with automating the full range of point-of-sale (POS) processes, Microsoft Dynamics RMS Store Operations enables managers to maintain tight control over inventory, pricing, suppliers, promotions, customer information, and reporting.

Point-of-Sale Capabilities

- Customize and resize transaction screens.
- Work with a "touch screen" graphical user interface.
- Quickly define keyboard-shortcut macros.
- Enter unlimited line items.
- Automatically look up price (sales, quantity discount, promotional, price levels).
- Automatically compute tax, VAT.
- Look up quantity and item attribute.
- Display item picture, extended description, and sub-descriptions.
- Set up default shipping services.
- Select shipping carrier and calculate shipping charges by weight/value.
- Support multi-tender transactions, including cash, check, credit card, and debit card.
- Accept food stamps.
- Sell and redeem vouchers, gift certificates, and gift cards.
- Place transactions on hold and recall.
- Perform voids and returns at POS.
- Access online credit card authorizations and capture electronic signatures.
- Save time and cost with integrated debit and credit card processing.

- Streamline business processes.

- Improve profit margins.

- Build customer loyalty and effectively understand sales priorities.

- Reduce supply chain costs.

- Leverage new technology and channels.

Point-of-Sale Capabilities (cont.)

- Ensure optional credit card discounts with Address Verification Supports (AVS).
- Support mix-and-match pricing structure.
- Discount entire sale or selected items at time of sale.
- Add customer account.
- Track customer information, including total sales, number of visits, and last visit date.
- Issue store credit.
- Receive payment(s) for individual invoices.
- Process deposits on orders.
- Search by customer's ship-to address.
- Create and process layaway, back orders, work orders, and sales quotes.
- Credit items sold to selected sales reps.
- View daily sales graph at the POS.
- View and print journals from any register.
- Preview, search, and print journals by register, batch, and/or receipt number.
- Print X, Z, and ZZ reports.
- Print receipts, invoices, and pick tickets with logos/graphics.
- Print kit components on receipt.
- Reprint receipts.
- Enter employee hours with an integrated time clock function.
- Sell when the network/server is down with offline POS mode.

Inventory Types

- Standard and service items
- Serialized (up to three serial numbers per item)
- Matrix (apparel)
- Lot matrix
- Kits (items you fabricate; shows components)
- Assembly (bill of material)
- Weight (tare, actual)
- Tag-along
- Parent/child
- Voucher (gift card, gift certificate, store credit)
- Non-inventory

Inventory Control and Tracking

- Track and manage all inventory types.
- Organize and modify assembly, matrix, and lot matrix items using clear spreadsheets.
- Look up and modify matrix items by specific attribute (i.e., size, color).
- Create/modify individual items in a matrix, as well as add or remove dimensions from existing items.
- Automatically calculate inventory replenishment by restock level or quantity sold.
- Support multiple suppliers for each item.
- Define "master pack" quantity for ordering.
- Assign item substitutes.
- Track by serial numbers.
- Create unlimited item aliases.
- Identify parent and child quantities.

Inventory Control and Tracking(cont.)

- Attach notes/reminders to specific items.
- Automatically generate purchase orders (POs).
- Quickly add items to POs using dialog window.
- Quickly create new items while creating a PO.
- Export POs to Microsoft® Office Excel® and Microsoft Office Word for easy customization and viewing in a matrix grid format.
- Receive shipments.
- Transfer inventory in/out.
- Process external file (data collection unit).
- Store and track offline inventory (items not for sale, breakage, etc.).
- Attach item pictures.
- Define department and category structure.
- Assign reason codes for inventory adjustments.

Pricing, Sales, and Promotions

- Set up mix-and-match pricing structure, including pricing and percentage discounts.
- "Buy X, get Y" discount capability, including percentage discount.
- Set lot pricing (single, six-pack, case, etc.).
- Set multiple price levels per customer (price break tables).
- Set mixed-case discounts.
- Discount from retail and mark up from cost.
- Set profit margin and price rounding rules.
- Discount by dollar amount.
- Assign subtotal amount.
- Set percent of discount.
- Put items on sale/promotion.
- Set up happy hours and sales schedules.
- Multiple tax rate tables (percent, base, cap) multiple sales tax (GST, PST, etc.).
- Support Euro and Value-Added Taxation.
- Define sales commission schedule.
- Give change in local currency.

Advanced Security Options

- Protect information with built-in security systems for manager and POS programs.
- Every menu and field can be protected per cashier's security level. Data fields can be hidden, view-only, or editable.
- Set cashier floor and return limits.
- Assign logon password.
- Assign reason codes for discounts, price override, and adjustments.
- Grant or deny cashier permissions to:
  - *Enter opening or closing amounts.*
  - *Change price, tax amount.*
  - *Allow "No sales" (open drawer).*
  - *Allow payouts.*
  - *Allow item cost display.*
  - *Allow editing of time-clock entries.*
  - *Allow generation of X reports.*
  - *Hold transactions.*
  - *Abort transactions.*
  - *Perform blind closeouts.*
  - *View sales journal and sales graph.*
  - *Allow customer account modification.*
  - *Allow deletion of customers and items.*
  - *Allow item information modification.*
  - *Allow posting empty transactions.*
  - *Allow selling to employees with discounts.*
  - *Show/hide customer addresses at POS.*
  - *Record and track cash payouts.*

Time-saving Tools

- Simplify item maintenance tasks, such as price changes, with the Inventory Wizard.
- Quickly add inventory with the New Item Wizard.
- Add/modify item dimensions using matrix forms.
- Design and print bar code and graphic labels with the Label Wizard.
- Schedule more effectively with a built-in calendar event planner and automatic reminders.

Customizable, Real-time Reports

- Filter, hide, sort, and group report data.
- Enable print preview.
- Adjust report header/columns on-screen.
- Drill down for access and/or to modify detailed database information directly from Active Reports.
- Memorize your custom reports.
- Export data to multiple formats.
- Work with highly customizable reports that include:
  - *Customer list*
  - *Account activities and receivables aging*
  - *Daily sales with filters and "Grouped by"*
  - *Summary daily tax collected*
  - *Detailed sales and detailed tax collected*
  - *Commissions*
  - *Register analysis*
  - *Department sales/cost*
  - *Regional sales*
  - *Item price and quantity lists*
  - *Item value list*
  - *Item reorder list*
  - *Item movement report*
  - *Offline inventory list*
  - *Serial number list*
  - *Supplier list*
  - *Alias and substitute lists*
  - *Work order summary and detailed lists*
  - *Back order summary and detailed lists*
  - *Quote summary and detailed lists*
  - *Vouchers summary and detailed lists*
  - *Purchase orders*
  - *Inventory transfers in/out*
  - *Open layaways and expiration reports*
  - *Summary daily sales*
  - *Sales rep and cashier daily sales*
  - *Supplier daily sales*
  - *Register daily sales*
  - *Department and category daily sales*
  - *Cashier log*
  - *Top sales reps and cashiers*
  - *Top customers*
  - *Top suppliers*
  - *Top items*
  - *Top departments and categories*

Customer Management and Marketing

- Drive increased sales with discount functionality, inculding mixed-case discounts.
- Track purchases by date, price, and quantity.
- Search by account information.
- Define different account types (i.e., revolving).
- Enable Aged Receivables option.
- Look up, adjust, and track invoices for specific customer accounts.
- Apply finance charges on accounts.
- Bill payments for net terms.
- Place limits on customer purchases for specified time period.
- Utilize 15 user-defined fields for customer data, including birth date, driver's license number, and resale permit number.
- Create customer accounts at the POS.
- Set up multiple shipping addresses per customer.
- Reprint customer statements and receipts.
- Generate mailing lists.
- Print accounts receivable aging report.
- Print account activities report.

Employee Management

- Track and manage employee information.
- Track employee performance.
- Set up and manage sales commissions.
- Send messages to cashiers.
- Enter employee hours using integrated time clock and time card report.

Integration with Popular Accounting Software

- Microsoft Dynamics GP
- Intuit QuickBooks®
- Open standards allow universal Windows® import/export

Support for Hardware and Peripherals

- Use Microsoft Dynamics RMS with existing computers and OPOS (OLE for POS)–compatible peripherals.
- Purchase complete hardware/software bundles from leading technology providers.
- Protect your investment with support for next-generation hardware devices.

Internet Applications

- Support XML for cross-platform data sharing.
- Retrieve and process orders from many virtual storefronts.
- Advertise to in-store customers using NetDisplay.
- Set up on-screen shortcuts to Web sites, software, and application tools.

Microsoft Dynamics Retail Management System Features List

Microsoft Dynamics Retail Management System Headquarters

Microsoft Dynamics RMS Headquarters runs at the head office of a chain of stores, enabling managers to upload and aggregate inventory, sales, and purchase order data from across their entire business. It enables company-wide reporting, communication, and performance analysis.

Inventory Control and Tracking

- Centralize inventory tracking and management for each store and for the enterprise as a whole.
- Microsoft Dynamics RMS Headquarters offers detailed information on quantity in stock, reorder points, and restock levels for each item at each store and then makes this information visible to the home office.
- Since some stores may have uniform or disparate inventories, Microsoft Dynamics RMS Headquarters can invoke inventory replenishment at the home office for any group of stores.
- A master inventory database can be set up and downloaded to any group of stores.
- Manage all item attributes and properties such as item types, departments, categories, suppliers, substitutes, aliases, parent relationships, and more from one location and send updated and new items to the stores you select for consistent stock identification.
- Sales taxes can be programmed individually by store or by groups of stores per local regulations.
- Promote inventory balancing by managing stock transfers among stores with an inter-store quantity check feature, so each store can check the inventory levels at all stores.
- On every scheduled connection to Microsoft Dynamics RMS Headquarters, updated item quantities and dynamic item properties (such as store costs and prices) in Microsoft Dynamics RMS Headquarters automatically change to reflect their new value at the given store.
- When cost information changes at the store level, item costs can be uploaded to Microsoft Dynamics RMS Headquarters, ensuring accurate, chain-wide item cost reports based on weighted average at Headquarters.

Purchase Orders

- Generate POs based on replenishment needs for all stores. You can make the orders for a set of stores or regions and ship to a single warehouse for later distribution or directly to individual stores.
- Automatically generate POs for selected items, by quantity sold during a period, or for items that fall below restocking levels for all stores or at individual stores.
- Centralize supplier list management for all stores.
- Inter-store inventory transfers can be initiated from the head office or at individual stores.
- Once POs are received by the store, the information is uploaded to Microsoft Dynamics RMS Headquarters automatically on the next scheduled connection.
- Designate a distribution site—a store or warehouse—as the receiving point where all goods are received.

Pricing, Sales, and Promotions

- The head office can change and download item prices to specified stores.
- Selected items can be put on sale at specific stores or across the entire business.
- Special pricing—including fixed-price and percentage discounts— can be set up for "Buy X, get Y" promotions, as well as for items, categories, or departments, and then downloaded to stores.
- Price changes can be programmed to take effect immediately or during a specified time period.

Sales and Order Tracking

- Microsoft Dynamics RMS Headquarters maintains highly detailed data from every transaction across the chain. Tracked information includes:
  - *Transaction number*
  - *Item lookup codes for items sold*
  - *As-sold prices*
  - *Tax collected*
  - *Customer*
  - *Cashier and sales rep IDs*
  - *Applicable serial number or matrix type*
  - *Tender received*
  - *Payments, drops, and payouts*
  - *Account receivables and adjustments*

- Easily generate detailed sales and profit analyses, sales commissions, and tax reports.

- View the electronic receipts generated at each store from Microsoft Dynamics RMS Headquarters Manager.

- Comprehensive data collection allows for custom data warehousing and OLAP.

Powerful, Flexible Reports

- Gain instant, flexible access to a wealth of meaningful data.

- Consolidated reports show sales breakdowns, identify slow-moving items and check sales for any day—by store location, item, department, category, customer, or taxes.

- Reports may be previewed on screen, printed, or exported to applications such as Microsoft Excel.

- Customer reports include:
  - *Global Customer List*
  - *Local Customer List*
  - *Accounts Receivable—Summary*
  - *Accounts Receivable—Detailed*

- Sales reports include:
  - *Summary Sales (Daily) Reports*
    - ▪ Daily Sales by Sales Rep
    - ▪ Daily Sales by Cashier
    - ▪ Daily Sales by Supplier
    - ▪ Daily Sales by Register
    - ▪ Daily Sales by Category
    - ▪ Daily Sales by Department
  - *Summary Tax Collected (Daily)*
  - *Detailed Sales*
  - *Detailed Tax Collected*
  - *Top Performers Reports*
    - ▪ Top Sales Reps
    - ▪ Top Customers
    - ▪ Top Cashiers
    - ▪ Top Suppliers
    - ▪ Top Items
    - ▪ Top Departments
    - ▪ Top Categories

Powerful, Flexible Reports (cont.)

  - *Regional Sales*
  - *Department Cost/Sales*
  - *Commission*

- Items reports include:
  - *Department/Category List*
  - *Master Price List*
  - *Master Quantity List*
  - *Master Value List*
  - *Snapshot Store Price List*
  - *Snapshot Store Quantity List*
  - *Quantity Discrepancy List*
  - *Supplier List*
  - *Alias List*
  - *Substitute List*
  - *Serial Number List*
  - *Item Movement*
  - *Offline Inventory List*

- Quotes/Orders reports include:
  - *Backorders—Summary*
  - *Backorders—Detailed*
  - *Quotes—Summary*
  - *Quotes—Detailed*
  - *Purchase Orders*
  - *Inventory Transfer In*

Customer Management and Marketing

- Microsoft Dynamics RMS Headquarters maintains a complete profile of every customer who has ever purchased from any of your stores.

- Customer information includes demographics, preferences, purchase or problem history, account balance, and credit information.

- Easily print monthly billing statements for On Account customers.

- Enable customers to pay their enterprise-wide balance at one store using the Remote Payment feature.

- Chain-wide buying habits, shopping frequency, and purchase amounts are readily available at the head office.

- Leverage thorough and accurate database marketing and relationship selling to targeted customers through custom applications.

- All data is exportable from the Microsoft SQL Server database—for example to CRM and ERP applications.

Microsoft Dynamics Retail Management System Features List

Employee Management

- Monitor sales reps, their hours, and the registers they run.

- Upload attendance records for computing hours and labor costs at the head office.

- Centrally compute sales commissions based upon sales transactions and commission structures found in associates' profiles.

Integration with Microsoft Dynamics GP

- Microsoft Dynamics RMS integrates smoothly with Microsoft Dynamics GP, providing retailers with an end-to-end solution for managing a multi-store network.

- Microsoft Dynamics GP purchase order import helps ensure agile, accurate financial management by tracking all inventory movement across the supply chain.
  - *Full and partial purchase order receipts are transferred from Microsoft Dynamics RMS to Microsoft Dynamics GP Purchase Order Processing, where all appropriate documents are created.*
  - *Microsoft Dynamics GP General Ledger updates automatically with inventory adjustments.*
  - *Items and vendors imported from Microsoft Dynamics RMS are linked and assigned to appropriate item classes in Microsoft Dynamics GP.*

- Microsoft Dynamics GP Receivables Management provides an extra level of visibility into sales transactions taking place at individual stores.
  - *All sales data from retail operations moves through Receivables Management and flows into General Ledger.*

Integration With Microsoft Dynamics GP (cont.)

- Integration with Microsoft Dynamics GP Bank Reconciliation helps eliminate double entry for critical retail processes, including:
  - *Cash, check, and credit card sales.*
  - *On-account customer transactions and payments.*
  - *Work order, layaway, and back order payments.*

- Increased General Ledger visibility improves operational efficiency by eliminating double entry for the following:
  - *Payouts*
  - *Overs/Shorts*
  - *Surcharges (debit/cash back)*
  - *Manual inventory adjustments*

Industry-specific Solution Offerings from ISVs

An extensive catalog of Microsoft Certified Partner add-on solutions—including e-commerce, mobility, business intelligence, merchandising, and others—further enhance the investment protection of a solution that can be tailored to suit demanding retail needs.

INNOVATE

Microsoft Dynamics Retail Management System Store Operations

System Requirements
- Pentium 600 MHz or faster processor (1 GHz recommended),
  50 MB of available hard-disk space, and 192 MB or more of RAM (512 MB recommended)
- Microsoft Windows XP Home or Professional with Service Pack 2 or later, Windows 2000 with Service Pack 4 or later, Windows Embedded for Point of Service
  (Store Operations only), Microsoft Windows Server ᵀᴹ 2003 with Service Pack 1 or later, or Windows Vista ᵀᴹ Business or later
- Ships with Microsoft SQL Server ᵀᴹ Express; supports Microsoft Desktop Engine (MSDE) or Microsoft SQL Server

Microsoft Dynamics Retail Management System Headquarters

System Requirements
- Pentium 600 MHz or faster processor (1 GHz recommended), 50 MB of available hard-disk space, and 192 MB or more of RAM (512 MB recommended)
- Microsoft Windows XP Home or Professional with Service Pack 2 or later, Windows 2000 with Service Pack 4 or later, Windows Server 2003 with Service Pack 1 or
  later, or Windows Vista Business or later
- Microsoft SQL Server 2000 Service Pack 4 or later, MSDE 2000 Service Pack 4 or later, SQL Server 2005 Server Pack 1 or later, or SQL Express Service Pack 1
  (included)

For More Information
Visit www.jdapos.com/solutions/microsoft/rms.html or call J.D. Associates, your Microsoft Certified partner, at (800) 564-4488.

Microsoft®