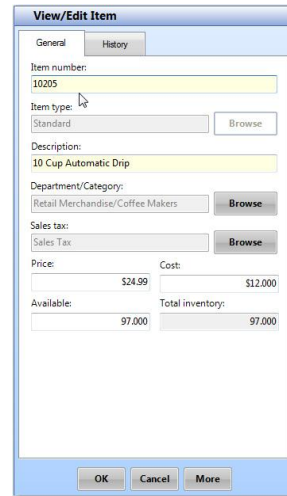


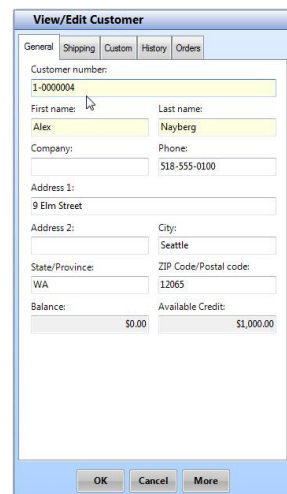
## Working with item information

To	Do this
Add an item to inventory	Press F2 (Items), press 1 (New), and then enter basic information about the item. <b>Note:</b> An item number and description are required.
View or edit an item's information	<ol style="list-style-type: none"> <li>Press F2 (Items), press 4 (By Item Number) or 5 (By Description), select the item, and then select <b>View/Edit</b>.</li> <li>On the <b>General</b> tab, change the information you want.</li> </ol>



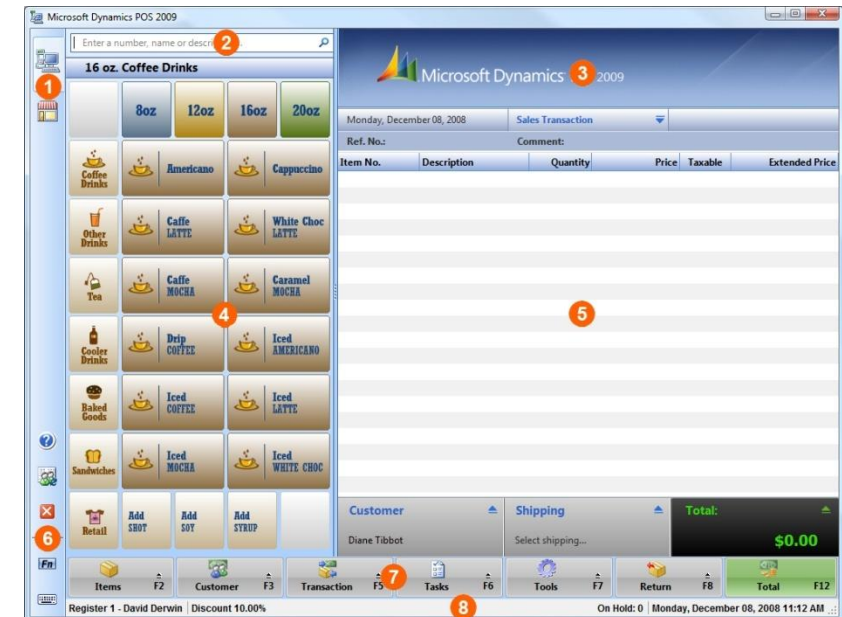
## Working with customer information

To	Do this
Add a customer to the customer list	Press F3 (Customer), press 1 (New), and then enter information about the customer. <b>Note:</b> A customer number, first name, and last name are required.
View or edit a customer's information	<ol style="list-style-type: none"> <li>Press F3 (Customer), press 4 (By Customer Number), 5 (By Name), or 6 (By Phone Number), select the customer, and then select <b>View/Edit</b>.</li> <li>On the <b>General</b> and <b>Shipping</b> tabs, change the information you want.</li> </ol>



## Quick Reference

### The POS View screen



- |                                  |                    |
|----------------------------------|--------------------|
| 1 POS View and Manager View tabs | 5 Transaction pane |
| 2 Search box                     | 6 Tray             |
| 3 Custom pane                    | 7 Function bar     |
| 4 Task pane                      | 8 Status bar       |



**Note:** If a function key button has been customized, the arrow appears shaded. In this case, press Shift plus the function key in the following procedures.

## Help and practice mode

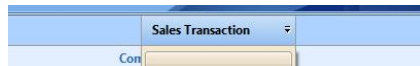
To	Do this
Get Help	Press F1.
Start a practice session	Press F7 (Tools), and then press 6 (Enter Practice Mode).

## Working with your register

To	Do this
Start Microsoft Dynamics POS	On the <b>Start</b> menu, select <b>All Programs</b> , then <b>Microsoft Dynamics POS 2009</b> .
Log on a different cashier	Press <b>F6</b> (Tasks), and then press <b>8</b> (Switch User/Exit).
Log off and exit	Press <b>F6</b> (Tasks), and then press <b>8</b> (Switch User/Exit).
Change your password	In the <b>Logon</b> dialog box, select <b>Change Password</b> .
Clock in or out	Press <b>F7</b> (Tools), and then press <b>2</b> (Time Clock).
Enter opening or closing amounts	Press <b>F6</b> (Tasks), and then press <b>1</b> (Open/Close).
Open the cash drawer	Press <b>F5</b> (Transaction), and then press <b>6</b> (No Sale).
Make a cash drop or payout	Press <b>F6</b> (Tasks), and then press <b>2</b> (Drop/Payout).
Turn the receipt printer on or off	Press <b>F6</b> (Tasks), and then press <b>5</b> (Printer On/Printer Off).
Find and view a receipt	Press <b>F6</b> (Tasks), and then press <b>3</b> (Find Receipts).
Reprint a receipt	Press <b>F6</b> (Tasks), and then press <b>4</b> (Reprint Last Receipt).
Use a calculator	Press <b>F7</b> (Tools), and then press <b>1</b> (Calculator).

## Processing sales

To	Do this
Process a sales transaction	<ol style="list-style-type: none"> <li>1. Scan item's bar code, or type item number in the search box and press ENTER.</li> <li>2. For cash or check sales, press <b>F12</b> (Total), and then type the amount paid. For credit or debit card sales, swipe the card or type the card number.</li> </ol>
Add an item to a transaction	Scan the item's bar code. Or, type the item number or description in the search box, press ENTER, select the item, and then select <b>Add</b> .
Check an item's price	Scan the item's bar code. Or, type the item number or description in the search box, press ENTER, select the item, and then select <b>View/Edit</b> .
Change a line item's quantity	Select the line item, and on the line item, select <b>Edit Qty</b> .
Add a customer to a transaction	In the transaction pane, select <b>Select customer</b> .
Remove a line item	Select a line item, and on the line item, select <b>Remove</b> .
Quotes, layaways, back orders, special orders, and work orders	At the top of the transaction pane, select the type of customer order you want.
Discounts:	
Discount a line item	1. Select a line item, and on the line item, select <b>Discount</b> .
Discount a transaction	2. Press <b>F5</b> (Transaction), press <b>1</b> (Edit Transaction), and then press <b>Ctrl+2</b> (Discounts).
Add or remove sales tax	Press <b>F5</b> (Transaction), press <b>1</b> (Edit Transaction), and then press <b>Ctrl+3</b> (Taxes).
Hold or recall a transaction	Press <b>F5</b> (Transaction), and then press <b>4</b> (Hold or Recall).
Cancel a transaction in progress	Press <b>F5</b> (Transaction), and then press <b>5</b> (Cancel Transaction).



## Processing returns and exchanges

To return or exchange an item	Do this
By customer or purchase history	<ol style="list-style-type: none"> <li>1. Press <b>F8</b> (Return), press <b>2</b> (By Customer), select the customer and select <b>Add</b>.</li> <li>2. On the <b>History</b> tab, select each item to return and select <b>Return</b>.</li> <li>3. If making an exchange, ring up the new items.</li> </ol>
By receipt	<ol style="list-style-type: none"> <li>1. Press <b>F8</b> (Return), and then press <b>1</b> (By Receipt).</li> <li>2. Press <b>Ctrl+1</b> (Today's Receipts), <b>Ctrl+2</b> (Receipts by Date/Time), or <b>Ctrl+3</b> (Receipts by Batch), then select the receipt.</li> <li>3. To return some items, press <b>Ctrl+1</b> or to return all items, press <b>Ctrl+2</b>.</li> </ol>

## Finding items

To find items	Do this
By item number	Scan item's bar code, or type the item number in the search box and press ENTER.
By description	Type a description in the search box and press Enter, or Press <b>F2</b> (Items), and then press <b>5</b> (By Description).
By receipt	Scan the bar code on the receipt or type the item number in the search box, and then press ENTER.
By purchase history	<ol style="list-style-type: none"> <li>1. Press <b>F3</b> (Customer), and then press <b>5</b> (By Name).</li> <li>2. Select the customer, select <b>View/Edit</b>, and then select the <b>History</b> tab.</li> </ol>

## Finding customers

To find customers	Do this
By name	Press <b>F3</b> (Customer), press <b>5</b> (By Name), and then type the name in the search box.
By phone number	Press <b>F3</b> (Customer), and then press <b>6</b> (By Phone Number).
By customer number	Press <b>F3</b> , (Customer), press <b>4</b> (By Customer Number), and then type the customer number in the search box.

## Finding transactions

To find transactions	Do this
By receipt	Scan the bar code on the receipt.
By transaction number	<ol style="list-style-type: none"> <li>1. Press <b>F6</b> (Tasks), and then press <b>3</b> (Find Receipts).</li> <li>2. Press <b>Ctrl+1</b> (Today's Receipts), <b>Ctrl+2</b> (Receipts by Date/Time), or <b>Ctrl+3</b> (Receipts by Batch).</li> </ol>