



DRS Add-ins for Microsoft® RMS

800-322-9471 || Canada: 800-353-0268 || www.digitalretailer.com

DRS Status Window™ Help

J.D. Young and Anil Garg

© 2005-2010 Digital Retail Solutions Inc.
All rights reserved.

Microsoft and Microsoft Retail Management System software are a trademark or registered trademarks of the Microsoft Corporation in the United States and/or other countries. Other trademarks or products mentioned herein are the property of their assigned owners.

Table of Contents

1 DRS Status Window Help

1 Welcome	1
2 What's New	1
3 Configuration	1
Registration	1
Customer Captions	2
Screen Setup	2
4 Operation	3
General	3
5 Contact Info	4
6 Make a Suggestion	5

1 DRS Status Window Help

1.1 Welcome

This add-in replaces the default status window included with Microsoft RMS to display additional details on customers and items when processing sales in POS .

DRS Status Window is designed to work with Store Operations and is only installed on PCs where POS will be run.

You can use Status Window to:

- View entries from the Additional tab* in Customer Properties
- Display margins on items and sales in real-time
- Alert cashiers to outstanding balances or credits
- View open orders by customer account
- Confirm customer discounts or price levels
- View custom profile data at-a-glance
- Display store name, phone, and email address in idle mode

***We suggest you setup [custom fields](#) to capture additional information about your customers.**

NOTE: For Status Window to work properly your workstation must allow access to the Store Operations, HTML folder on the local PC and support for the internal browser in RMS must not be disabled.

© 2005-2010 Digital Retail Solutions Inc.

1.2 What's New

The following enhancements have been added since the initial release of **DRS Status Window** .

March 2008

- Added Telephone number and Email address to active mode screen (removed last serial item purchased)

1.3 Configuration

1.3.1 Registration

A registration key is issued with DRS Status Window, but is only required if you need to update your installation.

Your should retain this key for your records.

If you do not already have your registration key, email your Store Operations serial number to support@digitalretailer.com. The serial number can be located in POS by pressing **Ctrl-Shift-F1**.

1.3.2 Customer Captions

Status Window is designed to display additional customer information while ringing in sales. These custom fields may currently be unused at your store. To label these fields select **Manager, File, Configuration, Captions** button, **Customer** tab.

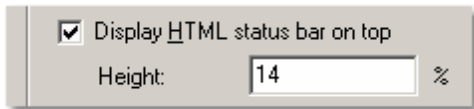
Defining these fields allows you to enter more information for a customer under the Additional tab in Customer Properties from POS or Manager.

Example:

1.3.3 Screen Setup

POS screen settings will be enabled during installation. However, you may need to size the Status Window at each POS station to fit properly. To do so press **Ctrl-F6** in POS, select **Transaction Screen** tab, **Display HTML Status on top, Height** and enter 14-18%. The exact figure will depend on screen

size and resolution settings for that workstation. Try 14% to start.



If any of your stations are set to 800x600 resolution try 18% for Status Bar, 14% for Custom Buttons, and 10% for Function Keys. If your POS station is using a larger font setting than normal, you will need a scaled down version of the status window for those stations. [Contact](#) our Support office for more information.

To maximize content without scrolling you may want to change your date format to show two digit years, not four. To do this go to **Control Panel, Regional Options, Customize, Date, Short Date Format** and change the format to **M/d/yy**.

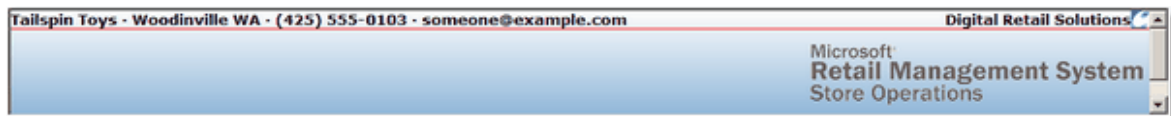
1.4 Operation

1.4.1 General

Status Window adds a margin calculator, customer profile, and order alerts to your POS screens.

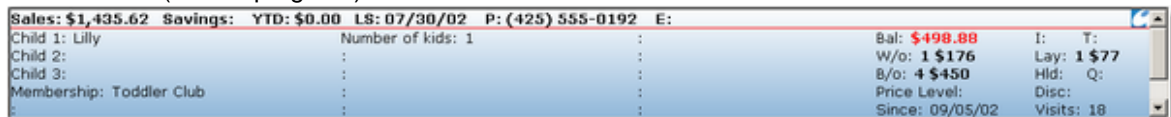
Idle mode is displayed when no sale is in progress and no items have been entered or no customer account has been assigned. Idle mode lists your store name, city/state, phone, and email address as entered in **Manager, File, Configuration, Store** tab.

Idle mode:



Active mode is enabled as soon as an item is entered or a customer is assigned to the sale.

Active mode: (sale in progress)



The top line of the DRS Status Window lists the following customer information:

- Lifetime Sales
- Total Savings (from discounted items)
- YTD Sales
- Last Sale Date
- Telephone number
- Email address

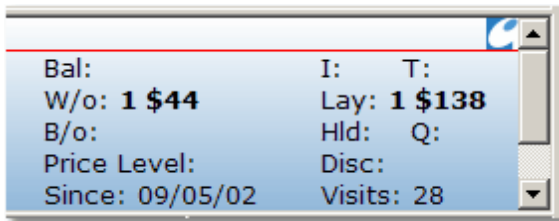
Customer Profile columns (beginning from the left) include:

- 1st column: Custom Text fields
- 2nd column: Custom Number fields

- 3rd column: Custom Date fields

[Custom fields](#) may currently be unused at your store. Defining these fields allows you to enter more information for a customer under the Additional tab in Customer Properties. To define and activate these entries edit [Customer Captions](#).

4th & 5th columns: Account Status



Account Status

4th column: (Bal)ance, (W/o)rkorders, Backorders, Price Level, Customer (S)ince mm/dd/yyyy

5th column: (I)tem margin, (T)otal margin, (Lay)aways, Holds, (Q)uotes, (Disc)ount percent, number of Visits

W/o, Lay, B/o, Hld, Q fonts: Bolded entry for numbers and dollars; blinking dollars in red if balance due on account; text color is dependent on money owed versus credit (red vs. black).

(I)tem margin is displayed whenever the cursor is moved to a specific Item Lookup Code.

(T)otal margin is displayed continuously.

NOTE: (I)tem and (T)otal margin entries will not appear unless the Cashier's security privilege has been set to "Allowed to view cost information" under **Managers, Cashiers**.

If the screen colors on a workstation are not set to 16-bit or higher, the transition background won't appear as intended. We can remove the background color or transition effect if required or supply you with a different color scheme upon request. [Contact](#) our Support office for details.

TIP: You can quickly play "what-if pricing" in POS by changing an item's price in the sales screen. The new margin will display instantly in the DRS Status Window.

1.5 Contact Info

Digital Retail Solutions Contact Information

Sales Office:

Phone: 800-322-9471
 Int'l: +1 305 420 6170
 Email: info@digitalretailer.com
 Website: www.DigitalRetailer.com
 Hours: 9am-5pm EST Mon-Fri

Support & Training:

Email: support@digitalretailer.com
 Website: www.DRShelp.com
 Hours: Available 7 days*

*See our [Support Agreement](#) for details.

Mailing Address:

Digital Retail Solutions Inc.
2018 Electric Rd PMB 205
Roanoke, VA 24018-1938
USA



1.6 Make a Suggestion

We are very interested in making improvements to our RMS utilities and add-ins to meet your needs.

- Have an idea for an enhancement?
- Thought of a feature we left out?
- Want to report an operating problem?

Please click through to our [Suggestion Box](#) and let us know right away.

Updates and upgrades to DRS add-in utilities are included with a DRS annual maintenance plan. Contact your RMS reseller for details.