

Setup Instructions for MicroSale with Windows 10



Important: Consider the time needed to properly prepare and stage the registers. Always stage the registers at your office or offsite. Do not stage registers onsite at the restaurant.

Completing this staging document in entirety is crucial to the success of your installation. If you are unsure of any of these steps, please contact MicroSale support. MicroSale's support department also offers remote staging services. There is a flat-fee per register; please refer to the dealer price sheet for more information.

MicroSale works on nearly all Windows-based POS terminals as long as [minimum requirements are met](#). Because MicroSale can work with most restaurant environments (from quick service to full service), register options are highly customizable. It also integrates with cash drawers, bar code/QR code scanners, kitchen video and more. For all integrated options, [please click here](#).

Prerequisites before Installing MicroSale

Preparing the Windows Environment

The following are prerequisites that must be completed on each terminal before installing MicroSale.

- 1 Setting up Windows User Accounts
- 2 Adjusting Windows Settings
- 3 Enabling .NET Framework 4.6 or higher
- 4 Enabling Windows File Sharing and Enabling Services
- 5 Installing Printers and Devices

Installing MicroSale

- 1 Sharing MicroSale data across all devices
- 2 Activating the software license
- 3 Setting up the terminal name and configuring remote terminals
- 4 Installing Microsoft SQL Server on each register. MicroSale requires having the Microsoft SQL Server application installed on each terminal. MicroSale offers links to easily install SQL.
- 5 Configuring register settings (register options)
- 6 Assigning installed printers and devices within MicroSale

Setting Up Windows User Accounts

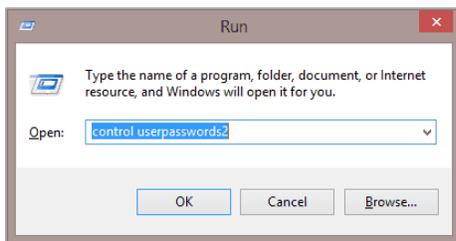
Create Windows user accounts and set auto-logon to Windows



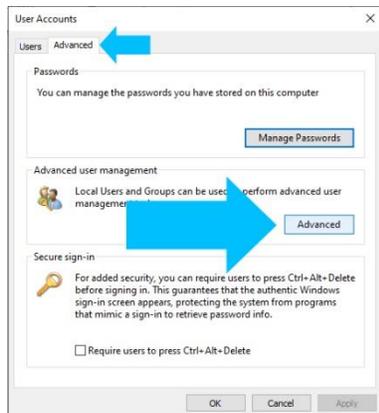
Important: The same Username and Password must be used on all terminals in order for MicroSale to communicate properly.

Always use strong passphrases with 7 or more alpha-numeric characters with at least one number, at least one upper- and one lower-case letter, and at least one symbol. Passphrases should be changed at least every 90 days as a preventative security measure and for PCI-compliance.

- 1 Right click on **Start** Button and select **Run**. Or use the keyboard shortcut Windows Key+R to bring up the Run dialog box.
- 2 Type **control userpasswords2** and select **OK**



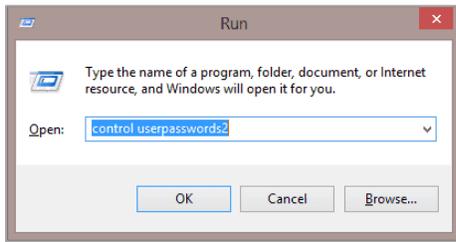
- 3 Click on the **Advanced** tab and uncheck “*Require users to press Ctrl+Alt+Delete*”.
- 4 Click the **Advanced** button



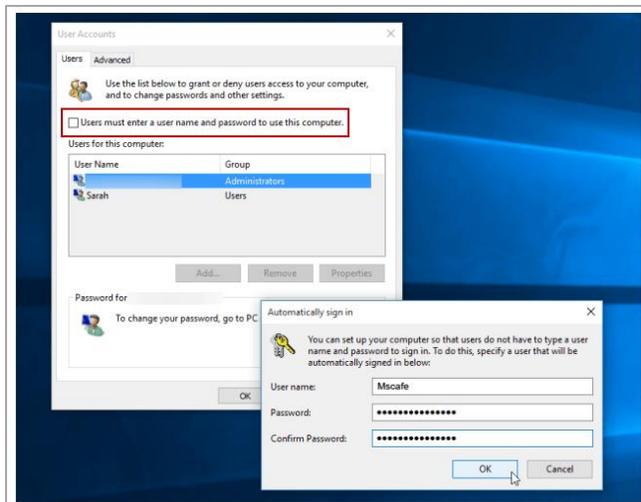
- 5 Double click **Users**, highlight **Administrator**, and click **Action > Set Password**
- 6 Highlight the **Users** folder again, and click **Action > New User**
- 7 Type a new administrator account **User name** for your company (or restaurant name)
- 8 Create strong **Passphrase** for it (**7 or more alpha-numeric characters with at least one upper- and one lower-case letter and one symbol**):
- 9 Close the **New User** window, click **Users** again, and double-click your newly created administrator account name from above. Enable *Password never expires*, and **Apply**.
- 10 Next click on the **Member Of** tab, and assign this account to the *Administrators* group.
- 11 **Apply** this, and close the Properties window for the new administrator account.
- 12 Double-click your newly created site user account name from above.
- 13 Again, enable *Password never expires*, and **Apply**.
- 14 For any and all other accounts listed including “Guest”, double-click the account name, check the *Account is disabled* box, and click **Apply**

Configure auto-logout to Windows – Administrator account

- 1 Right click on **Start Button** and select **Run**. Or use the keyboard shortcut Windows Key+R to bring up the Run dialog box.
- 2 Type **control userpasswords2** and select **OK**



- 3 The "**User Accounts**" box appears. Tick the checkbox, Users must enter a user name and password to use this computer. *This prompts to enter the username and password you wish to use to automatically when Windows starts. Use the same user name and password on all terminals.*



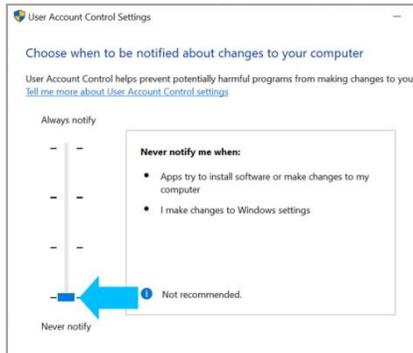
- 4 Highlight the newly created administrator account name for the site then **Uncheck** *Users must enter a user name and password to use this computer.*

Now, the terminal will automatically login using the selected Administrator account

Adjusting Windows Settings

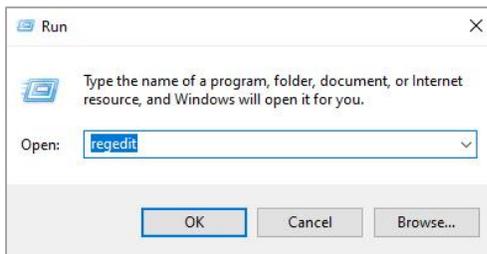
Security and Maintenance

- 1 Go to Control Panel > User Accounts > **Change User Account Control Settings**
- 2 Click **Change User Account Control settings**
Move the slider bar down to "**Never notify**", and click **OK**



Disable LUA setting in registry

- 1 Right click on **Start** Button and select **Run**. Or use the keyboard shortcut Windows Key+R to bring up the Run dialog box.
- 2 Type in regedit and click **OK**



- 3 Browse to following path

```
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System
```

- 4 Change **EnableLUA** from '1' to '0'

Windows Firewall

Important: The default Windows firewall must be turned off. **You will use the firewall from the router** or you can use a third-party company (such as Netsurion).

- 1 Go to Control Panel > **System and Security**
- 2 Click on Windows Defender Firewall on or off on the left side of the screen
- 3 Select the bubble next to **Turn off Windows Firewall**
- 4 Click **Change Security and Maintenance settings**
- 5 Uncheck the Windows alert messages that you do not want to be displayed so that they do not interfere with normal POS operations, click **OK**, and close the window.
- 6 Restart Windows to test the auto-logout to the new administrator account

Windows Updates

- 1 Install the latest **Service Pack** for the operating system
- 2 Install all **High-Priority/ Critical/ Important updates** from Windows Update
- 3 **Restart Windows** if and when prompted during this process

System Performance

- 1 Right-click **“This PC”** (on the desktop), and select **Properties**
- 2 Under **“Computer name, domain, and workgroup settings”**, click **Change settings**
- 3 To set the computer name, click the **Change** button.
- 4 Type the computer name and domain or workgroup name, and click **OK**.
Note: For consistency, name the computer similar to the register name that will be assigned later in MicroSale, such as POS1, BAR1, Backoffice, etc.
- 5 Click **OK** to confirm the message to restart the computer for the changes to take effect.
- 6 Click **OK** to go back to the System settings, and click **“Advanced system settings”**.
- 7 On the **Advanced** tab, and click the Performance **Settings** button.
- 8 On the **Visual Effects** tab, select **Adjust for best performance**, and **Apply**.
- 9 On the **Advanced** tab, set Processor scheduling for **“Background services”** and **Apply**.
- 10 Under Virtual memory, click the **Change** button.
- 11 Set the paging file to **Custom size**, set the **Initial** and **Maximum** sizes both to the same value, and click **Set**. Use a value that is higher than the **“Recommended”** (by Windows) value shown. Recommended values depend on the amount of available RAM and hard disk space, but common values are **6144, 8192, or 12288 MB**.

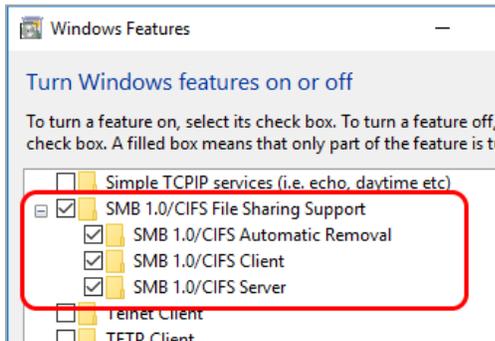
Tip: configure the page file size to be larger than the amount of RAM in use.

Enable Microsoft .NET Framework

- 1 Right-click **“This PC”** (on the desktop), and select **Properties**
- 2 Click **Control Panel Home** at the top left, and select **Programs and Features**
- 3 Click **Turn Windows features on or off** on the left side of the screen
- 4 Click the **“+”** in the box to expand **“.NET Framework 3.5**
- 5 Put a checkmark in the boxes directly under, and that will put a checkmark above
- 6 Click **OK**, wait for Windows to make the changes, and then click **Close**
- 7 Answer **Yes** if prompted to download updates from Windows update
- 8 Click the **“+”** in the box to expand **“.NET Framework 4.6**
- 9 Put a checkmark in the boxes directly under, and that will put a checkmark above
- 10 Click **OK**, wait for Windows to make the changes, and then click **Close**
- 11 Answer **Yes** if prompted to download updates from Windows update

Enable SMB 1.0/CIFS File Sharing Support

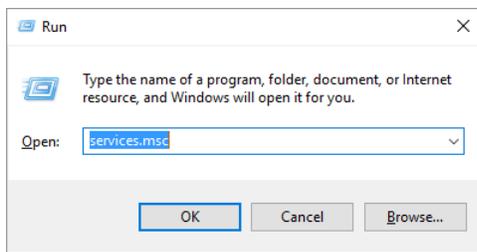
- 1 Right-click “**This PC**” (on the desktop), and select **Properties**
- 2 Click **Control Panel Home** at the top left, and select **Programs and Features**
- 3 Click **Turn Windows features on or off** on the left side of the screen
- 4 Click the “+” in the box to expand **SMB 1.0/CIFS File Sharing Support**. Put a checkmark in the boxes directly under (which will also put a checkmark above). Click **OK**, wait for Windows to make the changes, and then click **Close**.



- 5 Answer **Yes** if prompted to download updates from Windows update

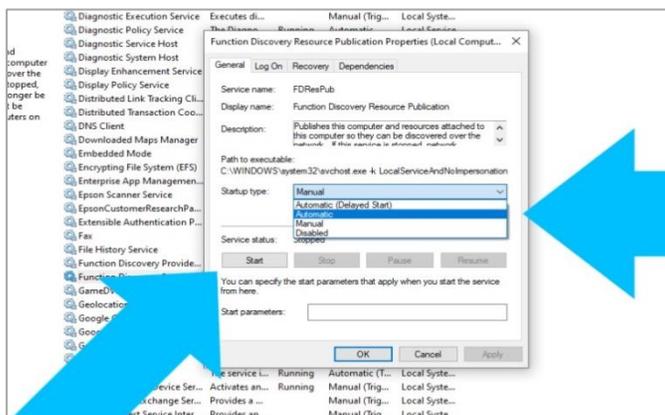
Enable Services in Windows for network browsing

- 1 Right click on **Start** Button and select **Run**. Or use the keyboard shortcut Windows Key+R to bring up the Run dialog box.
- 2 Type in **services.msc** and click **OK**



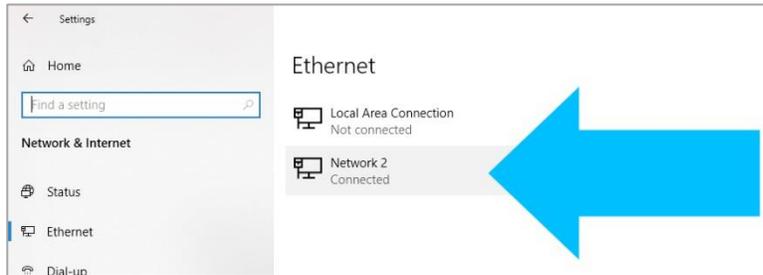
- 3 Set the following Services to **Automatic** and make sure to **Start** the service. Right click on each of the following service names and click on Properties. Where it stays Startup Type, change to **Automatic**, then **Start**, then **OK**.

- Function Discovery Provider Host
- Function Discovery Resource Publication
- SSDP Discovery
- UPnP Device Host

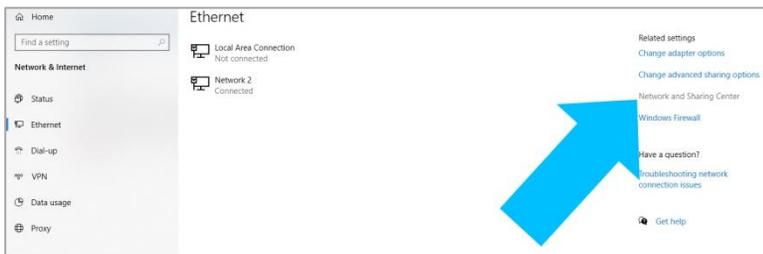


Network and Internet Settings

- 1 Go to Start > Settings > Network & Internet > **Ethernet**
- 2 Double click on **Interface** and change profile to **Private**



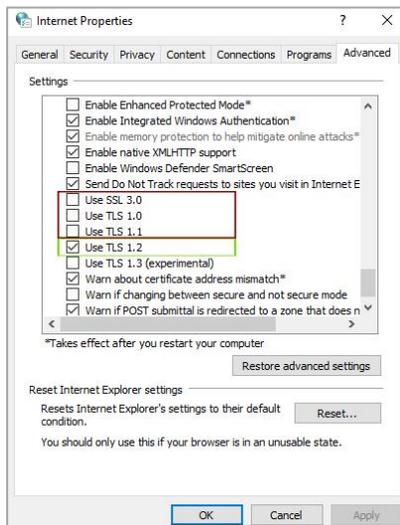
- 3 Click on **Network and Sharing Center**



- 4 Click on **Internet Options (bottom left of screen)**
- 5 On the General tab, set the homepage to <https://www.microsale.net>

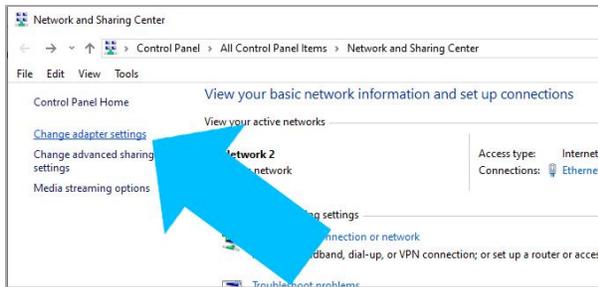


- 6 On the **Advanced** tab, under **Security**, uncheck SSL 2.0, SSL 3.0, TLS 1.0 and TLS 1.1. Check **Use TLS 1.2**



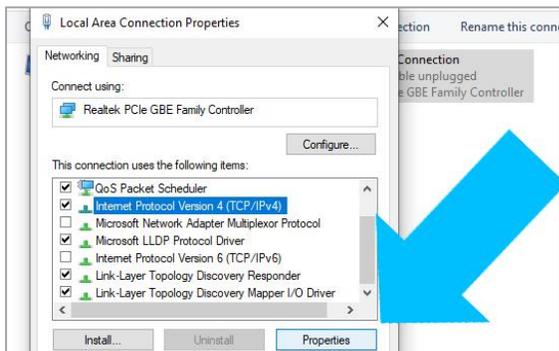
- 7 Select **OK**

8 Back under Network and Sharing Center, go to **Change Adapter Settings**



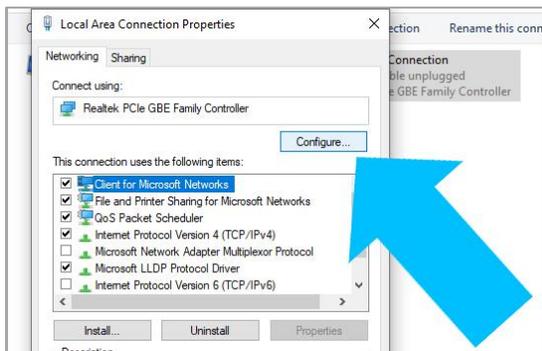
9 Click on **Local Area Connections** and then click **Properties**

10 Highlight *Internet Protocol Version 4 (TCP/IPv4)* and click **Properties**

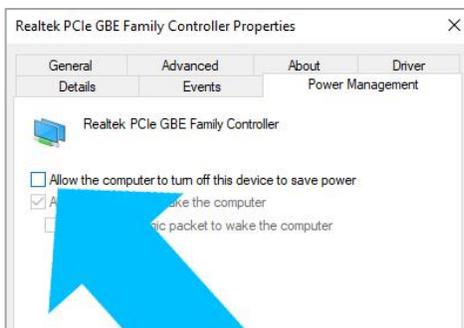


11 Set the IP address, Subnet mask, Default gateway and Preferred DNS Server. **You can wait until installing the system to set the static IP address.**

12 In the same area, click **Configure**



13 Click on the **Power Management** tab > uncheck the setting **"Allow the computer to turn off this device to save power"**. Click **OK**, Click **Close** and exit back to the desktop.

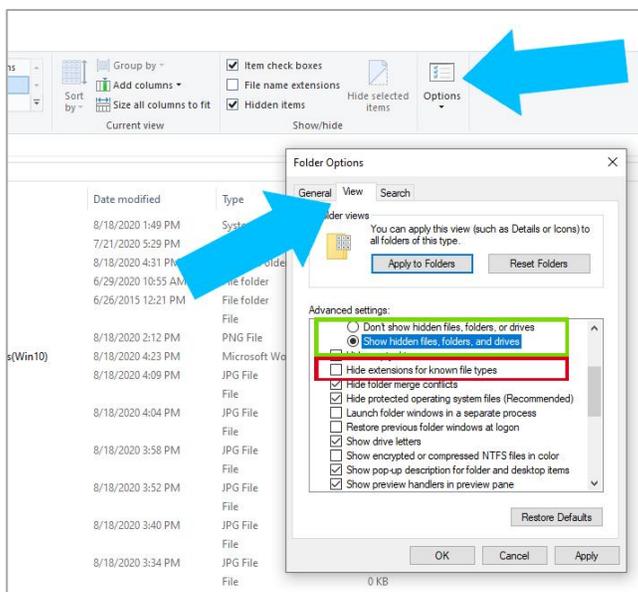


Display & Windows Settings

- 1 Click on Start > Settings > **Display**
Note: Do not move the slider bar under “Change the size of text, apps, and other items”.
 - a. Click **Advanced display settings**, select **1024 x 768** for the **Resolution**, and **Exit**
- 2 Click on Start > Settings > System > **Power & Sleep**
 - a. Select **Never** for both the “Screen” and “Sleep” settings
 - b. On the **Advanced** tab, uncheck *Prompt for password when resuming from standby*
- 3 Click on Start > Settings > **Time & Language**
 - a. Set the date, time, time zone, and enable daylight saving changes, if applicable.
 - b. Turn **Off** both “Set time automatically” and “Set time zone automatically” – MicroSale will automatically sync the time in Windows with the file server. **It is okay to configure only the file server to “Set time automatically”**
- 4 Click Start > Settings > **Update & security**
 - a. Click **Change active hours**. Set a window of time around the merchant’s normal business hours so that Windows will not try to update or restart the computer during that time, and click **Save**.
 - b. Click **Restart options**, verify it is set to **Off**, and click the back arrow.
 - c. Click **Advanced options**
 - d. Uncheck “Give me updates for other Microsoft products when I update Windows”
 - e. Enable/ Check “Defer feature updates” (will not affect security updates)
 - f. Uncheck “Use my sign in info to automatically finish setting up my device....”
 - g. Click **Choose how updates are delivered**, and verify that
 - h. “Updates from more than one place” is set to **Off**, and then **Exit**.

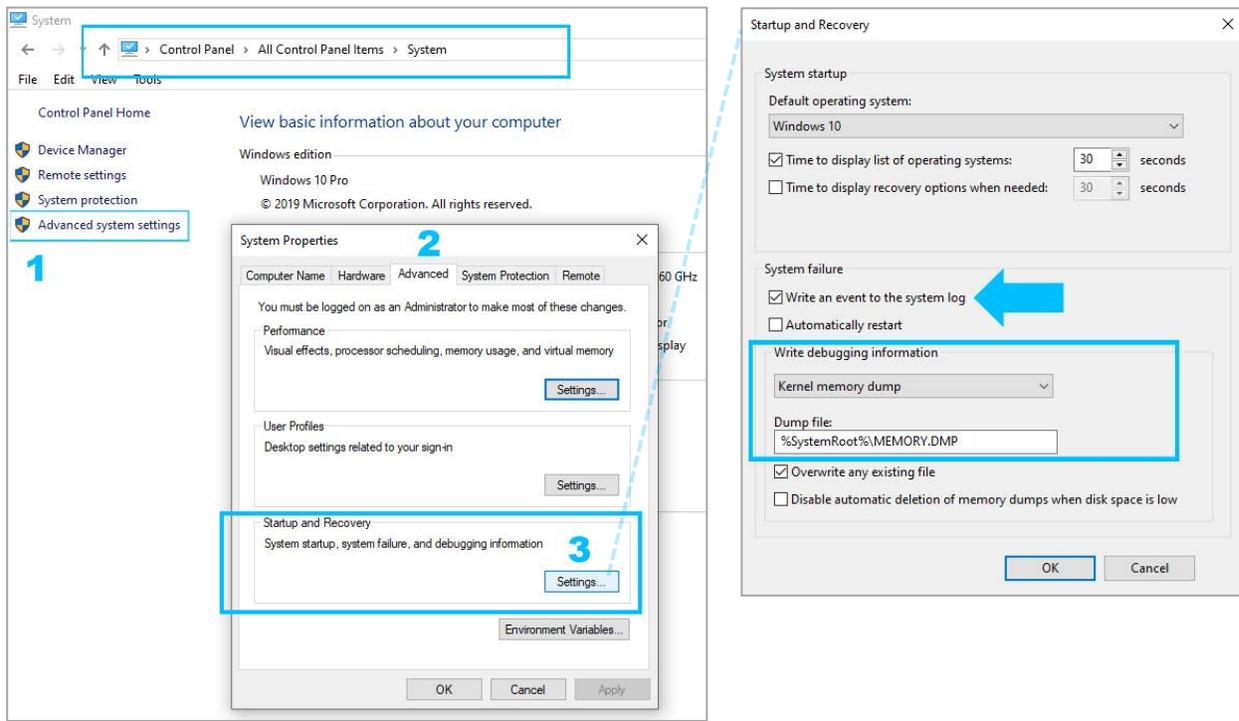
Folder Options

- 1 Select the **Start** button, then choose **File Explorer**
- 2 Select **View** and Click on **Options** to the far right
- 3 In the **Folder Options** window on the **View** tab:
 - a. Enable “**Show hidden files, folders, or drives**” and uncheck “**Hide extensions for known file types**”. **Leave “Hide protected operating system files (Recommended)” enabled**.
 - b. Uncheck “**Use Sharing Wizard**” if it is currently enabled.
 - c. Click **Apply**, then click the **Apply to Folders** button above, click **Yes**, and click **OK**.
 - d. Click **OK** twice to exit back to the System Properties window **Advanced** tab.



Windows Recovery

- 1 Go to Control Panel > **System**
- 2 Select **Advanced system settings (1)**, select the **Advanced (2)** tab, and select **Settings (3)** in the **Startup and Recovery** area



- 3 Under “**System failure**”:
 - Enable “**Write an event to the system log**”
 - Uncheck **Automatically restart**
 - For “**Write debugging information**”, select **Kernel memory dump**
 - Click **OK** twice to exit back to the **Control Panel**, but do not restart the computer yet
- 4 Right-click “**This PC**” (on the desktop), and select **Properties**.
- 5 Click “**System protection**” on the left, and click the **Create** button on the bottom of the “System Protection” tab.
- 6 Type a name or description such as the word, “**Installation**” with the date
- 7 Click the **Create** button, and wait while the Restore Point is created.
- 8 When you see the message, “The restore point was created successfully”, click **Close**. *It is a good idea to create another Restore Point at the end of the installation*

Install, configure, and test software for remote technical support (optional)

- 1 Install **TeamViewer** or implement the **TeamViewer QuickSupport** module
- 2 Test the **TeamViewer** connection with MicroSale Tech Support

Copy all necessary installation files onto the local hard drive for easy access

- 1 Create a folder called **M\$CD** on the root drive.
- 2 Copy all of the installation files into this **M\$CD** folder.

- 3 Copy any other required software and drivers into the appropriate sub-folders

Installing and configuring anti-virus software

You are welcome to use any anti-virus software, however, we recommend Avast or Malware Bytes. It is important to configure your anti-virus to only perform scans weekly, and only when it will not interfere with the performance of the software (i.e. when the system is in use).

Install printer drivers in Windows, and print a test page

- 1 Install local printer (Receipt)
- 2 Install network printers (Kitchen, Bar, etc.)
Use generic text/ only printer driver for Receipt and remote printers
- 3 Install office printer (if applicable), share it, and **set it as the default printer**



Important: If a physical office printer will not be used, install a [virtual printer](#) on the XPS port using a standard office printer driver for MicroSale to properly format reports and send reports via email.

Installing MicroSale

Complete these steps on each terminal.

- 1 Install MicroSale and share the **Micro\$ale** directory for full read/write access. *You can either download the MicroSale program from the FTP site or from the M\$CD folder with the MicroSale program installed in the previous instructions*
- 2 Run **setup.exe**
- 3 Click **Next**, and **Install**, and then wait for the installation wizard to complete. Click **Finish**. *You do not have to restart the computer unless prompted onscreen*
- 4 Browse to **C:\Program Files (x86)** and right-click the **Micro\$ale** directory
- 5 Select **Properties**, click on the **Sharing** tab, and click on **Advanced Sharing**
- 6 Enable **Share this folder**, click the **Permissions** button, and click **Add**.
- 7 Type **Administrators**, and click **OK**.
- 8 Highlight **Administrators** in the list, enable **Full Control**, and click **Apply**
- 9 Click **OK**, **Apply** and **OK** again, and **Close**



Important:

1. Right-click the **MicroSale** icon on the Windows desktop, and select **Properties**
2. Click on the **Compatibility** tab, and click the button **Change settings for all users**
3. Enable the **Compatibility mode** check box, and select **Windows XP (Service Pack 3)** for the drop-down box under "**Run this program in compatibility mode for**"
4. Click **Apply** and **OK**, and then **OK** again to exit

Complete steps 1-9 before proceeding.

Activating the software license and configuring MicroSale

1 Install the site license file

Note: You should have received this via email after ordering the software.

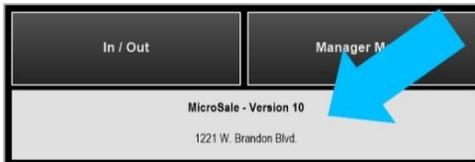
- a. Copy the license file ("*sitename&address Terminal.90x or .10x*") into the *MicroSale* directory: **C:\Program Files (x86)\MicroSale** for 64-bit operating systems

2 Install any preconfigured files

- a. Copy any files you have preconfigured (Menu databases, Discount, Register Options, .opt files, or company logo (image files for reports) into the *MicroSale* directory.
- b. If you do not have any preconfigure files, you can create the menu, register options, etc., after activating the license

3 Activate the terminal's license

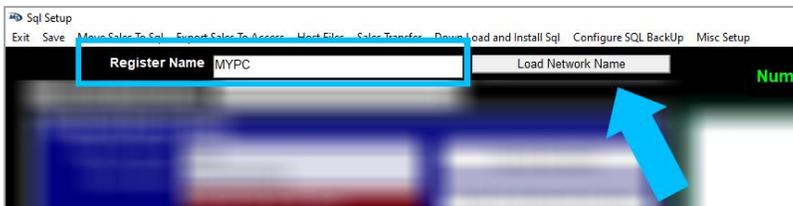
- a. Launch MicroSale, and **verify that the site name and address** appear onscreen



- b. From the ID Screen, enter 9137 > Managers Menu > Register Setup > **Activate License / Deactivate**
- c. Click **Activate POS Terminal License** for standard point-of-sale terminals click **Activate Back Office License** if this is the back office computer
- d. Click **Yes**, and click **OK** to the message, "**Activated Program Will End**", then relaunch MicroSale
- e. Verify that the terminal shows **Licensed** in the top right corner of the ID Screen

4 Configure the terminal name in MicroSale

- a. On the ID screen of MicroSale, Enter 9137 > Managers Menu > Register Setup > **Terminal Configuration**
- b. Click **Load Network Name** to load the Windows network name of the computer

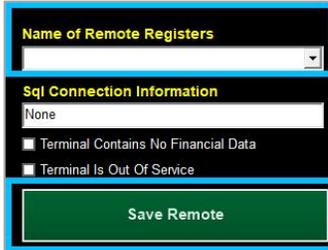


- c. Click **Save** (top left on toolbar), click **Exit**, and click **Exit to Windows**
- d. Restart **MicroSale** and verify that the correct terminal name is displayed in the upper right-hand corner of the **ID Screen** (to the left of the license status)

5 Configure Remote Terminal Names and Number of Users

Remote Terminal Names

- a. On the ID screen > enter 9137 > Manager Menu > Register Setup > **Terminal Configuration**
- b. You can either type the remote terminal names or you can use the **Load Remote Stations** button to find it through Windows



- c. Select **Save Remote** between each Remote Register name Entry
Note: MicroSale will test for read/write access of the shared *Micro\$ale* folder. If the test fails, repeat the steps for the "Sharing MicroSale" section of this document
- d. Add all terminal names into the remote register list (except for the terminal you are currently on)

Number of Users

Note: The Number of Users tells the system how many remote terminals are on the network and will constantly ping the terminals to look for menu changes. Each remote terminal only needs to worry about itself. Setting the Number of Users to 1 still allows other registers to pick up check details, tabs, etc. If any menu changes are needed, you must complete the changes from the file server.

Setting the number to the same as the number of users on the license will slow down the system if a terminal/table is offline, as the software is attempting to pull data from the offline machine.

Number of Users on Remote Registers

If you are currently staging a remote register (not the file server) select **1** for "Number of Users" from the dropdown.



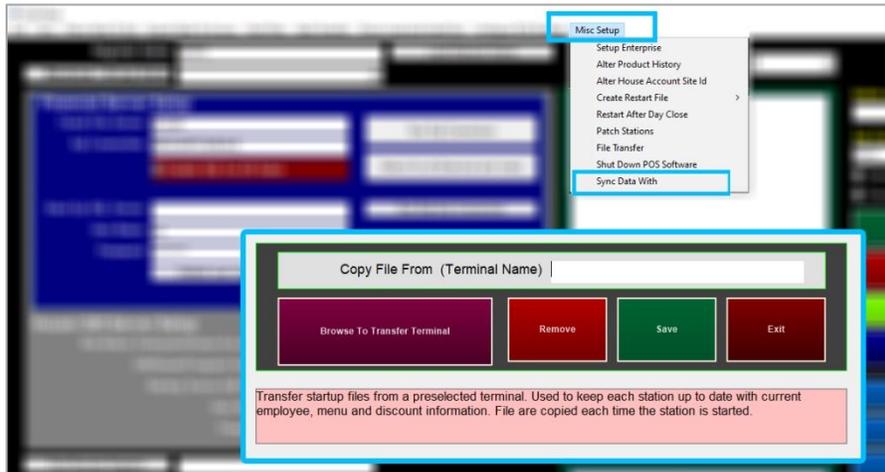
Number of Users on the File Server

If you are staging the file server or main POS station, set the **Number of Users to the same as the number of users on the license (the dropdown menu stops at the highest number of users)**. This will allow menu changes to deploy to all terminals. If the restaurant has tablets, exclude the tablet users. *Tablets are extremely volatile on the network and can affect the speed of the software; tablets may be turned off during slow times, have dead batteries, etc.*

Example: If a restaurant has a back office, 2 POS stations and 3 tablets, set the Number of Users to 3 (1 back office + 2 POS stations). *You will be able to sync menu data to the file server from the tablets (covered in "Number of Users on Tablets".*

Number of Users on Tablets

Each tablet only needs to worry about itself. Setting the Number of Users to 1 still allows other registers to pick up check details, tabs, etc. To sync the tablet with the most updated menu changes, go to Misc Setup > **Sync Data With** > Browse to terminal transfer > and choose the file server.



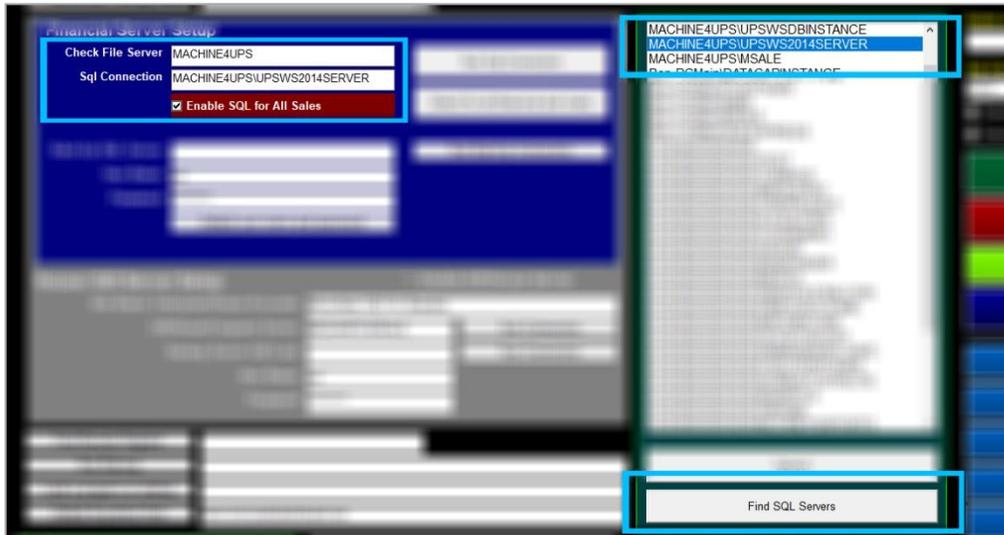
6 Download and Install SQL

Note: The MicroSale SQL Tools button installs SQL Server for you.

- a. Click Manager Menus > Register Setup > **Terminal Configuration**
- b. Press the **Download SQL Tools** button
- c. Follow the Prompts to Download, extract and install. Once SQL is installed you will be able to configure the Financial Server Setup

7 Financial Server Setup and House/ Gift Server Setup

- a. Click the **Find SQL Servers** button. This will display all terminals on the local network that have SQL Server or SQL Server Express currently running
- b. Highlight the **Terminal name\Instance Name** in the list that corresponds to the instance of SQL Server running on the MicroSale file server, and then click in the **Financial Server** box. Decide if you want to use the IP or Terminal Name, the **Main Server** box and **Gift/ House/ Frequent Server** box. Decide if you want to use the IP or Terminal Name. MicroSale will auto-populate the boxes with the IP or terminal name.



- c. Press the **Default User Name and Password**, to auto populate the information from the download you used and installed earlier (or if you used the batch file from the ftp site download). *The check marks to enable SQL will also be marked at this time.*
- d. Click the **Test Financial Connection** button
- e. Click the **Test Main Connection** button
- f. Click the **Test Connection** button next to the **Gift/ House/ Frequent Server** box
*** All of the tests should return the message, "**Good Connection To Server**". ***
- g. Press Save and you will be prompted to **Attach/Update SQL Database?**
- h. **If this is the file server terminal, Select Yes.**
- i. **For all remote terminals that are setup, Select No.** *However, will not hurt the system if you accidentally say Yes*

8 Configure Register Options by Terminal

- Go to Managers Menu > Register Setup > Terminal Configuration > **Register Options**
- Go to Quick Service, Full Server or Cashier Station
- You must first select the pre-configured button first (such as **Set as Cashier Station**, etc.) and select **Save**

☐ Show first car on the right (uncheck show first card on left)
☐ Drive thru allow all users
☐ Turn off pay at window for drive thru orders (from order screen)
☐ Set this station as Cash Taker
☐ Set this station as Order Taker

Use Grand Total
OFF

Configuration board

Print grill tickets
None

DEFAULT REGISTER OPTIONS

Set as Cashier Station Set as Drive Thru Order Taker / Cash Taker Set as Drive Thru Cash Taker Set as Drive Thru Order Taker Only Set as Back Office Station

- After setting the pre-configuration, set any remaining options that are needed. Save when finished.



Important: You **MUST** set the following options:

- Set the Terminal Register Number on the **General** tab. The REG# needs to be different for each terminal at the site. Go to the General tab and select a number from the “Register Number” dropdown list
- Set the *Business End* on the **General** tab
- Set the *System First day of Week* on **Time Clock/Misc.** tab.
- Save** when completed

For more information on Register Options:

<https://microsale.zendesk.com/hc/en-us/articles/115001344268-Understanding-Register-Options>

9 Configure printers, printer ESC codes, and peripheral devices

Go to Managers Menu > Register Setup > Terminal Configuration > **Printers Setup**

Assigning the Receipt Printer in MicroSale

- Select the **Receipt** printer port from the **Available Printers** drop-down menu at the top of the screen. The Windows name of that printer will appear in the **Device Name** box. Click **Save** in the top right corner of the **Printer Setup** screen

Assigning the Remote Prep Printers in MicroSale, if applicable (Kitchen, Bar, Salad, Expo, Pizza, etc.)

- Type the name of the first remote printer in the **Printer Name** box in the **Remote Printer Setup** section. **Note:** We recommend naming the printers the same in MicroSale and Windows for consistency and ease of setup
- Select the corresponding port or virtual port setting from the **Available Printers** drop-down menu, and the Windows name of the printer will appear in the **Device Name** box. Click the **Save** button in the **Remote Printer Setup** section
- Repeat this step** for each remote printer in use, saving one before adding the next

Configure printer ESC codes

- Click the **Printer ESC Codes** button near the bottom of the screen.
- Select **“Receipt”** from the **Printers** drop-down menu under the section for **Printer Driver Setup** on the left side of the screen. Type the corresponding codes for the model of printer in use, or select a configuration filename from the drop-down menu next to the box for **“Types (Click Here To Load)”** to load the ESC codes from a pre-configured file. Then click **Save to Printer** at the bottom of the screen.
- Repeat this step** for each remote printer

Configure cash drawer(s), if in use at this terminal

- a. In the **Cash Drawer Setup** section (on the Printer Setup screen), in the box next to **Cash Drawer # 1**, select the receipt printer and click **Save Drawer**.

For more information on setting up peripherals:

<https://microsale.zendesk.com/hc/en-us/articles/360006325393-Printer-Setup-Guide>

10 Configure credit card and gift card settings

Depending on the credit card processor, you may configure MicroSale to work with PAX devices or through NETePay to link to various processors and devices.

- a. Go to Manager Menu > Register Setup > Terminal Configuration > **Credit Card Setup**
- b. Refer to appropriate credit card setup document
- c. Refer to appropriate gift card setup document. Gift Cards can be set up using in-house gift cards or through various third-party companies using Datacap's GIFTePay software.

For more information on setting up Credit Cards / EMV Devices:

<https://microsale.zendesk.com/hc/en-us/categories/360000844654-Credit-Cards-and-Processing>

11 Add Customized Tenders to the System (Payment Types)

- a. Go to Managers Menu > Register Setup > Terminal Configuration > Tenders-Job Codes-Paid Outs > Click **Tender Setup**
- b. Type a **Tender Name**
- c. Enable the appropriate check boxes for this tender, and click **Save**
- d. **Repeat this step** for each Tender name you want to add or change

For more information on setting up tender types:

<https://microsale.zendesk.com/hc/en-us/articles/115001176767-Understanding-Payment-Options-Customized-Tenders>

12 Configure Sales Tax(es)

Note: To configure basic sales tax, follow steps a and b. If the site needs more advanced taxes set up, please follow the link at the bottom of this section.

- a. Go to Managers Menu > Register Setup > **Sales Tax Menu**

Sales Tax	Start	End	Tax
Sales Tax			6.0
Sales Tax			0.000

- b. Enter the tax percentage amount in the form of a decimal in the first *Sales Tax* field
- c. Select **Save** when completed
- d. You can customize the name of each sales tax, if desired. You can also configure special tax tables to allow tax exemptions for certain order types or sales amounts

For more information on setting up taxes (special tax, liquor tax, smart tax, etc):

<https://microsale.zendesk.com/hc/en-us/sections/360002070773-Setting-up-taxes>

Staging Checklist

This checklist will help ensure your installation and go-live goes as smoothly as possible. The system needs to be fully configured before the go-live. Unless you are installing MicroSale on existing hardware in the restaurant, equipment should **NEVER** be staged and configured on site.

Windows Checklist (complete all steps before moving on)

- Each terminal has the same Microsoft administrator user account and each terminal ONLY has this one user account.
- Each terminal is configured to auto-logon to Windows Administrator account
- Each terminal has the user account controls turned off
- Each terminal has the Windows firewall turned off and the alert messages are disabled
- Each terminal has the latest service pack for the operating system
- Each terminal has all High-Priority / Critical / Important Windows updates installed
- Each terminal is properly named through Windows
- Each terminal's Performance Setting is set for "Adjust for Best Performance" and the processing scheduling is set for Background Services
- Each terminal's virtual memory's paging file's initial and maximum sizes are set to the same value and set to a number higher than the recommended.
- Each terminal has Microsoft .NET Framework 4.5 or higher installed
- Each terminal has SMB 1.0/CIFS File Sharing Support enabled
- Each terminal has 'Enable Services' in Windows for network browsing
- Each terminal has the Ethernet profile changed to Private
- Each terminal is set to "use TLS 1.2" only
- Each terminal is set to a static IP address
- Each terminal's Power Management tab has the following option unchecked: "Allow the computer to turn off this device to save power"
- Each terminal's resolution is set to 1024x768
- Each terminal's Power & sleep tab for Screen and Sleep is set to Never
- Each terminal will not prompt for password when resuming from standby (under system settings)
- Each terminal's Time & Language is set properly and has "Daylight saving changes" enabled, if applicable. Under Time & Language, set time and zone automatically is turned Off
- Each terminal's update and security settings have the active hours set to a time window around the merchant's normal business hours (disables Windows from doing updates or restarting the terminal during that time)
 - Under Update & Security, you the restart option is set to Off
 - "Give me updates for other Microsoft products when I update Windows" is Unchecked
 - "Use my sign in info to automatically finish setting up my device..." is Unchecked
 - "Updates from more than one place" is set to Off
- Each terminal's Folder Option's is enabled for "Show Hidden files, folders or drives" and unchecked for "Hide extensions for known file types."
 - Hide protected operating system files is enabled.
 - Under Folder Options, Use Sharing Wizard is Unchecked
- Under Startup and Recovery > System Failure, Write an event to system log is Enabled and Automatically Restart is unchecked
- Each terminal has a "Windows Restore Point as a backup"
- Each terminal has Team Viewer 11 installed
- Each terminal has all proper printer drives installed (with a test page printed)
 - On the back office terminal, the office printer is installed (if applicable). The printer is set as the default in Windows.
 - If the office terminal does not have a printer, the virtual printer on the XPS port is installed

MicroSale Program Checklist

- Each terminal has the same version of MicroSale installed
- Each terminal's *MicroSale* folder is shared to all terminals with full read/write access
- Each terminal has a valid and activated MicroSale license
- Each terminal has a terminal name in MicroSale
- All of the remote terminals are configured
- Each terminal has SQL installed
- Each terminal's MicroSale's register options are properly configured (quick bar, wait station, quick service, etc.)
- Each terminal has the printers, escape codes and peripheral devices installed
- The file service or main terminal has tax rates properly set and is dispersing to all terminals
- Each terminal is properly configured for EMV
- You have verified with the processor that the account is properly configured for restaurants and have verified that the account is set to accept tips (if applicable) as well as adjust tips
- A test transaction has been successfully ran through MicroSale
- A tip has been successfully ran through MicroSale
- The daily closeout is set to automatically run (unless requested otherwise by merchant)
- End of day reports are set to email automatically and are successfully sending

Pre- Go Live Checklist

- The merchant has thoroughly reviewed the menu and all requested changes have been made. Merchant has given you a verbal or written approval of the menu
- All discounts are properly setup
- All employees are properly setup in MicroSale with a Job Title, Access Level and Access Number
- Training for staff and management has been completed and the training checklist has been signed by a manager.
 - Staff can login, logout and declare tips
 - Understands sales audits; starting and closing; entering deposits
 - Understands order entry
 - Understands phone orders and the difference between Go and Express Orders
 - Understands how to modify menu items
 - Understands check functionality; splitting, merging and transferring checks
 - Understands how to take payments; including split payments using multiple payment medias
 - Manager can add/edit employees
 - Manager can adjust tips and edit employee times
 - Manager can perform discounts and voids
 - Manager understands important reports (and reprint important reports)
 - Manager can run the closeout and properly deposit cash
 - Manager understands how to do refunds and when to do a void vs refund
 - Manager can make minor menu changes (change name, change price, change printer assignments)
 - Manager can make adjustments to discounts

I have thoroughly gone through the proper procedures to setup and stage each terminal for my merchant's restaurant. All of the points listed above have been completed. I understand that failure to properly complete the checklist can be detrimental to the success of the installation and go-live.

Signature _____ **Date** _____
Dealer / Representative of MicroSale