

PC Setup Instructions for MicroSale with Windows 10

1. Create Windows user accounts and set auto-logon to Windows

1.1 Create and configure Windows user accounts

Click **Start** → **Run** → and type: **control userpasswords2** <enter>

Click on the **Advanced** tab, and uncheck “*Require users to press Ctrl+Alt+Delete*”.

Click the **Advanced** button, click **Users**, highlight **Administrator**, and click **Action** → **Set Password**.

Type a strong passphrase for the default **Administrator** account:

Highlight the **Users** folder again, and click **Action** → **New User**

Type a new administrator account **User name** for your company:

And create strong **Passphrase** for it (*7 or more alpha-numeric characters with at least one upper- and one lower-case letter and one symbol*):

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**. Next click on the **Member Of** tab, and assign this account to the *Administrators* group.

Apply this, and close the Properties window for the new administrator account.

Double-click your newly created site user account name from above.

Again, enable *Password never expires*, and **Apply**.

For any and all other accounts listed including “Guest”, double-click the account name, check the *Account is disabled* box, and click **Apply**.

1.2 Configure auto-logon to Windows – Administrator account

Click **Start** → **Run** → and type: **control userpasswords2** <enter>

Enable *Users must enter a user name and password to use this computer*.

Highlight the newly created administrator account name for the site.

Uncheck *Users must enter a user name and password to use this computer*.

Click **Apply**, type the passphrase for that account, and confirm the passphrase.

1.3 Security and Maintenance

Control Panel → **User Accounts** → **Change User Account Control Settings**

Click **Change User Account Control settings**

Move the slider bar down to “**Never notify**”, and click **OK**.

Disable LUA setting in registry

Windows Key + R → **Type in Regedit**, browse to following path

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies

System

Change **EnableLUA** from ‘1’ to ‘0’

1.4 Windows Firewall

Turn **Off** the Windows firewall.

1.5 Click **Change Security and Maintenance settings**

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.

Computer Name:

Workgroup/ Domain:

1.6 Restart Windows to test the auto-logon to the new administrator account.

2. Windows Updates

2.1 Install the latest **Service Pack** for the operating system.

- 2.2 Install all **High-Priority/ Critical/ Important updates** from Windows Update.
- 2.3 **Restart Windows** if and when prompted during this process.

3. System Settings

3.1 Right-click **"This PC"** (on the desktop), and select **Properties**.

Under "Computer name, domain, and workgroup settings", click **Change settings**.

To set the computer name, click the **Change** button.

Type the computer name and domain or workgroup name, and click **OK**.

Click **OK** to confirm the message to restart the computer for the changes to take effect.

Click **OK** to go back to the System settings, and click **"Advanced system settings"**.

On the **Advanced** tab, and click the **Performance Settings** button.

On the **Visual Effects** tab, select **Adjust for best performance**, and **Apply**.

On the **Advanced** tab, set **Processor scheduling** for **"Background services"** and **Apply**.

Under **Virtual memory**, click the **Change** button.

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.*

3.2 Enable Microsoft .NET Framework

Right-click **"This PC"** (on the desktop), and select **Properties**.

Click **Control Panel Home** at the top left, and select **Programs and Features**.

Click **Turn Windows features on or off** on the left side of the screen.

Click the "+" in the box to expand **".NET Framework 3.5**

Put a checkmark in the boxes directly under, and that will put a checkmark above.

Click **OK**, wait for Windows to make the changes, and then click **Close**.

Answer **Yes** if prompted to download updates from Windows update.

Click the "+" in the box to expand **".NET Framework 4.6**

Put a checkmark in the boxes directly under, and that will put a checkmark above.

Click **OK**, wait for Windows to make the changes, and then click **Close**.

Answer **Yes** if prompted to download updates from Windows update.

3.3 Enable SMB 1.0/CIFS File Sharing Support

Right-click **"This PC"** (on the desktop), and select **Properties**.

Click **Control Panel Home** at the top left, and select **Programs and Features**.

Click **Turn Windows features on or off** on the left side of the screen.

Click the "+" in the box to expand **"SMB 1.0/CIFS File Sharing Support**

Put a checkmark in the boxes directly under, and that will put a checkmark above.

Click **OK**, wait for Windows to make the changes, and then click **Close**.

Answer **Yes** if prompted to download updates from Windows update.

3.4 Enable Services in Windows for network browsing

Press Windows Key + R

Type in services.msc in Open area

Press OK.

Set the following Services to automatic and make sure to start the Service.

Function Discovery Provider Host

Function Discovery Resource Publication

SSDP Discovery

UPnP Device Host

Right Click on Service and go to Properties

Where it says Startup Type: Change to automatic

Press OK.

Highlight Service and Press Start the Service.

Restart Windows

3.5 Start → Settings → Network & Internet → Ethernet

Double click on Interface, change profile to Private

3.6 Start → Settings → Network & Internet → Ethernet → Network and Sharing Center

Click the **Internet Options** link at the bottom left of the screen.

On the **General** tab, set the home page to <http://www.microsale.net>

On the **Advanced** tab, under the **Security** section, uncheck the following:

Uncheck the following: Use SSL 2.0, Use SSL 3.0, Use TLS 1.0, Use TLS 1.1

Check/ Enable only “Use TLS 1.2”, click **Apply** and **OK**.

3.7 Start → Settings → Network & Internet → Ethernet → Network and Sharing Center

Click **Local Area Connection**, and click **Properties**.

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

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

IP Address

3.8 Network Interface Card (NIC) power management setting

Click **Start → Settings → Network & Internet**

Click **Change adapter options** under **Change your network settings**

Double-click **Local Area Connection**, click **Properties**, and click **Configure**.

Click on the **Power Management** tab, and uncheck

Uncheck the setting “**Allow the computer to turn off this device to save power**”.

Click **OK**, click **Close**, and exit back to the desktop.

3.9 Click Start → Settings → System → Display

Do not move the slider bar under “Change the size of text, apps, and other items”.

Click **Advanced display settings**, select **1024 x 768** for the **Resolution**, and **Exit**.

3.10 Click Start → Settings → System → Power & sleep

Select **Never** for both the “Screen” and “Sleep” settings.

On the **Advanced** tab, uncheck *Prompt for password when resuming from standby*.

3.11 Click Start → Settings → Time & language

Set the date, time, time zone, and enable daylight saving changes, if applicable.

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”

3.12 Click Start → Settings → Update & security

3.12.1 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**.

3.12.2 Click **Restart options**, verify it is set to **Off**, and click the back arrow.

3.12.3 Click **Advanced options**

Uncheck “Give me updates for other Microsoft products when I update Windows”

Enable/ Check “Defer feature updates” (will not affect security updates)

Uncheck “Use my sign in info to automatically finish setting up my device....”

Click **Choose how updates are delivered**, and verify that

“Updates from more than one place” is set to **Off**, and then **Exit**.

3.13 Folder Options

Start Windows Explorer, and browse to any folder/ directory on the C drive. Click **View** on the menu bar, and click **Options** to the far right. In the **Folder Options** window on the **View** tab, enable “**Show hidden files, folders, or drives**” and uncheck “**Hide extensions for known file types**”.

Leave “Hide protected operating system files (Recommended)” enabled.

Uncheck “Use Sharing Wizard” if it is currently enabled.

Click **Apply**, then click the **Apply to Folders** button above, click **Yes**, and click **OK**.
Click **OK** twice to exit back to the System Properties window **Advanced** tab.
Click the **Startup and Recovery Settings** button.

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.

3.14 Restart Windows to apply these changes.

3.15 Create a Windows Restore Point as a backup

Right-click “**This PC**” (on the desktop), and select **Properties**.

Click “**System protection**” on the left, and click the **Create** button on the bottom of the “System Protection” tab.

Type a name or description such as the word, “**Installation**” with the date

Click the **Create** button, and wait while the Restore Point is created.

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

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

4.1 Install TeamViewer or implement the **TeamViewer QuickSupport** module

4.2 Test the TeamViewer connection with MicroSale Tech Support.

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

5.1 Create a folder called M\$TD on the root drive.

5.2 Copy all of the installation files into this **M\$TD** folder.

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

6. Install printer drivers in Windows, and print a test page to each

6.1 Install local printer (Receipt).

6.2 Install network printers (Kitchen, Bar, etc.).

We recommend using the generic text/ only printer driver for Receipt and remote printers

6.3 Install office printer (if applicable), share it, and **set it as the default printer**.

6.4 If they do not have a report printer, install a virtual printer on the XPS port using a standard office printer driver for MicroSale to use to format reports pages to be viewed on screen or sent via email.

7. Install MicroSale and share the *Micro\$ale* directory for full read/write access

Browse to **C:\M\$TD\Install Files\Micro\$ale Version 9.0.x**

7.1 Run *setup.exe*

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.

7.2 Browse to **C:\Program Files (x86)** and right-click the **Micro\$ale** directory.

Select **Properties**, click on the **Sharing** tab, and click on **Advanced Sharing**

Enable **Share this folder**, click the **Permissions** button, and click **Add**.

Type **Administrators**, and click **OK**.

Highlight **Administrators** in the list, enable **Full Control**, and click **Apply**.

Click **OK**, then click **Apply** and **OK** again, and then click **Close**.

7.3 MicroSale desktop shortcut properties

Right-click the **Micro\$ale** shortcut on the Windows desktop, and select properties.

Click on the **Compatibility** tab, and click the button **Change settings for all users**.

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:**”

Click **Apply** and **OK**, and then **OK** again to exit.

Complete steps 1 through 7 on all terminals before proceeding

8. Activate the License and configure MicroSale

8.1 Install site license file

Copy the license file ("*sitename&address Terminal.90x*") into the **MicroSale** directory:

C:\Program Files (x86)\MicroSale for 64-bit operating systems

8.2 Install preconfigured files

Copy any files you have preconfigured (Menu databases, Discount, Register Options *.opt* files, or company logo image files for reports) into the **MicroSale** directory.

8.3 Activate the terminal's License

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

Touch **9 1 3 7**, and then click **OK**

Click **Manager Menu → Register Setup → Activate License / Deactivate**

Click "**Activate POS Terminal License**" for standard point-of-sale terminals

click "**Activate Back Office License**" if this is the back office computer.

Click **Yes**, and click **OK** to the message, "**Activated Program Will End**", and then re-launch MicroSale.

Verify that the terminal shows **Licensed** in the top right corner of the **ID Screen**.

8.4 Configure the terminal name in MicroSale

Touch **9 1 3 7**, and then click **OK**.

Click **Manager Menu → Register Setup → Terminal Configuration**

Click **Load Network Name** to load the Windows network name of the computer.

Click **Save**, click **Exit**, and click **Exit to Windows** again.

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.

8.5 Configure Remote Terminals

Touch **9 1 3 7** and then click **OK**.

Click **Manager Menu → Register Setup → Terminal Configuration**

8.5.1 Click **Load Remote Stations**, select the first remote terminal name, and click **OK**. MicroSale will test for read/ write access to the shared directory across the network. If successful, the name will appear in the "**Name of Remote Registers**" box, then click **Save Remote**.

Repeat this step to add all of the remaining remote terminal names.

After all of the remote terminal names have been saved, select the total **Number of Users** from the drop-down menu at the top of the screen, and click **Save**. This total should include all terminals in the system including the one you are configuring.

8.5.2 Download and Install SQL

Click **Manager Menu → Register Setup → Terminal Configuration**

Press the **Download SQL Tools** button

Follow the Prompts to Download, extract and install. Once SQL is installed you will be able to configure the Setup.

8.5.3 Financial Server Setup and House/ Gift Server Setup

Click the **Find SQL Servers** button toward the bottom of the screen. This will display all of the terminals on the local network that have SQL Server or SQL Server Express currently running.

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, decide if you want to use the IP or Terminal Name 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. Press the **Default User Name and Password**, and MicroSale will enter the correct 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.

Click the **Test Financial Connection** button.

Click the **Test Main Connection** button.

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”. *****

Press Save and you will be prompted to **Attach/Update SQL Database?** You will press **Yes**, if this is the file server terminal, for all remotes you configure after you will press **No**. It will not hurt the system if you do happen to press **Yes** though.

8.6 Configure Register Options by Terminal

Managers Menu → Register Setup → Terminal Configuration → Register Options

Tabs for options are located at bottom, make sure to browse to your Quick Service, Full Service, or Cashier Station tab first and use the pre-configured buttons first.

Then, configure the remaining options if you need to. Make sure to set the *Terminal Register Number* on the **General** tab, *Business End* on the **General** tab, and *System First day of Week* on **Time Clock/Misc.** tab. Save when finished configuring.

8.7 Configure printers, printer ESC codes, and peripheral devices

Managers Menu → Register Setup → Terminal Configuration → Printers Setup.

8.7.1 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.

8.7.2 Configure remote prep printers, if any (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. 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.

8.7.3 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.

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

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

8.8 Configure credit card and gift card settings

Manager Menu → Register Setup → Terminal Configuration → Credit Card Setup

Refer to appropriate credit card setup document.

Refer to appropriate gift card setup document

8.9 Add Tenders to the System

Manager Menu → Register Setup → Terminal Configuration → Tenders-JobCodes-Paid Outs → Click the **Tender Setup** button on the menu bar at the top of the screen.

Type a **Tender Name**,

Enable the appropriate check boxes for this tender, and click **Save**.

Repeat this step for each Tender name you want to add or change.

8.10 Configure Sales Tax(es)

Manager Menu → Register Setup → Sales Tax Menu

Enter the sales tax percentage, and click **Save**. 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.