

## KEY-POS Enhancement Release Notes Version 8.6

The following are descriptions of enhancements extracted from the on-line KEY-POS release notes as of June 5, 2014, changes since version 8.5. They are arranged in descending order and organized by module and version number.

### Latest System Control Maintenance Screen 9

Register # 22    ~~~ System Control Maintenance Screen 9 ~~~    Date: 06/05/14

Prompt before printing invoice at point-of-sale?

Require vendor matching on item reads in P.O. Entry?

**<C>hange or <S>ave:**

0

F1 - END    F2 - C    F3 - S

### Latest System Control Maintenance Screen 8

Register # 22    ~~~ System Control Maintenance Screen 8 ~~~    Date: 06/05/14

Present the return original sale lookup dialog box at Point-of-Sale?

Present the return to on-hand or in-defective dialog box at P.O.S.?

  Show the serial number flag column in point-of-sale screens?

    Show cost and GP% columns in Bid Entry/Update?

      Number of A/R invoices to print:

  Use <A>verage or <R>eplacement cost in Bid screens:

  Amount of sales required for one point in Points Reward program:

  combine items at <S>KU, <T>otal, or <D>on't in Hold Ticket screens?

  combine items at <S>KU, <T>otal, or <D>on't in Bid screens?

  combine items at <S>KU, <T>otal, or <D>on't in the Refund screen?

  Show the "You saved a total of \$" message on printed receipts?

Sort auth. signature list by <F>irst, <L>ast name, or <D>o not sort:

  Print bar-coded receipt# on Print Wizard printed receipts?

  <M>enu, <C>lerk, or <N>ext transaction after non-sale transaction:

    Notify user of open hold tickets in Hold Ticket Entry?

      Show the "You saved \$" message on receipt line items?

      Show the "You saved \$" message on A/R invoice line items?

      Show the "You saved a total of \$" message on A/R invoices?

      Default tender code for house (A/R) charges:

**<C>hange or <S>ave:**

0

F1 - END    F2 - C    F3 - S



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## All Modules

### Version 8.5.9.8 (05/14/14)

### Version 8.5.9.7 (04/14/14)

### Version 8.5.9.6 (03/26/14)

Changed all PIBS terminal width settings from 79 character to 132 preparing for support for wide screen display.

Changes to *Accuterm* GUI display for lookup (selection) windows, removing the frame color and implementing "sculpted" lines. Also increased the size of field borders to provide a more three-dimensional appearance.

Changed to a lighter background screen color for *Accuterm* GUI display to enhance contrast for increased readability.

**Version 8.5.9.5 (03/11/14)**

**Version 8.5.9.4 (02/12/14)**

**Version 8.5.9.3 (01/22/14)**

**Version 8.5.9.2 (12/20/13)**

**Version 8.5.9.1 (12/18/13)**

**Version 8.5.9 (12/03/13)**

**Version 8.5.8.7 (11/01/13)**

**Version 8.5.8.6 (10/17/13)**

**Version 8.5.8.4 (09/08/13)**

**Version 8.5.8.3 (09/03/13)**

**Version 8.5.8.1 (08/13/13)**

**Version 8.5.8 (07/29/13)**

**Version 8.5.7 (07/16/13)**

**Version 8.5.6.8 (07/02/13)**

**Version 8.5.6.7 (05/14/13)**

**Version 8.5.6.6 (04/16/13)**

**Version 8.5.6.5 (04/10/13)**

**Version 8.5.6.4 (04/08/13)**

Changed **?** help display command at menu selection prompt to **H** and **?** to now present a list of available commands, shortcuts, etc. from which to choose.

**Version 8.5.6 (02/11/13)**

Added more error handling to *FTP* processing to cover login and other connection errors.

**Version 8.5.3.9 (07/05/12)**

Change to catalog/import file field for date created and converted to separate fields for each.

**Version 8.5.2.31 (01/05/12)**

Changed from using the same function key assignments system-wide to making them context-sensitive so the function keys relate to the routine in use.

Extended the new *Message Logging/Reporting* feature with support for changes in various fields like item costs, price, package quantity, and min or max quantities. Implemented for now in *Post Import Data* with the intent of implementing everywhere applicable.

**Version 8.5.2.13 (11/09/10)**

Changed *Linux File/Directory Selection* to show files in descending order, especially to aid in full restores by showing the last file-save performed at the top of the list. This should help prevent restoring from the wrong file-save file.

Changes in CD handling to support DVD-writer drives for writing file-saves to CD-R.

Added support for the HP2035 printer to the auto-normal/condensed table feature.

Added option controlled by user logged on for setting system case sensitivity. Maintained in *Clerk Maint.* or *O/S User Maint.*

Changes to print routines to automatically change to normal or condensed when output is to a spooler printer to work around problems with newer printers that can't be set any other way.

## Point-of-Sale

Added **Weighted Moving Average** and **Exponential Smoothing** methods to Calculate for Reorder.

Added option controlled in *Tender Code Maintenance* for whether or not to prompt for the authorization number for credit card tenders. Especially useful when set not to prompt for the credit card number and the authorization number isn't needed.

Added *System Control Maint. 9* setting for whether or not to require vendor matching in *Purchase Order Entry* SKU entry. Previously required the vendor be referenced in the list for each item being ordered.

Added to *Mail Maintenance* option to edit the **Alternate Phone Number** list with associated descriptions and included in word indexing the main business phone number as well as the alternate phone numbers.

### Version 8.5.9.8 (05/14/14)

Changes to *File-Save* to not allow deleting the **/sigcaps** directory from flash drives and to speed up measuring the total size of signature files before copying the file-save image.

Changes to support  lookup of all vendors instead of just by <?...> including part of the name.

### Version 8.5.9.7 (04/14/14)

Changed *Autopurge* routine method of processing receipts to help speed up purging.

### Version 8.5.9.6 (03/26/14)

Added option to *Credit Account Maintenance* for editing the authorized signature list for the customer attached to the account.

Changes to *System Control Maintenance Screens 6 & 8* for separate control on combining line items in the *Sale*, *Hold Ticket*, *Refund*, and *Bid* screens with options for each to combine at the SKU prompt, when totaling, or not to combine.

Added more checks to the *File-Save* routine for whether the folder is mounted for file-save to shared folder, for available disk space on the PC, and for available local disk space when saving to flash drive since the initial file-save image file is created on the local Linux drive first before copying to the flash drive.

Added gross profit range and clerk or salesperson options to the *Gross Profit Report*.

Changed *Payment Processing* and *Print Payment Receipt* to calculate the current account balance and update the credit account with it instead of using the balance from the credit account to ensure the correct balance is shown.

**Version 8.5.9.5 (03/11/14)**

Changes to allow "quick and easy" exit in *Item Maintenance* by escaping from the "Load new item from catalog/import file?" and "Update bar code?" prompts when the item isn't on file.

Changed *Item Maintenance* to allow no tax code entry, especially for non-product items where tax code doesn't really apply and to prevent NOTAX or other tax code for those items from appearing on printed receipts.

Added option to print item label from *Item Maintenance & Inquiry* screens.

Added auto-update of D3 PIBS term type to *Register Control Maintenance*.

**Version 8.5.9.4 (02/12/14)****Version 8.5.9.3 (01/22/14)**

Added **E?** email on-file yes/no column to the *Set Account Print Wizard Flags* routine and option to edit the account's email address.

Changed *Dead Stock Report* to wide type and added extended average and replacement costs to give value of dead stock.

**Version 8.5.9.2 (12/20/13)****Version 8.5.9.1 (12/18/13)**

Added to **KEY-POS** installation backloading of last payment date and amount into credit account records.

Added to *Scan Receiving Entry* saving of receiving options on closing for default next time used.

**Version 8.5.9 (12/03/13)**

Changed *Purge Purchase Order* routine to also purge canceled purchase orders in addition to closed ones.

Added option to mark purchase order lines closed to *Purchase Order Receiving* to allow closing when not received in full.

Added receipt lookup option to *Reprint Receipt* and *Transaction Inquiry* routines.

**Version 8.5.8.7 (11/01/13)**

Added support for gift card tender in *Payment Processing* to allow paying on account with gift card.

Changed the *Global Item Selection* routine to prompt after 'No matching items message!' instead of just sleeping to make consistent with rest of **EY-POS** messaging.

Added the date last received for the item being received to the *Manual Receiving* routine.

Changed *Point-of-Sale* screens to make room for all 40 characters of a customer name by replacing the "Customer" label with a dash separating the

number from the name and moved the **RR Repeat Rewards** indicator to after the name.

### Version 8.5.8.6 (10/17/13)

Added calculation and display of new account balance after each invoice payment applied to *Payment Processing*.

Added alternate option for combining of line items when totaling at point-of-sale instead of immediately at the SKU prompt, controlled in *System Control Maintenance Screen 8*. Also added **COM** command for combining items on-demand from the SKU prompt at *Point-of-Sale*.

Added {X#} quantity change command to the *Build SKU List* routine to work like in point-of-sale for those areas where it applies like *Item Label Print*, *Scan Receiving*, etc.

Changed the **DEL** command in the *Build SKU List* routine to work like in point-of-sale where you can delete the current line, previous line if current is blank, or use **DEL#** to delete any line.

Added read of warranty code from distributor catalog and display in the *Vendor Item Maintenance* screen if vendor is a distributor.

Added option to *Tender Code Maintenance Screen 2* for controlling whether or not to allow clerk to change the account number for charge account tender at point-of-sale.

Added option in *System Control Maintenance Screen 8* for controlling whether or not to prompt before printing invoices at point-of-sale.

Added new *Inventory Item Update Batch* routine for updating various fields like codes, prices, quantities, etc. from a list of items.

Added load items from saved <L>ist option to *Build Sku List* routine.

Removed *File-Save* option for saving signature files to flash drive with auto-detection and saving of them if on file.

Added update of last sales invoice and payment date and amount in credit account records with backload run at upgrade installation and with backload utility in menu.

Added new *Set Account Print Wizard Flags* routine to allow users to set the print/email/fax invoice/statement flags for any or all accounts.

Increased email address input area to 60 characters in *Customer & Credit Account Maintenance* routines.

Increased receipt# display column to 7 digits to allow for larger numbers, in the millions.

Added quantity on-hand to Promo Sales Report.

Added printing of "you saved" line item to receipt print controlled by flag in *System Control Maint. Screen 8*.

### Version 8.5.8.4 (09/08/13)

### Version 8.5.8.3 (09/03/13)

Added to *Item Label Print* new one, two, and four per page promotional price tags, for plain paper using *Print Wizard*.

Added warning to *Item Maintenance* when deleting item which is in one or more promotions.

Changed read locking to allow for exit when it doesn't interfere with processing like in batch routines. Implemented it in the following routines so far:

- *Item Maintenance*
- *Stock Quantity Movements*
- *Manual Receiving*
- *On-Hand Quantity Adjustments*
- *Inventory Kits Maintenance*
- *Matrix Maintenance*
- *Inventory Manufacturer Maintenance*
- *Customer Maintenance*
- *Credit Account Maintenance*
- *Vendor Maintenance*

Implemented locked processing in more areas, especially *Scan Receiving* and *Item Transfer* to notify user when another has an item locked instead of just beeping.

Changed *Clock-In* to allow editing the time card so a manager can correct the date or time instead of having to delete the timecard in *Clock-Out* and redo it.

### Version 8.5.8.1 (08/13/13)

Changes to *Inventory Duplicate Management* to prevent removing item with on-hand, on-order, or on-backorder quantities when merging. Also changed to more truly and fully merge from and into items.

### Version 8.5.8 (07/29/13)

Replaced **HOLD** point-of-sale command with **SUSP** to help prevent confusion between suspending sale and changing to *Hold Ticket* mode.

Changed *Calculate Reorder* to allow user to choose for min/max type whether or not to reduce the reorder quantity by on-hand and/or on-order and/or to increase the reorder quantity by quantity on backorder not yet ordered. This will help especially in cases where delivery is delayed like pre-order or order at market when product is needed for immediate sale without waiting for delayed delivery.

Added print of receipt number as bar code to receipts printed via *Print Wizard*, controlled in *System Control Maint. Screen 8*.

Changes to *Quantity On-Hand Adjustments* to support escaping to the options prompt after reason entry for ease in skipping other optional fields.

**Version 8.5.7 (07/16/13)**

Added purchasing phone number to *Vendor Lookup* window.

Added new optional *Points Reward* feature for accumulating points on purchases by customer for subsequent redemption for merchandise.

Added optional printing of "You saved" amount on receipts, difference between retail and selling price, if any controlled in *System Control Maintenance Screen 8*.

Added option for auto-sort of authorized signature list by first or last name controlled in *System Control Maintenance Screen 8* and implemented in *Customer Maintenance* and *Point-of-Sale*.

Added  option in *P.O. Entry* for viewing United Hardware Market Promo data.

**Version 8.5.6.8 (07/02/13)**

Added PCI compliance, removing track swipe data and encrypting credit card number and expiration date.

Enlarged signature picture print in 40-column receipts.

Added flag in *System Control Maintenance Screen 8* for controlling whether or not to combine line items in *Hold Ticket* screens.

Added seconds countdown display to iPad pin/signature pad handling to let user know how long they have before swiping card or manually entering card information.

**Version 8.5.6.7 (05/14/13)**

Added new password control over payment date entry in *Payment Processing* and *Password Maintenance*.

Added option for auto-creation of item transfer on local and remote systems and auto-creation of items on remote systems if needed, to handle *Scan Receiving* for drop-ship items in multi-store.

Added smallest and largest amounts to include options to *Customer Item Sales Report*.

Changed the *Remount Shares* routine to clear the folder after unmount attempt and before remounting to help prevent failure to mount due to *Linux* folder not being empty.

Added to *A/R Terms Code Maintenance* option to not show the terms on invoices.

**Version 8.5.6.5 (04/10/13)**

Added multi-item selection to *Sale* for alias to work the same as for description lookup.

Added quantity on-hand column to printer output of *P.O. Report*.

**Version 8.5.6.4 (04/08/13)**

Added distribution with KEYPOS upgrade of sample Rental Type Master data for customer reference or use.

Added support for printing labels with DYMO LabelWriter 450 Turbo printer via *Accuterm* and *Print Wizard* on 1.1" by 2" labels.

Added support for download of import data from shared folder on PC.

Added option in *System Control Maint. Screen 8* for choosing whether to use average or replacement cost in *Bid Entry* and *Update* screens.

Added gross profit percent column option to *Customer Item Sales Report* and changed to show 2-decimal quantity for increased precision.

Changed *P.O. Entry* routine to not show closed or canceled purchase orders in selection window since they can't be edited anyway.

Added <S>ave option to options prompt of *Register Control Maint. Screen 2*.

Added *System Control Maint. Screen 8* option for number of a/r invoices to print with option in *Credit Maint Screen 2* for override of system-wide number of invoices by account.

Added *System Control Maint. Screen 8* prompt for controlling whether or not to show and prompt for cost in *Bid Entry* and *Update* screens.

Added utility run during KEYPOS upgrade installation to make DCD settings to help prevent *Linux* PID remaining attached when closing emulator session or powering off register. Previously left *Linux* attached, preventing reconnection.

**Version 8.5.6.2 (02/21/13)**

Added option to *Print A/R Invoices* for printing retail-price-only invoices for accounts flagged for it in *Credit Account Maint*.

Added store fax# entry to *System Control Maint. Screen 1* and printing of it and store phone# to *P.O. Print*.

Added navigation to *Payment Processing*, page up/down using command keys from the Discount and options prompts and {down} key at the Discount prompt.

Added combine ship line items feature to *Item Transfer Ship/Receive* routine.

**Version 8.5.6 (02/11/13)**

Added *Credit Account Maint.* control over *Print Wizard* print/email/fax at point-of-sale and/or batch.

Added option in *System Control Maint. Screen 8* to control whether or not the "S" serial number flag column is displayed in point-of-sale screens.

Added new *Move Item Vendor to Main* and *Change or Remove Item Vendor* routines to the *Data Repair Utilities* menu.

Added option to *System Control Maint. Screen 8* for controlling whether or not the return to on-hand or in-defective quantity dialog box is presented at *Point-of-Sale*.

Increased GP% field width in *Inventory Evaluation Report* to allow for extra large percentages, decreased s/n col widths to make room for GP% increase.

Added option for printing retail price only invoices at point-of-sale controlled per account in *Credit Account Maintenance*.

Added option to *Print Account Statements* for extra indentation of the return address to fit special single-fold envelope window.

Moved the customer number prompt up to after the account# prompt in *Credit Account Maintenance* and added an option for loading customer data into the account when setting up a new one for an existing customer to help prevent re-entering the name, address, etc.

Added owner (level 4) password support.

Rearranged *Z Report* to make use of extra white space and help keep it to one page.

Added option to not present the return dialog box for looking up the original sales at *Point-of-Sale* controlled in *System Control Maint. Screen 8*.

Added option to *Mark Files for Resizing* and *Print D3 Message Log Report* routines to allow clearing message log even if not printing report.

Added display of gift card# issued to *Transaction Inquiry*.

Added new *Item Quantity Report* to the *Physical Inventory* menu.

Implemented 2-decimal quantity in *Physical Inventory Valuation Report* for more accurate reporting of decimal quantities and calculated extended cost and for consistency with *Item Evaluation Report* changes.

Added **ALL** date selection to *Reprint Closing Reports* routine.

Added exploding department sort and break option to *Hold Ticket Report* for subtotaling extended price by department code.

Added option to *Customer Maintenance Screen 2* for controlling whether or not items on canceled Hold Tickets are returned to the quantity on-hand. Applied in *Hold Ticket Update*.

Changes to *Print Wizard* document naming to distinguish between receipts, invoices, and statements, making each document name unique.

Changes to receipt print to open drawer only once instead of for every receipt copy.

Changes to *Print Wizard* receipt, invoice, and statement print/email/fax to delete the *Print Wizard* document and other related picture, email PDF and fax TIF files after processed to prevent cluttering up the PC folder.

### Version 8.5.4 (11/29/12)

Add serial tracking on/off selection criteria option to the *Item Evaluation Report* routine.

Finished fully implementing serial tracking into all routines where applicable including *Point-of-Sale*, all receiving routines, *Quantity On-Hand Adjustments*, *Quantity Movement*, *Physical Inventory*, *Item Maintenance and Display*, *Store-to-Store Item Transfer*, and some reports. Included is a *Backload Item Serial Numbers* utility in the *Data Repair Utilities* menu for back-loading serial numbers for the on-hand, on-hold, and in-defective

quantities since for serial tracking to work all quantities in the item master records must have matching serial numbers for those items flagged for serial tracking.

Added status selection criteria to the *Credit List Report/Label* routine.

Added option to display gross profit percent column in *Hold Ticket* screens, controlled by flag from *System Control Maintenance Screen 7*.

Added a *Reset Printer(s)* routine to the *System Setup* menu and an *RP* menu shortcut to it.

Added new option to the *File-Save* routine to not require an **OK** entry at the end of the file-save.

Changes to *Payment Processing*, moving the payment amount column to the right of tax columns and to calculate the default payment amount to include any discount and/or tax correction data.

### Version 8.5.3.11 (09/21/12)

Changed *P.O. Report* <I>tem option to show only data for SKU when specified instead of all items.

Added *Print Wizard* software path entry in *Register Control Maintenance* and applied in *Print Wizard Driver Subroutine* to support installing the software in other than the default folder on the PC.

Added option to *Mass Price Change* routine for rounding up to next number ending in 9 or to nearest ending in 9.

Changes to *Physical Inventory Entry* routine to not save each line as it's entered but to save all from options prompt, improved navigation to allow for serial tracking and serial number list edit. Added recovery option to allow user to recover data entered so far in case register connection is lost or other problem causes interruption before saving.

Added VAMPS price codes display to *Inventory Item Maintenance* and *Inquiry* screens.

Changed *P.O. Report* routine to use EDP search instead of SKU to allow for different alias used in reporting than originally entered even though the item is the same.

Added warranty return code display to screen 2 of *Item Maintenance* and *Inquiry*.

### Version 8.5.3.9 (07/05/12)

Added to *Post Import data to Live* updating of SKU list for vendor for item with alternate SKU when flagged to <O>verwrite and updating option chosen. Also added new prompt to allow user to choose whether to set the alternate SKU as the main SKU or just append it when updating.

Added customer number selection prompt and selection criteria to *Print A/R Invoices* routine.

Added average cost column to *Bid Entry* and *Update* and changed to allow entry of price with recalculation of gross profit percent and entry of gross profit percent with recalculation of price. Also changed two lines of

description due adding cost column and making description column shorter. Added entry of cost for recalculating percent.

Added negative, positive, zero, and non-zero balance selection option to the *A/R Invoice Register Report*.

Added *Store-to-Store Inventory Item Transfer* subsystem.

Added *Scan Receiving Entry* and *Scan Receiving Variance Report* routines to the *Purchasing and Receiving* menu.

Added indexing of customer (mail) and credit account records by email, address, and fax number, esp. for *Print Wizard* users for locating by email or fax when name not known.

Changed *Item Label Print*, Eltron shelf style 3 page mode to allow for longer and alpha-numeric SKU's by adjusting the font and bar code size and position.

Added new *Display Store Quantities* routine with print option for on-line via internet mult-store support.

Added new *Reprint Closing Reports* routine.

Added separate telephone number field editing to *Credit Account Maintenance*.

Added gift card issued breakdown to *Z Report* with other non-product sales.

Remapped *Linux* function keys and added auto-load option to *Define Function Keys* routine so regular, shift, and control function key registers are all defined consistent with *Accuterm*, *ViaDuct*, etc. and to define keys previously undefined in *Linux*.

Added prompt flag to *Calculate Reorder Quantities* for replenishment method for choosing whether to increase order quantity by backorder quantity not ordered.

Changed *Point-of-Sale Repeat Rewards* processing to check for **CERT#/PROMO CODE** in description as well as **RRCERT** SKU to default to negative quantity which allows for user setting up aliases in **RRCERT** item.

Added authorized signature list editing option to *Mail Maintenance* with lookup of name in *Point-of-Sale*.

Changes to *Replace Customer Number* routine to handle new *Repeat Rewards* fields and other general field fill-in to target item if null and source item has value.

Added support for Zebra native *ZPL* language to shelf style **3**, **4**, and **5** formats in *Item Label Print* routine.

Added to *Item Label Print* routine user control over whether to show the date printed on the label.

Added support for emailing and faxing receipt style **I** (full page invoice style receipt) via *Print Wizard*.

Added support for Topaz signature-only pad.

Split "reduce by quantity available-for-sale" prompt in *Calculate for Reorder* to two separate ones for on-hand and on-order and applied in calculation.

Added GP% column for summary option to *Item Evaluation Report*.

**Version 8.5.2.31 (01/05/12)**

Added *G/L Summary Report* for reporting to accountant or third-party software like *QuickBooks*.

Changes to *Inventory Qty On-Hand Adj*, *Merge Items*, and *Post Physical Count* routines replacing old read/locks with new technique to message user when item locked showing who and what.

Added new user control to *System Control Maintenance Screen 7* for whether to replace commas with blanks in word indexing instead of automatically doing so for those user who need to look up with commas in place like "conduit, 1/2" for example.

Changed *Process Finance Charge* routine to return to account type prompt after deleting finance charge invoices instead of exiting to menu to aid when deleting multiple ones.

Rearranged *Item Maintenance Screen 2*, changed to display last and previous physical inventory count and date.

Added date range option to *Z Report*.

Added receipt count column to the *Transactions by Salesperson/Clerk* report.

Added to *Change Credit Account Number* routine option for specifying whether to retain from or to account data when merging accounts. It previously merged the name, address, etc. for the from-account into the to-account when many times the to-account data should be left as is instead.

Changes to support alpha customer ID's or other which are not telephone numbers. Added flag for controlling to *System Control Maintenance Screen 7*.

Added a date prompt to the *Bid Update* total screen to allow for changing the date of a bid.

Added option to *System Control Maint. Screen 7* for user control over whether or not to include house charges (a/r invoices) in the *Repeat Rewards* transaction data upload.

Changed *Select Purchase Order* window to sort by descending date by PO# instead of by vendor first to ensure latest purchase orders are shown first.

Changes to support new iPad pin-pad device and Drexel's new *DSS TranSecure* version of *DebitListen* and *CCListen* which includes encrypted cardholder data from the iPad out to Mercury and back for PCI compliance.

Changes to point-of-sale to allow multiple gift card tenders and to prevent printing invoices for that tender type.

Added the *Global Inventory Selection Criteria* screen and multiple SKU options to the *Backorder Report* to provide for more selection and filtering of data.

Changes to have *File-Save* and *Full-Restore* routines remember the last file-save media selection.

Added support for <?...> description lookup for class codes.

Added default setting in *System Control Maintenance Screen 7* controlling what happens in *Build SKU List* when a duplicate item is entered allowing options to merge, append, ignore, or prompt at that time.

Added deletion of any residual credit card files from Drexel PC folder to prevent duplication or other problems if transaction timed out or otherwise failed. In other words to clear for the next transaction for the register.

Added dialog box message warning when trying to use taxable code as override in *Mail Maintenance* and *Credit Account Maintenance*.

Changes to *Build SKU List* routine to offer more options when duplicate item, to merge with other in list, append to list, or ignore and not append.

Changed to not default quantity to quantity available for sale in *Build SKU List* from *Scan Receiving Entry*.

Changes to further support gift card processing adding flag in *Tender Maintenance* to indicate gift card type and implemented in *Point-of-Sale* to prompt for account before tender amount and default to gift card balance if less than receipt total.

Added option to *Print Count Sheets* to allow choosing whether or not to start a new page for breaks in the main sort field.

Changes to allow for alpha or numeric floor codes applying left or right justification in sorting accordingly, controlled in *System Control Maintenance Screen 7*.

Replaced promo price with item replacement cost in *Promo Report* routine UH market option since the promo price is not included in the data

Implemented global selection criteria in *Print Count Sheets* routine.

Added vendor-level override option to system-wide move vendor to main when cost falls below that for main vendor.

Added new *Remove Factory Item Number from Description* utility.

Added option for removing Repeat Rewards member number and data to *Mail Maintenance Repeat Rewards Maintenance* screen.

Added new field to *System Control Maintenance Screen 7* for specifying the number of seconds before timeout for Drexel credit card authorization to provide user control instead of hard-coding at 60 seconds.

Enhanced *Data Import* subsystem to include support for new *Repeat Rewards* fields and special processing, multi-page support for fields in *Template Maintenance* and *Parse Field Options*, etc.

Added business area code and phone number to *Mail Maint. Screen 2*.

Added floor location to Zebra shelf style label **3**.

Changed display and labeling of Telephone# to Customer# to allow for gift card or other non-telephone type customer numbers (mail ID's).

Changes to *Customer Item Sales Report* to show full SKU and item description for summary option.

Added partitioning and formatting of flash drives to *Format Media* routine.

Added <??> option to *Inventory Item Selection* for using global selection criteria in looking up items.

Added display of credit account information prior to amount prompt in tender screen at *POINT-OF-SALE* and prompting for beginning balance in *Credit Account Maintenance* and auto-creation of manual invoice for beginning balance to aid in gift card use.

Added new *Item Customer Sales Report* option from *Inventory Item Maintenance* and *Inquiry* options prompts.

Changed *Inventory Quantity On-Hand Adjustment Entry* to allow entry of adjustment quantity and recalculation of quantity on-hand.

Added option to *Promo Report United* market version to show only items with reorder quantity.

### Version 8.5.2.13 (11/09/10)

Added new **retail**, **replacement cost**, and **gross profit percent** sort options with ascending or descending and smallest and/or largest amount to include to *Item Evaluation Report*.

Added flag controlled in *Credit Account Maintenance* for not allowing password override of account credit limit. Handy for use in gift card processing which starts with negative balance until sales reach zero.

Added quantity on-hand column to *Inventory Item Sales Report*. Changes to *Point-of-Sale* to display customer number and name before warning clerk that the customer is inactive. Also, added display of customer comments after warning and before returning to customer (phone) number prompt.

Changed to prompt for authorization code at tender in *POINT-OF-SALE* for credit card types even if no credit card number entered or swiped due to "Credit lookup?" in *Tender Maint.* set to **N**.

Added option controlled in *System Control Maintenance Screen 7* for showing alternate display in *Mass Price Change* with columns for replacement cost, margin%, and qty received previous and current year. Also added option to save list of all items, only those that changed, neither, or both.

Added type description to item list save window. Implemented in *Payment Processing* same rules for returning to tender prompt when on-line credit card is not authorized instead of prompting for manual authorization or defaulting to FLOOR.

Added list type description to *Save Item List* window.

Added <U>ser-set font size option in *Register Control Maintenance* for *Accuterm* registers so the user can set their own font type and size in *Accuterm Setup* as an alternative to **KEYPOS** setting it.

Added control in *System Control Maintenance Screen 7* for whether or not to show line-item customer discount or markdown on A/R invoice types **1** and **4**.

Changed *Print A/R Invoice* routine to always default "Include zero-bal invoices?" prompt to **N** to prevent problem with inadvertently printing all invoices, including paid ones.

Added option controlled in *System Control Maintenance Screen 7* for showing tax description or purchase order number in *Payment Processing*.

Added module and changes for support of *PPMI Repeat Rewards* program.

Added *Remount Shared Folders* routine in new *D3 and 3rd Party Software Setup* menu.

Moved **D3 and 3rd party software** selections from *System Setup* menu to new *D3 and 3rd Party Software Setup* menu.

Added *Tender Maintenance* control over whether to show the blank phone# line on receipts for credit card tenders.

Added **NEW** option at main vendor# prompt in *Item Maintenance* to present *Vendor Maintenance* screen so user can add new vendor if needed.

Added optional clerk ID selection and subtotaling to the *Summary Sales by Department* report. Also, changed to allow user to specify which reports to produce.

Added **month** option to the *Profit Margin Report*.

Changed *Customer Inquiry Display* to support showing sales for specific SKU even though item has been deleted from inventory.

Added new *Customer Sales by PO#* report to *Sales and Transaction Inquiry and Reports* menu.

Added date range selection to *Customer Sales Ranking Report* and changed to process receipts instead of customer sales summary to allow for date range and crossing year boundaries instead of just reporting from previous and/or current year.

Changes to *Reorder Report* to allow user to choose whether to show quantities vertically down the page with a wider description or horizontally across the page to shorten the report.

Moved average cost field from second to first screen of *Item Maintenance*.

Added prompt for user to choose whether to accept or reject manual Drexel credit card processing when track 2 was not swiped.

Added new *Customer Item Sales Report* to *Inventory Inquiry and Reports* menu.

Added quantity/SKU input option to *Physical Inventory Entry* to aid in multiple quantity input, especially when user has auto-quantity of **1** option enabled.

Added auto-quantity of 1 option to *Purchase Order Entry* and *Physical Inventory Entry* routines, controlled in *System Control Maint. Screen 6*.

Added option controlled in *System Control Maintenance Screen 7* for whether or not to prompt for a reason when overriding prices via the **P** command at point-of-sale.

Added display of quantity on-hand column to *Physical Inventory Entry* controlled in *System Control Maintenance Screen 6*.

Added option controlled in *System Control Maintenance Screen 6* for whether to redo/cancel tender when on-line credit card is not authorized or to prompt for manual authorization instead. Setting to redo helps prevent the clerk from authorizing declined credit card transactions by mistake.

Changes to not update last received data for item when moving vendor up to main position.

Added option to *Promo Maintenance* for choosing default of average or replacement cost when adding items to list. Previously defaulted only to replacement. Is handy for setting up sales promo's where average cost is more meaningful.

Added feature for multi-item lookup to *Point-of-Sale*, controlled in *System Control Maintenance Screen 6*.

Changed *Tender Maintenance* to allow changing the print signature line option for cash tender type zero [0].

Added option to *Inventory Item Maintenance* for specifying whether or not to include item when combining quantities at *Point-of-Sale*. It's good for bulk or other items where price or cost are entered at *Point-of-Sale* and combining wouldn't work.

Changed active/inactive in *Customer Mailing List* routine to apply to customer status code instead of sales activity, added separate sales activity prompt for additional criteria.

Added option to *Physical Inventory Variance Report* to allow user to show long description or extended amount data when viewing on the terminal screen.

Added option to *Physical Inventory Non-Counted Report* for choosing whether to start a new page for every change in vendor number, similar to the option already available in the *Variance Report*.

Changed *Hold Ticket Report* to show clerk name regardless of sort method.

Added option controlled in *System Control Maintenance Screen 6* for controlling whether or not the Amount Due column appears on statement format type **1**.

Added flag in *System Control Maintenance Screen 6* for controlling whether or not the user is prompted for the price in *Physical Inventory Count Entry*.

Added **CAL** option to *POINT-OF-SALE* screens for displaying *Item Sales Calendar* for item on previous line or current line if not blank.

Added second (alternate) vendor's main SKU to style **5** shelf inventory item label.

Added print, email, and/or fax features including captured signature on invoices and receipts, using *Accuterm* scripting and *Print Wizard* software on PC register.

Added department code to style **3** shelf item label between date and package quantity in *Item Label Print*.

Added to *Inventory Adjustments* and *Manual Receiving* routines storing of old and new minimum and maximum quantities and changed to record adjustment if any change to inventory even if not to quantity on-hand for better tracking of changes via adjustments.

Added option controlled by *System Control Maint. Screen 6* for showing or not showing gross profit percent on printed purchase order form.

Extended sort criteria in *Time Card Report* to also sort by work date and time, especially when main sort is by clerk ID.

Added option to *Customer Special Pricing Report* for showing only pricing by individual SKU.

Added option to *Dead Stock Report* to specify whether or not to include blank last sale or received dates in reporting.

Changed *PURCHASE ORDER Entry* to allow sorting by vendor in other than first position, applicable when multi-vendors.

Added options controlled by *System Control Maint. Screen 6* for choosing to get the status (discontinued) code and package quantity from the distributor catalog instead of using that in the item master for *Calculate for Reorder*.

Added customer lookup via <?...> and <??...> to *Transaction Query Report*.

Added option to *Assess Finance Charge/Late Fee* routine to allow not charging late fee when account has zero or negative balance.

Added option to *System Control Maintenance Screen 6* to allow the user to not apply add-on items in *PURCHASE ORDER Entry*. This is handy for those that calculate for reorder, to prevent duplicating add-on's when editing purchase order line items.

Added new menu shortcut (IL) for *Inventory Item Label Print*.

Added to the *Printer Configuration* routine support for setting HP2035 *Linux*-configured printers to condensed/normal.

Added new feature for combining line items in the *Sale, Refund, and Bid* screens, controlled by flag setting in *System Control Maintenance Screen 6*. Line items are re-priced after combining.

Added support to *Customer Special Price Maintenance* for pricing by clerk ID as an alternative to customer number and code. Changes to the *Customer Special Pricing Report* to match.

Added to the *Customer Code Transaction Report* a new option to subtotal customer name and show the name and loyalty card number.

Added to the *Promotional Sales Report* routine new sort option of by department by SKU with new option to also subtotal by SKU. Changed to show department column first if sorting first by department code.

Added department code entry/update to item master in *Item Quantity On-Hand Adjustments* routine with lookup. Also added lookup to group code entry.

Added new *Item Sales Sort Criteria* window with item fields the same as *Item Sort Criteria* and addition of customer name, number, and transaction date criteria for use in item sales related reports.

Added showing current replacement cost to *Scan Receiving Variance Report* depending on options for showing purchase order and invoice data.

Added support for the VeriFone pin-pad device for credit and debit card processing as well as signature capture.

Changed the *Reset and Logoff Line (port)* routine to logoff network connected lines regardless if shelled out to *Linux* and when the line isn't shown as logged on but the user can't reconnect because *Linux* thinks it is (line is still assigned a PID by *Linux*).

## Distributor Communications Module

### Version 8.5.9.8 (05/14/14)

Added support for EDI with Southern Hardware, although they support only invoice download for now.

### Version 8.5.9.7 (04/14/14)

### Version 8.5.9.6 (03/26/14)

### Version 8.5.9.5 (03/11/14)

### Version 8.5.9.4 (02/12/14)

### Version 8.5.9.3 (01/22/14)

### Version 8.5.9.2 (12/20/13)

### Version 8.5.9.1 (12/18/13)

Added to *Distributor Data Maintenance* and implemented in *Post Invoice Data* a new flag for controlling whether or not to update the distributor catalog with downloaded invoice data to help prevent changes in the catalog for special cost or suggested retail which applies only to the specific invoice instead of being the regular amounts and since the catalog should already be up to date from item maintenance and/or price change data downloads.

### Version 8.5.9 (12/03/13)

### Version 8.5.8.7 (11/01/13)

### Version 8.5.8.6 (10/17/13)

### Version 8.5.8.4 (09/08/13)

Removed intermediate prompt after download and before update to help prevent users from skipping it.

### Version 8.5.8.3 (09/03/13)

### Version 8.5.8.1 (08/13/13)

### Version 8.5.8 (07/29/13)

### Version 8.5.7 (07/16/13)

Removed intermediate prompt after data download and before update to help prevent users from skipping it.

**Version 8.5.6.8 (07/02/13)**

Enhancements to United Hardware Market Promo processing including updating promo with all items, whether or not in item master, changes to *Promo Maintenance* and reporting with new field-selection window.

**Version 8.5.6.6 (04/16/13)**

Added support for *FTP* data download from Ace Hardware.

**Version 8.5.3.9 (07/05/12)**

Added to the *Convert UH Market Promo* routine option to look up existing promo and dialog box giving option to update old existing promo data with new.

Implemented locked clause feature in *Convert UH Market Promo* routine to notify user when someone else has inventory or promo item locked.

**Version 8.5.2.13 (11/09/10)**

Added support for Handy Hardware item level dealer price overrides download and update.

Added option for showing only items whose price has changed to *Invoice Inventory Changes Report*.

Added  option to the *Item Maint. Inven. Changes Report* to allow reporting only on new items added by the distributor.