MicroBiz Version 12.0.6
Release Notes
07/27/2006

Contents

Introduction

Version 12.0.5 is the latest update to the MicroBiz Business/Liquor/Bike Controller Series.

Before Installation

Please familiarize yourself with the contents of these Release Notes for details regarding this release.

You must be on MicroBiz Business/Liquor/Bike Controller series for Windows version 6.5 or above to apply this update.

If downloading the upgrade from the Internet, please verify with Technical Support (800.929.8324) that your serial number is authorized PRIOR to downloading. If you download before your serial number is authorized you risk being locked out of the system until we can get your serial number authorized (this process could take more than a day).

As with any upgrade or change to your MicroBiz system, a complete backup of your BizWin and Business directories should be made prior to the upgrade.

New Features

1) Signature Pin pad HHP TT8810

MicroBiz is now integrated with the new Signature Pin pad HHP TT8810. The customer signature is now stored in a database file signatur.dbf in the Business folder. In addition, signature can now be printed on receipts. Note: must use Invoice# 6 – New 40 column with signature and barcode for signature to print. (10492).

2) New 40-column Invoice

Invoice# 6 - New 40-column Invoice with signature and barcode.   Recommended to be used with Signature Pin Pad HHP TT8810. Signature from pin pad device now prints on receipts. (10495).

3) New Sales Graph

MicroBiz now has a new sales graph. Defined under Reports | Sales Graph, Retailers now have option to print graph for:

-Sales by Department

-QTD Sales/Margins by Department

-Sales/Profits by Employee

-Sales/Margins by Month

-Last 12 Months/Margins by Month

-Sales/Profits by Source (Excel required)

In addition, Retailers now have option to choose different chart types. (10661).

4) New advanced Look up options for Customers

The advance search will allow search and filter of customer records using any combination of customer data fields and display only those customers satisfying the condition. (7899)

5) Reprinting Close Outs

MicroBiz now stores up to 99 old close out reports with 80-column close out selected. With new feature, you can now reprint old close outs past the previous 10 close out reports. (8832)

6) Reports

New feature added to provide the option to enter the page numbers to print. Option is only available with trigger file NEWREPO9.MBZ. The trigger file is created in the Bizwin folder by default. The option only appears if there are two pages or more to print. (10647)

<u>Enhancements</u>

1) Close Outs
    a. Products Used Report
        i. Brand is now printed on the reports. (11147)

    b. Summary of Sales by Department
        i. Report now includes Department Description when using an 80-column close out printer. (5623)

2) Customers
    a. Add/Edit Customers
        i. An additional phone field has now been added to allow up to two phone numbers per customer account. (10333)

        ii. When viewing or editing a customer account, the arrows are now enabled to allow browsing to the previous or next customer. (7904)

    b. Customer Statements
        i. Option "Save customer check information?" is now checked by default, under Management | Customize | Transaction Settings. With the option checked, Checks will be displayed on customer statements when using Statement Showing Checks. If you attempt to uncheck the option, a warning message appears "Warning.. Statement is set to print check information. This option must Remain checked." (8213)

3) Hardware Settings
    a. Cash Drawer
        i. New option defined under Management | Customize | Hardware Settings "Open Cash Drawer for Debit Card Receipts". Similar to "Open for Credit Card Receipts". (10688)

4) Import / Export Data
    a. Import New SKU's and update existing Description and Prices
        i. New enhancement has now been added to allow the ability to import on user demand from a CSV file SKU, DESCRIPTION, and PRICE. If SKU does not exist in the PRODUCT.DBF, add (append) it. If SKU does exist, replace DESCRIPTION and PRICE with ones supplied in the CSV file. Defined in Management | Import/Export Data | Import New SKU'S and Update Existing Description & Prices. (7175)

5) Inventory
    a. Add/Edit Inventory
        i. Inventory item history for the previous years will now appear on PriorY and PriorY2. (8968)

        ii. Price scheme codes are now automatically assigned by default to new price schemes when added. Option to enable or disable "Auto Assign Code" can be selected under the Inventory | Add/Edit Inventory under the Assign Price Scheme. (9366)

    b. Inventory Reports

   i. New enhanced feature to include option to print the Physical Count Report by Bin location. Defined under Inventory | Inventory Reports | Physical Count, "Sort by Bin/By SKU Physical Count Report Form". (10790)

 c. Purchase Orders

   i. New Receive Order "F2-Save-Receipt" allows user to receive PO items and save the session with out finalizing the Receive PO. This will come in handy when a PO has numerous items and a single session is not possible. This is a new feature implementation and will surely be expanded and enhanced in the near future. (8755)

6) Main Screen (Blue Screen)

 a. MicroBiz Beta Version should now display correct number of days before Beta expires. (11089)

7) Print Settings

 a. Invoice Type

   i. 80-column Invoice Type# 1 now defaulted with list discount, similar to Invoice Type# 14. Invoices now show Price, Discounted Price and Discount. (7530)

   ii. Invoice Type# 9 now prints customer account number next to account name. (8341)

   iii. New 40-column Invoice type# 9 now added to the RV Module.

   iv. New layout on Invoice type# 9 for Layaway transactions. Receipt now prints in the order: Item, Subtotal, Tax, Total Amount, Deposit, Balance Due and Due Date. (8249)

8) Reports

 a. Bottle Deposit Report

   i. Bottle Deposit Report is no longer listed under Reports for Non-Liquor Module. (7402)

 b. Product Turnover Report

   i. Product Turnover Report now prints "Brand". Defined under Reports | Product Turnover. (8654)

 c. Tax Reports

   i. New layout for Tax by Area Reports. Report now includes a breakdown of Total Taxable Revenue; Tax Exempt Revenue and Non-Taxable Revenue with Grand Total for each. Report also includes Grand Total of all Departments and a Grand Total of Sales. (10338)

9) Security

 a. Security Level

   i. New setting to split the Security options for Add and Edit Products. Defined under Management | Customize | Transaction Settings | Security Tab, option# 6 "Split Add/Edit Security to Add and Edit". With option checked, once you click on the Add button or the Edit button in Product Lookup Screen, the new Security options 92-"Add Product" and 93-"Edit Product" will be added to Security Level with a security level set to 0. (5674)

10) Tools

 a. Barcode Printing

        i.   General Barcode option now available when receiving Purchase Orders, allowing capability to print labels with or without Label Works. (9550)

       ii.   New barcode printer CAM Stryper100 now added to Tools | Barcode Printing to replace the previous Eltron 2022 printer. (10792)

11) Work Screen
    a. New interface now added to the Credit Card Swipe Screen for card expiration Month and Year. Fields are separated with pull down window or manually entered capability. (6744)

    b. Customers
        i.   After posting a payment, the customer information now clears from the work screen. (7006)

       ii.   New enhancement created to provide the option to reprint old invoice from the Customer History (CH) Screen. Defined under Work Screen | CH | Reprint Old Invoice Button. (9534)

    c. F9-Print/Done - New payment options to select either Credit Card or Debit Card at the Tender Screen, thus eliminating the need to indicate type as Master/Visa or Discover or Amex…etc… Trigger file "NOCCTYPE.MBZ" will need to be created in the Bizwin folder to enable this new feature. (11183)

    d. Post Payments
        i.   Now able to over post customer account without an issue. (8927)

    e. Void/Return
        i.   Now able to VOID a negative transaction. (9485)

12) Zap Files
    a. Zap Product Data
        i.   New option to Zero Out All Product Qty. Defined under Management | Zap Files. (10791)

Issues Corrected

1) Business Type Settings
    a. Fixed so that after switching to Recreational Vehicle Controller Module, it no longer appears twice under the Business Settings. (8304)

2) Close Out
    a. Daily Summary of Sales Report
        i.   The Daily Summary of Sales Report from an 80-column close out no longer prints an extra line with 0.00 under Tax after each transaction line and under Total Amounts. (5798)

    b. Exception Reports
        i.   Now able to print Exception Report with no errors when using 80-column close out printers. (10928)

    b. Expense Payout
        i.   If an Expense is entered under Office Payouts in the Sales Summary for End of Day Screen, during close out, the IN's and OUT's will now match. (7151)

c. File Backups
    i. Now fixed so that automatic backup's can be done when using 40-column close out printers. Auto backup setting is located under Management | Customize | Global Settings | File Backups. (10094)

d. Products Returned Report
    i. The subtotal and total are now calculated correctly. (9600)

e. Sales Summary for EOD
    i. Using Liquor Controller, the Bottle Deposits and Net Bottle Deposits fields are no longer empty when items with Bottle Deposit are sold. (6836)

3) Credit/Debit Settings
    a. Station ID
        i. All Station ID's manual assignment and/or editing must now be made under Credit/Debit Settings. In Windows Settings, the Station ID is now disabled so that if you click on the Station ID box, a message box will appear "Editing of Station ID's must be made under 'Management | Customize | Credit/Debit Settings'. (11321)

        ii. Changing the Station ID in the Credit/Debit Settings now also changes the Station ID in Windows Settings. (11321)

        iii. For ICVerify, MicroBiz will automatically prefix zeros to the Station ID's before authorization is submitted. (11321)

        iv. Now able to save Station ID changes without it reverting back to the original ID. (6636)

        v. Program will now auto-check for duplicate Network Name (Windows Computer Name) and Station ID's at start-up. Duplicates will be deleted except for 1 Station ID. (11321)

        vi. When the Station ID is edited and then 'Saved' under the Credit/Debit Settings, it should immediately be reflected at the main screen's title bar. (11321)

        vii. When using multiple computers over the network, you may now browse to verify the assignment of Station ID's. Defined under the Credit/Debit Settings, by clicking on the 'Browse Station ID's'. (11321)

4) Customers
    a. Customer History (CH)
        i. ACCT line now appears in Customer History. (11605)

        ii. Fixed error message "No History Found" when loading customer history for those with purchase history. (11558)

        iii. History Report - Now able to print a specific number of pages with trigger file newrepo9.mbz. (11033)

        iv. IIP transactions now recording to Customer History. (11601)

        v. Now able to load customer history without issues or error messages. (11322)

      vi.   System will now update the date on Invoice ACCT to the last date that the customer comes in to post to acct. (10807)

    b.   Customer Statement

      i.   Customer Statements using Blank Statement type now include detailed information of all posted payments. (9137)

      ii.   If Blank Sheet is selected, now able to print customer statement history within a date range. Defined under Customers | Customer Statement. (7348)

      iii.   In the past, when printing customer statements on Old Statement Form "N", all paid and unpaid invoices would print in numerous pages. Now able to print just unpaid invoices only. Defined under Customers | Customer Statement. (7075)

    c.   Employee Control

      i.   Commissions are now calculated accordingly for Employees who are paid for commission on sales and/or services. Employee Commissions can be viewed and printed by going to Management | Employee Control | and then clicking on the Commission button. (8965)

      ii.   Values are now retained in Set Up Commission Tables Tiers1, 2 and 3. Defined under Management | Employee Control, select an Employee and then click on the Set Up Commission Tables button. (8963)

5) Inventory

    a.   Add/Edit Inventory

      i.   If a SKU is created with a space in the beginning, the space will be removed after tabbing to the next field. (9103)

      ii.   In Windows XP Pro, an error no longer occurs after selecting a product and then clicking on the History button. (10134)

      iii.   History - MTD and YTD are now fixed to show inventory history. (10451)

      iv.   Kit Items

        1.   Components of a KIT now display the regular price and not the suggested price. (8404)

        2.   In Liquor Controller, KIT components with bottle deposits now calculate bottle deposit total correctly when loaded to the work screen. To create a KIT, "Charge Deposit" should not be checked, defined under Inventory | Add/Edit Inventory | Price Levels. "Deposit Amt" will automatically fill with the total bottle deposit when components with bottle deposits are added to the KIT. (8617)

        3.   The Reg Price field for a KIT component is now enabled to allow editing of the components and its prices from the Product Lookup Screen. (8406)

      v.   Price Schemes/Mix & Match

        1.   Fix for items with both promo and price schemes assigned will now calculate total correctly when loaded with other items also assigned to the same price schemes. Issue was reported on Liquor Controller. (9399)

      vi.   Rental Product - Under the Rental Tab, the full Year is now visible for Date Last Rented and the Date Due Back. (7895)

      vii.   Serial Items
          1.   Fix for when a serial item is sold, it is now moved from the Edit Unsold Screen to the Edit Sold Screen. (9326)

      viii.   Stock Tab
          1.   Fixed issue with Qty in Stock to allow a negative number that is greater or equal to a 4 digit negative number. On previous versions, anything lower than -999 will not be counted in. On this current version, the negative number can now go up to 5 digits. Ex: -10000. (8642)

          2.   Fixed to set security level on Qty in Stock. With security level set under Edit Security Level, a username and password will be required when editing products from Qty in Stock and when switching between products by clicking on the arrows below. (8479)

  b. Inventory Reports
      i.   Report by Department and by Vendor – detailed and summary now prints correctly. (5838)

  c. Purchase Orders
      i.   For products that are ordered by case, "Cs" now prints under the Qty field on the Purchase Order. (10446)

      ii.   Multiple computers may now view the PO Edit/Receive Screen at the same time. (11456)

      iii.   Purchase History Report spreadsheet now appears before actual report. Purchase Order number also now appear on the report. (11467)

6) Installations
  a. Add/Edit Passwords
      i.   Now able to detect Passwords after upgrade. (11354)

  b. Open With Window
      i.   Open With Window no longer appears during installation. (11452)

7) Reports
  a. Bottle Deposit Report
      i.   Liquor Controller - Bottle Deposits Report now calculate correctly. (10602)

  b. Inventory Valuation
      i.   Now tracks changes to quantity by Sales. (10267)

      ii.   Report no longer prints endlessly if printing more then one page. (11810)

  c. Rental Product
      i.   Non-Serialized and Serialized transactions are now recorded correctly to the proper reports. The Non-Serialized Report can be viewed from the Work Screen by typing "Rentals" in the SKU box. The Serialized Report can be viewed under Reports | Rentals - Serialized. (9915)

  d. Sales Report

> i. Employee Summary Report and Detail Report now show correct information. Defined under Reports | Sales | Employee, select Generate Report. On the print option screen, select either Detail or Summary and then print. (6213)
>
> ii. Item Report now shows correct qty for promo items sold. (10680)

- e. Vendor List
  - i. Report now prints Vendor fax number. (10794)

8) Taxes
- a. Tax Exempt Report
  - i. Calc tax by total or by line item will now only show you those items that are non-taxable on the Tax Exempt Report. (9450)

9) Transaction Settings
- a. Finance Charges
  - i. Now able to disable and Save "Charge Finance Charges?" settings when exiting and re-entering the program. Defined under Management | Customize | Transaction Settings | Fin. Charges. (10314)

10) Tools
- a. Barcode Printing
  - i. Now able to print a Matrix barcode on a 2 ¼ x 1 ¼ standard label. Defined under Tools | Barcode Printing | General Barcode Printer. (5550)

11) Work Screen
- a. Credit Cards
  - i. Fixed issue with the credit card stored in the customer account, the cards expiration date is automatically entered when voiding a transaction on the work screen. An error returns "NO XC Invalid Expiration" or "N Invalid Expiration". Issue was caused by expiration dates/year reversed or expiration field is blank in the customer account. Expiration dates are no longer an issue. The Credit Card field is found under Customers | Add/Edit | Account Tab. Option to "Save Credit Card Number in Customer File?" can be found under Management | Customize | Transaction Settings | Security Tab. (10571)

  - ii. 'N Invalid Amount' error message no longer occurs after swiping credit card. (11010)

  - iii. Program now processes the transaction by the order of the tender types. Ex: When using Gift Card for Tender 1 and Credit Card for Tender 2, the program will now request the card be swiped in the order it was entered in the Tender Screen. (10734)

  - iv. Split tender with Master/Visa Card as tender 2 now prints invoice. (11581)

  - v. Using 40-column receipts - now fixed to print the correct credit card information on the receipts. (10969)

  - vi. Using Invoice Type #11 - now fixed to print the correct credit card information on the invoice and to no longer leave the imprint of credit card information on the main blue screen of MicroBiz. (10959)

  - vii. Using Invoice Type #18 – now fixed to print receipts fine. (11561)

> viii. When selecting Master/Visa, then swiping an American Express Credit Card, a warning message now appears "Card Type Selected is Not Correct". (10739)

b. Customers
>
> i. Customer History
>> 1. Delay when loading Customer History is now fixed. (11356)
>>
>> 2. Now able to Reprint Old Invoice from the Customer History Screen. (11497)
>>
>> 3. Now able to search invoices by Date using Look Up feature under CH. (11493)
>>
>> 4. Information is now recorded in the Customer History (CH) and in the Sales Report for customer transactions. This issue is part of issue# 10004. (10606)
>
> ii. Issue fixed to remove Voided invoices from the customer Post Screen. (9830)
>
> iii. Issue fixed where if a customer account was edited but not loaded to the work screen and then viewing IIP's, the IIP's appear to be missing. If you exit the IIP Screen, and try to load a new customer to the work screen by clicking on F8-Cust, the previous customer that was edited will appear instead as if loaded to the work screen. Also, fixed issue where no customer appears to be loaded to the work screen, yet transactions are being processed to the customer history. (10004)

c. F6-Edit
>
> i. Issue fixed to allow KIT items to be edited at the work screen with out changing other product information. (10097)

d. F9-Print/Done
>
> i. Issue fixed where if Taxes are set up under Management | Customize | Transaction Settings | Taxes Tab and the option "Always Require a Customer at F9" is CHECKED under the Security Tab, taxes will disappear after loading a customer. (9339)
>
> ii. Now able to finalize transactions with out delay. (11445)
>
> iii. Now able to process transactions with out error, when Change is due back to the customer. (10149)
>
> iv. When processing payment with split tender, the transaction now appears correctly on the EOD and Transaction Reports. (8688)

e. F11-Trade In
>
> i. The Trade In feature is a primary function of the Game Controller. Now fixed so that Trade In transactions are recorded in Subtotal Paid Out under Daily | Display Cash Figures. (8468)

f. Gift Cards

i. Error response "NOXC Invalid Amount No Approval/Authorization" occurs when processing Gift Card returns. Now able to process Gift Card returns with out errors. (10252)

ii. Now able to split payment for a sales transaction using two different Gift Cards. (10529)

iii. Now able to swipe Gift cards using X-Charge 5.0 and 6.0 with the latest MicroBiz version 12.0 and above without response code error message 'N0014 - Account number not found'. (11934)

g. IIP/WIP/LA

i. Check information is now requested when option 5-Check is selected as a payment type for a deposit made on an IIP. (9178)

ii. Fixed issue when a deposit is made to an IIP, an error message will appear "Signature Not Found". (10145)

iii. IIP invoices will no longer show payment method unless a payment or deposit was made. (9178)

iv. Known issue with IIP's disappearing after it is loaded to the work screen. Usually occurs after CREDIT, VOID, or OLDVOID is typed into the SKU box and then cancelled. An error message will appear "Invalid Input" causing the IIP to disappear. This issue is now fixed. (10585)

v. Now able to load IIP's without errors and/or program automatically shutting down. (11306)

vi. Now able to process IIP transactions with out delay. (11494)

vii. Now by default, the IIP Other Entries Screen no longer displays tender types unless a deposit is entered. (9178)

viii. Now by default, on the IIP Other Entries Screen, when a deposit is entered the Amount Tender field will appear. If an amount is not entered into the field a message box will now appear "Insufficient Funds". Forcing Clerk to enter the tender amount to complete the IIP transaction. (11417)

ix. The credit card information of a previous customer no longer prints on IIP invoices. (9813)

h. Invoices

i. In Service Module, Company name now prints on Invoice Type# 20. (11846)

ii. In Service Module, using Invoice Type# 20, customer account numbers greater than 4 will now print on invoices. (8959)

iii. Missing Invoices – Issue is caused when a customer with no history is loaded and then attempting to view history by typing CH on the work screen. This issue was discovered on versions 10.0 and above…now fixed on 12.0.6. (11708)

iv. Printed invoices no longer overlap when using split tender on 80-col invoice. (11475)

     v.   Reprinted invoices now show original time of transaction. (5616)

     vi.   Voided invoices will no longer appear in the list when browsing old invoices to void. (8011)

i.   KIT Items
     i.   From the work screen, Discounts may now be applied to KIT items with out issues. (10460)

j.   Pole Display
     i.   "See Sales Slip Item Discounted" is no longer displayed when a promo item is rung up on the work screen. (9794)

k.   Post Payments
     ii.   Problem with posting where the credit does not add to the Post Screen, but adds to the Work Screen. This issue is known to occur while processing any of the transactions below:
          1.   Applying to customer account
               a.   This occurs when items are sold and charged to a customer account and then later returned and the credit is applied to the account. On the work screen, the balance will differ from that of the Post Screen. When viewing the Post Screen, the original invoice/transaction and a negative (credit) will appear. Now fixed, so when applying a credit to an account, both the Work Screen and the Post Screen Balance Due will match.

          2.   Posting payment for more than the Balance Due.
               a.   When over posting a payment to an account for more than the balance due, it will now calculate Balance Due correctly. (10156)

     iii.   Unable to Refund or Credit a negative invoice in the Post Screen.
          1.   Problem occurs whenever a change due back from a sales invoice is applied to an account.
               a.   This occurs when processing a transaction and the payment amount is higher than the tender amount, and the change due back is applied to account. Fixed so that after applying Change Due Back to account, clerk may then process a Refund or Credit in the Post Screen.

          2.   Tender 1 can only be refunded.
               a.   Can now process a Refund on all Tenders on the Post Screen. (10913)

l.   Profit Margins
     i.   With option "Hide Profit / Margin Data from Work Screen" defined under Management | Customize | Transaction Settings is UNCHECKED, the Profit Margin will now appear on the work screen. (8895)

m.   Promo Items
     i.   Fixed issue with 2Fer/3Fer items loaded multiple times to the work screen now calculates total correctly. (8985)

n.   Rental Product

   i. Issue fixed to disallow two workstations to load the same Rental item at the same time. A warning message will appear "Item is already being rented out by another workstation". Also, rental information now populates correctly under the Rental Tab, defined under Inventory | Add/Edit Inventory | Rental Tab. (9915)

   ii. Now able to return Serialized Rental Items without errors. This issue only occurred if Serial Rental Item was rented out on one workstation and then returned on another workstation. (11384)

 o. Reprint Invoice (RP)
   i. Fixed issue with reprinted invoices printing to the wrong printer after exiting Microbiz. (7594)

 p. Serial Items
   i. When a Serial Item is not committed and is in stock, if you load the item to the work screen, a message will appear "SERIAL Qty Committed or Not in Stock.." This will only occur if options "Allow Sale When Qty = 0?" and "Allow Sale of Committed Qty?" are CHECKED, under Management | Customize | Transaction Settings | Misc. Tab. This issue has been fixed to allow Serial Items that is not committed and is in stock to load on the work screen. (10006)

Known Issues

1) Inventory
 a. Add/Edit Inventory
   1. Fixed to set security level on Qty in Stock. With security level set under Edit Security Level, a username and password will be required when editing products from Qty in Stock and when switching between products by clicking on the arrows below. Login window prompts twice to enter the username and password before allowing access to edit Qty in Stock. Ref previous issue# 8479. (11153)

2) Work Screen
 a. F9-Print/Done
   i. At F9-Print/Done Tender Screen, if option #3 American Express is selected but a Master/Visa Card was swiped instead, MicroBiz will process the sale as an Amex Card transaction. The transaction will append to the American Express totals in MicroBiz. The credit card processor will process the sale as a Master/Visa card transaction. At the End of Day the MicroBiz report and the credit card processor report will not match. Ref# 10739. (11233)

 b. Promo Items
   i. Returning Promo Items do not calculate correctly if returning by line item. For the correct calculation, the work around would be to return the promo line as well. (10555)

 c. Sign-on Initials
   i. Clerk's initials are not retained after pressing enter several times. Issue only occurs with options "Ask for Clerk at Time of Invoice?" and "Force New Clerk Password After Each Sale" are selected under Management | Customize | Transaction Settings. Other settings also must be selected "Validate Clerk's Initials" and "Carry Security Level Thru After Initial Sign-on?" under Management | Customize | Transaction Settings | Security Tab. The work

around is to ensure option "L - Enable Entry of Clerk During Invoice" is checked under the Transaction Settings. (9207)

    d. Store Credit
        i. Issue with purchasing store credit with two tender payment types. Does not add tender2 amount to the customers credit balance. Defined under Customers | Add/Edit Customers | Account Tab. The work around would be to purchase store credit with one payment type. (11068)