

Keystroke Software v8.01.19

New Features and Enhancements

This document describes the new features and changes added to version 8.01 of both Keystroke and Keystroke Advanced that were not available in previous versions (see WNew800.PDF for additions made prior to v8.01). The information in this document is similar to what is in the file ReadMe.txt but is in a more readable format instead of as a list of changes. In this document, changes that are similar have been grouped together and fixes are not included. This makes it much easier to read when updating from a previous version. But since it may not always be up-to-date, is not in chronological order, and does not include fixes, the [ReadMe.txt](#) does a better job of showing what has recently changed and should be checked whenever an update is installed.

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Keystroke Advanced

This section describes changes that are available only in Keystroke Advanced. Systems that have the standard Keystroke license are not able to see and/or use these features. Upgrading to Keystroke Advanced is very simple. Please contact your dealer or SBS for more information.

Sales Section

MultiStore Transaction Search

When MultiStore is set up, the Transaction Search function (and Parameters) displays a "Store" field. If it is set to a number, then the search function searches only that store's data set. If it is left blank (Null) then it searches all stores marked as searchable.

Production Section

Advanced License Includes Production

The Keystroke Advanced license now includes the Production Module.

Keystroke and Keystroke Advanced

This section of this document describes changes that are mostly available in both Keystroke and in Keystroke Advanced. However, there may be some changes included that apply to features available only in Keystroke Advanced. The changes that are for Advanced Only are marked with the text (AO).

Sales

Loyalty

Keystroke Loyalty is a built-in system and is available to all store licenses running the latest version of Keystroke. It has been created to reward customers for previous purchases and drive demand for future purchases.

Keystroke Loyalty was created to meet the needs of most stores while keeping a system that is both easy to understand and use. It is based on "Points" where customers "Earn" points by making purchases and can then "Redeem" those points on future purchases.

Multiple Loyalty Rules can be created, can be organized by Points Buckets, and are always used concurrently (they are added together instead of one being used over the other). Points can be Earned and Redeemed based on either Dollars (total price) and/or Qty (number of items). The Dollars method is fairly simple and provides a way to reward a customer with a set dollar amount off a future purchase each time a threshold is met (e.g. "Spend \$500 and receive \$20 off next purchase"). The Qty based method is very similar to the Price Tables - BOGO Pricing formulas. This allows the Loyalty system to work the same as BOGO but across multiple transactions.

A Points button on the Customer Database record provides a "Show Loyalty Points" table view of customers' Earned, Redeemed, and Available Points, by Points Bucket. This same table may be viewed by selecting the Points Button (or pressing [Ctrl+F4]) while viewing the Customer Lookup List.

Sales receipts and invoices can be printed displaying Points Earned, Redeemed, and Available.

A Loyalty Reports option is available is under the Tables Menu and provides the ability to print (or save to file) all the Loyalty settings for Points Buckets and Points Codes.

The customer Database report can be set to print Loyalty Points (similarly to the way Customer Alternate Codes may be printed).

Back Orders / Open Orders

The Customer Order Number field and the Vendor Invoice Number field are now stored on Back Orders and on Open Orders. The fields are also indexed so they can be used to lookup/sort the Back/Open Orders lists. Note: Older back/open orders will not include these fields. Use the DelUtil.exe utility's Update Open/Back Order function to rebuild these records and have the fields updated.

Record List Box Filters

"Equals" and "Starts With" Search support is available on Record List Box Filters. For "Equals", put an equal sign at the beginning of the search text (e.g. "=BOX"). For "Starts With", put an asterisk at the end of the search text (e.g. "BOX*"). These options can be combined with the "Not" syntax by adding an exclamation point to the very beginning of the search text (e.g. "!=BOX" or "!=BOX*"). Note that special cases like this do not work with Comment fields nor if the "Whole Word" parameter is turned on.

Detail Box - Sales

Support has been added to display information in the Detail Box for the Inventory Item's Vendor 1. FieldNumbers are: 185 = V1Number, 186 = V1Name, 187 = V1PartNumber, 188 = V1LastPurchaseDate, 189 = V1Cost.

Simplified Customer Entry

[Ctrl+F8] can be used to toggle between the Full Enter Customer screen and the Simplified Customer Entry screen.

Customer Entry Screen Points Button

A Loyalty "Points" button is available on the customer entry screens (on both the default and the Simplified Customer Entry screens).

Payment Surcharge for Credit Memos

Payment Surcharges may be used when entering Credit Memos in Sales Manager when the Payment Type is processed through the Keystroke Direct (EVO) Authorization Method and has Surcharge enabled with Record As set to Payment. If a surcharge is added when the payment is processed, it is displayed on the Credit Memo screen as "SChg:" along with the "Tendered:" field (which is the total of the Amount to be applied plus the surcharge). The surcharge is saved as a separate field (called "PayFee") with the ROA Payment. When viewing the list of ROA Payments, only the "Amount" is displayed since that is what was credited to the Customer's account.

Lock Message

The Lock Message that appears at times to interrupt transaction entry and get the clerk's attention now supports clicking (or tapping on a touch screen) anywhere within the message area to clear it.

Lock Multiple Items Found Entry Parameter

The "Lock Multiple Items Found" Entry Parameter, when turned ON, displays a message before the "Which One?" list appears stating that multiple items matched the entry and to press [Esc] or Click on the message to continue.

Delete/Void - Reversing Transaction Number

The Reversing Transaction has the letter "v" (lower case) added to its Transaction SubNumber field. This makes the full "Transaction Number plus Letter" not exactly match the original transaction which helps with importing the data into an outside accounting system. (This is similar to the Returns function which adds an "r").

Databases

Alternate Codes List

A third column has been added to the Alternate Codes List and displays the item's Description (or the Customer/Vendor's Lookup Name).

Find – Search - Lookup List

The Lookup List function is now available when using the Search (and/or Replace) screens. Press the Lookup List key ([Ins] or [F2]) to display a list of the available options for the currently selected field (if there are any).

Inventory Deposit Field

The Inventory Deposit field is located on the More Data Inventory Screen, just below the Multiplier field. When this field is populated with an Inventory item, that item is automatically added to the sales transaction just below the item that defined the Deposit item. It works the same as a Scripted Tag-along item.

Inventory Open Price Toggle Field

The Inventory "Open Price" toggle field, when turned ON, allows anyone in the Sales Manager to edit the line item Price of the item (the "Edit Line Item Price" security level is NOT checked). Note that the "Not Discountable" field is also ignored as far as checking the "Edit Line Item Price of Non Discountable Items" security level, but it still functions for telling Keystroke to not automatically prompt for the price to be entered. The "Open Price:" toggle field is automatically added to the "More Data" Inventory Database Screen as long as the screen is similar to the default (shipped) screen.

Accounts Receivable

Due Date

When the Billing Period is changed the Due Date is automatically changed as well. The relation between the Closing Date and the Due date is preserved. If closing date was the last day of the month it will be set to the last day of the new month when the Due Date is updated.

Enable AR Payment Surcharge Parameter

The Enable Payment Surcharge parameter is available (visible) only if there is a payment type set up for it. The payment type must be configured to process through the Keystroke Direct (EVO) Authorization Method, and have Surcharge enabled with Record As set to Payment. If the parameter is somehow On with no supporting payment, then it remains visible but a warning message is displayed when the parameters are saved stating "There are no payments that support the Enable Payment Surcharge parameter. It should be turned off."

Payment Surcharge for ROA Payments

Payment Surcharges may be used on ROA payments when the Payment Type is processed through the Keystroke Direct (EVO) Authorization Method and has Surcharge enabled with Record As set to Payment. If a surcharge is added when the payment is processed, it is displayed on the AR screen as "SChg:" just to the right of the "Tendered:" field (which is the total of the Amount to be applied plus the surcharge). The surcharge is saved as a separate field (called "PayFee") with the ROA Payment. When viewing the list of ROA Payments, only the "Amount" is displayed since that is what was credited to the Customer's account.

Closeout

Autofill Count

When using the full Closeout mode ("Total" column is visible), [Ctrl+Enter] can be used to copy the "Total" amount to the current "Count" field and then proceed to the next payment.

Configuration

PIN Pad – EVO - Keystroke Direct

The PIN Pad setup screen shows the settings list for all pin pads in a single field as well as the current setting being used based on the current Machine Number and Register Number.

Form File Names

Form file names can now be mixed case (upper and/or lower-case letters) instead of all upper case only.

Price, Tax, and Commission Tables

When editing a Table and choosing from the displayed Formulas, the Formulas list can be restricted to display only current formulas (use [F9]) or formulas valid for specified date (use Ctrl+Home).

Startup Switch – PIN Pad - MWGenius

Support has been added for specifying the IP address for the PIN Pad and/or Alternate PIN Pad through the startup switch "PINPadIP=" and "PINPadAltIP=" (works the same as "GeniusIP=" and "GeniusAltIP=" switches which are still supported). (These switches were already supported with the new EVO - Keystroke Direct" interface.)

Startup Switch – ReportManager=Legacy

The ReportManager=Legacy switch is used to change the default Report Manager to the previous report module (i.e. Reports (Legacy)). This switch has the same result as using ReportManager=KSR8.

Startup Switch – ReportManager=Prompt

The ReportManager=Prompt switch is used to select which Report Manager to open. When used, a message box is displayed when Report Manager is selected from the Navigation Menu or from the Main Menu. The message asks: "Which Report Manager?". Make a selection by choosing either the "Report Manager"(KSRN) button or the "Legacy Report Manager"(KSR8) button.

Startup Switch – RptViewerLocation=

The RptViewerLocation= switch is used to specify the location where the Report Viewer in the New Report Manager (.Net) is displayed. By default the location is in the upper left corner of the Keystroke Program window with the size based on the Keystroke screen size. The format for the value is: X, Y (left,top). The comma is mandatory. For example: RptViewerLocation=-1000,100 places the viewer to the left of the main screen. Note: if the specified location is not on an active monitor then it is ignored.

Startup Switch – RptViewerSize=

The RptViewerSize= switch is used to specify the size of the Report Viewer in the New Report Manager (.Net) to be displayed. By default its size is based on the Keystroke Program window size (and is located the upper left corner of the Keystroke Program window). The format for the value is: W, H (width, height). The comma is mandatory. For example: RptViewerSize=1920,1080 sizes the viewer to 1920 pixels wide by 1080 pixels high. Note: if the specified location is not on an active monitor then it is ignored.

Title Bar

The title bar now always includes " - Evaluation Mode" when using an evaluation license. It will also show " - Sample Data" when the Data Folder ends in "\Tutor\" (not case sensitive).

License Check

Keystroke no longer checks for an updated license or warns about an expired license when a scripted program is run (one that loads Keystroke, runs a function, and then exits). The following functions will support the skip: RecChrg, KSR, KSRN, KSR8, ARPayOff, Importer, GLLink, and Prod.

GoTo Startup Switch Toolbars

When the GoTo (/G Startup Switch or GoTo INI File Setting) Switch is used Keystroke no longer displays the Toolbars in the Logo module (when first opening Keystroke) since it immediately jumps to the module specified by the GoTo switch.

Genius Delay Card Removed Check Parameter

If the Delay Card Removed Check Genius setup parameter is On, then after a payment has been processed Keystroke continues to the Print Button box even if the PIN Pad has not yet returned to its Ready Screen. However, Keystroke will halt when leaving the Print Button box, or the Complete Sale screen, or when entering another payment until the PIN Pad shows that it has returned to its Ready Screen. Note that it is recommended to leave this parameter Off because turning it on can result in a customer leaving their card behind. Also, turning it on may be in violation of PCI regulations exposing the merchant to liability if a card is stolen and used in a fraudulent manner due to it being left in the PIN Pad device.

Audit - Importer Activity

Importing data through the Importer extension module now generates an Audit record entry showing what type of data was imported and the name of the file from which it was imported. This audit parameter is always On.

TouchScreenMode Parameter

The TouchScreenMode Parameter can be set using either a Startup Switch and/or a macro ("@SetTouchScreenMode=On" or toggled with "@ToggleFlag(TouchScreenMode,1)"). When TouchScreenMode is On, several of the parameters that determine the size of elements on the screen are changed to make items easier to select with a finger (in most cases things will be larger). The parameters that are changed are:

Font size is slightly reduced to make room for the larger items (FontSize is reduced by .05 (e.g. from .85 to .80)).

Record List Boxes:

The Scroll Bar Width is doubled (e.g. RibSbWidth=2 instead of 1).

The Row Height is doubled (e.g. RibRhFactor=2 instead of 1).

The result is fewer rows are displayed in the List Box.

Transaction Screens:

The Scroll Bar Width is doubled: LineltemsSbWidth=2 (instead of 1).

The Detail Box is scaled down: DtIBoxCellWidth=0.96 instead of 1.

Sales Manager Line Items:

The width of the 2nd column is reduced by 1 cell: SmCol2Width=29 (instead of 30).

TouchScreenMode Startup Switches

The following Startup Switches control the size of some of the screen elements in either TouchScreenMode or StandardMode. In some cases changing a StandardMode settings also changes the respective TouchScreenMode setting because the TouchScreenMode setting is related by ratio to the StandardMode setting (e.g. using "FontScale=.70" will cause the TouchScreen FontScale to be ".65"). The TouchScreenMode settings can also be changed (or changed on their own) by adding "Ts" in front of the switch name (e.g. "TsFontScale=.90"). The switches and their default settings are:

FontScale=0.85 (Already existed)

Note: This switch name was changed from GUIScale (GUIScale still works if used).

MenuFontAutoSize=False (Already existed)

MenuFontSize=Normal (Already existed)

RlbSbWidth=1.5

RlbRhFactor=1

LinItemsSbWidth=1

DtlBoxCellWidth=1.00

SmCol2Width=30

TsFontScale=0.80 (or FontScale-0.05 if not used)

TsMenuFontSize=Large

TsRlbSbWidth=2.0

TsRlbRhFactor=2

TsLinItemsSbWidth=2

TsDtlBoxCellWidth=0.96

TsSmCol2Width=29 (or SmCol2Width-1 if not used)

Note: These switches can also be referenced by viewing the Files\WS.ini file.

Appearance – Font & Element Sizes

The "Menu Font Size" and "Font Scale" buttons have been moved to the "Font & Element Sizes" function. To change these and the other parameters added for the TouchScreenMode, select the "Font & Element Sizes..." button in the Appearance function (under the Settings menu). This function is used to set the default sizes for screen elements in both the Standard and TouchScreen modes. As with all other Appearance parameters, the values set here are stored and read from the WS.ini and/or the WS#.ini file (where # is the register number) depending on if the setting is already stored in the WS#.ini file.

Reports

New Report Manager

A completely new Report Manager has been released and is accessed selecting "Reports" or "Report Manager" from the Keystroke menus. The new Report Manager uses a very powerful Report Engine (to generate the reports), Report Viewer (to view the generated reports), and Report Designer (AO - requires an Advanced license) which is a WYSIWYG editor for the forms that control how reports look. See Doc\Reports.pdf for more detailed information about the new Report Manager.

The new Report Manager's module code is "KSRN". The previous report manager is still available (from the Extensions Menu by selecting Reports (Legacy)) and now uses the module code "KSR8". The module code "KSR" now refers to "KSRN" unless the startup switch "ReportManager=Legacy" is used (in which case "KSR" refers to "KSR8"). The new KSRN module is available only as a .Net program. Selecting it from the current standard Keystroke system (which is based on vb6) opens another copy of Keystroke to run the new Report Manager module.

Calendar Reports

Every time a Calendar report (from the Calendar Menu in the New Report Manager) is run, the latest period's Calendar (Summary) data (the period just before the current period) is automatically regenerated just in case data from that period has been changed. This process uses the same routines as the Summary.exe program.

Field Flags - FirstBandOnly

The Field Flag "FirstBandOnly" is now available. When it is used the field will be hidden if it is not in the first band being printed (i.e. bands above are turned Off).

New Report Manager Message

The New Report Manager message screen is displayed whenever a Legacy Reports settings file (KSRE*.dat) is converted to a New Report Manager settings file (KSRS*.dat). The message includes a brief introduction paragraph, a "Show Flyer..." button to display the Enhanced Reports flyer, as well as a check box to stop showing the message (at least until another KSRE file is converted). The "Close" button is used to close the message screen without displaying the flyer.

Print To File

The Print To parameter on the report settings screen can be set to "Comma Delimited (*.csv)", "Excel File (*.xls)", or "Open Excel File (*.xlsx)" if, and only if, the selected Report Form File's name contains the word "Export" (case does not matter). Note that most report forms will not export properly. It is assumed that a form with the word "export" in its name is formatted for exporting. Properly formatted export forms contain only single lines of data and possibly a single header line for the column names (which must exactly match in size and location to the data field they label). There should also be no formatting and now extra characters. lines, graphics, or symbols in the report.

Purchases

Security Levels – Leave \$0.00 Cost on Line Item

The Security Level - POR-"Leave \$0.00 Cost on Line Item" is available. If this Security Level is not met, the purchase transaction cannot proceed until the Cost field on the line item that starts with a Cost of \$0.00 is changed. However, the cost can be still set to 0.00 from another value. If a line item needs to be kept at a \$0.00 cost, it can be first set to a non-zero value, then leave the line item, and then go back to it and set it \$0.00. (Use [Ctrl+BackSpace] to remove the line item if necessary). The default value for this security level is 10 (most Clerks are not affected).

Picture Viewer - Purchases

Support for Picture Viewer has been added to Purchases. To automatically display a line item's photo add the value of 16 to the PVIInv= setting. For example, if using PVIInv=15, change it to PVIInv=31. Also added is support for displaying the Vendor's photo with PVVend=16.

Ignore Inventory Deposit Item

The Ignore Inventory Deposit Item - Line Item Entry Parameter prevents the item's Deposit Item (if it has one) from also being added to the Purchase transaction as an additional line item.

Extensions Menu

New Extensions Menu

The Extensions Menu replaces the Custom Modules menu on the "Exit To:" menu. It has also been removed from the Utilities menu (the Dashboard function has been moved to the top of the Utilities menu). The menu list now shows modules as (Eval) and places them at the bottom of the list if not licensed for use (except when the system is an Evaluation copy because everything is already in Eval mode).

The Extension menu can be changed by editing the ExtMenu.xml file. Internal Keystroke modules must use the <ModCode> field to identify which module to switch to. External stand-alone programs must use the <Command> setting to specify how to run the program.

The "Custom Modules" menu list (based on .cst files) has been merged into the "Extensions" menu list (based on the ExtMenu.xml file). For backwards compatibility, if any .cst files exist, they will be merged "on-the-fly" when the Extensions menu is created (in most cases this is just to pick up the Security Level in the .cst file (if there is one). A unique hotkey is assigned to each .cst item added (as long as one of the letters in its name is not already used).

Accounting Link

QuickBooks Online

QuickBooks Windows - The Setup Menu Link To... link name has been changed to "QuickBooks Windows/Online". A "CSV" file is now created along with the "IIF" file. The "CSV" file can be used to import into QuickBooks Online. The date format has been changed to show the full year ("YYYY").

ROA Payment Surcharges

Support for payment surcharges (PayFee) added to ROA payments has been added. If there is a surcharge on an ROA payment, a balancing entry will be generated using the payment type associated with the surcharge. Note the payments on sales transactions are already taken care of by the balancing Surcharge payment placed on transactions.

Importer

Import Loyalty Bucket Points

The Loyalty option has been added to the Import menu to import Loyalty Bucket Points. There is no entry for this under the Setup menu because the import parameters are entered and saved directly from the Import function. If Loyalty has not been set up then the Loyalty Import menu option is not displayed. Note: The Format: line of text below the File Name field shows the required format for the records in the file to be imported. While it shows commas, Tab delimited is also supported (and preferred). The [Earned], and [Redeemed] fields are optional. Fields also supported (and optional), but not shown are: [LastEarned], [LastRedeemed]. Record format is: ID, BucketCode, PointsAvailable, PointsEarned, PointsRedeemed, LastEarned, LastRedeemed.

Importer – Rename Previous Backup Files

Before copying the data file to be changed to "*.BAK", Keystroke now renames previous backup files to "*.bk#" (where # is the next available number from 1 to 9). File "*.bk9" is overwritten if it already exists.

Keystroke Express

This section describes changes that are available in Keystroke Express.

Express License

Express License

The Keystroke Express license now includes the following modules: Accounting Link (GLLink), Production (Prod), and Importer (Imp).

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