

StockBoy V 8.9

Summer 2026 Release

In addition to the weekly StockBoy software updates for security features and cosmetic improvements, Bob and a team of programmers are releasing a significant update for all StockBoy customers beginning in stages starting June, 2026. This update and all subsequent technical time to implement it is INCLUDED WITHOUT CHARGE as part of your monthly Maintenance fee.

The primary focus of this update is to implement ISO/IEC/IEEE 90003 Quality Management standards for the StockBoy suite of programs, and to provide modern security enhancements – a concern for our larger installations. We've also added a few dozen new features based on customer requests that can be **optionally** implemented at your particular site, and which are detailed in the notice below.

Every attempt has been made to NOT CHANGE any menu options or to change familiar program flow in order to minimize re-training and operator frustration. As per general ISO 9000 guidelines, our goal is to have every StockBoy installation updated to the new V 8.9 prior to August 31, 2026.

The vast majority of improvements are will be ***totally invisible to the users***. This includes such things as encrypted hard drive storage, expanded system logging, and the processing of error messages directly to your Customer Support provider without any operator intervention.

This document is a bit lengthy, but we've divided it up into sections so that you can share specific information with appropriate staff members.

SEMI-TECHNICAL

Encryption of Sensitive Data: All passwords used in various places throughout the system are now fully encrypted when stored to hard drive, as are Social Security Numbers (SSN). It impossible to export a StockBoy data file to Windows with clear text, readable passwords or SSNs.

Network encryption: The networking protocol between a Windows PC using the THEOS Workstation (TWS) software and the host server computer can now be encrypted much like a VPN for those customers concerned about sophisticated snooping activities inside your network or over the Internet.

Observe Other Terminals: StockBoy has always provided a means for Management to electronically Observe any terminal {8-6} which is also very handy for training purposes. Now, additional security measures let the user being observed know when someone is watching them with a BEING OBSERVED message in the upper right corner of all non-sales-screen programs. In addition, when a payroll clerk is being observed while working with sensitive personnel information, a new prompt pops up asking if they want to continue working while being observed or to exit out. The system history log {8-3} records who is doing the observation and who they are observing and the time they started and stopped observing.

Password Expiration: Every Logon Name requires a password to prevent other operators from using that Name and its associated privileges. By default, V 8.9 sets all logon passwords to EXPIRE in roughly 180 days. The passwords themselves have not changed – but when they expire, the user immediately after logging in will be prompted to enter a new password and repeat it in a dialog very familiar to Windows users. Yes, it's a brief irritation, but Best Practices demand it. For those who are troubled by this change, a system administrator can change the length of the expiration time period or even eliminate the expiration totally at {8-2-name-#-#} The passwords for Tills and the special access password for Payroll are NOT impacted, nor are the optional one character passcodes for Cashier initials.

VMware: VMware Workstation Pro is now distributed free of charge by Broadcom. There is a new version labeled “26H1” with multiple advantages over older versions. This is a full 64-bit implementation with significant enhancements and performance improvements. You can download the installation file from our support page <https://stockboyservices.com> The appearance of the controls has changed slightly from previous versions, so when you plan to install this product, please set aside a few minutes to instruct your staff on how to start and re-start the Guest Operating System (THEOS) in case of a power failure or a computer 'freeze-up.'

One major feature should be utilized immediately – clone. A clone is a full, exact copy of the virtual machine. In under a minute you can make a complete backup (clone) of the entire VM, including the THEOS operating system, the StockBoy software, and all data files. This clone resides on the Host Windows computer and can be an invaluable component in a disaster recovery process. This is NOT a substitute for the data backups that StockBoy executes every business night.

The steps for creating a clone from the VMware product “26H1:” Workstation > VM > Manage > Clone > next > Current state > Full Clone. It is highly recommended that you have your technical person contact us for details on creating/managing clones on your Host Windows computer.

Printouts: Support for Parallel interface printers has ended in StockBoy as it has with the entire personal computer industry. Use of the Gutenberg printer service for Windows is highly recommended over direct ethernet or LPR/LPD interfaces. If you are currently using specialized printers such as bar code printers or dedicated sales receipt printers, this update will not impact them in any way. If you are using direct-network-connect printers then have your tech person contact us to discuss converting those printers to a Gutenberg-controlled environment, but they should continue to function the same after this software update.

Boot-up Maintenance Mode: The StockBoy re-boot occurs in the early morning hours each day to run brief system diagnostics. In the unlikely event that a boot-up file is corrupted, there is a new prompt that will appear on each re-boot asking whether the boot should continue in "N" normal or "M" maintenance mode. The prompt lasts 3 seconds on the screen – if no answer is given, the system boots normally. If maintenance mode is needed to resolve a rare or unusual issue, StockBoy support may ask you to re-boot and press the "M" key to allow a technician to work on the system in Maintenance mode. In four years of using VMware virtual machine servers this has been needed only in one instance.

Log Files: The StockBoy system tracks thousands of events during the business day. You can peruse these at any time by typing SBLOG at any Logon Please screen. You will see a listing of files (sorted newest to oldest). When you select a file it will be displayed in the StockBoy Editor and you can use all of the keyboard commands to navigate. Log files may not be edited then saved.

Although the majority of these files are designed to be used by technicians to track down issues, some common scenarios for Management include:

- Are my backups running every business night? Select Backup Log and view the last few weeks of activity.
- How did SKU “xyz” get deleted? Select System History and search <F11> for the SKU
- Who changed the screen colors? System History.
- What sections of the software has Charlie been using? System History sorted by Logon Name.
- Who was observing Sally when she was doing payroll? System History.
- Did Ralph complete the End of Day Update properly? End of Day log.
- Did Jessica encounter an error message yesterday? System History.

Re-boot: [R] remains the best way to re-boot the StockBoy system. This can be done at ANY terminal by typing [R] <ENTER> at Logon Please. Re-booting the HOST VM computer or using Vmware to re-start guest should only be done coordinating with Customer Support.

Cut and Paste to/from Windows: Yes, this can be done when you're using a Windows PC to access the StockBoy server. Pizza box terminals do not apply. To copy and paste a section or line of a StockBoy Screen, use your mouse to select the “Edit” option in the menu strip above the StockBoy viewport. Then “Select.” Use your mouse to size the yellow box from an upper left corner starting point to highlight what you want to capture. Then select Edit > Copy. That text is now in the Windows clipboard and can be pasted into any Windows app with <CTRL V>.

To paste from Windows to StockBoy, copy text from an app with <CTRL C> then click on the StockBoy screen, in the strip menu above the viewport select Edit > Paste and the Windows text will be entered into the StockBoy prompt.

If you encounter garbled results please contact Customer Support as this is correctable by adjusting the pasting speed to sync with your network connection speed.

FEATURES ELIMINATED

- Ingenico credit card authorization terminals
- Telxon/MS900 portable inventory capture devices
- Internal Gift Cards and redemption database within StockBoy (can be installed on demand)
- Purchasing OTB & EDI (open to buy, Electronic Data Interchange)
- serial terminals (no longer being manufactured)
- monochrome screens (c'mon, who wants a green screen?)

- standalone THEOS server computers (we now use Windows Pro Host computer with VMware)
- Axel 'pizza box' terminals (still work great, but microPC's are less expensive and more flexible)
- INV EOM {1-3} Inventory End of Month is now 100% automatic and not accessible from menus.
- support for dot matrix (impact) style printers and printouts (except via ethernet adapters)
- Reprint W2s from 2007 and earlier

ALL USERS

Error Messages: If you encounter a system error message, it is no longer necessary to contact Customer Support – that is done automatically with this update. If an error occurs, you will see a brief pop-up message and will be routed back to Logon Please. If an error message occurs in a mission critical function, do not hesitate to phone Customer Support, but there is no need to take a picture of the screen and text it. A good rule of thumb: if you're hindered from doing a critical function, call immediately. If you have a general question, put in in email. Text messages are not checked as often.

Keyboard functions: Remember that every prompt with a red input field to the right is a mini word processor. If the input field has room for several characters such as names and addresses, etc, then remember these useful functions:

<INSERT> toggles between insert mode and over-type mode. Insert (large block cursor) means that characters you type are added at the cursor - any characters to the right of the cursor are 'pushed' to the right. (this is the default behavior of word processing apps). Over-type (small underline cursor) means that character you type at the cursor replaces any characters that were there before. This is the default condition in StockBoy unless/until you change it.

If there is text already in the input field (such as a default answer or when editing existing information) as soon as you begin typing, the pre-existing text is eliminated, leaving a clear input area for the new text you're typing. If you want to add text to the existing text in the input field you press <Insert> then position the cursor then type in your additional text without erasing any pre-existing text.

<F1> puts the cursor at the beginning of the input field (left)

<F2> puts the cursor at the end of the text in the input field (right)

<F5> erases all the text from the cursor to the right.

<F6> restores the default text in the input field back to what it was when you first encountered the prompt.

 deletes one character at the cursor

<BACKSPACE> deletes the character to the left of the cursor and moves the cursor there.

<ESC><ESC> will attempt to abandon the procedure you're doing and start it over. There are several places in StockBoy where the escape is not allowed because it would leave a situation with partial data being saved.

<F10> when possible will immediately log you off – returning to Please Logon

<F8> instantly locks your terminal from further use (see full description below)

Pick List Boxes: Pick list boxes are rectangular contrasting-colored areas of the screen that pop-up to

reveal a list of options you may select. In the standard StockBoy configuration these are red boxes on the blue background. <F1> takes you to the first (top) selection, <F2> takes you to the last (bottom) <up> <PgUp> move the cursor bar up and <down> <PgDn> move the cursor down. Press <ENTER> to select the highlighted answer. Press <F10> or <ESC> to exit the pick list or if you begin typing, a search box pops up to jump instantly to matching items in the list. The <LEFT> and <RIGHT> arrows can move the entire box if it is covering up something you would like to see.

StockBoy Text Editor/Viewer: the Editor is used in hundreds of places throughout the StockBoy system. The most obvious place is when printing a report to "V". It presents text on a white background within a gray frame. <F10> exits the Editor, <ESC> shows you a list of all important keyboard commands for reference. When viewing printouts wider than 80 characters it is handy to note that you can jump the viewport to the far right with <END> and back to the far left with <HOME>. The editor is used when viewing Log files and in many places where you are entering free form text such as Memo's in Inventory, A/P and A/R in which case <F9> saves. (see Log Files above)

Change your screen colors {7-6} : This function has been robustly improved to allow you to change all aspects of the screen colors on the terminal you're using. The color scheme does NOT associate with your Logon Name, it is configured on a terminal by terminal basis. Every session on a terminal may have a unique color scheme. The color scheme can be changed temporarily until the nightly re-boot or it can be saved and used day after day until changed again.

The <up> and <down> arrows select either the configuration for standard StockBoy screen displays or the configuration for contrasting screens (for picklists and input fields). There are two choices up/down and they are highlighted by double arrows on each side of the screen. The <left> arrow cycles through the eight possible colors for the text, while the <right> arrow cycles through the eight colors for the background. You therefore can change the text color and background color for both standard screens and for input fields.

Screen Print: < SHIFT F2 > is no longer supported for generating a printout of your current screen. Pressing the <Prt Scr> key is the better method.

Lock Screen: <F8> or <SH F8> Industry security standards and best practices demand that operators NOT abandon their workstation for any significant period of time. Leaving your screen exposed to passers by defeats the purpose of passwords, privilege levels, and most all other security features.

Any time you leave your workstation, press <F8> or <SH F8> to instantly lock your screen from use. Sales screens do not use Screen Lock. THE ONLY WAY to resume your activity where you left off is to input your password then <ENTER>. When you type while at the lock screen, no characters appear – you must blindly type in your password for the lock screen to disappear and for your StockBoy screen to resume. While the screen is locked, you may not switch sessions – so it is as safe as leaving your screen at Please Logon.

For those who would like a personal full screen picture instead of the boring "LOCKED" screen, you can email a JPG graphic file to support@stockboyservices.com. The pic should be approx 465 wide by

350 high (pixels). Every LOGON name can have a single personal lock screen picture.

NOTE: The Screen Lock is NOT a screen saver that will popup after a period of time. Locking your screen requires <F8> to activate it and your password to exit it.

Macros: Macros are user-named files that contain a sequence of keyboard keystrokes that can be 'played back' to execute a complex task on demand. This update has greatly enhanced the macro recording and playback to provide improved consistency. At the Main System Menu, you may execute (play back) a macro by pressing <F7> and entering the name (same as always). To create a macro you input <CTRL U>. There is now a mechanism to delete a macro, as well as to record or manually input the keystrokes. When you record a macro, the screen will show **RECORDING** in the upper right corner, and when you press <SH F7> to end recording, a pop-up message will confirm. Any macro that reaches the Logon Please screen is automatically terminated, both when recording and when executing.

Time of Day & Clocked-in: At Logon Please pressing <F4> <I> takes you to the time card screen just as it does from the beginning of a sales ticket. <F4> <T> displays a calendar with rolling time display. If your employees are using the StockBoy time card system then pressing <F12> at Logon Please will display all active employees who are clocked-in. This is intended to help quickly identify whether a staff member is in the building for phone calls, etc.

GENERAL LEDGER

Invoice search: New options have been added to allow bookkeeping staff to search for specific invoices in both A/P {4-5-6-?} and A/R {4-6-7-?} and during GL transaction posting.

Accounts Payable Invoice Numbers: The length of invoice numbers for both A/P and A/R remains at 12 characters. When inputting A/P invoices and when searching for them, the system will allow you to enter 18 characters, but only the right-most 12 characters will be saved and stored.

End of Month adjustment for Quantity Edits: When using the quantity editor {1-5} or quantity verification {1-A} you are changing quantities on hand, which effects the total value of your real-world physical inventory. Sales Screen tickets do this, too, but the system automatically adjusts your cost of goods sold GL expense account(s) and your Inventory Value asset GL account at End of Day. Also, stocking a purchase order automatically increases your Inventory Value asset GL account and your Purchases GL account.

To compensate for quantity edits not automatically making these adjustments at the time they are done, the system will now do it during the Inventory End of Month update which is run automatically on the 1st of each month. The system will look up all the quantity edits (and quantity verifications) that were made during the just-closed month and will generate a journal transaction that will adjust the Inventory Value asset GL account {8-4-3-down-I} and the EOD Balance Adjustment GL account ("slop") {8-4-3-down-D}. If you track loss, theft, shrink, error separately from the slop account, then you will want to manually post the calculated amount from the slop account to the desired account(s).

PAYROLL

“No Tax on Overtime:” When you’re ready to print W2’s for 2025 or future years, there will be a new prompt asking “Print qualified overtime on W2? Y/N”

If you answer “N” – there are ZERO changes to the W2 printouts from previous years

If you answer “Y” you will come to a screen where you can input the Payroll Posting Code(s) that you used for paying employees at time and a half (1.5x)

You can have multiple codes as long as they all represent time and a half wages. (double time or better has not been addressed by IRS yet).

Input the code(s) one per row then <F9> to save <F10> to exit. The W2’s will print as before with one addition – box 14 will show “qualified OT” and the total amount of wages within your list of OT codes DIVIDED by 3 (only the .5 is qualified, the 1.0 is taxable as usual). Example: if your OT wages for the year is 7500, only 2500 is qualified for the new tax deduction. In this example, 2500.00 is put in Box 14 for the employee to use when filing their taxes.

The IRS has not set up new rules for withholding as it pertains to “no tax on overtime”, as of this writing, so employee checks are **not** changed in any way. You may want to prepare a note for your employees with OT wages to explain that the amount in Box 14 can be used when they file their taxes and claim the qualified overtime tax deduction. (be prepared for employees to ask: why isn’t the entire 7500 totally deductible?)

NOTE: the W2 format printed by StockBoy is guaranteed to match the 2025 form as shown at the IRS.gov website. We have re-implemented the two-to-a-page W2 format, but since IRS does not provide a sample on their website, we can only guarantee the one-to-a-page form. We have tested our printout with several 2-up form vendors and they all work perfectly.

We have eliminated the dot matrix continuous feed version of the W2 printout.

If your CPA advises you differently about “no tax on overtime”, or if you need to use a dot matrix printer for W2’s, or if you have OT wages that are NOT 1.5x (time and a half), please contact Bob by email so that we can make arrangements for customizations.

“No tax on tips:” If you need a a feature for tracking employee tips, and the above “no tax on overtime” scenario does not work for you, please contact Bob to discuss your requirements. 208 572-0723.

Reverse Payroll: If a critical mistake is discovered after updating a payroll run, the correction is now much simpler. The reverse payroll option is no longer available – it is replaced with 'Delete Bad Payroll Run' {5-6-8}. Follow the prompts carefully to select the payroll date and the correct state/department code(s) and the payroll run will be completely eliminated. The GL transactions are gone and all payroll data files for that date and state/department are gone. The deleted bookkeeping transactions are saved to a separate file in case your bookkeeping auditor later wants to know why the GL transaction numbers are missing. This procedure will also automatically run a GL re-calculation of

financial statements to adjust for the deleted transactions. Printing an audit report {5-5-5} will prove out the changes to an employee's master totals.

Employee Listing / Selection Box: When selecting employee files to edit or add, the pick list box is now slightly different. The names are now listed in last name alphabetical order for ACTIVE employees, followed by terminated employees in date sequence. All employees are included in the list, as before, but just in a more useful sequence. The search bar will find employees by name and by code just as before.

ACA tax withholding: The system will now track and calculate the Affordable Care Act withholding, which is .009 on the portion of wages in a calendar year over \$200,000.

W2 Printing: To improve compatibility with enterprise-level large office laser printers, we are now using micro spacing graphic control to position the text on the printed W2 forms. PLEASE DO A PRACTICE RUN OF THE W2's WELL BEFORE THE IRS DEADLINE. Your Windows printer driver software could possibly need to be updated for the W2s to be perfectly printed.

The 1099-MISC and the 1099 NEC forms also use this more sophisticated internal software function.

Electronic Filing: The electronic filing of Federal and State information remains in an unsettled situation. The StockBoy code has been written but it is not proofed yet by the government agencies. The SSA's Business Services Online portal remains available to manually input your W2's, but the Accuware Online portal is backlogged and has slowed down StockBoy validation trials. Idaho's state tax commission has approved our test files. We will email all customers when the federal government has validated our W2 transmission files.

Payroll Summary: This feature changes the way the GL transactions are printed following a payroll computation update run. Activating the Payroll Summary feature {5-6-1-4-N-E} tells the Mandatory Journal printout to print the transaction for each check in a simpler format –printing just the credit to the checking account and the debit to a designated Payroll Summary account. With payroll summary de-activated, each check's transaction will show all the GL debits for that check – with payroll summary activated, all the deductions are saved up for one big summary transaction at the end.

The payroll summary account is a zero-balance temporary-use-account that you create at {4-7-1-F1}. Since it has no impact on your financial statements we recommend that you choose an expense number at the end of your Payroll Expenses range like '4999' or '5999' or '6999' etc.

To re-cap the Payroll Summary feature: At the end of the listing of check transactions in the Mandatory Journal printout, one big summary transaction is generated. This summary transaction includes the totals for all the deductions and withholdings for the entire payroll, the net payroll total, and the appropriate credit to the Payroll Summary account. This makes the appearance of the individual Journal transactions much 'cleaner,' plus it saves paper by printing the withholdings and deductions only once. Some find that the summary transaction is also handy for it's reference to total payroll and grand totals of all deductions. This feature can be turned on and off at will, and ONLY

affects the payroll mandatory journal printout.

Direct Deposit file: The file that StockBoy creates for delivery to banks is now named PDD.TXT (no longer PDD.DAT) This change is necessary to allow easier editing/viewing of the file with Windows apps.

Payroll Access Password: Nothing has changed except there is no longer a Read-only Password. The read-only password had not been implemented by any StockBoy installation, so it has been eliminated.

SALES SCREEN

Blind Z Blind Z means that the individual tills are Z'ed (totalled and reconciled) without the cashier seeing the amounts that SHOULD be in the till drawer – in other words the cashier does not know if they're over or short. This helps eliminate the closing staff from manipulating the denomination count when a till is over and in general helps emphasize the importance of an accurate till count. Menu steps to activate Blind Z {8-4-5-D-N-B} to deactivate {8-4-5-D-N-N}

Remember, in an ideal situation the cashiers Z's their own till and keep a printout of the denomination count at the end of business. Then the next morning during office hours the bookkeeper/office manager does the End of Day {3-1} and reconciles all the tills there. This is best practice – having two different people count the tills – if there is a dispute, the cashier can produce the Z denomination printout to compare with what the bookkeeper counted at End of Day. (THAT's why the End of Day defaults to yesterday).

Nickel rounding can be activated at {8-4-5-N} This eliminates the use of pennies on all cash transactions and refunds, adjusting the cash back amounts to an even 5 cents. StockBoy uses the Retail Federation standard of rounding numbers ending with 1 and 2 down to zero; 3 and 4 up to 5; 6 and 7 down to 5; 8 and 9 up to next dollar. This affects ONLY cash tendering and cash back at the sales screen and on Special Tickets.

There is NO rounding on any ticket type that involves any other method of payment other than cash. Research indicates that the long-term effect of this rounding is zero. Basically half the tickets round up, half the tickets round down. This feature does not alter sales tax tracking or sales tax liability but it WILL impact your till over/short at End of Day (negligibly). StockBoy complies with 2026 legislation regarding penniless operations, and fully expects that it will pass muster in all American jurisdictions.

Note: This feature can be purposely manipulated on methods of payment where you allow cash back (overtendering). For example, in Special Tickets if you set-up the Check method of payment to allow cash back {3-5-2} then a check could be written and tendered for two cents less than the ticket total, which would be accepted as payment in full (rather than cash back of 0.05) thus giving the customer a \$0.02 discount.

This nickel rounding feature applies to all tills and kicks in when they first logon following the {8-4-5-N} change. If you make this change while tills are logged in and running, they must logoff and log back in for it to take effect.

The StockBoy Retail Price Manager {1-4-8-6} program can quickly re-price any range of SKUs to help ensure whole-nickel ticket totals based on your sales tax rate. However a sales ticket with multiple SKUs or quantities greater than 1 can still result in a grand total that is not nickel-friendly due to rounding of sales tax calculations. Contact Customer support for assistance and discussion.

MAIN SYSTEM MENU

Observe and Force other terminals: {8-6} If you have administrator privilege (access to Menu option #8 Master System Maintenance) you may now observe any other workstation at {8-6}. This is a newly re-designed multi-purpose screen showing all logged in operators in a standard picklist with the option to exit <F10> or <ESC>, observe a terminal <ENTER>, force a terminal back to Logon Please , or send an instant message to a terminal <F12>.

Instant messages deliver a text message immediately and over the top of the screen the recipient is using. It stops the recipient from using their screen until they press <ESC> presumably after having read your message. Once they hit <ESC> the message disappears off their screen and their operation resumes. Instant messages are not logged or saved. This feature can be very handy for training sessions and to capture someone's attention if they're engrossed using their screen, but it's recreational usage is restricted by making it only available to users with #8 administrator privilege as set at {8-2}.

To send a message, highlight the terminal by using the up/down arrows or the mouse and press <F12>. You may enter several lines of text. To send the message just press <ENTER> on an empty row.

Change Screen Colors: {7-6} is where you change the color appearance of the workstation you're using. You may change the text color and background color for any of the sessions on this workstation. This allows you to make the color scheme more appealing to you than our default white letters on blue background with white on red screen titles, input fields, and pop-up boxes. Some operators prefer to have differing color schemes for each session – when you make a color scheme change at {7-6} you are changing the scheme for JUST the current session.

The <UP> and <DOWN> keys move a highlight selection arrow between "Standard Text" and "Text for Input Fields", the <LEFT> key changes the text color in an 8 color rotation, while the <RIGHT> key changes the background color in an 8 color rotation. The color controls are quite intuitive, but may require a few moments of experimentation. The system attempts to alert you if you exit the app using an unreadable color scheme (e.g. Red text on red background) After setting your screen colors, you have options to temporarily use the scheme until your next Logon Please, revert back to StockBoy defaults, or save it for perpetual use for this session.

Your Logon Options: {7-2} Every user may access menu steps {7-2} to control their own operating environment.

A = Change Password	*
B = Auto 2 Decimal Dollar Input	N
C = Upper Case Input Only	Y
D = Allow Key Ahead Input	Y
E = ENTER After 1 Chr. Input	N
F = Default input mode	OVERTYPE

G = Simultaneous Logons
H = Default printer

N
S HPLaserJet

By choosing the appropriate line letter A-H you may change any of these functions. Note that the screen above represents the recommended settings.

A is where you can change your own Logon Name password. Max 8 characters, no spaces, minimal punctuation. Following this software update, ALL Logon passwords will expire in approx 6 months. Only the system Administrators can change the expiration time frame, but when you change your password here, it starts the clock over again, giving you another six months (approximately) until the system forces you to set a new password again.

B if set to "Y" will automatically assume your dollar inputs include cents, e.g. '123456' will be accepted as '1234.56' – many accounting people prefer this method. "N" means no decimal is used unless specifically input '123456' becomes '123456.00'. This setting only applies when the system is prompting for monetary input (the input field is preceded with a Dollar sign.)

C StockBoy generally converts all input to upper case anyway, so this is an artifact from previous eras. When you're inputting Internet info such as email addresses & passwords, StockBoy will ALWAYS allow you to use lower case regardless of this setting.

D Keyahead allows you to type faster than the screen can display. If the screen is switching between programs and you are answering anticipated prompts before you actually see them, then your keystrokes are saved and given to the computer when the prompts appear on the screen. We recommend "Y" since there is no benefit to "N"

E "Y" means that you must end every input with the <ENTER> key. "N" means that no <ENTER> is needed when the system is asking for a Y/N type single character answer (one character input field is surrounded with square brackets "[]") This setting only applies to input fields that are one character long, all other input fields require an <ENTER> to tell the system you're done typing and to accept the text as your answer.

G is a security feature. "N" means that this Logon Name may only be used on one physical terminal (workstation) at a time. If you are logged in at terminal "OFFICE" and want to work on terminal "RECEIVE" you must logoff of Office before you can log on to Receive. "Y" means that this Logon Name can be simultaneously logged in to as many terminals as you want. Simultaneous use is always allowed when logging on to secondary sessions.

H is where you can determine the default printer at every Select Printer prompt in the system for THIS LOGON NAME. If, for example, you set your default printer to "1", all the select printer prompts will default to "1" no matter which terminal you are using. Valid answers are 1-26 and 28-64 to represent the possible numbered printers connected to your Network or "S" for the slave (local) printer that is currently configured for the terminal you are using. You can always SELECT any valid printer # prior to any printout, this setting only affects the DEFAULT printer at all Select Printer prompts.

INVENTORY

Cost of Goods Sold: In the Inventory display and editor screens, next to the GL Revenue account number (edit letter “S”) will now show the corresponding Cost of Goods Sold GL account number. If the COGS number is highlighted with a bright background, that means there is NO SUCH ACCOUNT in the GL system. That means that there will be an ACCOUNT NOT FOUND error in the Posting Summary page at End of Day. The calculated book value cost of that SKU will be added to your “slop” account (End of Day Balance Adjustment), and you've effectively lost your revenue-to-cost detail information for that SKU until you work out the problem with the COGS mask.

The COGS GL Account for each SKU is determined on the fly by a COGS “mask” which is set at {8-4-3-down-H}. When determining the COGS account each SKU uses, the system takes the Mask and replaces any “?” with the digit in the same position from the GL number. Examples: if your mask is “5???” a SKU with GL 4001 will have COGS written to 5001. If your mask is “70????” a SKU with GL 4100 will have COGS “7000”, also a SKU with GL 4200 will have COGS 7000 (undesirable to have SKUs from differing sections write to the same COGS account).

? SEARCHES: Various places throughout the StockBoy System give you the opportunity to search your master inventory file and fill a pick list box with SKUs that match your search conditions. There are two basic searches – the single “?” which lists your SKUs in alpha-numeric sequence from your desired starting point (e.g. “10?” begins a listing of SKUs beginning with “10”) and the double “??” which tells the system to look for specific word(s) associated with SKUs (e.g. “Knife??” and “Chef Knife??”) When you add a second word to the search, you tell the system to find all SKUs with BOTH WORDS. StockBoy searches for up to three words.

SEARCH DISPLAY: The fields for each SKU that is displayed in the search box is totally configurable by an administrator (which means Full access to #8 Master System Maintenance at {8-2}). To select the fields that are displayed, menu steps {8-4-4-down-D} You may select any number of fields that are listed. If the combined length of the fields is bigger than the standard 80 column screen, the system will expand the screen width to accommodate the display of all fields.

IMPORT SKU INFORMATION FROM SPREADSHEET: While this is not a brand new feature, extensive improvements have been made to help eliminate tedious manual editing or adding new SKUs in Inventory Maintenance. If a supplier or vendor provides you a spreadsheet that contains costing or pricing or description information that you would like to quickly put into StockBoy then {1-4-9} will do the trick. There is a bit of a learning curve involved, so for your first time we recommend that you email the spreadsheet file to your Customer Support and you will be stepped thru the procedure so that your edits are made smoothly.

BUGS

There will always be an occasional issue with the introduction of new software, but you can

reasonably expect no mission-critical problems. Every one of the 11,219 menu functions have been tested, and no changes were made to any calculations inside the programs. There are approximately 560 options you can select in the StockBoy Master System Maintenance, so your particular configuration may expose an issue we have not seen. Most of these issues are simply screen display issues, so they will be quick to fix, but some may take a bit longer.

This letter is being sent to the Mountain West customers (Montana, Utah, Idaho, Arizona). Many customers in the East have already been running the new version and have fleshed out a few screen display issues ahead of you. But we have customers that use the software in unique ways that are somewhat different from our target customer: hard goods retail stores. We have service stations, C-stores, construction companies, and wholesale distributors who utilize different sections of StockBoy, and some sections not at all – and they may encounter an issue that needs to be reported. The fastest way to resolve issues is by reporting an incident with details about what part of the system you are in, and what menu steps you're trying to complete. Often, taking a cell phone picture of the screen is the best way to convey your experience.

Please make certain when you schedule your update that you select a date where your on-site system administrator can devote time and energy into communications with Customer Support.

Thank you for your continuing participation in the StockBoy Maintenance program. We appreciate your feedback and your patience as we implement these improvements!

-Bob Baker
CTO StockBoy Services
208 572-0723
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