

# MicroBiz Newsletter

March 2008



## Spring Cleaning and X-Charge



### Spring Cleaning

Spring is here, which means it is a good time to clean out some of those inactive customers and products. MicroBiz offers reports for both of these to help aid you in your MicroBiz "spring cleaning."

*\*Please note that it is a good idea to make a backup of your "Business" folder before "cleaning up" your information in MicroBiz.*

### Products

**Slow Moving Product Report** - This report can be viewed by clicking on "Reports" and "Slow Moving Products." From this screen, you can view your products by several criteria, including: fewest dollar amount sold and fewest quantity sold. It can give users a good idea about which products they do not carry anymore as well as which that they can clear out of their inventory. After locating the products that you would like to remove, you may do so by clicking on Inventory - Add/Edit Inventory and using the "Remove" button. The "Look" button may also be useful to you for finding these products.

### Customers

**Customers Who Have Not Bought Recently** - This report can be viewed by clicking on "Reports" and "Customers Who Have Not Bought Recently." This report will allow the user to view customers who have been inactive for X amount of months. Just simply type in the number of months inactive and it will be displayed on a report for you. Like slow moving products, you can view this report on the screen or directly to the printer.

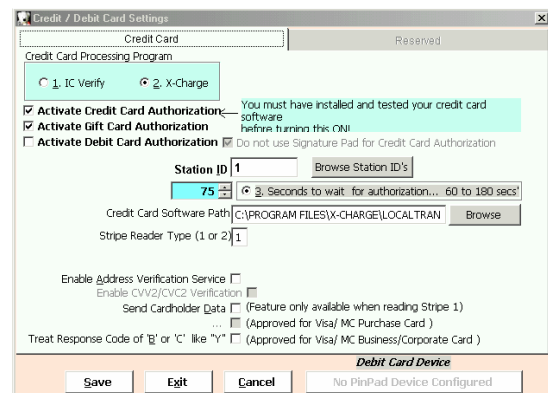
After locating the customers that you would like to remove, you may do so by clicking on Customers - Add/Edit Customers and using the "Delete" button. In addition, MicroBiz will ask you if you would like to "transfer history to another account." This might be a good idea if you have customers with duplicate entries that you would like to merge to one. To transfer, choose "Yes" which will open up another "customer lookup" screen. Choose the customer that you want to merge with and press the "Enter" key. All done.

*\*Please note to make sure that your customers do not currently have an outstanding balance before removing as this could affect your balance due reports.*

### X-Charge

X-Charge is a credit card processing software program that provides merchants with a fast and secure payment-processing platform that can be used by any Microsoft Windows compatible personal computer. Merchants can use X-Charge as a standalone credit card terminal or integrate it with existing POS (Point of Sale) applications (MicroBiz). To find out more information about X-Charge, please contact your sales representative at 1-800-937-2289.

Once you have been set up with X-Charge, you will need to be set up for X-Charge within MicroBiz. To do so, click on Management - Customize - Credit/Debit Card Settings.



X-Charge will be the deciding factor as to which card types you may accept or not. For more information on how to utilize **gift cards** in MicroBiz, please contact Vicki Botten at 714-241-9241. If you are already set up for gift cards, make sure you are running X-Charge version 6.2.3.

### MicroBiz Version 12.0.7 Update!

MicroBiz 12.0.7 is now available to download on the MicroBiz website <http://www.microbiz.com/>. This version addresses critical issue #14618 (voids all customer balances). It is highly recommended that you update to this version as soon as possible. For any questions about this update, feel free to call MicroBiz tech support at (800) 929-8324. Your call may be billable.

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