

02/08/06



The CounterPoint Connection





Some of the new features in the upcoming 7.5.11

System

Expanded report numbers

Each CounterPoint report and journal is identified by a 4-digit report number, (from 0001 to 9999) to help you track system events, spooling, accounting distributions, and so forth.

Because of this limited 4-digit range, report numbers could "roll over" on high-volume systems, resulting in multiple reports with the same number. This could be a problem if you ran, for example, a report of accounting distributions for a particular journal number, but there were two different journals with the same journal number.

To avoid report number "roll over," report numbering has been expanded to include letters. Now, instead of rolling over to 0001, report number 9999 is followed by 999A, 999B, and so forth; report number 999Z is followed by 99A0, 99A1, and so forth.

NiceLabel Engine 4.0 (Windows)

CounterPoint includes the NiceLabel Engine, which allows you to print graphical labels, including pre-defined item, customer, and vendor labels, as well as user-defined labels designed using the NiceLabel Pro label designer (sold separately).

This release includes NiceLabel Engine 4.0, which supports the new features that are available in the latest version of NiceLabel Pro.

NOTE: Version 4.0 of the NiceLabel Engine is fully compatible with labels created in previous versions of the NiceLabel Pro designer.

Point of Sale

Cash drop

CounterPoint now allows authorized users to process **Cash drop** transactions—which are similar to pay out transactions—to record cash withdrawals. This feature is useful for sending excess cash to the back office or to the bank.

You can also set a "warning" level to remind users to perform a cash drop and a "lockout" level to prevent users from entering tickets until a cash drop is completed. These features ensure that excessive amounts of cash do not accumulate in each drawer.

The new **Cash Drop** screen in **Setup / Point of Sale / Stores / Configuration options** allows you to enable cash drops for each store and to specify the account to use for cash drop distributions. You can also set a **Cash warning level**, a **Cash lockout level**, and the **Pay code to monitor** for cash drops.

In Regular Ticket Entry, if the amount that has been entered for the monitored pay code exceeds the specified **Cash warning level**, a **Cash drop warning** message appears, indicating the amount of cash in the drawer and the amount of **Excess cash**, along with the message **Please perform cash drop**. If the amount of cash exceeds the specified **Cash lockout level**, a similar **Cash drop lockout** message appears, requiring the user to perform a cash drop in order to continue entering tickets.

Authorized users can perform a cash drop in Regular Ticket Entry from the **Pay** panel function by selecting **Cash drop**, entering the amount of the drop, completing two optional comment fields, and then printing an optional **Pay out** form. Completing a cash drop transaction decreases the monitored pay code by the entered amount and makes the appropriate distribution to the specified cash drop account.

Use **Setup / System / Users** to authorize users to perform cash drop transactions. You can also authorize users to override the **Cash drop lockout** dialog, allowing them to continue entering tickets after the **Cash lockout level** has been exceeded.

You can include cash drops on the **Daily Non-sale** report by enabling the **Print cash drops** option.

NOTE: To assist in verifying and entering drawer closing amounts, you may wish to retain the printed cash drop receipts.

Applying pay-on-account transactions to multiple invoices

In previous versions, when entering a pay-on-account transaction in Regular Ticket Entry, you could apply the payment to a particular invoice, leave the payment **Open**, or **Auto-apply** the payment to the oldest unpaid invoices.

You can now press **F4** to specify **Multiple apply-to entries** for a pay-on-account transaction and choose up to eighteen individual invoices. You can pay each document's current balance or enter a different amount to apply to the invoice. Any remaining amount is left **Open**.

Pay-on-account transactions do not allow for the processing of discounts or write-offs.

Quantity and price maximums

If a user accidentally scans a barcode into a **Qty** field or a **Price** field, an unreasonable sale can be recorded.

To reduce the possibility of entering unreasonable values, you can now use **Setup / Point of Sale / Stores / Configuration options** to specify **Maximum line item quantity allowed** and **Maximum line item price allowed values**.

If a user enters or scans a quantity or price that exceeds the specified maximum, an error message is displayed (e.g., **Quantity exceeds maximum allowed** or **Price exceeds maximum allowed**), accompanied by the "bad scan" sound. The user must press the **Esc** key (or click the **Cancel** button) to proceed. Because scanners don't generate **Esc** characters, this feature ensures that the user cannot proceed accidentally.

Non-discountable items special handling for coupons

Regular Ticket Entry supports several different types of validated coupons, including **Amount**, **Percent**, **Fixed price**, and **User-entered** coupons, which could apply to qualifying items or a qualifying sale amount.

You can now configure any type of coupon to exclude non-discountable items (i.e., items for which the **Discntble ?** field is set to **N**). This feature allows you to prevent non-discountable items from qualifying for coupon-related discounts.

When the value of a coupon that excludes non-discountable items is calculated, only discountable items (i.e., **Discntble ? = Y**) will be considered as qualifying items or as part of the qualifying sale amount.

NOTE: Coupons are not supported in Touchscreen Ticket Entry.

Inventory

Total quantity display

Previously, CounterPoint has allowed you to display the total cost for each ticket when you enter payment information in Regular Ticket Entry. In this version, you can now also display the total quantity of items on each ticket by using the new **Total qty** setting in **Setup / Point of Sale / Stores / Configuration options**.

Including sale items in group discount quantities

You can use quantity-based group discounts to encourage your customers to purchase additional items to qualify for a discount. For example, you might allow customers to "purchase 6 or more widgets in this category and get 10% off each widget."

Some merchants—notably liquor retailers—include sale-priced items in the quantity, even though sale-priced items are ineligible for the group discount. For example, a merchant might allow customers to "purchase 12 or more bottles of wine (on sale or not), and get 10% off any bottle that isn't already on sale."

When setting up a **Group discount** price code, you can now specify to **Include sale price and price overrides**. This option ensures that even though the sale priced or price override items are not actually discounted, they are considered for the purpose of determining whether the sale is eligible for the group discount.

Transfer all inventory from a location

You can now use **Inventory / Transfers / Transfer out / Transfer advice** to transfer all inventory out of a location. This feature allows you to easily close down a location (by transferring out all inventory) or stop stocking a complete line of goods (by transferring out all items in a particular category or from a particular vendor).

For the **Transfer advice** report, if you have specified a single **From location** and a single **To location**, you can now choose a **Calc method** of **All** to transfer the goods whether or not the **To location** "needs" any quantity.

Transfer reporting using average cost

Previously, all incomplete transfer documents were reported using **Last cost**. You can now specify in **Setup / Inventory / Control** to report transfer documents using **Average cost**.

NOTE: Your selection does not affect the accounting for inventory movements, which are always recorded based on your accounting method.



Synchronics is now the retail division of Radiant Systems. We will be offering along with our other hardware, Radiant Systems equipment.

This is equipment designed for the harsh retail environment and will be available in April.

We still offer all the equipment and support for brands we have offered in the past. This just adds to the available equipment we can use to match to your needs.

Customers

Generate CSV customer list data

You can now use **Customers / Utilities / Generate CSV customer list** to create a customer mailing list file, which you can merge with letters, labels, faxes, or email messages. This feature simplifies the creation and distribution of targeted marketing materials to your existing customers.

You can use the same criteria that are available in **Labels / Tags / Generate** to select the customers to include in the mailing list file, including customer number, customer category, store number, ticket date range, products purchased, and minimum sale amount.

When you generate a customer mailing list, the **Maillist.csv** file is created in the **\EXPORT** subdirectory of your company directory.

If you select the **Brief** format, the file contains basic mailing information, including name, address, and email information. You can also select **Full** to include more than 150 fields, including profile fields, loyalty points balance, credit information, ticket number, product purchased, and other fields that can be useful for more advanced processing functions.

tips & tricks

Deleting groups of spooled reports:

CounterPoint has a nice security feature so you can't delete an audit report spooled to disk until you have physically printed it. But sometimes this can be a problem and you would like to delete a large number of old spooled reports and don't want to print each one. This same technique can also delete a large number of regular reports.

To delete a lot of spooled reports.

/System/Utilities/Group Report Archive/

You can select by report#, date, user, and application. Call the group 2004, March04, or if you would just like to delete them, call the group Junk then delete all the junk files. The reports are in \SYN\Company_Name\REPORTS

Email documents from within CounterPoint:

Do you ever have a need to email an invoice or report from CounterPoint, or for that matter any program? Setup a mail account on the computer, you can use Outlook or any email client that resides on the computer, sorry you can't use AOL or other WEB based email. Install PDFCreator, this is a free open source program that can be found at <http://sourceforge.net/projects/pdfcreator/> You can also get it from our FTP site. In Internet Explorer, go to <ftp://acclink.homeip.net> User: Craig, Password: download Copy the contents from the PDFCreate folder to your computer and install.

Next, if you don't have one, set up a Windows printer in CounterPoint. /Setup/System/Printer groups/. For TYPE select Windows. Give it any name you want. For Device ID enter Select. If it will be for reports select (Y) for compress, if it will be for PO's or Invoices select (N) for compress. Next time you print, choose the printer you just added and list of Windows printer will be available, select PDFCreator. You can now print this to disk as a PDF or email it using your default email client.

Create quick entry "alias" item numbers:

If you have items that are not easily barcoded, or you don't use barcodes. The item number is hard to remember or is very long. So you would like to create a short memorable "alias" you could type that would sell the correct item. In /Inventory/Items/, bring up the item in question. In field number to change, enter 18. If you already have a barcode press F2, then add a short 'alias'. For example you sell bags of Ice. They are kept at the front door and the customer usually just pick them up as they leave. So its not available to scan. You can enter ICE as the barcode. Then at the register when a customer says they want a bag of ice, you just key in ICE at the register and it will be sold automatically.

