

## Handy Free Utilities and Applications



ADD SPELLCHECKER TO COUNTERPOINT

How would you like to add a Spellchecker to CounterPoint. Better yet, a Spellchecker to all your programs. Try this handy Free utility. TinySpell. You can download this free utility at [www.download.com](http://www.download.com).



### Complete Office Suite

Is Microsoft Office breaking the bank. Everyone

needs Word-processing and Spreadsheet capabilities. But buying a copy for every computer can get a bit expensive.

OpenOffice is a complete office suite. It's compatible with Microsoft office, so you can read and save documents created by others. In fact I've got customers who prefer OpenOffice over Microsoft Office.

Because Open-Office is free you can afford to install it on every computer you have, even if you only need an office suite occasionally.

OpenOffice contains **word processing, spreadsheets, presentations, graphics,**

**databases and more.**

To get your copy go to [www.openoffice.org](http://www.openoffice.org).



And.....



**I HOPE EVERYONE IS READY FOR SPRING.**

**IN THIS ISSUE OF THE COUNTERPOINT CONNECTIONS ARE A FEW TIPS AND DOWNLOADS THAT CAN HELP.**

## Under-Used Features: Using Price Rules in CPSQL

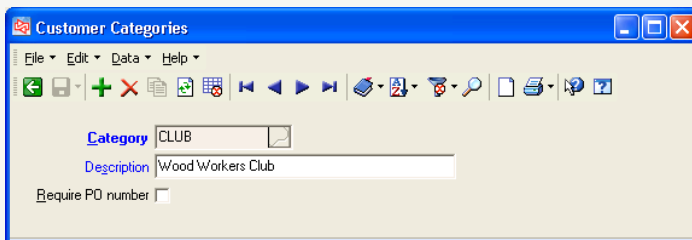
Price rules allow you to give discounts on products based on customer, quantity, dates, selling units (each, dozen, box, etc.) plus many more. Price rules can be combined to handle almost any situation. Here is a way to do discounts off for Club Members. You can give different discounts on different products.

First setup a Customer Category called Club. To start go to :  
/ Setup / Customers / Categories /

Next Assign customers to the Category 'CLUB'. Go to :  
/ Customers / Customers /

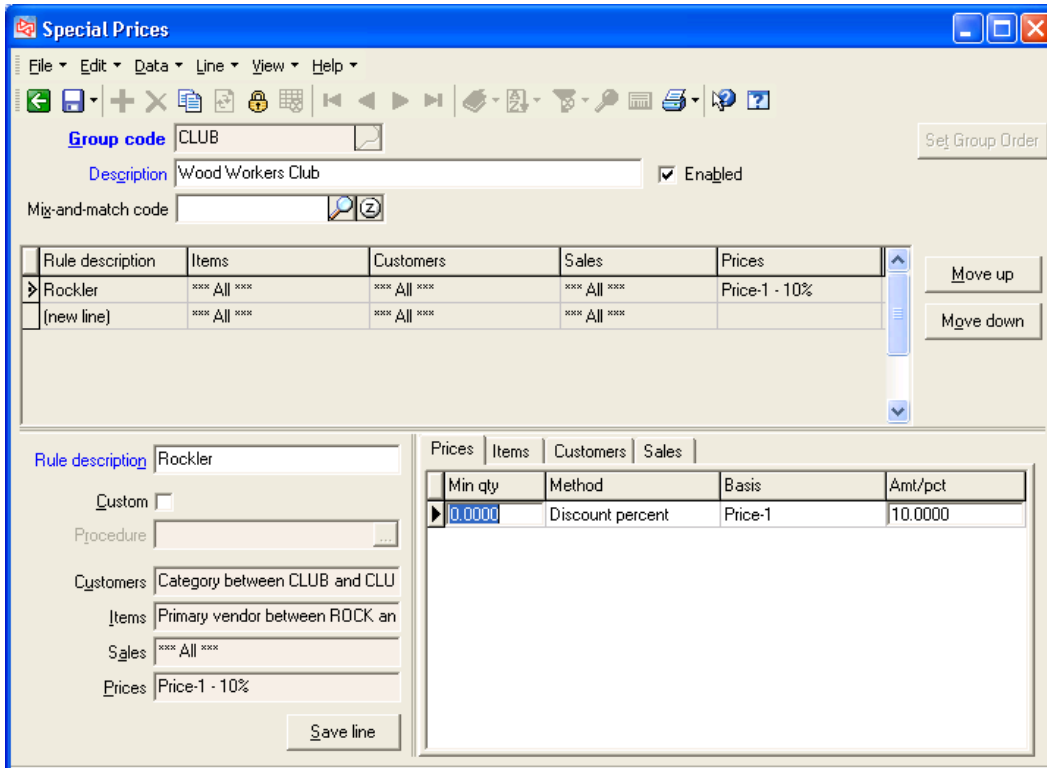
Next create a Special Price to give 10% to CLUB members on Rockler brand items.

Continued on next page....



### INSIDE THIS ISSUE:

<i>Spelling Checker</i>	1
<i>Free Office Suite</i>	1
<i>Price Rules CPSQL</i>	1-3
<i>Tech Corner</i>	2
<i>Custom Reports V7</i>	4



We're working on an detailed training program for Counter-Point SQL. This will cover all the basics from setup to use.

You can use it to refresh current employees on CPSQL or train new employees.

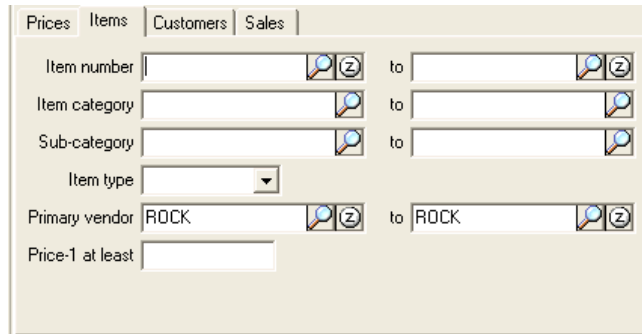
And unlike classroom training, you can use it over and over again. You can navigate directly to the area you want to cover. You can backup, pause or even skip sections.

I will be emailing a sample of the training video in the near future so be on the lookout!

We don't require a minimum quantity for this discount so in the Min qty field enter 0 (zero). This is going to be a percentage off, so in the Method field select Discount percent. The discount will be based on our normal selling price, so in the Basis field select Price-1. This is a 10% discount, so in the Amt/pct field enter 10.

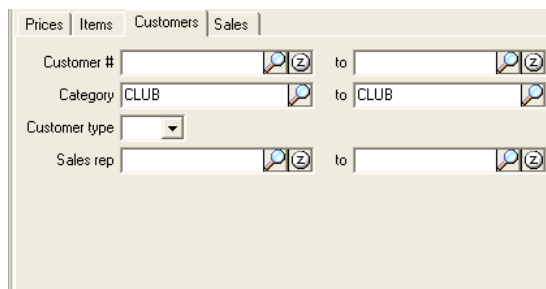
We now need to select which items qualify for discounts. So Click the Items tab where we will use filters to select only the items we want.

We want to give this discount on all Rockler items. So for Vendor select ROCK to ROCK.



Next we need to limit the discounts to only Club members. Click on the Customer Tab. Set Category to CLUB to CLUB.

Now only Club members get 10% off on only Rockler items.



### Technology Corner

The new Atom-POS system. Small, just over 10" tall. It has the connections you need: 1 parallel, 3 serial, 6 USB ports. It's good for the environment as well. Using the new Intel Atom processor it uses 1/3 the power of most systems. It's also miserly on the wallet, call for information.

But within the Special Prices group CLUB we can create more rules.

Say in addition to 10% off Rockler, Club members also get 3% off Powermatic items that are over \$200.00. Save the Rockler line then add a new rule. We'll call this rule Powermatic.

This rule is for Rockler

This rule is for Powermatic

You can have as many rules as you want for Club members.

In fact you could for example have 3 Rules for Rockler. 1<sup>st</sup> Rockler rule is 3% off any items between \$100 and \$500. The 2<sup>nd</sup> rule could give 10% off Rockler items under \$100. The last rule would be 2% off all other Rockler items.

So lets get on with Powermatic

Here we enter Powermatic as the Primary vendor and add a filter to limit this rule to items with a price-1 of at least \$200.00

Again we limit it to only Club members. Remember if you need more ways to apply rules, right click and add your own filter fields.



An important thing to keep in mind is that the first rule that is true is used. CPSQL looks in this order—Contracts, Promotional, then Special pricing. If you don't get the price you expected use price test to see which rule is being used. / Inventory / Utilities / Price Test /

For example if on a set of items you give 30% off of items over \$500, 20% off of items over \$200, and 10% off all other items.

You want the first rule to be the 30% off of items over \$500, the second rule to be 20% off of items over \$200, and the third rule to be 10% off all others. Why? If your first rule was 20% off of items over \$200. When the customer purchased an item for \$600. The first rule would be true and they would get a 20% discount. But you wanted them to get 30% off of items over \$500. But since the first rule was true, CounterPoint never got to the second rule.

## Custom inventory summery reports in V7:

A new feature in CounterPoint V7. You can now create custom inventory summery reports.

This is a two step process.

First you go to / Inventory / Utilities / Build inventory summary / -- From here you select the scope of data you may want to include on the report. You can include a summary of Items, categories, vendors, and history. If you include history you can select a specific month range, a specific date range, or Year-to-date. You can pick up to 3 historical periods from the current or previous years. They can be separate or overlapping dates.

You can further restrict by items, locations, vendors, Categories, Sub-categories, Profiles, and tracking method (Normal, gridded, serialized). This will create a work file with the data you selected that you will then create your custom report from.

Build inventory summary		Camptown Hardware
1. Item summary method	Item	
2. Category summary ?	Y	
3. Vendor summary ?	Y	
4. History summary ?	Y	
Summary period A	1/01/09	thru "Latest"
Summary period B	Jan 2008	thru Mar 2008
Summary period C	None	
5. Item #	"All"	
6. Location	"All"	
7. Vendor #	"All"	
8. Category	"All"	
9. Sub-category	"All"	
10. class	"All"	
11. seasn	"All"	
12. (Reserved)		
13. (Reserved)		
14. Tracking methods	"All"	
Field number to change ?	<input type="text"/>	
F1=Clear defaults    F3=Delete defaults		

Remember, you will need to run this utility periodically to keep the work file up to date. Also if you want to include a different period than what was originally included you will need to run it again as well.

Next go to / Inventory / Utilities / Inventory summary reports / -- From here you can give your custom report a name and save it if you want, to be run anytime you need.

In the previous step you may have generated a work file with all locations and with summary information on items, categories, and vendors, but when creating your custom report you can choose only the data you want for the specific report (You can create as many different reports using the same work file created above as you want). You can choose what location, choose from item, category, or vendor information. Your only restriction for the report, is the report can only contain information that was included in step one, (Build inventory summary).

*Continued* →

Now you can pick which fields to include in your report.

Summary data reports Camptown Hardware

Report columns

Barcode	Color	Size	Price	Reg price	Average cost
Last cost	Maximum qty	On hand	Committed	On backorder	On transfer
On layaway	On order	Beginning	Received	Transferred	Adjusted
Sold	Returned	Markdown	Discount	Ending	[Finished]

Period: 1    Data type: Cost

Report columns:

5. Price	17.	29.	Quantity	41.
6. Committed	18.	30.	Retail	42.
7. 1-CST-Sold	19.	31.		43.
8. 1-RTL-Discount	20.	32.		44.
9. 1-CST-Transfer	21.	33.		45.
10. Committed	22.	34.		46.
11. On backorder	23.	35.		47.
12. <span style="background-color: #800000; color: black;">                    </span>	24.	36.		48.
13.	25.	37.		49.
14.	26.	38.		50.
15.	27.	39.		51.
16.	28.	40.		52.

When selecting most fields (if you included history when you ran Build summary) you can select the period and the data type (Cost, Quantity, or Retail). For example: if you select the field 'Transferred' you can pick to see the Cost, Qty, or Retail that was transferred. You can also include the same field 3 times, once for each data type.

You can choose to print the report or export it into an Excel spreadsheet format. If an export file is created you can press F2 to launch Excel and view the report in Excel instantly.

1	Date 03/26/09 Time 09:04:23 User MAS									
2										
3	Camptown Hardware, Inc.									
4	Summary report									
5	Report type: Item									
6	Based on summary data created 3/26/09									
7	Location: MAIN Location detail printed									
8	Historical periods are: 1 - 1/01/09 thru Latest" 2 - Jan 2008 thru Mar 2008"									
9										
10	Loc	Item	Price	Committed	1-CST-Sold	1-RTL-Disco	1-CST-Transf	Committed	On backorde	1-RTL-Transfer
11	MAIN	A	0	0	0	0	0	0	0	0
12	MAIN		23	1	0	0	0	0	1	0
13	MAIN		2	1	0	0	0	0	0	0
14	MAIN		3	18	0	0	0	0	0	0
15	MAIN		4	42	0	0	0	0	0	0
16	MAIN		7	16	0	0	0	0	0	0
17	MAIN		8	0.9	0	0	0	0	0	0
18	MAIN		9	354	0	0	0	0	0	0
19	MAIN		10	195	0	0	0	0	0	0
20	MAIN		12	75	0	0	0	0	0	0
21	MAIN		13	10	0	0	0	0	0	0
22	MAIN		30	0.25	0	0	0	0	0	0
23	MAIN		777	10	0	0	0	0	0	0
24	MAIN		888	5	0	0	0	0	0	0
25	MAIN		1000	89	0	0	0	0	0	0
26	MAIN		1010	24.99	0	0	0	0	0	0

← Sample of Excel report

-----										
	Loc	Item	1-QTY-Sold	On hand	Price	Average cost	Average cost	Average cost		
-----										
	A11	A	0.0000	0.0000	0.00000	0.00000	0.00000	0.00000		
	A11	*LABOR	0.0000	0.0000	15.00000	0.00000	0.00000	0.00000		
	A11	*MISC-PARTS	0.0000	0.0000	0.00000	0.00000	0.00000	0.00000		
	A11	*MISC-TOOLS	0.0000	0.0000	0.00000	0.00000	0.00000	0.00000		
	A11	1	1.0000	1129.0000	23.00000	12.80000	12.80000	12.80000		
	A11	2	0.0000	588.0000	1.00000	7.31845	7.31845	7.31845		
	A11	3	0.0000	395.0000	18.00000	10.54022	10.54022	10.54022		
	A11	4	0.0000	401.0000	42.00000	24.10000	24.10000	24.10000		
	A11	5	0.0000	579.0000	15.00000	8.23500	8.23500	8.23500		
	A11	6	0.0000	222.0000	45.00000	26.50000	26.50000	26.50000		
	A11	7	0.0000	143.0000	16.00000	9.72000	9.72000	9.72000		
	A11	8	0.0000	3379.0000	0.90000	0.45200	0.45200	0.45200		
	A11	9	0.0000	146.0000	354.00000	194.40000	194.40000	194.40000		

Sample of printed report →