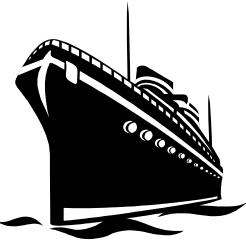# CounterPoint Connection Aug 1st 2007

CounterPoint 7.5.14 has arrived-take a look

In this issue I'll cover some of the new features in CounterPoint 7.5.14 and also some tips and a little information on switching to the new SQL product— is it right for you?

As always if you have any questions, don't hesitate to call me. 614-890-5500 or email me at cyoungman@acclinkltd.com

Thinking of going Touch Screen?

Touchscreen can simplify POS operations. Allowing even new employees to enter sales quickly and easily, putting even those hard to find items right at your fingertips, literally.

You still have full barcode scanning and item lookup capability, your just adding touchscreen.

Radiant SYSTEMS

System

Purge mail utility:

You can now purge user mail that you no longer want to retain from your CounterPoint database. This feature allows you to remove old mail for current users, or to remove all mail for users who no longer work for you.

Point of Sale

Second highest-priced item only coupons:

In this version, you can select the new **Second highest-priced item only** option from the **Selection method** field in **Point of Sale / Coupons**. This option allows you to define a coupon that a customer can use to purchase an eligible item at the regular price and receive a second, eligible item of equal or lesser value at a reduced price.

When you redeem a coupon with this setting in **Ticket Entry**, the coupon will automatically be applied to the second most expensive eligible item on each ticket. If a ticket includes two (or more) eligible items with the same price, the coupon will apply to one of those items.

Ship-to zoom from lookup:

In this version, when you use the **Lookup ship-to** window to look up a ship-to address, you can now press **F6** or click the **Zoom** button to display the **Ship-to zoom** window for the selected ship-to address. This feature allows you to view the details of each ship-to address before selecting one for a ticket or order.

Entering serial numbers as item numbers:

In this version, **Ticket Entry** has been updated to allow users to enter a serial number or scan a serial number barcode in the **Item Number** field to sell a serialized item with the specified serial number.

If more than one item with the specified serial number is on file, the **Lookup items** window appears, allowing the user to select the correct item.

Displaying category and sub-category notes:

You now have category and sub-category notes. If you have entered notes for your item categories and sub-categories, whenever you specify an item in **Ticket Entry** or **Touchscreen Ticket Entry**, the corresponding category and sub-category notes appear automatically. So if you want to display a note whenever a DVD is sold, you don't need to put the note on all DVDs, just the category for DVDs.

Zoom from lookup for orders, layaways, holds, and quotes:

In this version, when you look up an order, layaway, hold, or quote in **Ticket Entry**, you can now press **F6** or click the **Zoom** button to display the corresponding **Zoom** window, which includes additional information about the selected document. This feature allows you to more easily determine which document you want to recall.

Inventory

Inventory Summary report:

The **Build inventory summary** utility (**Inventory / Utilities / Build inventory summary**) creates current and historical inventory data for items, item categories, and vendors. Previously, merchants had to use a third-party application, such as a spreadsheet or report generator (e.g., Microsoft Excel or Crystal Reports), to produce useful reports from the data generated by the **Build inventory summary** utility.

This version includes the new **Inventory Summary** report (**Inventory / Utilities / Inventory Summary reports**), which allows you to easily design and print (or export to Excel) user-defined reports from inventory summary data. You can choose from more than 100 fields, including current quantities, prices, and costs, beginning and ending totals for historical periods, and activity totals for each type of transaction (sales, receivings, and so forth).

For example, you could create a simple report that indicates current **Quantity on hand** and **Quantity on order** amounts, as well as the **Quantity sold** during the previous month.

To create an **Inventory Summary** report, specify a report type (i.e., **Category**, **Item**, or **Vendor**), choose the location (s) for the report, and then select the columns to include on the report. For **Item** reports, you can include cell-level detail and you can include location-specific detail if you selected **All** locations or a location group.

You can define and save multiple **Inventory Summary** report formats for future use.

Deactivated items:
In this version, the **Status** field in **Inventory / Items** allows you to designate items as **Deactivated**. Unlike **Discontinued** items, items that are **Deactivated** cannot be added to tickets, orders, or purchase requests, nor can they be imported into a ticket or an order. Also, **Deactivated** items are skipped automatically when you browse through your items. With this feature, you can retain item records and historical data for items that you no longer sell, while preventing them from being sold or purchased.

Group item change utility selection parameters:
The **Group item change** utility (**Inventory / Utilities / Group item changes**) has been updated to allow you to specify **Account code**, **Tax code**, **Label code**, **Commission code**, and **Prompt code** options as selection criteria for the group of items you wish to change. This feature allows you to easily find and change specific values for these fields.

Including active items only in item lookups:
You can now configure CounterPoint to exclude **Discontinued** and **Deactivated** items from the **Lookup items** window when you are looking up **In-stock items** by selecting **Yes** from the new **Active in-stock items only ?** field on the **Keywords / Lookups** screen.

Minimum order values for vendor items:
You can now define a minimum order value, instead of a minimum order quantity, for each vendor item in **Inventory / Vendors / Vendor items**. This feature allows you to specify the minimum cost that a vendor will allow you to order for a particular item.

Printing labels while viewing items:
In this version, you can now press **F2** or click the **Tags** button in **Inventory / View / Items** to create tags or print labels for the item you are viewing. This feature allows you to print item labels directly from the **View items** screen, as well from as the **Inventory** and **Location** windows, without requiring you to access another function.

Including a category recap on the Inventory Valuation report:
In this version, you can now choose to include a category recap on the **Inventory Valuation** report (**Inventory / Reports / Standard / Valuation report**). Similar to the location recap that is automatically included on this report.

Purchasing

Future and Special Cost List:
For each vendor item, you can specify a **Future cost**, which takes effect on a specified date, and a **Special cost**, which is valid for a specified period. Previously, the only way you could view future and special cost values for your vendor items was to browse through them in **Inventory / Vendors / Vendor items** or the corresponding maintenance functions. This version includes the **Future and Special Cost List** report (**Inventory / Reports / Standard / Future and special costs**), which lists all of the future and special cost values that are defined for the vendor items and date range you specify. This report allows you to quickly review future and special costs for your vendor items.

Required purchase order fields and forms:
In this version, when you define **Default buyer**, **Default ship-via**, and **Default F.O.B.** values in **Setup / Purchasing / Control**, you can specify whether the corresponding fields are required.
 With these settings, when a user creates a new purchase request in **Purchasing / Purchase requests / Enter**, the user must enter values (or accept the default values) in the **Buyer**, **Ship-via**, and **F.O.B.** fields before completing the purchase request.
You can now also control whether users are required to print purchase order forms, receiver forms, or RTV forms when posting each type of purchasing document.

Warn user if quantity or cost ordered is below vendor minimum:
In **Purchasing / Purchase Requests / Enter**, if a user enters a **Qty-ordered** value for a vendor item that is below the **Min order qty** value defined for the vendor item, CounterPoint now displays a warning message to alert the user.

Sales History

Sales Analysis by Item by Sales Rep report:
This version includes the **Sales Analysis by Item by Sales Rep** report (**Sales History / Reports / Sales analysis reports / By item by sales rep**), which allows you to review your sales reps' sales of each item—in units, dollars, and

gross profit—over a specified date range.

You can generate this report for a particular sales rep, a range of sales reps, or all of your sales reps. You can also specify a **Minimum sale amount** for the report and whether to report each sale amount as the **Original sale amount** or the **Net after discount** amount.

Timecards

Minimum number of minutes for lunch breaks:
You can now define a number of minutes (up to 99) in the new **TIMEWARN=** environment variable to configure Counter-Point to warn users if they attempt to clock in within the specified number of minutes of clocking out, or to prevent users from doing so entirely.

This feature allows you to enforce a minimum lunch break policy by requiring your users to be clocked out for at least the specified number of minutes.

For more new features see the documentation…

Squeezing more information out of your sales history. Everyone uses Category and Sub-Category for maintaining items. But you can get more creative if you want. Category and Sub-Category are referred to as profile codes. Did you know you have a total of **six**. The name and use of the other 4 are completely up to you. You could label one Holiday and the choices would be Christmas, Easter, Halloween, ect. Now you can run sales reports on Holiday items. You could name one of the profiles season and valid choices would be summer, fall, spring, winter. Now you have the ability to track the sales of seasonal merchandise. In addition you can now put all winter items on sale. Because many functions, including generating sale prices can be based on profile codes. You no longer need to go through item by item to put them on sale.

There are all kinds of uses you can put profiles to. Possible choices for the for profiles could be Holiday, Season, Sex, Age, Date, Code.

Date could be used if you carry very unique one time purchase items. The date could be the date you first started carrying them. Codes could be use on Gift Certificates or promotional items. To track a special event that the promotional Gift Certificates were given out. Your imagination is the only limitation.

Which version is for you? As many of you know there are two versions of CounterPoint, CounterPoint V7 and CounterPoint SQL. Both are excellent products. For many, V7 is the ideal product and just what the doctor ordered. But for others they need different capabilities. Each product has it's benefits and for many V7 is the 'best fit'. But for others they can use some of the extraordinary capabilities of CPSQL.

CPSQL is a 100% GUI (Graphical User Interface), that means it's all graphical not character based like V7 and many people today are more comfortable with GUI. It's also based on Microsofts SQL database, MSSQL. But the big difference is the almost endless customizations that can be done. In V7 you are given a lot of choices on how it works and looks. But they are choices that CounterPoint has given you to choose from. With CPSQL you choose what columns to display, what fields to show, what columns are use to sort by. You can even add your own fields to forms and to the database.

Another great feature is simultaneous multiple field lookups. With V7 you could look up items by description, vendor, or category. You could look up by any one of these but just one way at a time. With CPSQL you lookup by all of these at once. You type in part of the vendors name, part of the description, and part of the category name and CounterPoint automatically displays matching items.

If you would like to get more information or see a demo, let me know.

Options, do you need one ?
Most of the time I only cover things that are
built into CounterPoint. In other words you
don't have to pay extra for them. But today I'm
going to mention some of the options that are
available for CounterPoint. If you find any of
them interesting, give me a call.

Price Pack – This option allows you to go
from the built in 3 prices for items to 6. For
gridded items normally all cells are the same
price. With the Price pack you can have oversize pricing. Where you say my XL shirt is $2 more and the XXL is
$4 more . From that point on you only adjust the base price for the item and the XL is automatically $2 more and
the XXL is $4 more. That's not all, you also get location pricing. You can charge more for some or all items at
different locations. Currently the same item is the same price regardless where it is sold.

Serial/Lot Tracking – Allows you to track individual items by serial number and will track parts and labor war-
ranty automatically. This feature will also track Lots. This can be handy for paint, carpet, pharmaceuticals. Any-
thing that you don't need to track individually but need to simply track by groups (lots).

Kits – This goes way beyond the simple kits that is built in. This allows you to have pre-built kits. Essentially
where you order in parts and assemble them into a product. If you build furniture, you don't sell the tops, legs, and
hardware separately, but you do need to track what you order and convert them into finished products, that's a pre-
built kit. You can also create kits where you're prompted for choices. When you sell a car stereo you get a choice
of good, better and best speakers. The end price needs to change to reflect the speaker choice. But the "kit" price is
better than purchasing all the parts individually, with the kits option you can. There's even more you can do with
kit. Also you frequently don't want all the bits and pieces on the customers receipt. You want gift basket to be the
only thing to show, with kits you decide what items print and what ones don't.

 Offline Ticket Entry – This is a great feature that can actually make you money. This has two main uses. First if
your server has a problem or your network goes down, it allows your registers to keep functioning until you get the
problem resolved. But another great feature is remote or tent sales. You can install this on a laptop, take it to a mall
or to an outdoor event and have a sale. This allows you to bring your store wherever you go. You ring up items like
always. Let CouterPoint manage sale prices, contract prices, quantity pricing, ect. When you get back to the store
all the sales are uploaded into your system.

Rentals – This is a very flexible rental system. So if you rent videos, bicycles, tools, almost anything, rentals can
help manage it.

SQL Connection – This is unique in that all by itself it does nothing for you. But that doesn't mean you can't do
big things with it. With this option you now have direct access to your CounterPoint data. You can use Excel,
Word, Access, Crystal Report Writer or other ODBC products to create custom reports, modify or examine your
data in unique ways. There is no need export or import, you have direct access to all the data in your CounterPoint
system.

Wireless – This lets you put CounterPoint, or at least a version of it, in your palm. In a device about the size of a
cell phone you can check prices, print labels, receive product, and take physical counts all wirelessly. You can
even use it as a "line buster". This is great on days with a big sale, where you enter the items from a customer's
cart, then when the customer reaches the cashier all the items have already been scanned, they show up on the
cashiers screen, and all that's left is pay the bill.

CPShip Shipping interface – This allows you to integrate CounterPoint into UPS Worldship or other shipping
software. You enter the order into CounterPont, all the shipping information is sent to UPS Worldship. After UPS
Worldship processes the order the tracking number is sent back to CounterPoint.

UnForm – This is very powerful forms management software. It can take the plan simple forms (Invoices, PO's, Transfers, ect) that CounterPoint produces and creates very professional looking documents. But just as important these forms can be 'programmed' to print different information or multiple copies depending on customer, or other information. Maybe you want an additional copy if you ship the product. Plus when shipping is involved you want your shipping policy to print and have a place for the customer's signature. This and much more is possible with UnForm.

These are the most popular options but not all of them.

As always if there are areas or topics you would like covered in CounterPoint Connections or if you would like it to be more or less technical, please email me at cyoungman@acckinkltd.com.

Also for more in-depth or extensive information or training call and we can schedule a time.

Stop working so hard!

Let CounterPoint help. One of the more time consuming jobs is ordering merchandise and inventory control. CounterPoint can give purchasing advice based on minimum and maximum settings. But also it can base purchasing on selling history.

This can be as simple as ordering everything you sold last week to ordering stock for your upcoming fall sale based on your sales last year for this same period. It even allows you to change your order by a percentage to allow for the bigger add campaign this year.

To use this feature go to /Purchasing/Purchase requests/Purchasing advice/ From here you can select to order form the Primary vendor, lowest cost vendor or you can pick the vendor. Then you can pick to base the advice on Minimum/Maximum or replenishment or days of supply.

What if this all sounds great but you've never had the chance to setup your minimum/maximum values or they've changed but you haven't been able to keep your item records up to date. Well, CounterPoint can do this for you. Go to /Inventory/Reports/Standard/Min-max advice/ From here not only can CounterPoint suggest what your min/max values should be, but it can even set them for you. So a job that could have taken weeks can now be done in a few minutes.

To make this even more valuable, use the Vendor items feature. What this allows is for you to setup information on your inventory as related to your suppliers. CounterPoint allows you to setup multiple vendors for all your items. In addition you can set individual minimum order quantities, lead times, cost, and vendor units (you have to order in quantities of 6 or 12 ect.) per item, per vendor. This gives you great flexibility and power, allowing the purchasing advice feature to do most of the work for you.

Well that's all I can fit in, in this issue.