

10/01/2005

# The CounterPoint Connection



## Upcoming Features: 7.5.10

### **System:**

There are many functions that allow you to save your viewing or reporting parameters. This can simplify running the same view or report because your most often used parameters are already filled in. But things change, and sometimes you want to clear the saved settings. With 7.5.10 you now can.

Major security changes. You can now enforce passwords to be complex, force passwords to be changed, credit card data will be encrypted. See CISP compliance in this news letter.

### **Inventory:**

To speed up data entry, when in /Inventory/Vendors/Vendor items/. If you're in vendor mode, the vendor is automatically set to the last vendor you entered.

### **Customers:**

Loyalty Points calculation has been made more flexible. You can now set the earning of loyalty points to be reduced if loyalty points were used for partial payment.

### **Point of Sale:**

You can now restrict store credits to the current customer. This also makes finding a store credit easier because only credits for the current customer are displayed on the lookup.

Fixed price coupons: In 7.5.9 CounterPoint had Amount and Percent coupons. You now have coupons that fix the price of the sold items. If you have a rack of sweaters that range from \$30 - \$40, and you run a promotion for any sweater for \$20.00. Setup this coupon and when used with the \$30 sweater the coupon reduces the price by \$10. If used for a \$40 sweater the coupon reduces the price by \$20.00, fixing the price of the sweaters to \$20.

Recharge gift certificates. I have gotten many requests for this feature. You can now add value to a gift certificate. You are not limited to the original value; you can add part or even increase it beyond the original value.

Item prompts by transaction type. You can now add a prompt for a specific item for whenever it is returned or sold. Or have a prompt "Overnight?" whenever a particular item is backordered.

### **Sales History:**

Now in Sales History / Reports / Management history reports / you can select a range of stores. In the past you could only run it for one store at a time.

Ticket time now prints on Ticket history report

and more.....



# Tip Corner



Did you ever want to get your CounterPoint data into Excel to do some custom data mining or to just examine the data in a unique way. For example: You think you have a couple of items marked non-taxable that should be taxed, but your not sure of the item numbers. There are reports that show the tax status but you would have to manual scan thru all the items looking for the items marked non-taxable. If you pulled your item file into Excel, then sort by tax status. Then all the non-taxable items would be at the top of the list. You can now go in and fix the problem.

Go to /File Utilities/Special/System/Create CSV data/. Select the module you would like to export data from. The files will be in \SYN\companyID\EXPORT\CSVDATA\ directory. If you have Excel installed, just double click on the file and it will be loaded into Excel.

Do you get tired of running the same 5 reports at the end of every day. Do you have some other task you do monthly or daily. I'll show you a few ways to quickly accomplish this.

CounterPoint has macro capabilities built right in. You just start CounterPoint in record mode, run thru all the reports or other task you want to accomplish and exit CounterPoint. Now, whenever you want to run the task you start CounterPoint in play mode, and it will automatically run thru all the steps you recorded. First step: Right click your CounterPoint desktop icon and copy it. Next right click the copied icon and select properties. Add at the end of the target line `-RECORD filename`. Filename is the name of the file to store the key-strokes. Run the reports or other task you want to do and exit CounterPoint. Rightclick the new icon, select properties and change `-RECORD` to `-PLAY`. Next time you double click the icon it will run thru all the steps automatically. In places where a date is required, you can press enter for the default date or 't' for today's date. You can't enter a physical date because you will want to use different dates when the report is run.

If you need more flexibility, you can also use 'Perfect Keyboard'. This program is included on your CounterPoint CD. It is a Windows based keyboard and mouse macro program. It is a more powerful and has the advantage that it will work with programs other than CounterPoint. Because of the extra capabilities it may take longer to become proficient with it. I won't cover Perfect Keyboard in this issue, I'll leave that for latter. Full documentation is included with the program.

Would you like an easy way for employees to clock in and out, even employees that don't use CounterPoint, or at your registers, when they start CounterPoint, have it start at the register screen. You can have CounterPoint start at any menu. Just create another copy of the CounterPoint icon on the desktop. Right-click the icon, and select properties. In the target box, add to the end, the following line. `'-run menu#'`, without the quotes. Menu# it the CounterPoint menu you want to start at. For Clock-In its 901. How do you find the menu number. When in CounterPoint when you're at a menu choice press F8, the menu ID will be displayed.



Would you like a spell checker for CounterPoint. Try TinySpell <http://tinyspell.m6.net/>. It will monitor you're typing and beep when you misspell a word and even correct it if you like.

## Visa CISP Compliance

Are Your Credit Cards Secure?



Credit card fraud costs billions every year. You don't want it to cost you your business.

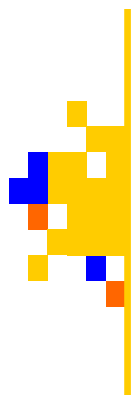
When your customer pays you with a credit card—in-store, online, or by phone—you collect cardholder information. You need to protect that information.

Visa enforces strict guidelines for the Cardholder Information Security Program (CISP) for any system that accepts credit cards. CISP ensures that cardholder information is secure and protected against theft.

As a merchant who accepts credit cards, you are responsible for adequately securing your customers' cardholder information wherever it resides—on your computers, in a drawer, or in a filing cabinet. If you fail to do so, Visa and your bank—under the terms of your Merchant Processing Agreement—can hold you accountable for fines, and for any losses they suffer from the fraudulent use of cardholder data obtained from your business.

Synchronics is currently having CounterPoint evaluated for CISP compliance. They expect CounterPoint to be one of the first POS application certified CISP compliant. But there is more to it than just CounterPoint. Any place customer data and credit card information is kept, file cabinet, rolodex, post-it notes. All have to be secured. Go to [www.synchronics.com](http://www.synchronics.com) to read more about it.

If you need help setting up better security on your computers or network please let us know..... and keep things secure !



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