



AcclinkLTD

Issue for Dec 2006

7.5.13 New Features

System Wide:

"Yesterday's date" shortcut key

Previously, you could enter **T** in any date field throughout CounterPoint to specify "today's date." In this version, you can also enter **Y** in any date field to specify "yesterday's date."

Previous record shortcut key

All maintenance functions that allow you to press **F1** to advance to the next available record now also allow you to press **CTRL+F1** to view the previous record. This feature adds this shortcut key to those maintenance functions that did not previously include it.

Point of Sale:

Specifying store credit numbers for returns



Previously, when a user issued a store credit for a return in regular **Ticket Entry**, the associated **Store credit-#** was always determined automatically. In this version, you can allow users to specify a

Store credit-# by entering the number manually or by swiping a card with a magnetic stripe. This feature allows merchants to use pre-numbered cards or certificates to track store credits, as well as to add value to existing store credits.

With this setting, when a user selects a **Store credit** pay code for a return ticket, the user can enter or look up a **Store credit-#** for the store credit. If the user's workstation includes an MSR, the user can swipe a suitable magstripe card to issue the store credit to the **Store credit-#** assigned to the card.

Inventory:

Logging changes to item records

You can now configure CounterPoint to record and log significant changes to item data, including the addition, deletion, and renumbering of item records, as well as changes to item prices, costs, and other maintained fields (e.g., descriptions, categories, sub-categories, vendors, codes, and units). This feature allows you to track and monitor all changes to critical data that are not already included in a separate audit journal.

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 / Reports / Merchandising / Summary**), 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

New Features Continued...

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.

Detailed transfer and adjustment history

Previously, if multiple transfers or inventory adjustments were posted for an item at one location on a particular day, all of those transactions were grouped together into a single inventory history record under a single document number.

In this version, CounterPoint retains the individual document number for each posted inventory transaction in history, allowing you to easily determine the original document for each adjustment or transfer.

Preventing blank Category/Sub-category values in item records

In previous versions, users could leave the **Category** and **Sub-category** blank when defining new items. You can now configure CounterPoint to prevent the creation of new items with blank **Category** and **Sub-category** values.

Excluding discontinued items from the Consolidated Grid report

Previously, the **Consolidated Grid** report automatically included items that were designated as **Discontinued**. You can now exclude **Discontinued** items from this report by selecting **No** from the new **Discontinued items ?** field in **Inventory / Reports / Merchandising / Consolidated Grids**.

Customers:

Logging changes to customer records

You can now configure CounterPoint to record and log significant changes to customer data, including the addition, deletion, and renumbering of customer records, as well as changes to customer balances, names, addresses, contact information, and codes. This feature allows you to track and monitor all changes to critical data that are not already included in a separate audit journal.



Viewing open/closed items in descending order

In previous versions, when you viewed an A/R customer's open or closed items in **Customers / Account management**, they always appeared in ascending order. You can now choose to view open and closed items in descending order by selecting one of three new sort options.

Sales History:

User-specific default monthly history views

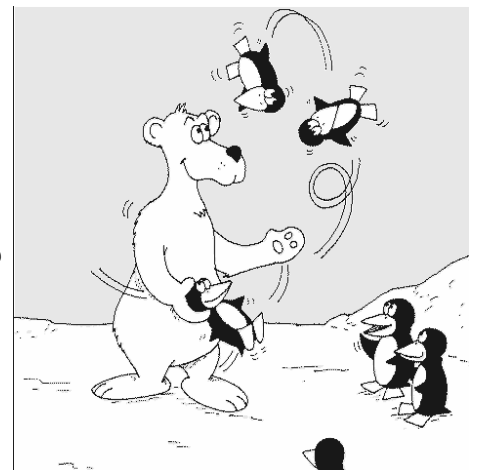
In this version, each user can select a different default view for each type of history in **Sales History / View / Monthly history**. This feature allows each user to select the default view that he or she prefers.

Tips and Tricks

You can have notes for Items, Customers, and Vendors. These notes can be displayed on screen whenever looking at the specific Item, Customer, or Vendor. But they can also be set to print on invoices, automatically display when entering sales or purchase orders.

Instead of typing these notes into CounterPoint you can also import them from Word, Excel or other files. You simply create or edit a file so the Item number, Customer number, or Vendor number is first, followed by a comma and up to 770 characters for the note. The note must be entered without pressing the [Enter] key. Just type the text and when imported CounterPoint will format the text to fit the note box. The file would look like this:

Continued on following page...



Tips and Tricks Continued...

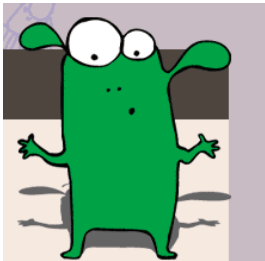
21343212, This is a note for item # 21343212. This number can be the item number or the bar code. This line can be up to 770 characters long.

9282828912, This is the note for item #9282828912.

9255528912, This is the note for item #9255528912.

4, You can enter as many item notes as you need. Then import them all at once.

Then go to Inventory / Utilities / Import item notes / or Inventory / Utilities / Import vendor notes / or Customer / Utilities / Import customer notes / Enter the file name of your notes, the name you want to give to your notes and your done. By the way you can have multiple notes per Item, Customer, Vendor.



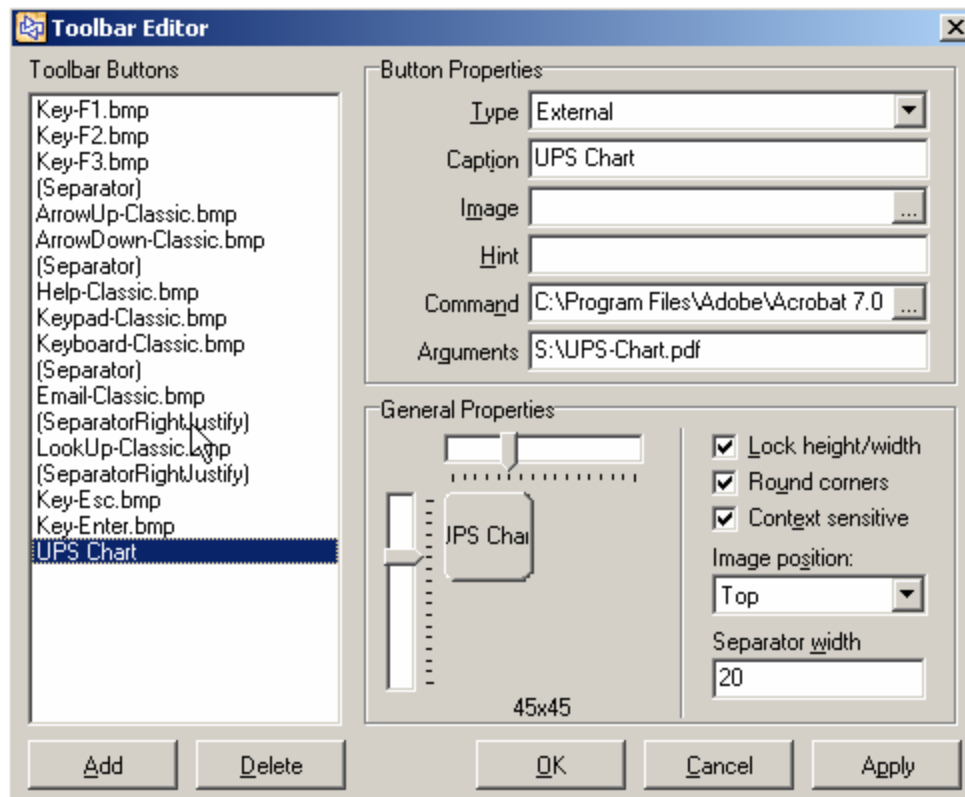
You'll be amazed!!

Did you know there are ways to add functions and external programs to you CounterPoint system?

These can be as simple as launching your favorite word processor from within CounterPoint to displaying the UPS shipping chart, to tracking lost sales for items you don't carry. Sending printer commands to switch trays, sending emails, the list is almost endless.



I'll just cover some simple things you can do here. With your mouse anywhere within the CounterPoint window, right click and select / Toolbar / Customize... / You will see a screen like this.



In this example say you what to have the UPS shipping chart one click away for quick reference. Just go to the UPS web site and download the chart or you could type it out with Word. In this example I've downloaded the Acrobat Reader version (PDF). Save the PDF to the drive where CounterPoint is.

Next, bring up the toolbar editor. Right click and select / Toolbar / Customize.../ Click [Add] button. Then in button Properties select External for Type. Caption, I chose "UPS Chart". Optionally you can have an image for your button and Hint. A hint is yellow text that displays when your mouse hovers over the button. What command to run when the button is clicked. In this case C:\Program Files\Adobe\Acrobat 7.0\Reader\AcroRd32.exe. Then in Arguments the document to display, in this case S:\UPS-Chart.pdf.

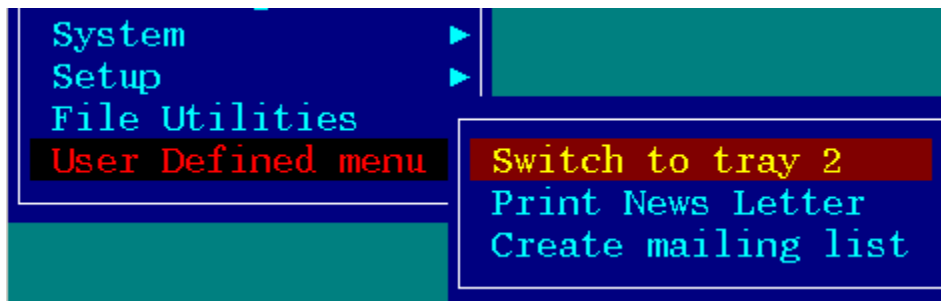
You can choose where your button is displayed on the toolbar by left clicking on the item and dragging it in the toolbar editor. Now you have a new button in my CounterPoint toolbar.



There are no restrictions on what program you can call. Common ones are Acrobat Reader (AcroRd32.exe), Excel (Excel.exe), Notepad (Notepad.exe) and Internet explorer (iexplore.exe). To keep things running fast, if you want to display a simple text message, running Notepad is better then Word. Word takes longer to start up. Using Notepad will display the note much faster.

Even more powerfull is you can write programs in Visual Basic and have them interact with CounterPoint. CounterPoint gives you two programs as a free sample. SendKey.vbs and PromptAndLog.vbs. SendKey allows you to assign a key sequence, like End of Day, or to run a particular report to a button. PromptAndLog will prompt with a question and add your response to a file. A good use for this is a lost sale report file. If a customer ask for an item you don't carry the clerk can click a button and type in the item the customer was looking for. It will be added to a file of items you may want to carry.

There is another place you can add programs or command to as well. You can add to the CounterPoint menu as in this example.



I've added menu choices to switch my laser printer to tray 2, Print a news letter on demand, and create a mailing list.

User-defined menus				Acclink
Lev	Description	Command	Quick Run	
2	Switch to tray 2	tray2.bat	Y	
2	Print News Letter	nl.bat	Y	
2	Create mailing list	ml.bat	Y	

To do this go to / Setup / System / User-defined menu / Here you can enter commands to start programs that can do many common operations. Lev is the menu level. You can have up to 4 levels. Each succeeding menu level will be indented from the previous level.

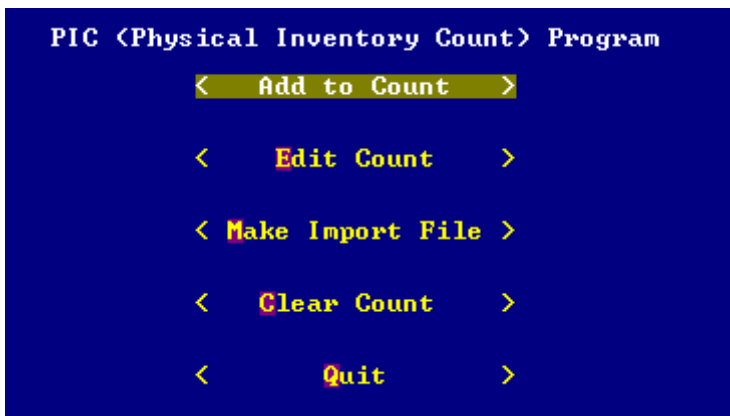
To have the menu display you need to assign the menu to the user. In / Setup / System / Users /. Field 14 'User-defined menu'.

It's that time of year again, physical counts:

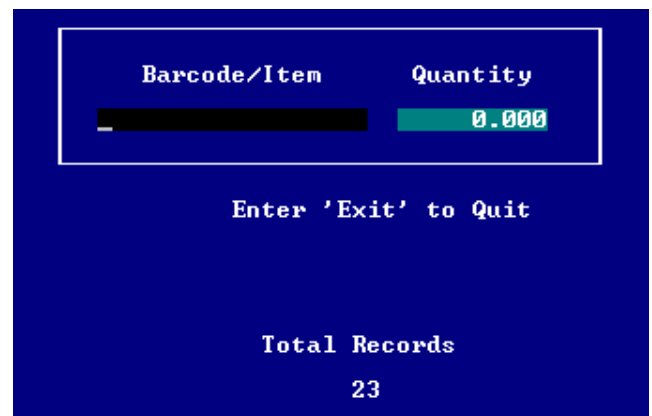
You can hire an outside firm to do the count, manually enter the counts in CounterPoint, you can buy or rent a handheld data collector, but did you know instead of purchasing an expensive data collector you could use an old laptop and small utility program we have to do your physical counts. The utility is



only \$50.00, you load it on a laptop and connect a bar-code scanner. Now you're all set. You just put the laptop on a small cart and wheel it around to do your physical counts. When done. Upload the counts into CounterPoint.



Main Menu



Add Count screen

Sample screen shots of PIC (Physical Inventory Count) program

I want feedback !!

What would you like in the newsletter. What don't you like. Would you like more technical tips or is it too technical. Would it be useful to cover the basics or should I stick to the less known or little used features. Would you like to hear how CounterPoint options may be of benefit.

Would you like to cover things other than CounterPoint, networking, security, new products like wireless, or the latest POS equipment.

Send your thoughts to: cyoungman@acclinkltd.com