

Acclink

CounterPoint SQL Connection 9-30-08

New Features

CounterPoint SQL 8.3.8 New features (July 2008):

Important: starting with CounterPoint SQL 8.3.8 Microsoft SQL 2000 or the free version, MSDE will no longer be supported. You must upgrade to Microsoft SQL 2005 or the free SQL Server 2005 Express Edition (SSE). **If not using SQL 2005 you must upgrade to SQL 2005 before you install the CounterPoint 8.3.8 update.**

Skip the Login dialog: You can now skip the login prompt when starting CounterPont.

New Look: The Look has been updated to be more modern and attractive.

Validated returns: This allows you to verify that the items being returned were actually sold. Validated Returns window allows you to look up a ticket and select the items to return. It will also prevent a customer from returning the same item multiple times, as well as ensures that the item is returned for the same price it was sold.

Cash drops and Cash loans: In the past you needed to use the pay-out and pay-in function to move cash in or out of the drawer. This could only be done in Ticket Entry, requiring you to go into Ticket Entry to do this. Now you can use Cash drop and Cash loan from outside of Ticket Entry.

Releasing orders with balances in batches: Previously you could only release a batch of orders if there were no balances, now as long as the final payment pay code has been selected, you can batch release orders with a positive balance.

More pay codes on screen: Previously you could have as many pay codes as you wanted but only 8 would display on the screen. You can now display as many as 15 pay codes. You can still access additional pay codes with a drop down selection.

Suppress unwanted dialogs: You can now suppress many un-needed dialogs. You may now suppress the Validations dialog if not needed, Suppress the authorization codes dialog for credit cards, Suppress the ticket completion dialog.

New Inventory Availability report: In some retail stores, inventory is not kept on the sales floor or on display. Instead, items that match a customer's specifications must be retrieved from a stock room or warehouse on demand. For example, in a shoe store, clerks must present multiple pairs of shoes of a particular size, width, color, or style to each customer for his or her consideration. However, for merchants that stock hundreds or thousands of similar items, such as a typical shoe store, finding and retrieving items that meet a customer's specifications can be a time consuming process. To help merchants streamline this process, CounterPoint now includes the INVENTORY AVAILABILITY report.

The INVENTORY AVAILABILITY report indicates on-hand quantities (and bin location, if one is specified in the inventory record) for those items that meet a customer's preferences (i.e., color, size, category, vendor, and so forth) or any other criteria you specify. This report allows a clerk to quickly respond to questions like, "What do you have in a size 8?"

Enhanced Barcodes window: CounterPoint SQL allows for multiple barcodes, but in the past you could only work with one barcode at a time. Now the barcode window allows you to work with multiple barcodes simultaneously.





CounterPoint 8.3.8 New Features

Inventory Aging Report: This version of CounterPoint SQL includes the Inventory Aging report which provides an overview of the length of time that items in your current inventory have been in stock, based upon the date that the inventory was received.

Retail Inventory Value report: CounterPoint SQL now includes the Retail Inventory Value report which provides you with a detailed overview of your item inventory for a specified date range.

Adding multiple items to a purchase request: In this version, you can click the **Add items** button on the **Purchase Requests Enter** window to display the **Add Items** dialog. This dialog allows you to select multiple items from a filtered checklist and specify the quantity to add to a purchase request for each item you select.

The **Select items** tab of the **Add Items** dialog displays the items you can add to the purchase request in a checklist format. To include an item on the purchase request, simply select its check box, and then specify the quantity for the item, either by entering the **Quantity to order** or by clicking the **Suggested qty** button.

Purchasing Advice by Days of Supply: In previous versions of CounterPoint SQL, The Purchasing Advice report calculated suggested order quantities using either the **Maximum** or **Replenishment** methods.

The Purchasing Advice report now includes the **Days of Supply** method, which considers both quantity on-hand and actual sales trends to calculate suggested quantities to order. This method results in a more accurate order recommendation.

Physical count of Always serialized items: Previously in CounterPoint SQL, **Always serialized** items were excluded from the physical count process. With this release, CounterPoint provides a method for counting **Always serialized** items that allows you to enter or import the serial numbers for your items during the physical count process.

This feature will provide more accurate on-hand quantities and cost values for **Always serialized** items by allowing you to review any discrepancies between the counted serial numbers and on-file serial numbers using the Physical Count Worksheet and the Physical Count Edit List. During the posting of physical counts, this feature will also automatically reconcile counted and on-file serial numbers.





SECURITY



Security is an often overlooked part of business. We all want to trust our employees and fellow workers. Security is about more than trusting the staff. Many security steps are to protect from accidental loss of information and or money. Security also can prevent hackers or other types of outside theft. Also to reduce your liability in case information or money is lost. If you take credit cards, you also have contractual obligations to the credit card processor. They even have the right to fine you if you don't meet their requirements.

Control who has access to what. Any confidential information should be kept under lock and key, literally. If you have paper work with confidential information it should be kept in a locked limited access area.

Don't let everyone treat the computer they use as their own. If you let them install any software, be it games, photo sites, screen savers, music players, there is also the risk their installing spyware, viruses or other malware. Or they may simply install software or make changes that will conflict with the system making it unreliable. These are business computers, and it's your business. So control who is allowed to make ANY changes to the settings or software. This also makes it easier to find computer problems. If only one person is making changes then when there is a problem, you have a better chance of finding what caused the problem and fixing it.

In CounterPoint you have tremendous control over what users can do. You can restrict users by customizing the menu and settings in security. Use them. CounterPoint makes it easy to manage these settings. By simply creating a few menu codes and security settings then assigning these to the users you can restrict what users can do.

You can do a self assessment by going to <https://www.pcisecuritystandards.org/> download the Self-Assessment Questionnaire.



Using Alternate Units



Alternate Units: Alternate units are often overlooked. Alternate units are most commonly used to handle selling and receiving items in something other than EACH. You may have items that you sell by the EACH, 12PK, 24PK, ect. You may also sell by EACH but receive by the case of 12.

If you have an item that you sell in a box of 6, you add this alternate unit by going to the item, and then click the Units tab. Then click the Alt-1 button. In the box Alt-1 unit, lookup or enter your alternate unit, say 6pk. You can then enter a description. Next you will enter how many Stocking units (usually EACH) make up a 6pk. Last, you enter a price for a 6pk. This can be the same or a different amount than 6 eachs, that's up to you.

To further speedup checkout and reduce errors you can assign a barcode to the alternate unit. You will find whether its candy bars or golf balls that almost always the package barcode is different than the individual item barcode. This allows you to assign the box barcode to the 6pk and the individual barcode to the EACH. And yes, CounterPoint will automatically reduce the inventory by 6 when you sell a 6pk of the item.

A less known but highly useful use of alternate units is for kits and packages. Say you have items A = \$2, B = \$3, and C = \$6. You want to sell them as a package deal or kit for \$10. You could make a sales kit, and put all three items in it. But the price will add up to \$11. You could create a discount item of -\$1 and add it to the kit. This will work. But using this method you can't control where the discount is taken. What if, for instance you wanted the whole \$1 to come off the A item. So that A sold for \$1, B for \$3 and C for \$6. Here is where you can use Alternate units. Create an Alternate unit called KIT. Define a KIT unit as containing 1 EACH. Assign a price of \$1 to the KIT unit for item A.

When you define the Sales Kit set the Unit for item A to KIT. It will still reduce the inventory by one, but it will sell for \$1 instead of the EACH price of \$2. Now when you sell this Sales Kit the total price will be A = \$1, B = \$3 and C = \$6 for a total of \$10. But when you sell item A outside of a kit it still sells for \$2.

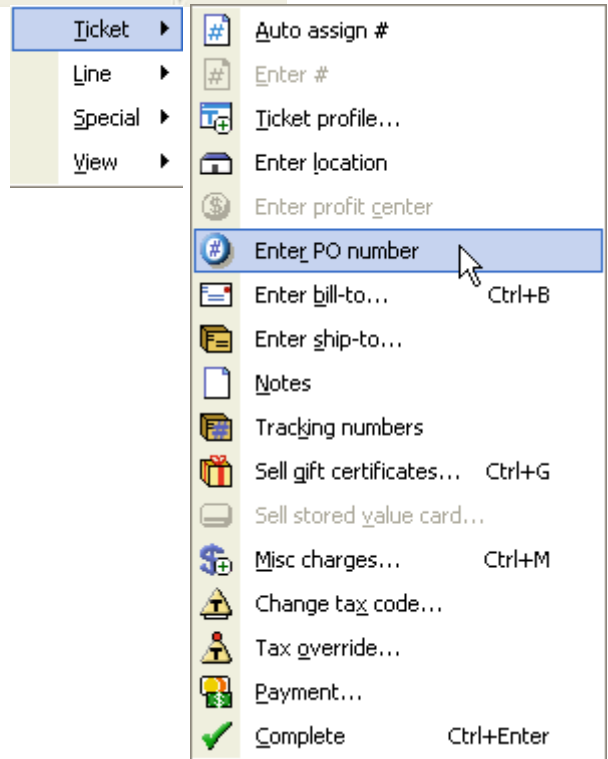
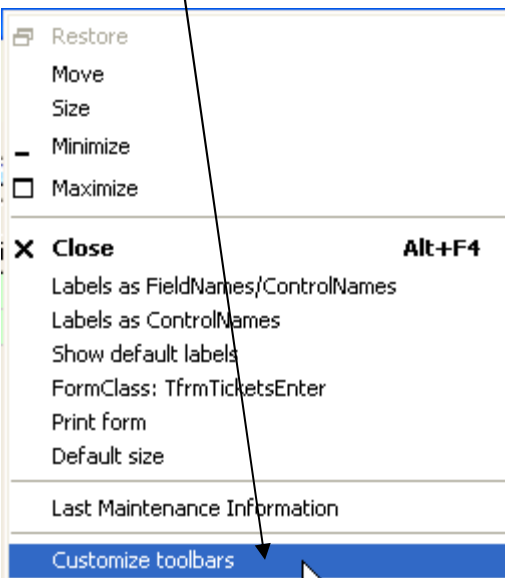
Customizing the Look and Feel in POS:

In Point of Sale (POS) you need speed and accuracy. In CounterPoint you have over 50 functions available to you on the POS toolbar. You can set up any of these to have one click access (speed) but if you put them all on screen you would lose accuracy in the likely hood of clicking the wrong button in all the clutter.



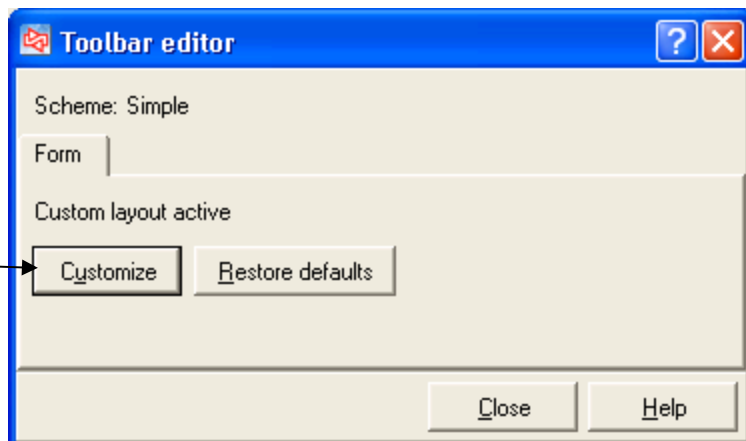
Most of us don't use all the functions or some of them very infrequently. So what we need to do is put the common functions on the tool bar. That will give us the speed and accuracy we need.

To customize the toolbar just right click on the blue bar at the top and select customize.

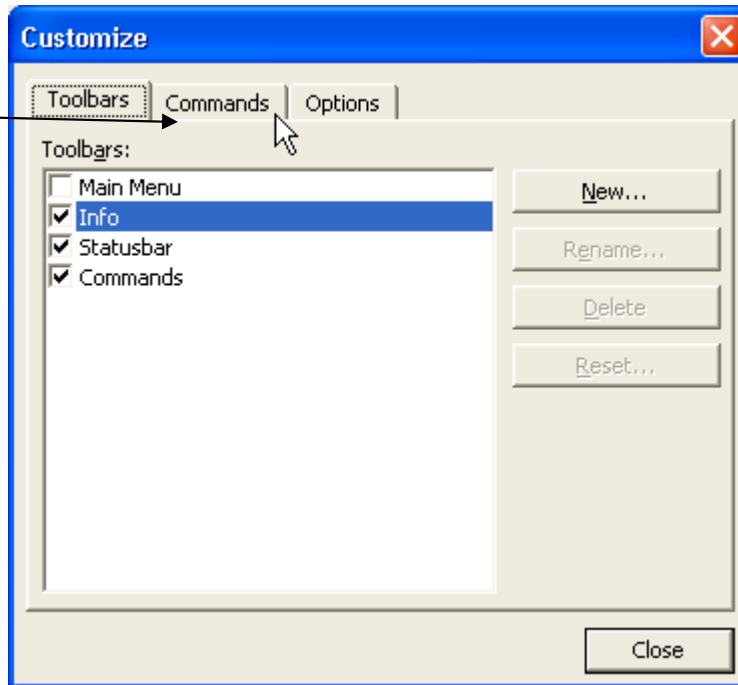


You will then see the Toolbar editor.

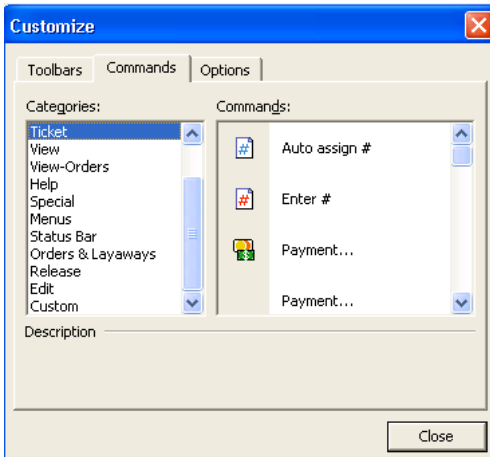
Click the Customize button.



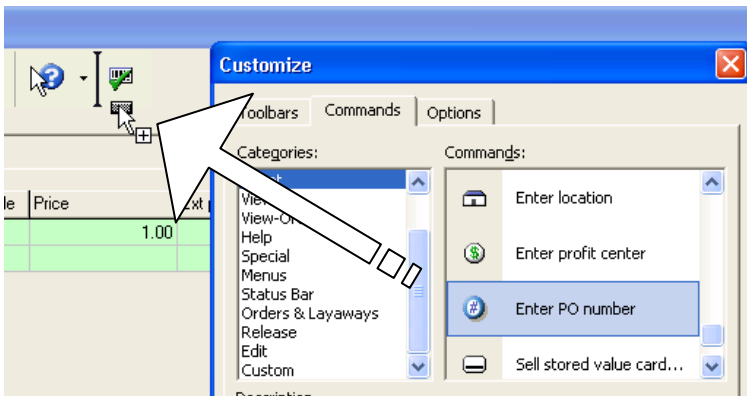
Then click the Commands tab



You will then see the various categories and commands in those categories.



Just drag the command to where you want it on the toolbar.



That's it, just save changes when you exit the Toolbar editor to make them permanent.

Making the detail area more useful. By default the POS screen has the following columns.

Item number	Description	Quantity	Taxable	Price	Ext prc
100001	WIDGET	1	N	1.00	1.00
>	(new line)				0.00

Labels below the table with arrows pointing to columns: Item #, Description, Qty, Taxable, Price, Ext Price.

If you process a lot of orders it may be handy to have , qty to release and qty to backorder.

Item number	Description	Quantity	Qty to-rele...	Qty to B/O	Taxable	Price	Ext prc
100001	WIDGET	1	1	0	N	1.00	1.00
100002	Widget Holders	1	0	1	Y	199.99	199.99

To customize the columns just right click on any column, and select column designer.

Column designer dialog box showing column configuration options.

You can move any columns in the left panel to the visible columns on the right. You may also move them around by using the Move Up and Move Down buttons. When you're done click OK and then once again right click any column and then pick save as. Pick Default if you want this to be your standard POS screen.

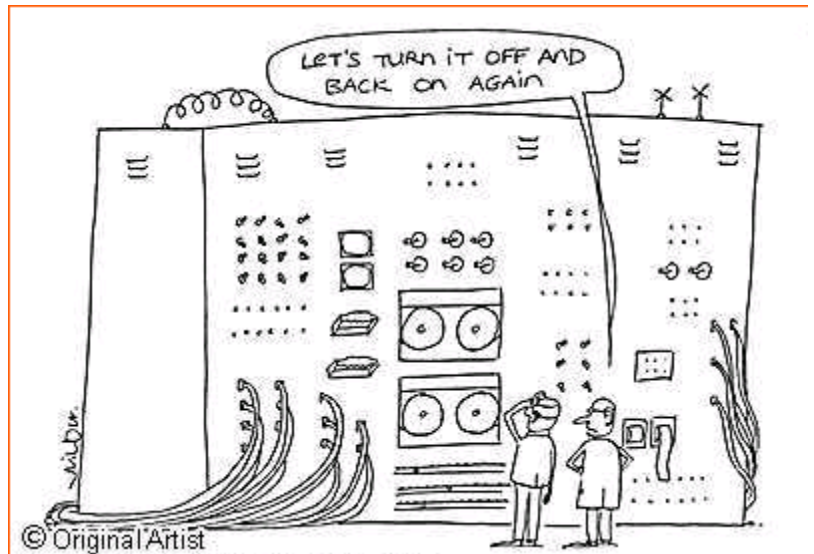


Contribute to the community.

Have you found a solution to a problem and want to share?

Send in any tips or helpful hints and maybe they will appear in a future CounterPoint Connection publication.

Send to: cyoungman@acclink.net



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