

COUNTERPOINT^{SQL}

COUNTERPOINT SQL FUNCTIONS & FEATURES



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INTRODUCTION

At Radiant Systems, we attribute our longevity and success to our emphasis on customer service, our strong relationships with our CounterPoint Business Partners, and our dedication to product quality.

The Company

Founded in 1985, Radiant Systems (NASDAQ: RADS) provides innovative store technology for the hospitality, petroleum and convenience, retail, and entertainment industries with more than 50,000 sites worldwide.

A publicly traded company since 1997, Radiant is headquartered in Atlanta with regional offices in Dallas, Los Angeles, Prague, London, Singapore, Melbourne, and Memphis.

Radiant has more than 900 employees worldwide and more than 125 certified sales and service providers. Backed by a global infrastructure, Radiant uniquely offers an end-to-end solution with the easiest to use and most reliable software and hardware in the industry.

CounterPoint SQL

CounterPoint SQL is a complete retail management solution that gives you power and control over every aspect of your business—point-of-sale, inventory, customers, purchasing, sales history, and more. CounterPoint includes powerful features and flexible options so you can run your business your way.



CounterPoint SQL is available in two editions: Express and Enterprise.

Unless otherwise indicated, the features described in this booklet apply to both editions of CounterPoint.

CounterPoint SQL Express

The Express edition is ideal for small, single-store businesses that want a powerful, yet economical solution. Express includes many of the same features as the Enterprise edition, and it's compatible with CPGateway and CPOnline.

You can start with CounterPoint SQL Express and—when you're ready—move up to Enterprise.

When you move up to Enterprise, you won't need to convert data, change your business practices, reconfigure the software, or retrain your staff.

CounterPoint SQL Enterprise

The Enterprise edition can be used in any size business. It includes all the features available in Express, plus:

- Support for multiple locations
- Advanced customization utilities
- Expanded reporting tools
- Additional features including customer loyalty, backorders, special orders, offline ticket entry, markdown tracking, serial numbers, and more

Base System and Options

The CounterPoint Base System offers countless front-counter and back-office tools to your help business run efficiently and profitably.

Options add specialized functions to your system and can be purchased with the Base System, or later as your business needs change.

Which Edition Is Right for You?

CounterPoint is sold exclusively through a worldwide network of Business Partners. A Partner in your area will help you determine which edition is right for you.

The feature grid on the following page provides an overview of the functions and features included in the Express and Enterprise editions.

CounterPoint SQL Base System	EXPRESS	ENTERPRISE
Small business (1-3 users)	✓	✓
Medium to large business		✓
Multiple companies		✓
Multiple locations		✓
Multiple workgroups		✓
Wide Area Network support		✓
Import/Export utilities		✓
Customization tools		✓
Unlimited database size		✓
Point of Sale		
Regular or Touchscreen Ticket Entry	✓	✓
Sales, returns, orders, and layaways	✓	✓
Holds and quotes	✓	✓
Ticket history	✓	✓
Gift certificates and store credits	✓	✓
Multiple currencies	✓	✓
Manager overrides	✓	✓
Crystal receipts	✓	✓
OPOS receipts		✓
Special orders and backorders		✓
Signature capture		✓
Drawer reconciliation		✓
Compulsory cash drawer close		✓
Commissions		✓
Inventory	✓	✓
Promotional pricing	✓	✓
Three price levels	✓	✓
Alternate selling units	✓	✓
Physical count	✓	✓
Multiple stocking locations		✓
Transfers between locations		✓
Markdown tracking		✓
Contract and special pricing		✓
Customers	✓	✓
Receivables	✓	✓
Credit limits	✓	✓
Loyalty programs		✓
Purchasing	✓	✓
Advice based on Min/Max levels	✓	✓
Receivings (with or without a PO)	✓	✓
Automatically generate POs		✓
Advice based on Replenishment		✓
Purchasing adjustments		✓
Returns to vendor		✓
Customer-specific purchasing		✓

CounterPoint SQL Base System	EXPRESS	ENTERPRISE
Labels	✓	✓
Merchandise and customer labels	✓	✓
Barcodes	✓	✓
Grids and Apparel	✓	✓
Three-dimensional grids	✓	✓
Sales History	✓	✓
Sales analysis for items, customers, and sales reps	✓	✓
Sales analysis for user-defined groupings		✓
Accounting Interface	✓	✓
Interface to accounting packages	✓	✓
Profit centers		✓
Credit Cards	✓	✓
Built-in credit card processing	✓	✓
Support for additional processors	✓	✓
CPGateway	✓	✓
Ecommerce	✓	✓
CPOnline	✓	✓
Upload items, prices, and customers	✓	✓
Shopping cart	✓	✓
Reports	✓	✓
Crystal Reports viewer	✓	✓
Quick Reports	✓	✓
End of day reports	✓	✓
Inventory analysis reports	✓	✓
Merchandise analysis reports		✓

CounterPoint SQL Options	EXPRESS	ENTERPRISE
Credit Cards Option —Additional processors include First Data North, First Data South, Vital, and Paymentech*	✓	✓
Receivables Option —Charge sales, receivables tracking, cash receipts, account aging, and statement printing	✓**	✓
Serial Numbers Option —Detailed records of each piece of merchandise		✓
Advanced Pricing Option —Six price levels, price-by-location, oversize pricing, and custom pricing for price calculations		✓
Multi-Site/Hub Option —Multiple stores can operate independently and periodically exchange information		✓
Offline Ticket Entry Option —Ring up sales and process orders without a connection to the server		✓

* Paymentech processing is built into the Express Base System and does not require the Credit Cards Option.

** The Receivables Option is included as part of the Express Base System.

SQL Technology

CounterPoint SQL is based on Microsoft SQL Server, an industry standard database that's affordable and easy to use. Your business records (items, customers, history, etc.) are securely stored in the SQL database.

SQL technology provides reliable data storage and excellent performance. Plus it is highly scalable—from a small single-user system to hundreds of users with huge databases. SQL database operations take place at the server, so reporting and analysis is quick and easy, even with years of detailed data.

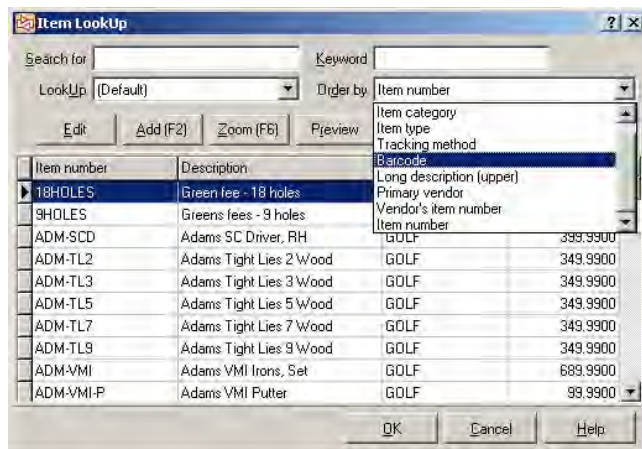
CounterPoint takes advantage of SQL transaction processing to protect your data. Even if your power goes out while posting transactions, SQL will “roll back” the transaction that was in progress so you can re-post without losing any data.

SQL data can be easily integrated into other applications, such as Microsoft Excel or Word. With the Enterprise edition, you can easily import and export data to and from any number of external sources.

Find It Fast

When you want to find information in CounterPoint, just type in what you know and let CounterPoint do the rest. LookUp functions are available for any information you've put into your system.

For example, you can use keyword LookUps to find any item with “blue” in the description, or any product in the “golf” category, or any customer whose phone number contains “1234.” LookUps let you pick which fields you want to display in the list, and even in what order to present the records.



To narrow the scope of what displays in LookUps, you can “filter” the data. Filters let you see, for example, just the customers who live in your state, or just the items that sell for more than \$100.

You can even assign names to your favorite Filters and LookUps (“Blue items,” “Golf products,” etc.) and save them for future use.

And when you don't find the information you're looking for, authorized users can add it on-the-fly from the LookUp window.

See It Your Way

When you want to see detailed information for an item (or customer, vendor, etc.), Zooms show you exactly what you want to see from anywhere in CounterPoint.

CounterPoint's ready-to-use Zooms display basic information, such as an item's description, category, and available stock, along with buttons that display additional details, such as recent sales and open orders.

You can also configure the Zooms to display just the information you want—no more, no less.

Reports, Reports, Reports

CounterPoint includes an extensive library of reports. Each report is designed to give you all the information you need to run your business.

CounterPoint reports and forms are designed using the industry-leading Crystal Reports engine. You can customize or add information to any CounterPoint report—without having to create new reports from scratch. (Report customization requires the Crystal Reports Designer, purchased separately.)



Getting Around

CounterPoint offers a choice of menu styles and toolbars for navigating through the system.

Authorized users may select their own menu style—whether it’s a button-style menu (excellent for single-click and touchscreen environments), a dropdown list, etc. To simplify usability and provide better security, you can assign users to limited menus with fewer selections. You can even change menu names or add new menu selections.



Audit Trails

Each time you post transactions, CounterPoint records the essential information. With a solid audit trail, you can go back at any time to see *what* was updated, *when* it was updated, and *who* updated it.

Architecture

Yes, CounterPoint provides the features you need to run your business profitably and securely.

But some of CounterPoint’s greatest strengths are not *specific* application features—they are the benefits of a solid and remarkably powerful architectural approach to software design.

CounterPoint’s architecture is based on a framework that provides a solid foundation for the applications and ensures consistency throughout the system.

With a consistent framework, you only need to learn a few basic concepts that you can apply system-wide. For example, once you learn how to “find,” “view,” “report,” etc., you can use that same knowledge for items, customers, vendors, and throughout every function in CounterPoint. The basics are easy to learn and, more importantly, easy to use.

Customize CounterPoint Your Way

You’ve dreamed about software that was designed especially for you—not for businesses that are “kind of like you,” but for *you*. Software that talks the way you talk and that works the way you work.

CounterPoint can use the same vocabulary that you use in your business. Perhaps you prefer “departments” instead of “categories,” or you use the word “members” instead of “customers.” Just make the changes in one place and CounterPoint uses your vocabulary for all screens and reports.

But it doesn’t stop there.

You can change more than the way CounterPoint looks. You can actually change the way it works. Speed up data entry by skipping fields you rarely use. Or change default messages to better fit your operation—“Selected item is not valid. See Rebecca in Operations for a valid item number.”

CounterPoint’s unique architecture lets you expand your system to include your own custom fields, screens, reports, and applications. Do you need to track the names of your customers’ children? Add a new field in CounterPoint. Do you need to track customer-specific part numbers? Add a new screen—you can even print the part numbers on invoices so customers can identify their merchandise.

The customization capabilities are unmatched—and practically unlimited.

With the Express edition, most customizations require the services of a CounterPoint Business Partner. With the Enterprise edition, any authorized user can customize CounterPoint using the built-in tools.

Just dream up what you want CounterPoint to do. Chances are CounterPoint can do it.

Ready To Use

Yes, you can tailor CounterPoint just about any way you want. But you don’t have to! CounterPoint is ready to use right away and gives you all the tools you need to run your business.

What Are You Waiting For?

Call (800) 852-5852 today. We’ll put you in touch with a CounterPoint Business Partner right away.

COUNTERPOINT BASE SYSTEM

The CounterPoint Base System contains countless front-office and back-office tools to help your business run efficiently and profitably.

POINT OF SALE

Overview

Point of Sale provides fully integrated cash register functions on a computer workstation. It also gives you a full complement of management controls and reports to help you operate your business profitably and securely. **Point of Sale** works well in a variety of retail, wholesale, mail-order, and ecommerce environments.

You can mix sales, returns, orders, and layaways on the same ticket. With the Enterprise edition, you can also mix special orders and backorders.

Associate image, audio, or video files with each item and/or customer, and CounterPoint can automatically display the image.

You can choose either Regular or Touchscreen Ticket Entry.

Regular Ticket Entry

The heart of **Point of Sale** is Ticket Entry. Because the screen is designed to look like a sales ticket, training your clerks is quick and easy.

Item number	Description	Quantity	Taxable	Price	Ext. price
ADM-VM1	Adams VMI Irons, Set	1	Y	620.99	620.99
SHIRT	Men's Polo 100% cotton	1	Y	24.99	24.99
DUN-DIS	Dunkin' Distance Balls	1	Y	25.19	25.19
APL-UMB	Golf umbrella	-1	Y	13.49	-13.49
RANGE	Large Bucket Range Balls	2	Y	4.50	9.00
ADM-TL9	Adams Tight Lies 9 Wood	1	Y	314.99	314.99

Order	Item number	Quantity	Price	Ext. price
Sale	ADM-TL9	1	\$14.99	\$14.99

Document totals	
Subtotal:	981.67
Gift certificates:	0.00
Misc charges:	25.00
Tax:	88.35
Document total:	1,095.02

Touchscreen Ticket Entry

CounterPoint also provides a simplified Ticket Entry user interface based on large buttons suitable for touchscreen, mouse, keyboard, and scanner input. A touchscreen monitor is not required.

Touchscreen Ticket Entry is user-configurable, so you control the screen layout, button behavior, button colors, button text, and even the graphics that appear on each button. You can set up one touchscreen layout to be shared by all stations, or create unique layouts for particular stations.

To further customize Touchscreen Ticket Entry, you can define RunPage actions. RunPage is a powerful and easy method to perform multiple actions from a single button.

For example, you could simplify the steps a clerk must perform when entering a Point of Sale order by defining a RunPage button called "New Customer Order." When New Customer Order is pressed, the following actions would be automatically executed: Start Order, Enter Customer, Enter Sales Rep, Enter PO Number, and Enter Shipping Information.

You can also define "custom" actions to display forms, run scripts, or print reports.

Passwords

Optionally password-protect ticket entry to ensure that access is restricted to authorized users. Through passwords, you may authorize a user for specific functions such as price overrides or the ability to void a ticket. You may also restrict a user to a specific store.

An authorized user can override another user's security settings and allow that user to void a ticket, change the tax on a ticket, reprint a ticket, etc.

Clock-in/Clock-out

Employees can clock in and out from ticket entry. You can automatically prompt users to clock in, and you can restrict them from accessing any CounterPoint functions if they are not clocked in.

Customers

Customers can be selected by entering the customer's number, scanning a customer ID card or loyalty card, or by searching for keywords that match any portion of the customer's name, telephone number, or any other field designated as a keyword search field. New customers can be added on-the-fly.

For an A/R charge sale, CounterPoint checks the customer's credit limit, and only an authorized user may override credit limits.

Zoom in on the customer's account to see balance owed, credit limit, last payment date, up-to-date account aging, images, detailed sales history, open customer orders, and more.



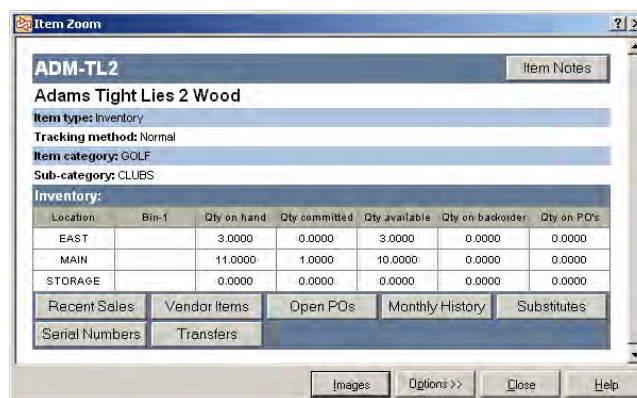
Enter unlimited pages of notes for each customer—customer notes allow you to store additional information. You can automatically display a specific note for a particular customer: “Your special order is scheduled to ship next week.”

Notes can be automatically displayed based on the individual customer or on the customer category.

Inventory

Items can be identified by typing the item number, scanning a barcode, or by searching for keywords that match any portion of the item number, description, vendor number, category, or any other field designated as a keyword search field.

Item Zooms display quantities for each location, recent sales, open purchase orders, monthly sales history, substitute items, images, and more.



Enter unlimited pages of notes for each item. Notes allow you to provide additional information about your products. Automatically display item notes to encourage clerks to power-sell related items: “Would you like some tennis balls with that racquet?” Notes can be automatically displayed based on the individual item or the category or subcategory.

Pricing

Merchandise is priced accurately and automatically, based on list price, quantity breaks, customer discounts, a markup on cost, or a desired margin. Use mix-and-match pricing to group items together—by item number, category, sub-category, or vendor—to grant discounts based on quantity, etc.

Promotional prices can be date- and time-activated for limited-time sales. With the Enterprise edition, you can also use Contract and Special prices. Contract

prices are valid for certain customers for a group of items during a specific time period. Special prices indicate general pricing policies or for particular groups of customers and typically don't have starting or ending dates.

Promotional, Contract, and Special prices can be based on a discount, markup, fixed price, or desired profit margin. Alternatively, you can simply pick the price. Prices can be based on relevant item, customer, or ticket information.

Items can be priced and sold by the stocking unit or up to five alternate selling units. For example, you may stock golf balls by the EACH, and sell them at one price by the DOZEN and at another price by the SLEEVE.

Holds and Quotes

A ticket or order can be placed on hold indefinitely and then later recalled for editing or completion. Customer quotes can be printed and retained indefinitely and can be reviewed, edited, and copied prior to completing the sale. Holds and quotes do not commit inventory.

Orders, Backorders, and Special Orders

In ticket entry, you can mix sales, returns, orders, backorders, special orders, and layaways on the same ticket. Backorders and special orders are only available in the Enterprise edition.

An order can be quoted, held, and recalled—just like a sales ticket. Plus, you can edit the order, accept a deposit, release the entire order or just specific lines, print a picking ticket, cancel an order, and reinstate a cancelled order. With the Enterprise edition, you can view an order's history, including the original

order, each time it was edited, each partial release, and the completed order.

CounterPoint's order processing works for pure retail as well as for retail-delivery, retail-assembly-delivery, retail-special order, retail-wholesale, wholesale, and wholesale-manufacturing operations.

Layaways

A complete layaway processing system allows you to add new layaways, record deposits, view the status and history, and release completed layaways. Layaway processing is similar to order processing.

Order and Layaway Deposits

You can define minimum deposit amounts based on a dollar amount or a percentage of the order, backorder, special order, or layaway. For example, the minimum deposit amount can be \$5 for an order, 20% for a backorder, 50% for a special order, and \$10 for a layaway.

Multiple payment types can be accepted for each deposit. For example, you can accept a \$30 deposit with \$10 cash and \$20 credit card charge.

Customer-Specific Purchases (ENTERPRISE ONLY)

CounterPoint makes it easy for you to take a customer's order from the point-of-sale, place a purchase order with a vendor, track and receive the PO, and fulfill the customer's order.

Store Credits, Gift Certificates, and Shopping Cards

Store credits and gift certificates can be issued, printed, partially redeemed, reissued, and voided. Rechargeable gift cards and shopping cards with magnetic stripes are also supported.

Certificates and cards may be redeemed at any store or restricted to the issuing store.

Taxes

Taxes are calculated automatically based on the taxable status of the merchandise and the customer. Tax calculations can be overridden by authorized users on a per-ticket basis, or individual line items can be set to “no-tax.” An entire ticket can be non-taxable by entering a tax registration (tax exempt) number. Tax can be a percentage of the sale amount, an amount per piece, or a combination.

An item’s tax can be different for each location. Tax figures are printed on end-of-day reports and are retained for historical purposes.

Surtaxes (taxes on the tax) and Canadian PST/GST calculations are also supported.

Payment Types

An unlimited number of payment types (e.g., cash, check, A/R charge, or credit card) may be defined.

Each payment type may be defined to open the cash drawer, allow change to be given, and to require validation (such as a credit card or driver’s license number). An unlimited number of payment types can be accepted on a ticket, including multiples of a single payment type (such as two different Visa cards).

You can also specify restrictions on each payment type. For example, you can require a \$10 minimum on all Visa cards, or set a \$5 maximum cash back amount for gift certificates.

End-of-day reports provide reconciliation information for each type of payment. Historical data is retained and reported for each payment type.

Multi-Currency

Multi-currency allows you to define foreign currencies with associated exchange rates. You can accept multiple foreign currencies on a ticket, and you can issue change using the home currency or foreign currency.

Commissions (ENTERPRISE ONLY)

Optionally calculate sales commissions for each item on the sales ticket based on either the sale amount or the gross profit. Commissions are tracked by ticket and are reported in detail or in summary on the Commissions Due report.

Ticket Numbering

Ticket numbers are normally assigned sequentially by CounterPoint. Alternatively, user-assigned ticket numbers may be entered. Each station can have an independent series of ticket numbers, or all stations can issue tickets from a single series of numbers for the store. Order, layaway, hold, and quote numbers offer similar capabilities.

Drawer Readings

Drawer readings display an instantaneous summary of store-level or drawer-level activity and show the exact amounts of cash, checks, and other tender expected to be found in each cash drawer.

Store MAIN Drawer #1 Print store totals					
Store	MAIN	Drawer 1	Drawer status: Active		
Type	Merchandise	Amount	Type	Non-Merchandise	Tender
				Amount	Begin amt Trx amt
Sales	1,779.67		Gift cert	20.00	A/R Charge 0.00
Returns	-29.99		Misc charges	15.00	American Express 0.00
			Tax	157.47	Cash 465.94
			Ord dep recvd	250.00	Personal Check 0.00
			Ord dep refund	0.00	Discover 0.00
			Ord dep applied	0.00	Gift Certificate Redemg 0.00
			Pay-Ins	0.00	MasterCard 0.00
			Pay-Dats	-15.00	Store Credit Redemptic 0.00
			Pay-On-Account	250.00	Visa 1,890.32
Net Sales	1,749.68		Total	677.47	0.00 2,427.15

Daily Reports

Multiple daily reports (including X-tape and Z-tape) can be generated for each drawer and run at any time. Each report’s parameters are user-specified and provide end-of-day balancing, summary sales reporting, and sales and profitability analysis by department, user, and salesperson. Additional

analysis is available by tax code, sales rep, store, station, user, and payment type.

Sophisticated exception reporting allows a manager to monitor danger zones without having to pore through voluminous reports. Exception reports are available for critical areas such as tax overrides, voids, merchandise returns, and others. The Price Exceptions report allows you to review price overrides on unposted tickets before you post them.

Payment overages and shortages are reported in daily reports, and you can optionally create accounting distributions. The Ticket History report offers a view of sales across multiple stores and days.

End-of-Day Processing

The end-of-day process (counting drawers, posting tickets, settling credit card transactions, etc.) can be run for any station while other clerks continue to ring up customers. Drawers can be counted by currency unit (e.g., 4 fives, 7 ones, 2 quarters, etc.).

With the Enterprise edition, managers can reconcile drawers during the end-of-day process to verify the closing amounts and correct any mistakes made when the drawer was counted. Drawers can optionally be auto-reconciled.

End-of-day processing updates inventory, customer history, and financial records. End-of-day reports may be run automatically during the end-of-day process or at any time in the future.

History

CounterPoint retains complete history for management reporting in detailed (line-by-line) format.

Detailed history by customer and item can be retained indefinitely and is limited only by disk space. A complete history of a customer's sales activity can be printed or viewed, showing every item purchased, transaction dates, and prices paid. Similarly, you can review an item's detailed history.

In addition to detailed history, summarized history can be printed for item categories, users, salespersons, stations, etc. Historical reports can provide valuable information such as a comparison of sales for Easter week this year with Easter week last year.

More information regarding history is provided under **Sales History** (page 23).

Retail Kits

You can use Touchscreen Ticket Entry's RunPage capabilities to press a single button that processes a retail kit. Retail kits are useful when the sale of an item causes multiple component parts to be deducted from inventory. A kit is made from a set of components (which may be substituted at the time of sale).

The sample kit below illustrates some of these features:

Deluxe Stereo Package

- Acme stereo.....1 Each
- Grade B speakers.....2 Each
- Installation3 Hours
- Extended warranty3 Years
- Speaker wire.....20 Feet
- Warning: Loud music causes hearing loss

In our sample kit, the clerk is required to enter a serial number for the stereo. The shopper may choose from three speaker grades: A, B, or C.

The stereo package also includes 20 feet of speaker wire, a 3-year extended warranty, and three hours for the installation. All quantities can be altered, and the price is adjusted accordingly. When sold, the speaker wire is deducted from inventory, but not printed on the receipt (using conditional printing). Other components, including the environmental impact warning, are printed on the customer's receipt.

Use a single button to sell multiple items

Allow clerks to select from pre-set choices

Form Printing

Multiple printers can be defined for each station, including 40-column receipt printers, full-width invoice printers, warehouse picking printers, check validation printers, admission ticket printers, etc. An unlimited number of forms may be printed for each sale, quote, hold, or order. Forms may include tickets, sales drafts, invoices, or even special forms such as Material Safety Data Sheets.

CounterPoint includes pre-defined forms for receipts, picking tickets, and invoices. You may define new forms or customize existing forms. Individual form layouts may be Crystal .rpt files, OPOS .xml files, or static documents such as Word or PDF files. Graphics, such as your company logo, may be printed on receipts or invoices.

Multiple forms can be grouped together, and the group becomes “active” under certain, user-defined conditions. For example, when a ticket is completed, the pre-defined group “TICKETS” will print a receipt and a credit card sales draft, and, if appropriate, a gift certificate.

You can also:

- Automatically print forms at ticket completion
- Use a single button to print one or more forms
- Let the clerk choose which form(s) to print from multiple buttons
- Require certain forms to be printed and/or limit reprints
- Print all forms to a single printer, or print different forms to different printers
- Define which printer the forms will print to, or let the clerk select the printer in Ticket Entry
- Automatically display messages, for example, “Print the Material Safety Data Sheet?”

Peripheral Devices

Each **Point of Sale** checkout station can support optional peripheral devices such as:

- Receipt printers
- Invoice printers
- Combination invoice/receipt printers
- Electronic cash drawers

- Barcode readers and scanners
- Magstripe readers (for credit cards, loyalty cards, or ID cards)
- PIN pads (for debit cards)
- Signature capture (Enterprise only)
- Check (MICR) readers
- Customer pole displays
- Multiple monitors (for displaying a separate screen image to your customers during checkout; you can display advertisements, change due, item images, change due, customer details, etc.)
- Programmable keyboards
- Touchscreen monitors
- Weight scales
- Handheld data-collection terminals (can also be used for physical count)

To simplify setup for commonly-used devices, a series of pre-defined **Express Certified** device definitions are installed with CounterPoint. The Express edition works with any of the **Express Certified** device.

The Enterprise edition works with any of the **Express Certified** devices as well as other OPOS devices.

Special Functions

In addition to sales, returns, orders, layaways, quotes, and holds, Ticket Entry also handles:

- Adding and changing inventory and customer information on-the-fly
- Age-restricted items (for alcohol, etc.)
- Automatic station locking
- “Discount” items (to track coupons, trade-ins, or other sale reductions)
- Fractional prices (e.g., \$1.3755 per LB)
- Fractional quantities (e.g., 1.6255 feet)
- Free-form comments
- Item and serial number prompts for requesting additional info (such as a monogram or permit #)
- Maximums for change, refunds, and overtenders
- Minimum price restrictions based on the item’s price level (“don’t allow a price below Price-2”) or a profit percent (“don’t allow a price with less

than 20% gross profit based on Average-cost”) with optional security overrides

- Miscellaneous charges (amount or percent)
- No-sales (authorized users can open cash drawers)
- Pay-ins and pay-outs to add or remove money from a drawer
- Payments on customer accounts
- Predefined ship-to addresses (addresses can also be entered at the time of sale)
- Price, tax, and quantity overrides
- Random weight barcodes
- Reason codes for returns, overrides, and voids
- Ticket profile tracking fields for collecting additional information
- Ticket reprints
- Ticket voids for authorized users
- Weighed items (with scale support) and tare weights (container weights)

Built-In Credit Card Processing

Credit card processing under the CounterPoint Merchant Program (CMP) is included in Express and Enterprise and is more fully described under **Credit Cards** (page 26). For Express, processing through Paymentech is also included in the Base System.

Other processors compatible with Express and Enterprise are described in **Credit Cards Option** (page 34).

Credit card processing allows you to swipe a credit card through a magnetic stripe reader, automatically authorize a credit card sale, verify an address, and settle funds to your bank. With the Enterprise edition, you can also electronically capture the customer’s signature.

CounterPoint can optionally retain a customer’s credit card number for future purchases. For receipts and invoices, you may print just the last four digits of the card number.

Multiple stations share a phone line and process credit card transactions more quickly by maintaining an active phone connection to the processor.

An optional CPGateway service is available for fast (2-second) Internet credit card authorizations.

Built-In Debit Card Processing

Complete debit card processing is provided (with DUKPT support) and requires the use of PIN pads and magnetic stripe card readers.

Built-In EBT Food Stamp Processing

EBT food stamp processing is available with CMP, First Data North, or Vital. EBT requires the use of PIN pads and magnetic stripe card readers.

Built-In Check Authorization

CounterPoint includes check authorization capabilities compatible with TeleCheck and Certegy.

Benefits

Point of Sale provides valuable benefits to any business that desires to:

- Simplify and accelerate checkout
- Reduce costly checkout errors and shrinkage
- Provide clerks with up-to-date inventory quantities and customer information
- Keep track of what’s selling and what’s not
- Update customer balances automatically
- Improve audit controls and accounting efficiency
- Improve accuracy of sales analysis reports
- Electronically process credit cards, debit cards, EBT, and checks

INVENTORY

Overview

Inventory is the backbone of CounterPoint. It is the means by which all items are identified, priced, and tracked. **Inventory** is designed to help you maintain optimum inventory levels, control inventory costs, and track merchandise movement. It provides the tools you need to minimize inventory levels and out-of-stock conditions, and maximize valuable management information and profitability.

Setting up inventory items is quick and easy. Item numbers and barcodes may be manually entered or assigned automatically. When a new item is added, much of the basic information may be copied from

another item to help reduce errors and speed up the entry process, or a template item may be defined.

The Enterprise edition supports multiple stocking locations. Locations may be reported separately, together, or in location groups. An unlimited number of locations and location groups may be defined, and each group may have an unlimited number of locations. Location groups can be used for reporting and merchandise allocation.

Each item number identifies a unique inventory item with an associated description, category, price, barcode, and other information.

The 'Items' window displays the following information for item 'TSHIRT':

- Description:** CampGolf T-Shirt
- Item type:** Inventory
- Tracking method:** Gridded
- Price:** 9.99
- Default cost / COGS:** 4.5800
- Quantity on hand:** (empty)
- Quantity available:** (empty)
- Stocking unit:** EACH
- Tagable:** ☒
- Tax category:** STATE
- Category:** APPAREL
- Sub-category:** MENS
- Status:** Active
- Status date:** 06/14/2004
- Account code:** 1
- Label code:** HANG
- Barcode:** (AUTO-ASSIGN) Auto-assign
- Primary vendor:** I200 I200-Philips-Van Heusen Corporation
- Vendor's item number:** 995664

CounterPoint supports normal inventory items, as well as gridded (apparel color/size) items.

The 'Zoom View Grid' window displays a grid of apparel items. The grid is organized by color (rows) and size (columns). The 'Qty on hand' is shown for each item.

Color	Small	Medium	Large	1X-Large	2X-Large	3X-Large
Red	7	7	7	5	4	7
White	7	6	7	7	7	7
Blue	7	7	7	7	7	7
Multi-Color	7	0	7	7	2	7
Orange	0	0	7	2	2	7
Yellow	7	7	7	7	7	7
Green	7	7	7	7	7	7
Total	42	34	47	36	36	36

An item may be defined as an Inventory, Non-Inventory, Service, or Discount item. CounterPoint tracks on-hand quantities for Inventory-type items.

You can easily remove inactive items. Inactive items are those that have no quantity on-hand, no quantity committed, and no sales activity after the specified

cutoff date. CounterPoint retains sales history for items that were removed.

Item Information

Categories, subcategories, and up to six user-defined classification methods may be established for grouping items. These classifications are validated to ensure correct setup of information.

An item may also have:

- Unlimited barcodes, a stocking unit, and five alternate selling units (e.g., EACH, BOX, CASE)
- Up to 20 user-defined profile fields for collecting and displaying additional item information
- Images, sounds, or video clips that can be displayed in Zooms and Ticket Entry
- A weight assigned
- Unlimited substitute items
- A primary vendor and an unlimited number of alternate vendors. For each vendor/item combination, CounterPoint tracks the cost, the vendor's item number, and other information.

LookUps

Easily select an item by entering the item number, scanning a barcode, or by using LookUps. With LookUps, you can find the item using a keyword search by entering any portion of the item number, description, category, subcategory, or any other field designated as a keyword search field.

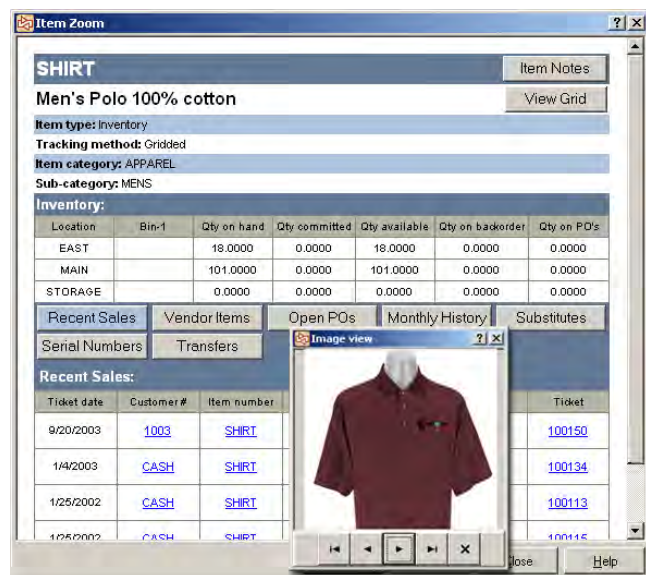
For example, you could define a Filter that displays only those items that have the word "Wood" in the description, a primary vendor of "Adams," and that are in the "Golf" category. You can save named LookUps for future use. Custom Filters are automatically saved with your LookUp.

The 'Item LookUp' window displays a list of items filtered by the keyword 'wood'. The list includes the following items:

Item number	Description	Item category	Price-1
ADM-TL2	Adams Tight Lies 2 Wood	GOLF	349.9900
ADM-TL3	Adams Tight Lies 3 Wood	GOLF	349.9900
ADM-TL5	Adams Tight Lies 5 Wood	GOLF	349.9900
ADM-TL7	Adams Tight Lies 7 Wood	GOLF	349.9900
ADM-TL9	Adams Tight Lies 9 Wood	GOLF	349.9900

Zooms

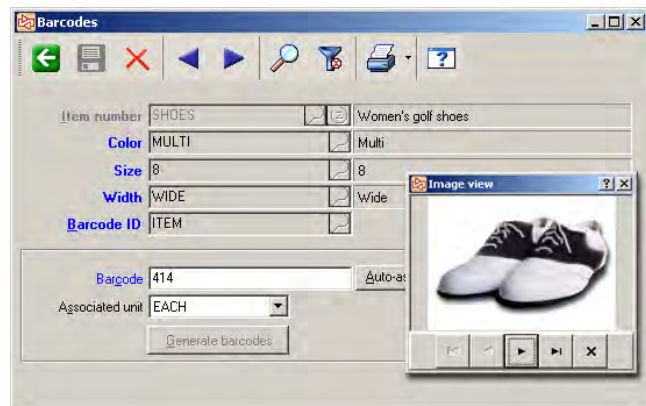
You can easily view details of an item whenever you look up or view an item. Item Zooms display information about the item (price, category, extended description, etc.), the inventory (location, cost, quantity available, etc.), recent sales history, vendors for the item, open purchase orders, monthly history, substitute items, images, item notes, and more.



Barcodes

An item may have an unlimited number of barcodes. Barcodes may be associated with a specific selling unit—for example, one barcode may indicate BOX, while another barcode indicates EACH.

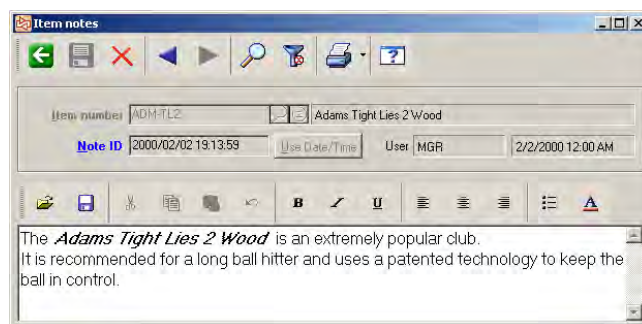
Barcodes may be manually entered or automatically generated by CounterPoint. Both manufacturer and in-house barcodes are supported. Barcodes may be printed on labels and scanned during checkout, when taking a physical count, and in other functions. A unique barcode is supported for each individual color/size combination for a gridded (apparel) item.



Random-weight barcodes allow for variable weight items, such as meat or produce. Ticket Entry recognizes random-weight barcodes and automatically calculates the correct quantity (weight) and price. Weight scales and tare weights (container weights) are also supported.

Notes

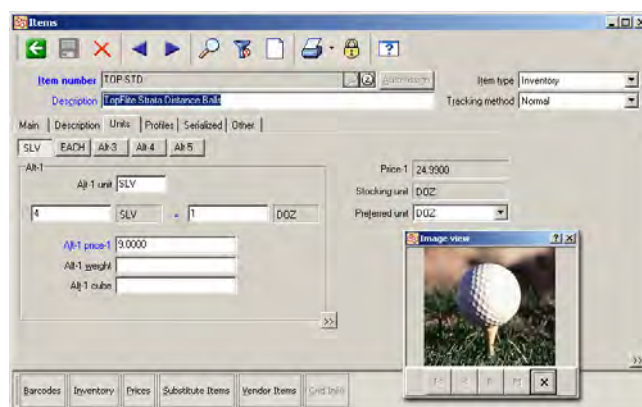
An item may have unlimited pages of notes. These notes may be viewed, printed on forms, and even be set to automatically display when the clerk sells the item (valuable for power-selling related items).



Easily find your notes simply by entering a key word or phrase. For example, enter “patented technology” in the keyword search field to find all item notes that contain that text.

Pricing and Units

Item prices can be set up by simply assigning a selling price to each item. Or you can take advantage of CounterPoint's flexible pricing rules.



An item may be priced by its stocking unit or by alternate units (up to five alternate units per item). For example, you may stock golf balls by the EACH, and sell them at one price by the BOX and at another price by the SLEEVE. Alternate units are supported throughout CounterPoint, including ticket entry,

inventory, purchasing, receiving, adjustments, physical count, transfers, etc.

Each item may have up to three price levels for the stocking unit and for each of its five alternate units.

With the Enterprise edition's **Advanced Pricing Option**, you can have up to six price levels. **Advanced Pricing** also supports price-by-cell and location-specific pricing and is more fully described on page 36.

Pricing Rules

Pricing rules determine the basic pricing structure of an item—whether the item's price is selected from one of the price levels or whether it is based on the quantity purchased, item or customer information, or a combination of those factors.

The calculated price can be based on a price level, a discount percentage/amount off of a price level, a markup percentage/amount from cost, a desired profit margin, or a fixed price determined by user-defined pricing rules.

Pricing rules provide flexible pricing options, including Promotional, Contract, and Special pricing:

- **Promotional**—Sale prices typically have starting and ending dates (and times). Discounts may be defined for specific items or entire categories or subcategories. Multiple sales may be defined in advance using Planned Promotions.

- **Contract**—Customer-specific prices may be defined for specific items or entire categories/subcategories of merchandise and have optional starting and ending dates (and times). (Contract pricing is only available in Enterprise.)
- **Special**—Special prices may be defined for general pricing policies or for particular groups of customers and typically don't have starting or

ending dates. (Special pricing is only available in Enterprise.)

With the Enterprise edition, you can also customize price calculations using SQL stored procedures.

Valuation Methods

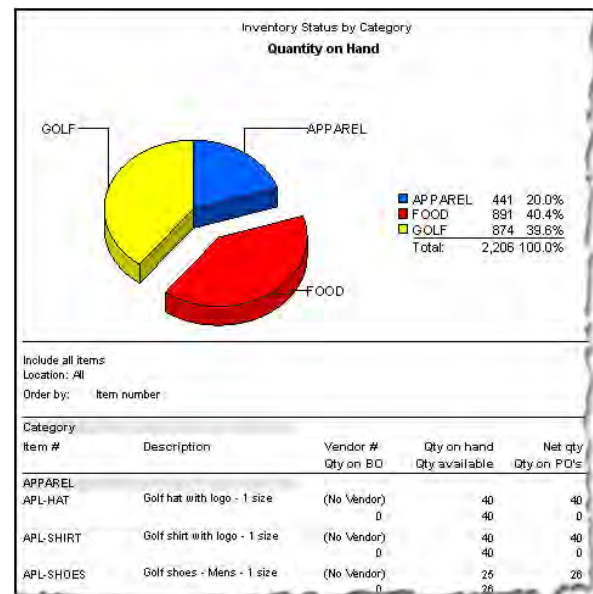
Inventory valuation is provided by stocking location using the Average Cost method.

With the Enterprise edition, you can use the Retail Valuation method to track your inventory based on its presumed selling price. For example, if you receive two shirts priced at \$10 each, you have increased your inventory value by \$20. If you later mark down those shirts, you have reduced your inventory value, even though you have not received or sold any merchandise.

Reports

CounterPoint includes an extensive library of inventory reports to meet your reporting and analysis needs:

- **Inventory Status report** and **Stock Status report** provide valuable and concise views of your inventory levels.



- **Valuation report** shows your current inventory position from different points of view.
- **Inventory Analysis report** includes Top X and Bottom X reporting based on quantity on-hand, profit value, sales, quantity sold, etc.
- **Inventory History report** provides a detailed transaction log of historical inventory activity.

- **Inventory Snapshot report** provides a simple view of your inventory status and sales history.
- **Six Week Item History report** evaluates item performance and helps you spot trends.
- **Twelve-month Item History report** evaluates item performance and helps you spot trends.
- **Committed Inventory report** provides details of quantities committed, on order, on backorder, on layaway, and in transit.
- **Price reports** list the current selling prices, including Price-1 values, sale prices, etc.
- **Transfer Advice report** suggests transfer amounts and can create transfers (Enterprise only).
- **Transfer Status report** provides details of all inventory transfers (Enterprise only).

Merchandise Analysis (ENTERPRISE ONLY)

Merchandise Analysis is a powerful tool for analyzing inventory. You can classify and rank merchandise using criteria you choose, including units sold, sales dollars, profitability, quantity-on-hand, turn-rate, GMROI (Gross Margin Return on Investment), weeks-on-hand, discounts, etc.—there are over 180 different measurements to choose from.

Analyze merchandise at the item level, or get the bigger picture by grouping inventory by vendor, category, subcategory, etc.

With hot/cold reporting, you can show, for example, the “hottest 40 items based on quantity sold” or “the coldest 20 items based on turn rate.”

Merchandise Analysis includes pre-defined reports:

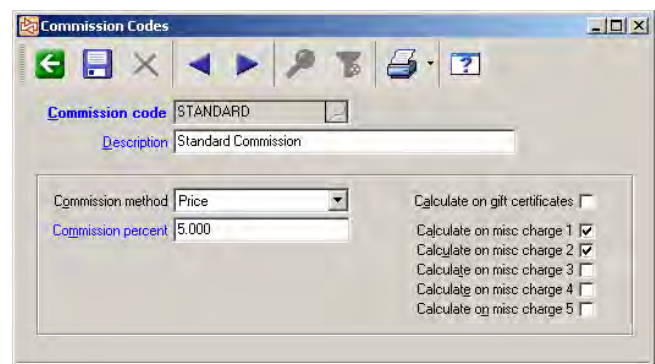
- **Sales** is a high-level view of your performance.
- **Inventory Performance** measures the performance of a particular item, category, or subcategory.
- **Sales/Returns** evaluates returns in relation to sales.
- **Vendor Comparison** compares each vendor’s sales performance against your investment in that vendor’s merchandise.
- **Retail Value History** provides an in-depth or summarized analysis of inventory changes at the retail value within a selected period.

- **Sales Analysis** shows the retail and off-retail values so you can compare discounts and profits.

Alternatively, you can create your own merchandising reports by selecting the columns, grouping, and ranking method you want to use.

Commissions (ENTERPRISE ONLY)

Each sales rep can be assigned a commission code, and commissions can be based on the selling price or gross profit. Different commission rates may be used for different sales reps. Commissions are described more fully under **Sales History** (page 23).



Markdown Tracking (ENTERPRISE ONLY)

Whenever Price-1 is changed, CounterPoint automatically tracks that change as a markdown. For example, if you reduce a shirt’s price from \$10 to \$9 and you have two shirts on hand, the change is recorded as a \$2 markdown. CounterPoint retains a detailed history of all markdowns.

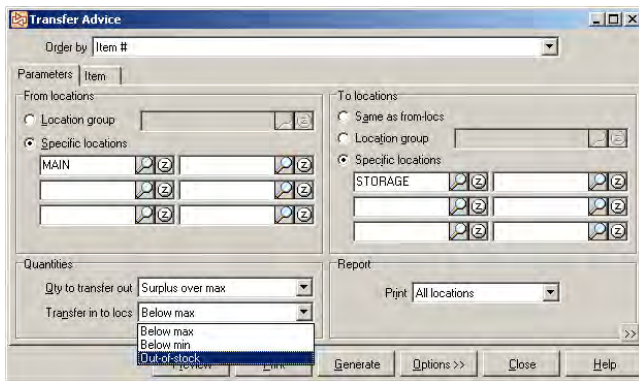
Transfers (ENTERPRISE ONLY)

A transaction processing system is provided for initiating and tracking inventory transfer activity and in-transit quantities. A transfer-out may be entered manually and reviewed prior to posting, and may be accompanied by a printed transfer form. The completion of the transfer is accomplished by a transfer-in transaction.

For businesses with more than one store, transfer documents can be completed at the main office or at the other stores.

The Transfer Advice report provides a list of suggested transfers using the maximum-quantity calculation method. Transfer Advice can automatically create transfer transactions which may be reviewed and edited prior to finalizing the

transfer-out. Miscellaneous charges, such as freight, can optionally be added during the transfer.



You can also use “Quick Transfers” to transfer inventory in a single step.

CUSTOMERS

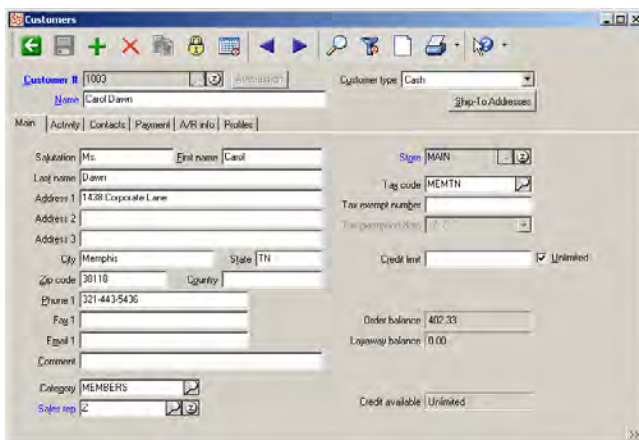
Overview

Customer tracking is an integral part of CounterPoint. CounterPoint retains complete details of every customer, including detailed sales history.

The **Receivables Option** adds charge sales, receivables tracking, account aging, cash receipts processing, and statement printing to CounterPoint. The Express edition includes all receivables functions in the Base System. For the Enterprise edition, you must have the **Receivables Option** in order to process receivables. Receivables processing is more fully described under **Receivables Option** (page 34).

Customer Information

A customer may be set up using the standard maintenance function, or on-the-fly in **Point of Sale**.



Basic customer information includes name, address, email, two contact names, fax numbers, and phone numbers. A customer may be assigned to a specific user-defined category to group similar customers for reporting and analysis.

Customer numbers may be manually entered or automatically assigned. When a new customer is added, much of the basic information may be copied from another customer to help reduce errors and speed up the entry process, or a template customer may be defined.

Customers can be selected by entering the customer’s number, scanning a customer ID card or loyalty card, or by searching for keywords that match any portion of the customer’s name, telephone number, etc.

For a charge sale, CounterPoint checks the customer’s credit limit, and only an authorized user may override credit limits.

Easily remove inactive customers from CounterPoint. Inactive customers are those that have no open orders or layaways, no open balances, no unposted balances, and no sales activity after the specified cutoff date.

Loyalty Programs (ENTERPRISE ONLY)

CounterPoint allows you to reward loyal customers with points that can be redeemed for future purchases or special incentives.

Customers can earn points for all items they purchase or just for certain items. The number of points can vary based on the item number, category, vendor, etc. as well as the sales information (date, store, day of the week, time of day, etc.).

You can enter loyalty point adjustments to grant or reduce points, and you can print reports and mailing labels based on point accumulation.

Customer Profiles

Customer profiles allow you to build a valuable database of information to assist in analyzing and marketing to your customers. Up to 20 user-defined profile fields may be tracked for each customer, such as birthday, preferences, membership status, etc.

Each user-defined profile field is set up to only allow certain types of information.

For example, “birthday” would only allow valid date entries, “shoe size” would only allow numeric entries between a specified range of values, etc. In addition, you may set up user-defined profile codes to ensure that (for example) “membership status” is selected from a list of valid user-defined values (e.g., Gold, Silver, or Bronze).

The screenshot shows the 'Customers' window with a toolbar at the top. The 'Customer #' field is set to 1003, and the 'Customer name' is Carol Dawn. The 'Customer type' is set to Cash. Below this, there are tabs for Main, Activity, Contacts, Payments, A/R info, and Profile. The 'Main' tab is active, showing fields for Member Status (GOLD), Lead Source (FRIEND), Referred by (Mary Anderson), Birthday (10/26/1972), First Purchase on (07/06/2002), Anniversary (11/06/2002), Shoe Size (7.5000), Wrist/Part Size (0.0000), and Shirt Size (8.0000).

Account Management (ENTERPRISE ONLY)

CounterPoint’s Account Management allows you to manage credit and serve your customers by presenting all of the relevant information about a customer account in a single, unified form.

LookUps

Easily select a customer by entering the customer number, scanning a membership ID card or loyalty card, or by using LookUps. With LookUps, you can find the customer using a keyword search by entering any portion of the customer name or number, or by any field designated as a keyword search field.

Customize LookUps by setting the order in which the records display or by specifying which fields display (category, sales rep, email address, etc.). You can filter LookUps so that only customers that match specific criteria will display. For example, you could define a Filter that displays only your A/R customers that live in New York that are in the “Preferred” category. You can save LookUps and Filters by name for future use.

Zooms

You can easily view detailed customer information whenever you look up or view a customer.

Zooms provide information about the customer including current balance, last payment date, recent sales, open orders, ship-to addresses, layaways, customer-specific purchases, images, customer notes, and detailed ticket history. You can customize the format and the fields that display in the Zoom.

The screenshot shows the 'Customer Zoom' window for customer 1003, Carol Dawn. It displays contact information (Phone 1: 321-443-5436, Fax 1: 321-443-5477, Email 1: caroldawn@yahoo.com), balance (Unposted bal: 0.00, Order balance: 108.99), and order history (Number of orders: 1). A photo of Carol Dawn is shown in an 'Image view' window. Below this, there are tabs for Recent Sales, Monthly History, Orders/Quotes, Ship-to Addresses, Layaways, and Special Purchases. The 'Recent Sales' tab is active, showing a table of recent sales.

Ticket date	Item number	Description	Quantity	Price	Ticket
9/20/2005	APL-HAT	Golf hat with logo - 1 size	-1.0000	9.9900	100153
9/20/2005	APL-HAT	Golf hat with logo - 1 size	1.0000	9.9900	100150
9/20/2005	APL-UMB	Golf umbrella	1.0000	13.4900	100150
9/20/2005	GLOVE	Deluxe Golf Glove	1.0000	10.7900	100150

Shipping Information

Each customer may have an unlimited number of shipping addresses, and the default ship-to address can be different from the primary address. Each shipping address may have its own tax code, preferred shipping method, and specific ship-to notes that can be printed on invoices.

The screenshot shows the 'Ship-To Addresses' window for customer 1003, Carol Dawn. It displays the 'Ship-to address' as HOME. Below this, there are tabs for Address and Contacts. The 'Address' tab is active, showing fields for Address 1 (1727 Kirby Parkway), Address 2 (Apartment B), Address 3, City (Memphis), State (TN), Zip code (38120), Country (USA), Comment (unless otherwise specified, ship to this address), Shipping zone (UPS ZONE 1), Ship-via code (UPS GROUND), and Tag code (MEMTN).

Taxes

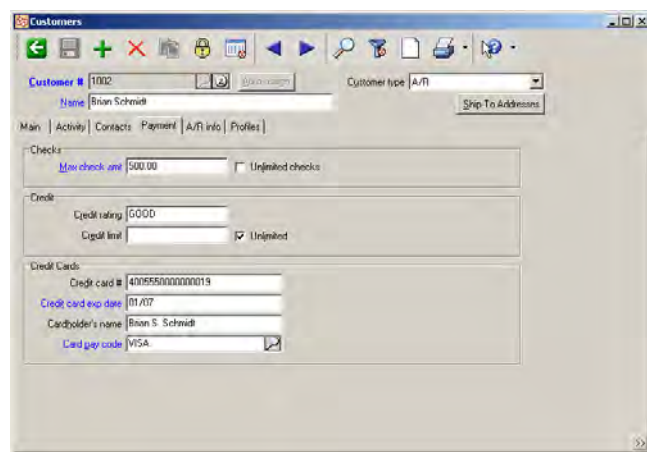
For basic retail sales, a tax code is assigned to the store.

Customers may have multi-level tax codes assigned that indicate special tax rates or taxing authorities. If applicable, a customer may be non-taxable, and the customer's tax exemption number is entered and retained in CounterPoint.

You can optionally specify a tax code for each customer's ship-to address. If a ship-to tax code is specified, tax calculations are based on that code instead of the customer's tax code.

Credit Limits and Controls

Credit limits ensure that customers do not exceed management's guidelines for open credit. In addition, individual customers may be prevented from paying by check, making charge sales, making any kind of sale, or even from placing orders.

The screenshot shows the 'Customers' window in CounterPoint. The 'Customer #' field is 1002, and the name is Brian Schmidt. The 'Credit' section shows a 'Credit rating' of GOOD and a 'Credit limit' of Unlimited. The 'Credit Cards' section shows a 'Credit card #' of 4389550000000019, a 'Credit card exp date' of 01/10/07, a 'Cardholder's name' of Brian S. Schmidt, and a 'Card pay code' of VISA.

For charge sales, the customer's credit limit is checked and only authorized users may override credit limits.

Credit card information may be retained for each customer and may be retrieved automatically when paying for a purchase. Credit card numbers are masked for security purposes.

Sales Reps

Each customer must have a sales rep assigned. **Point of Sale** may be configured to allow a different sales rep (other than the one specified in the customer's record) to receive credit for a particular sale.

Labels

Labels may be printed for any range or grouping of customers. Customer labels can be printed from ticket

history based on merchandise purchased during a specific time period. For example, you can print mailing labels ordered by zip code for customers in the "Gold Member" loyalty program who purchased at least \$100 worth of merchandise last year.

Notes

Customer notes may be viewed, printed on forms and labels, and even be set to automatically display when the clerk selects the customer.

Easily find your notes simply by entering a key word or phrase. For example, enter "special order" in the keyword search field to find all item notes that contain that text.

The screenshot shows the 'Customer Notes' window in CounterPoint. The 'Customer #' field is 1002, and the name is Brian Schmidt. The 'Note ID' is 2003/06/30 12:25:36. The note text reads: 'Remind this customer about his Special Order for bicycle parts. His order should be in next week sometime.'

History

A multi-year monthly summary view is available for each customer showing sales, cost, profitability (dollars and percent), number of sales, and average sale amounts. Complete, detailed history shows every item sold on every ticket, or summarizes individual categories of merchandise.

Historical reports are available in **Sales History** (more fully described on page 23).

Reports

Customer listings (brief and full) are available, organized by type of customer, customer number, zip code, name, etc., to show basic customer information, credit rating, and payment information. Customers may be included in reports based on their category, loyalty point balance, profile information, or any other criteria.

PURCHASING

Overview

Purchasing is designed to help businesses control purchases and receivings.

New purchase requests (unapproved PO's) are entered with system-assigned or user-entered document numbers. Optionally print PO forms when you post.

CounterPoint automatically updates on-order quantities for items. New vendors and items may be added on-the-fly. Vendor item records can be automatically created and updated.

During receiving, PO's may be retrieved by PO number, vendor, or other keyword fields. A PO may be received in full, or only selected lines may be received. Unreceived goods can be backordered or cancelled. You can add additional lines or change, reissue, or reprint the PO. Merchandise that arrives without a PO may be entered on-the-fly during receiving.

Item number	Description	Order qty	Unit name	Unit cost	Ext cost
DUN-DDH	Dunlop DDH 110 Balls	12	DOZ	11.9960	143.95
DUN-DIS	Dunlop Distance Balls	12	DOZ	11.1960	134.35
DUN-TI	Dunlop Titanium Balls	4	DOZ	11.5960	46.38
ADM-VMI-P	Adams VMI Putter	3	EACH	39.9960	119.99

To simplify reorders, historical PO's may be copied into new purchase orders.

An item may have unlimited vendors, each with its own cost and purchasing unit. Costs and quantities may be entered on a PO and printed on forms. Vendor items are automatically defined as part of normal **Inventory** and **Purchasing** usage.

Full support is provided for gridded (color/size) items when entering PO's, entering receivings, and printing reports. With the Enterprise edition's **Serial Numbers Option**, you can enter serial numbers during receiving.

With the Enterprise edition, you can also use "Quick Receivings" to enter and receive inventory in a single step.

Automatic Purchasing

Purchasing Advice automatically calculates restocking orders. With the Enterprise edition, you can also automatically create the purchase request.

Purchasing Advice calculates the quantities to reorder based on current inventory levels, commitments, backorders, in-transit merchandise, open PO's, desired stocking levels, vendor multiples, and/or vendor minimum order requirements.

Reorder quantities may be calculated using one of two methods:

- **Min/max**—Orders an item up to its desired maximum stocking level when it falls to or below its minimum (reorder) level.

Date: 7/21/2005 Time: 8:44:22AM

Purchasing Advice Report - Maximum

Location: MAIN
Cell detail in Grid view - Suggested qty
Suggested quantity = Max qty - Qty on hand - Qty on PO - Qty on PR + Qty commit + Qty on BO.
Suggested quantity is adjusted for vendor minimum and rounded to nearest vendor multiple. (Gridded items are not adjusted.)
Reorder selection criteria: (Qty on hand + Qty on PO + Qty on PR - Qty commit - Qty on BO) <= Min qty and Suggested qty > 0
Order by: Item #, Location
Item: Status is (exactly) Active

Item #	Description	Vendor #	Vendor's site
ADM-SCD	Adams S.C. Driver, RH	ADAMS	
Location	Avg unit cost	Qty on PO	Min qty
	Last cost	Qty on PR's	Max qty
	Vendor unit cost	Qty on order	Qty on hand
MAIN	270.5960	0	3
	159.9960	0	12
		0	4
Item #	Description	Vendor #	Vendor's site
ADM-TL9	Adams Tight Lies 9 Wood	ADAMS	ADM-TL9
Location	Avg unit cost	Qty on PO	Min qty
	Last cost	Qty on PR's	Max qty
	Vendor unit cost	Qty on order	Qty on hand
MAIN	212.8000	3	3
	180.0000	0	12
	180.0000	3	3
Item #	Description	Vendor #	Vendor's site
APL-UMB	Golf umbrella	** None **	
Location	Avg unit cost	Qty on PO	Min qty
	Last cost	Qty on PR's	Max qty
	Vendor unit cost	Qty on order	Qty on hand
MAIN	7.8867	0	25
	5.9960	0	50
		0	3

- **Replenishment**—With the Enterprise edition, CounterPoint can order enough of an item to replace what was sold during a specified time period. You can even enter a history factor to order, for example, 20% more or 5% less.

Miscellaneous Charges

Extra charges (for freight, etc.) may be entered during receivings and optionally included in the landed cost. You can enter up to five separate miscellaneous charges which can be allocated based on the weight, quantity, cost, or cube (cubic volume) of the items received. You can also use negative miscellaneous charges to record discounts and credits from your vendors.

Electronic Orders

You may print paper PO's for your vendors or output text files suitable for use in electronic ordering. You may save PO's as PDF files to fax or email to vendors. Full EDI (Electronic Data Interchange) typically requires use of third-party translator and communications software.

Accounts Payable Interface

Received PO's may be vouchered directly into a third-party Accounts Payable system. Invoices may be vouchered to the vendor and a report of unvouchered receivings is provided. Interfaces to more than a dozen A/P packages are provided.

Views and Reporting

A detailed history of PO receivings and cancellations is retained for viewing and reporting. Open PO's may be viewed or printed showing quantity ordered, received, and expected. The Open PO Report shows outstanding PO's and can be printed by PO number, vendor, delivery date, etc.

Customer-Specific Purchases (ENTERPRISE ONLY)

CounterPoint makes it easy to take a customer's order from the point-of-sale, place a purchase order with a vendor, track and receive the PO, and fulfill the customer's order.

You can review open customer orders and generate multiple purchase requests automatically from those orders.

Multi-Location Purchasing (ENTERPRISE ONLY)

Full support is provided for purchasing and receiving across multiple stores. PO's may originate at the main office and may be received at the other stores.

Allocated PO's (ENTERPRISE ONLY)

For multi-location purchasing, Purchasing Advice can generate allocated PO's. Using location groups, you can order and receive merchandise for a group of stores in a single, combined PO.

CounterPoint supports allocated/merged PO's as well as allocated/separate PO's.

- **Allocated/merged PO's** remain a single document throughout the ordering/receiving process. When the PO's are received, transfers are automatically created to distribute the merchandise to the appropriate locations.
- **Allocated/separate PO's** are split into one PO per location when issued.

Purchasing Adjustments (ENTERPRISE ONLY)

After your receivings have been posted, you can correct receivings costs and miscellaneous charges to adjust inventory and/or cost of goods sold.

Returns to Vendors (ENTERPRISE ONLY)

Returns to Vendors (RTVs) may be entered, reviewed, and posted to record the return of merchandise to a vendor. RTVs reduce on-hand inventory. RTVs may also be vouchered into Accounts Payable to record credits with a vendor.

LABELS

CounterPoint allows you to print labels for merchandise and customers and supports barcode printing.

CounterPoint includes "out of the box" labels which may be printed directly from CounterPoint to any Windows printer, including dedicated thermal label printers and most laser and inkjet printers. No third-party label printing software is required.

With CounterPoint, you can:

- Print item labels—including barcodes—directly from CounterPoint
- Print item labels immediately after posting a purchase request, receiving, or transfer

- Generate and print a variety of labels—including customer labels, shipping labels, file folder labels, and more

Inventory labels may be printed for on-hand items, or a specific quantity of labels can be printed for each item. Inventory and customer labels may be printed based on category or profile fields (or from any other information for the item or customer).

Customer labels can also be printed from history based on merchandise purchased during a specific time period.

Predefined labels are included with CounterPoint, or you may design new labels using NiceLabel Pro software from NiceWare (purchased separately).

Predefined Labels

CounterPoint includes a number of predefined “label jobs,” which define the layout and content of particular types of labels. These label jobs allow you to print, for example, labels for items that are on file, labels for items on unposted receivings, labels for customers who are on file, and labels for customers based on ticket history.

CounterPoint’s predefined label layouts are compatible with industry-standard labels. Layouts are supported for pressure-sensitive labels, split (two-up) pressure-sensitive labels, butterfly labels, and perforated hangtags.

Specific support is provided for high-speed printing of multiple copies of a single label.

Predefined layouts and compatible labels simplify setup for several popular Cognitive Solutions and Eltron printers. You can also use a laser printer and standard Avery labels.

WYSIWYG Designer

You can modify the predefined label formats or create your own label formats using NiceLabel Pro label design software (purchased separately).

NiceLabel Pro is a “what you see is what you get” (WYSIWYG) label designer that allows you to easily create labels that can retrieve data from any CounterPoint field or table—including custom fields and tables—and format them for a variety of printers.

Coded Costs and Dates

Coded cost and date information can be printed on labels using NiceLabel Pro (purchased separately). User-defined encryption ensures that the information is readable by you but not by your customers.

Barcodes

Supported barcode symbologies include UPC-A, UPC-E, EAN/JAN-13, Code 39, Interleaved 2 of 5, Codabar, and many others. You can control the barcode height, width, and text under bar printing.



Membership ID Cards

Labels with optional barcoded identification may be printed for customers or employees to serve as loyalty card, membership card, or ID cards.

Notes

Item and customer notes can also be printed on labels so you can print the text associated with specific items and customers, categories and subcategories, or notes. For example, you could print a plant’s care instructions on the label.

Item and Customer Profile Fields

In addition to notes, you can print profile information such as the customer’s birthday or the item’s recommended age group.

Targeted Mailings

Mailing labels may be generated for customers who meet certain historical sales criteria, such as all customers in the “Gold Member” loyalty program who bought more than \$100 worth of merchandise at Store 1 from categories D or F, between June 1st and July 15th last year, printed in zip code order.

Summary

CounterPoint offers an integrated, trouble-free approach to printing labels as part of daily operations. When used with NiceLabel Pro (purchased separately), CounterPoint gives you the flexibility to customize the labels the way you want.

GRIDS AND APPAREL

Apparel

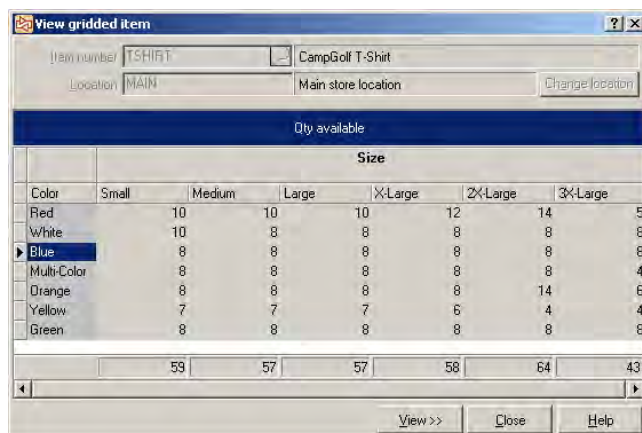
Apparel capabilities are woven throughout CounterPoint. CounterPoint offers the ease of use, integrated features, and merchandising information essential for profitable soft goods retailing.

In soft goods, a single inventory item (a “style”) can be stocked in multiple colors and sizes (or lengths, widths, patterns, etc.).

Grids

Apparel grids can be one-, two-, or three-dimensional, with an unlimited number of colors and sizes (or lengths, widths, heights, etc.). An item can have thousands of unique color/size combinations, each of which is called a cell.

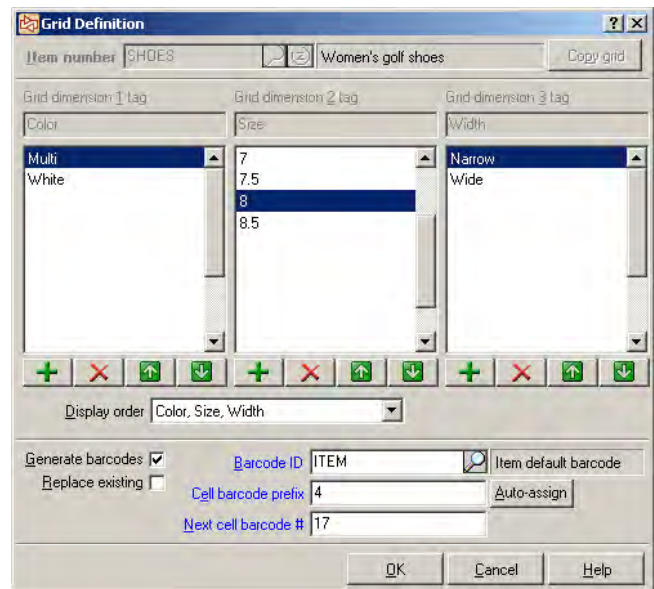
Items can be viewed, processed, and printed in grid format throughout CounterPoint, including adjustments, receivings, purchasing, transfers, physical counts, and ticket entry.



The screenshot shows the 'View gridded item' window for 'CampGolf T-Shirt'. It displays a grid of available quantities for different colors and sizes. The 'Color' column lists Red, White, Blue, Multi-Color, Orange, Yellow, and Green. The 'Size' columns are Small, Medium, Large, X-Large, 2X-Large, and 3X-Large. The 'Qty available' row shows the quantity for each cell. The total quantity for each size is shown at the bottom of the grid.

Color	Small	Medium	Large	X-Large	2X-Large	3X-Large
Red	10	10	10	12	14	5
White	10	8	8	8	8	8
Blue	8	8	8	8	8	8
Multi-Color	8	8	8	8	8	4
Orange	8	8	8	8	14	6
Yellow	7	7	7	6	4	4
Green	8	8	8	8	8	8
	59	57	57	58	64	43

When a new item is set up, its grid layout is also established. New grids may be copied from an existing item to reduce errors and speed up the entry process.



The screenshot shows the 'Grid Definition' window for 'Women's golf shoes'. It allows defining a 3D grid with dimensions for Color, Size, and Width. The 'Color' dimension has 'Multi' and 'White' options. The 'Size' dimension has '7', '7.5', '8', and '8.5' options. The 'Width' dimension has 'Narrow' and 'Wide' options. The 'Display order' is set to 'Color, Size, Width'. The 'Generate barcodes' checkbox is checked, and the 'Barcode ID' is set to 'ITEM'. The 'Cell barcode prefix' is '4' and the 'Next cell barcode #' is '17'.

You can track information for each cell, including quantity-on-hand, quantity-committed, quantity-backordered, quantity-on-PO's, min/max quantities, and more. You can also specify which cells are stocked (or not-stocked) for each location.

Oversize Pricing (ENTERPRISE ONLY)

With the **Advanced Pricing Option**, you can charge more or less for specific cells (colors or sizes). For example, you could charge \$3 more for Extra Tall or 15% less for Plaid.

Barcodes

Each cell of a gridded item can have a unique barcode with multiple barcodes per cell, if needed. This feature allows goods to be scanned throughout CounterPoint, reducing entry time and errors. Cell-specific barcodes may be manually entered or automatically assigned.

With the Enterprise edition, you can import barcodes from the vendor using CounterPoint's Database Import utility.

Purchasing

In **Purchasing**, gridded items can be quickly placed on order and easily tracked. Reorders may be entered manually or calculated automatically to meet model-stock levels. PO forms can print color/size information in a list or grid format. Receivings are quick—only the exceptions are entered.

Merchandising Reports

CounterPoint includes valuable reports for comparing, summarizing, and analyzing merchandise so you can make decisions on whether to reorder specific merchandise.

- **Inventory Status**—Shows you the “whens” and “wheres” of your inventory (including quantity on hand for one or more locations).
- **Stock Status**—A true “exception report” that prints just the items stocked above the maximum, below the minimum, out of stock, etc.
- **Management History - Item Category**—A high level comparison of your gross profits during different time periods that clearly separates your profitable categories from the unprofitable ones.
- **Six Week Item History**—Helps you spot sales trends in your recent sales.
- **Inventory Analysis**—See how well your inventory is performing (analyze gross profits or see which items will sell out in the next two weeks).

Include items if qty on hand qty's are: Above zero
Cell detail: Grid with zero qty
Print cell qty: Qty on hand
Order by: Item number
Item: Item number is (exactly) VEST

Category	Description	Vendor #	Avg unit cost	Qty on hand	Net qty
Location	Bin1 / Bin 2	Bin3 / Bin 4	Qty on BO	Qty available	Qty on PO's
APPAREL					
VEST	Men's 100% cotton vest	IZOD	19.9900	39	39
MAIN			0	39	0

	Small	Medium	Large	X-Large	Total
Black	5	5	4	5	19
	1	1	1	1	4
Sandstone	5	5	5	5	20
	1	1	1	1	4
Total Qty on hand	10	10	9	10	39
Net qty	10	10	9	10	39
Min qty	2	2	2	2	8
VEST totals					39
					0
					39
					0

- **Merchandise Analysis** (Enterprise only)—Classify and rank merchandise using criteria you choose. Analyze merchandise at the item level, or get the bigger picture by grouping inventory by vendor, category, subcategory, etc.
- **Sales Analysis by Group** (Enterprise only)—A flexible and powerful reporting tool that analyzes your “hot and cold sellers” based on your performance indicators (quantity sold, quantity returned, average selling price, profit dollars/percents, and more).

SALES HISTORY

Overview

Sales History retains and manages historical sales data, and allows you to view and report those sales in summary or detailed format.

Ticket History View

CounterPoint retains detailed history of every sale and return ticket, including ship-to and bill-to addresses, line item detail, payment detail, sold gift certificates, and sales tax amounts.

Look up tickets by ticket number, customer number, store number, station number, or ticket date.

You can see as much detail as you want—totals, payments, or individual line items.

Individual tickets may also be retrieved by searching for keywords that match any portion of any field designated as a keyword search field.

View Ticket History

Event number: 11 Store: MAIN
Ticket number: 100099 Station: 1

Ticket	Bill-To	Ship-To	Lines / Total	Payments	Gift Certificates	Taxes
Item number	Description	Quantity	Selling unit	Taxable	Price	Extended price
TEES	Bag of Tees	1.0000	EACH	Y	1.0000	1.00
WALK	Pull cart fee	1.0000	EACH	Y	5.0000	5.00
18HOLES	Green fee - 18 holes	1.0000	EACH	Y	36.0000	36.00
RANGE	Large Bucket Range Balls	1.0000	EACH	Y	5.0000	5.00

Sale lines: 4 Misc charge 1 amt: 0.00 Subtotal: 47.00
Return lines: 0 Misc charge 2 amt: 0.00 Misc charges: 0.00
Total paid: 50.88 Misc charge 3 amt: 0.00 Tax: 3.88
Total change: 0.00 Misc charge 4 amt: 0.00 Gift certificates: 0.00
Misc charge 5 amt: 0.00 Total: 50.88

Filters may also be defined to show the detailed information for specific tickets. For example, you could define a filter to display only the tickets for customer # 100 between May 1 and June 30, 2005.

Ticket History Report

A complete audit-level report of ticket history may be printed in order by store, station, or date, and can optionally include payment detail, line item detail, serial number detail, and cost.

The summarized report allows you to view sales across multiple stores.

Flash Sales

The Flash Sales Report provides a brief one-page synopsis (with optional pie chart) of sales activity at one or more stores for a specified period of time.



Flash Sales shows the total sales, number of tickets, average sales dollars per ticket, cost of sales, and gross profit for each store during the reported period. You can include up to five of over 20 columns on the report.

Flash Sales is a very powerful reporting and analysis tool that lets you define and present your own analysis of store operations.

Management History

Summarized and detailed historical reporting is provided for item categories, payment methods, sales reps, stations, stores, tax codes, and users.

History can be retained indefinitely and management history reports can provide valuable information such as a comparison of sales for Easter week this year with Easter week last year.

By Item by Customer & By Customer by Item History

Two reports, Sales History by Item by Customer and Sales History by Customer by Item, analyze what merchandise is being sold and who is purchasing that merchandise. These reports may be run for a selected range of items, customers, stores, dates, categories, or any other reportable criteria, and allow you to “drill down” to additional levels of detail.

Sales History by Item by Customer shows selected items and lists the customers who made purchases, along with the applicable sales, quantities, profitability, and percent-of-totals figures.

Sales History by Customer by Item shows selected customers and lists the items that were purchased,

along with the applicable sales, quantities, profitability, and percent-of-totals figures.

Tax History

The Tax History Report provides detailed or summarized information for sales, taxable amounts, and tax amounts. You can choose how much detail to include on this report—from a summary by tax authority to a detailed report of the tax on each ticket.

Exception Reports

Sophisticated exception reporting allows a manager to monitor danger zones without having to pore through voluminous reports. Exception reports are available for critical areas such as price overrides, tax overrides, voids, merchandise returns, and others.

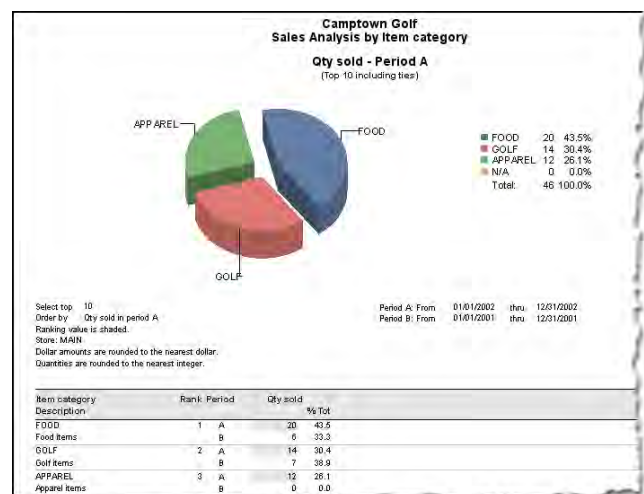
Commissions Due (ENTERPRISE ONLY)

Each sales rep may be assigned a commission code with a commission percentage based on the sales amount or the profit amount.

The commissions to be paid are reported in detail or summary on the Commissions Due report.

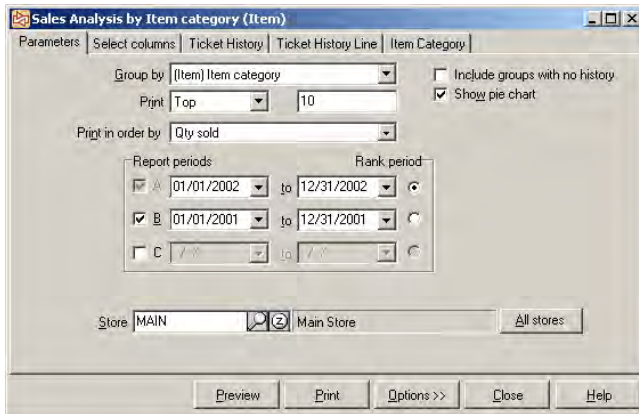
Sales Analysis by Group (ENTERPRISE ONLY)

Sales Analysis by Group is a powerful reporting and analysis tool that lets you define and present dozens of different analyses of historical ticket sales—with optional pie charts.



Choose from more than 120 different groupings, including item number, item category, customer zip code, customer category, customer profile fields, user, store, vendor, hour of the day, week, and many more.

For gridded items, you can group sales for colors and sizes within each category and subcategory.



For example, you can group reported information by item category to analyze the sales activity at the category level.

Each group can display up to three reporting periods. You can print all members of a group or just, for example, the top 10 members.

Store-level groupings summarize a store's activity including ticket lines, sale amounts, and profitability. Reports may be run for one or more days, for one or more stores, and for a multitude of other criteria.

You can even view “theoretical” sales—as if all goods had been sold at the retail price.

Use Filters to limit the report to particular tickets (stores, customers, stations, etc.) and/or particular line items (items, categories, vendors, etc.). You can also use Filters to limit the group members (e.g., “only item categories A, B, and C”). Groups with no history can optionally be included so you can show, for example, all your sales reps whether or not they had sales activity during the period.

ACCOUNTING INTERFACE

Overview

CounterPoint integrates seamlessly with a variety of accounting packages, including QuickBooks, BusinessWorks Gold, and Small Business Financials. With the Enterprise edition, CounterPoint also integrates with MAS 90/200 and Great Plains.

You can voucher received PO's into Accounts Payable (A/P) and interface distributions to General Ledger (G/L).

In addition, utilities are provided to voucher receivings and export distributions for use by other third-party Accounts Payable and General Ledger products, such as Solomon IV, MIP, ACCPAC, and The Financial Edge.

General Ledger

CounterPoint account numbers are mapped to corresponding G/L account numbers. Mapping rules can be set up that pertain to all accounts, or on a one-to-one basis. G/L account numbers may be up to 50 characters and may be segmented.

The Distribution Report may be printed in order by account number or by posting source (distribution type or module). A summary version is available, or the detailed version may be printed in order to provide a complete audit trail back to the individual posting journals and document numbers that originally created the distribution.

Distribution activity can be transferred automatically into G/L in summary or detail format, providing a complete audit trail from G/L.

Accounts Payable

CounterPoint **Inventory** and **Purchasing** track vendor information. An Accounts Payable package is used to track payables and issue checks outside of CounterPoint. CounterPoint vendors may be set up automatically from existing A/P vendors or created manually in CounterPoint.

After a CounterPoint PO has been received, that receiver may be vouchered into A/P as an invoice (a payable). A/P invoice vouchers may be entered, and accounting distributions are automatically passed into A/P along with the invoice vouchers. With the Enterprise edition, Return to Vendor (RTV) transactions may also be vouchered into A/P and appear as vendor credits.

Importing and Exporting Data

(ENTERPRISE ONLY)

Easily import G/L account numbers into CounterPoint and add or update vendors from A/P to CounterPoint or from CounterPoint to A/P.

CREDIT CARDS

Overview

Credit Cards provides electronic draft capture (EDC) capabilities by allowing you to swipe a credit card through a magnetic stripe reader, automatically authorize a credit card sale, verify an address, and settle funds to your bank. With the Enterprise edition, you can also electronically capture the customer's signature.

Electronic check authorization, EBT, and debit card processing are also provided.

Full support is provided for multiple industry classifications including Retail, Mail-order/Telephone-order (MOTO), and Ecommerce. CounterPoint also supports AVS, CVV2/CVC2, and purchase cards.

Transactions may be authorized using a standard dial-up telephone line. Two-second Internet authorizations are available using the optional CPGateway service (more fully described on page 41).

CounterPoint's Base System includes credit card processing with the CounterPoint Merchant Program (CMP). With the Express edition, CounterPoint also includes processing with Paymentech.

Additional processors are available with the **Credit Cards Option** (page 34) and ensure that CounterPoint is compatible with the vast majority of U.S. banks.

Benefits

The benefits of integrated credit card processing include:

- Visa CISP Compliance
- Rapid, automatic charge authorizations
- Faster checkout times
- Reduced customer frustration

- Fewer errors and fewer chargebacks
- Reduced cost of accepting credit cards
- No hand-recording of card information
- No paper slips to deposit at the bank
- No rekeying of card information
- No separate credit card terminal

Visa CISP Compliance

CounterPoint SQL is approved by Visa as a CISP-Validated Payment Application.

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.

Check Authorizations

CounterPoint includes electronic check authorization compatible with TeleCheck and Certegy. MICR check readers are optional, but are quicker and more accurate than manual data entry.

Debit Card Processing

Complete debit card processing with DUKPT support is built into CounterPoint. Debit card processing requires PIN pads and magnetic stripe card readers.

EBT Food Stamp Processing

EBT food stamp processing is available with CMP, First Data North, or Vital. EBT requires the use of PIN pads and magnetic stripe card readers.

Address Verification

Address Verification Service (AVS) reduces credit card fraud by confirming the customer's address. AVS is primarily used in mail-order or ecommerce applications where the physical card is not present.

AVS processing does not affect whether or not the charge is approved. Instead, it informs the user whether or not the address provided by the customer matches the address information on file with the credit card company so the merchant can decide whether or not to process the ticket.

Optional CVV2/CVC2 supplements AVS information by sending the extra three or four digits printed on the back of the card to the processor.

Purchase Cards

CounterPoint supports Level II Purchase cards, Corporate cards, Business cards, and Commercial cards.

Purchase cards are Visa and MasterCard cards that look like normal credit cards, but are processed in a special way so the cardholder (typically a large business or government agency) will receive additional information on the monthly statement regarding the type of goods or services purchased.

Hardware Requirements

Requirements for credit card processing are a modem and phone line or an Internet connection, and typically a magnetic stripe card reader. The card processor determines the modem speed and the card reader requirements.

CounterPoint is compatible with any Windows-compatible modem and either Track 1 or Track 2 card readers. Card processors typically require a 1200 baud modem (minimum) and a Track 2 card reader.

One modem and phone line is typically shared by multiple workstations. You can use a dial-up server as your primary processing method or as a backup for CPGateway. CPGateway is an optional service that authorizes credit cards over the Internet in less than two seconds.

Functional Description

During Ticket Entry, the credit card is swiped through the magnetic stripe card reader. Card information is read and the amount is authorized over a dial-up or Internet connection. The processor

returns an authorization number or a decline. Capabilities are provided for call retry and for a backup phone number. Any number of credit cards can be used on one ticket, and multiple cards of the same type are also allowed.

Authorizations only commit the cardholder's credit line. Funds are not actually transferred until the transactions are settled, typically at the end of the day.

Invoices and receipts print the credit card information required by the processor (typically just the last four digits of the card number). Receipts can support one- or two-part paper with a signature line, as well as an abbreviated sales draft (that doesn't list the merchandise sold).

The Pre-Settlement List allows you to review the day's activities prior to settling the transactions.

Funds may be settled (electronically transferred) with the credit card processor daily. For most card types, settled funds are transferred via ACH to your local bank within two business days.

Other Costs

Typically, the costs associated with credit card processing include a telephone line and monthly usage, modems, magnetic stripe card readers, and cabling.

CPGateway requires Internet access and has startup and monthly transactional fees. You can try CPGateway for free for a limited time with your new CounterPoint system.

ECOMMERCE

Overview

Opening an online store is easier than you think.

Ecommerce capabilities are built into CounterPoint and are compatible with CPOnline, a Web-hosting and ecommerce service designed especially for CounterPoint merchants.

Because CPOnline is fully integrated with CounterPoint, you can maintain your brick-and-mortar store and your online store at the same time. There's no costly double entry.



CPOne is suitable for merchants of all sizes. With CPOne, you can publish CounterPoint's inventory and customer information to your online store. Shoppers place orders online, and the orders are imported into CounterPoint for processing and fulfillment.

Capabilities

CPOne capabilities include:

- A complete Web site and shopping cart
- Real-time credit card authorizations with CPGateway
- Special member pricing, member-only items, and customer-specific discounts
- Online account access where shoppers can view their order status (A/R charge customers can also view their available credit and account status)
- Automatic email notifications to shoppers when orders are shipped
- Package tracking
- Easy-to-use Store Management Web site where you can maintain and configure your online store
- **Automated Data Transfer** (Premium Feature) exchanges data in unattended mode
- **Tax Rate Lookup by ZIP Code** (Premium Feature) accurately calculates tax rates based on the ZIP code of the order

Marketing Tools

Get noticed—and stay noticed. CPOne includes the marketing tools you need to make your online store a profitable endeavor.

- **eNewsletters** keep customers informed about upcoming sales, special offers, and new items, and include links to items in your storefront
- **Discounts and promo codes** drive traffic to your store with flexible discount options
- **Froogle™ data transfers** increase your Web presence and help shoppers locate items in your store
- **Featured items** encourage impulse buys
- **Tell-a-friend emails** let your shoppers email their friends about items on your storefront
- **Affiliate programs** reward Web sites that advertise your products or provide links to your storefront

Security

Security is provided through SSL, an industry standard that employs the latest 128-bit encryption technology to encrypt sensitive information—like your customers' names and credit card numbers—for safe transfer over the Internet.

Requirements

Ecommerce and credit card functions are built into CounterPoint. The only requirements for CPOne are a CounterPoint system, a Windows workstation with Internet access, and a Web browser.

SYSTEM

Overview

CounterPoint is ready to use right away and gives you all the tools you need to run your business efficiently, profitably, and securely.

For a truly tailored fit, CounterPoint can be customized to meet your unique business needs. You can easily customize LookUps, Filters, Zooms, menus, toolbars, fonts, color schemes, Touchscreen Ticket Entry, table views, and grid layouts.

Nearly every aspect—its appearance, content, and behavior—can be customized. With the Express edition, customizations must be performed by a

CounterPoint Business Partner. With the Enterprise edition, you can customize CounterPoint using the built-in tools.

For example, you can:

- Customize reports, field names, field sizes, warning messages, and more
- Skip unwanted/unused fields
- Add new, user-defined fields to the system
- Add new, user-defined screens or attach custom programs to the CounterPoint main menu
- Print a report that identifies any customized columns, tables, triggers, stored procedures, etc.

Timecards

CounterPoint allows you to track the hours your employees work. In addition to automatically notifying users when they are not clocked in, CounterPoint allows you to void timecards, print reports, and export timecard records into a third-party payroll application.

Online Help and Tutorials

CounterPoint includes Online Help and tutorials designed to increase your knowledge. The searchable Online Help includes context-sensitive help as well as general overview help topics. Tutorials are interactive, computer-based training courses that provide basic knowledge for you and your staff.

Security

Detailed function-level security is provided for each user. Function-level security determines whether a user is authorized to view costs, void tickets, enter returns, override credit limits, enter transactions for previous years, and much more.

CounterPoint can be password protected. Passwords can be required and can have a minimum length and an expiration date. Users can be forced to change their password after logging in. You can also see who is logged into CounterPoint at any given time, and, in many cases, which part of the software they're using.

For additional security, you can assign users to limited menus with fewer selections.

Menus and Toolbars

Multiple menu styles (buttons, single panel, dual panel, or dropdown list) are available to provide access to all system functions.



Each authorized user may determine menu style preference and customized menu selections.

Multiple toolbar schemes are also available. An authorized user may select a toolbar scheme or design a custom toolbar. Toolbars can be the same or different for each screen.



An easy drag-and-drop design interface allows authorized users to change the appearance and behavior of toolbars and menus, including:

- Toolbar visibility
- Toolbar position
- Button/Menu images
- Button/Menu text
- Shortcut keys
- External programs

Touchscreen Interface

CounterPoint includes a simplified “touchscreen” user interface based on large buttons suitable for touchscreen, mouse, keyboard, and scanner input. A touchscreen monitor is not required.

A pop-up keyboard is available in Touchscreen Ticket Entry as well as from all standard maintenance forms, report forms, and filters. With pop-up keyboards, users

can enter information using touchscreen workstations that aren't equipped with keyboards.



Zooms

Zooms display additional details throughout CounterPoint. Zooms are available for items, customers, A/R documents, vendors, stores, users, gift certificates, store credits, locations, location groups, PO's, receivings history, ticket history, serial numbers, transfers, and more from virtually anywhere.

For example, while entering a ticket, the Item Zoom displays information about the item, quantities available, recent sales, vendors, monthly history, substitute items, notes, etc. The Customer Zoom displays the customer's contact information, current balance, recent sales, ticket history, etc.



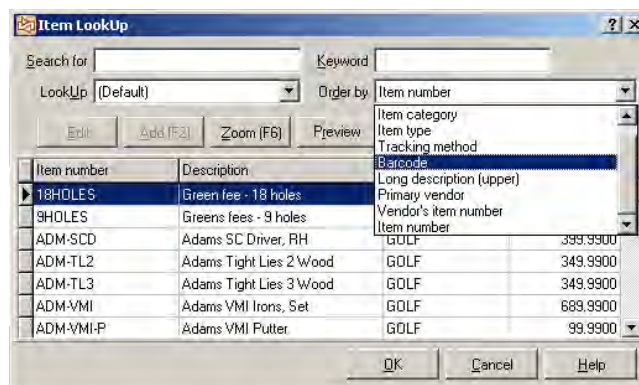
With the Enterprise edition, you can use the Zoom Dictionary to create new Zooms and to control the appearance, content, and behavior of existing Zooms.

LookUps

LookUps let you view a list of valid records (e.g., items, customers, vendors, etc.). LookUps are

available from any field in which information can be "looked up" from a list of valid choices.

For example, when an item LookUp is requested, the LookUp window displays the complete list of items. The items can be ordered by item number, barcode, category, vendor, description, etc.

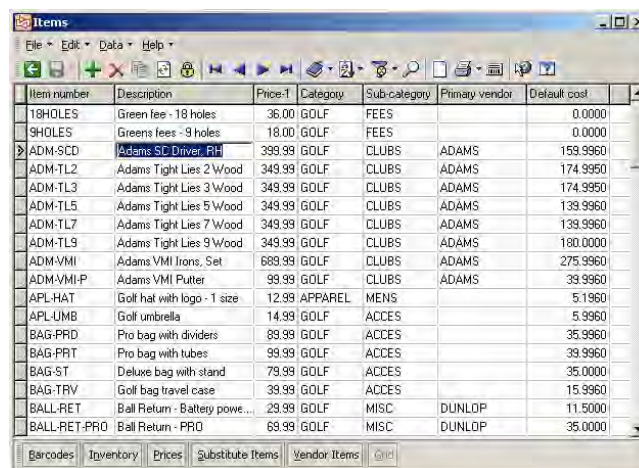


With user-friendly keyword searching, CounterPoint matches keywords to any field designated as a keyword search field. Keyword searching finds, for example, an item based on a partial match of any keyword fields (category, description, vendor, etc.).

All LookUps are customizable. From within a LookUp, you can zoom in on detailed information or set Filters to display only the items you want. Authorized users can even "add on-the-fly" or make changes to existing records.

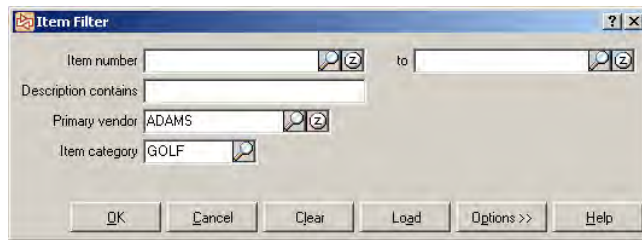
Table View or Record View

On each CounterPoint screen, you can choose which view to use when editing and maintaining your data. Use the standard Record View to work with a single item, customer, etc., at a time. Or switch to Table View to view and edit multiple records at a time.



Filters

You can use Filters to customize the information displayed in LookUps, maintenance screens, and reports. Filters are automatically saved with LookUps.



The Item Filter dialog box contains the following fields and controls:

- Item number: [] to []
- Description contains: []
- Primary vendor: ADAMS
- Item category: GOLF
- Buttons: OK, Cancel, Clear, Load, Options >>, Help

Filters allow you to set conditions that limit the records that display. For example, you could choose to display only the “items in category GOLF with a primary vendor of ADAMS.”

Indexes

Indexes increase the speed of LookUps and reports. Adding an index allows you to quickly sort and look up information in the order you prefer.

For example, if you have tens of thousands of items on file, and you frequently look up items by subcategory, you may want to define a subcategory index to speed up the Item LookUp.

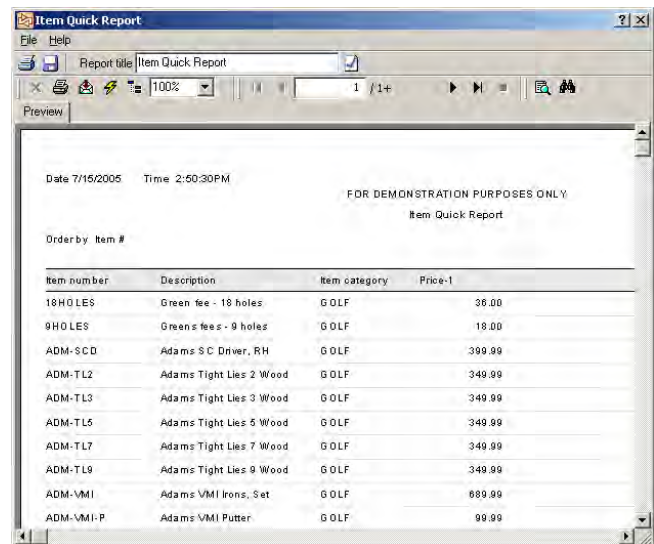
Crystal Reports

CounterPoint includes the Crystal Reports Viewer, so you can view and print reports outside of CounterPoint and export reports to a variety of formats.

New forms and reports may be created, and standard forms and reports may be customized using Crystal Reports Designer (purchased separately). Custom reports may be used in place of any standard report, or they may be added to custom menus and used in addition to the standard reports.

Quick Reports

You can create a Quick Report from any LookUp window to preview, print, or save the information. Quick Reports can easily be added to a customized menu and function like standard reports. You can also export the information from the Quick Report to another application, such as Microsoft Excel.



The Item Quick Report window displays the following information:

- Date: 7/15/2005 Time: 2:50:30PM
- FOR DEMONSTRATION PURPOSES ONLY
- Item Quick Report
- Order by: Item #
- Table with 4 columns: Item number, Description, Item category, Price-1

Item number	Description	Item category	Price-1
18H0LES	Green fee - 18 holes	GOLF	36.00
9H0LES	Greens fees - 9 holes	GOLF	18.00
ADM-SCD	Adams S C Driver, RH	GOLF	399.99
ADM-TL2	Adams Tight Lies 2 Wood	GOLF	349.99
ADM-TL3	Adams Tight Lies 3 Wood	GOLF	349.99
ADM-TL5	Adams Tight Lies 5 Wood	GOLF	349.99
ADM-TL7	Adams Tight Lies 7 Wood	GOLF	349.99
ADM-TL9	Adams Tight Lies 9 Wood	GOLF	349.99
ADM-VMI	Adams VMI Irons, Set	GOLF	889.99
ADM-VMI-P	Adams VMI Putter	GOLF	99.99

Automatic Workstation Updates

To simplify the installation of periodic software updates, newer software need only be installed on the server. Each CounterPoint workstation automatically detects new software and updates itself.

Triggers

For advanced requirements, additional processing can be performed using SQL triggers. A “trigger” is a set of SQL commands that execute automatically when information is added, updated, or deleted. Triggers are a powerful way to update your business records when certain conditions are met.

For example, you could define a Warranty Repairs trigger for billing the manufacturer (not the customer) for repair work. When a customer brings in an item for repair, the clerk enters a normal point-of-sale ticket, and the warranty work is “paid for” with a special A/R pay code. The trigger automatically charges the manufacturer’s A/R account. At the end of the month, a statement of how much money the manufacturer owes you for the warranty work can be printed and mailed to the manufacturer.

Batches (ENTERPRISE ONLY)

CounterPoint updates data in “batches” so that multiple users can operate independently without interfering with one another.

For example, two people at the same location can concurrently enter and post inventory adjustments or cash receipts. Posting one user’s batch of data will not affect the other user’s batch.

Workgroups (ENTERPRISE ONLY)

A workgroup is a group of users who share similar characteristics. Workgroups control the locations, stores, and features that a user can access, as well as the automatically-assigned “Next” numbers (e.g., next PO number, next item number, etc.).

Workgroups are also beneficial for grouping users in wide area networks and Multi-Site configurations.

Messages/Reminders (ENTERPRISE ONLY)

With the Message Center, you can send electronic messages to other users to inform them about system changes, daily specials, etc., or you can schedule repeating reminders. Messages automatically display when a user logs into CounterPoint.



Renumbering Utilities (ENTERPRISE ONLY)

Utilities are provided to renumber items, customers, and vendors.

Importing and Exporting Data (ENTERPRISE ONLY)

CounterPoint includes Database Import and Export utilities to create and update CounterPoint data (item numbers, descriptions, prices, etc.). CounterPoint is also capable of importing and processing transactions (transfers, receivings, and adjustments) from text files. Many third-party packages can create text files suitable for importing into CounterPoint.

Data can be exported using CounterPoint’s Database Export utility or other applications such as Excel, Crystal Reports, or Microsoft SQL.

Upgrade Utility (ENTERPRISE ONLY)

CounterPoint SQL includes an Upgrade Data utility which allows you to import CounterPoint V7 inventory, customer, and vendor records, as well as

inventory history (including markdowns), open purchase orders, ecommerce information, and configuration information into CounterPoint SQL.

You can also convert data from third-party applications into the appropriate CSV format, and then use the Upgrade Data utility to convert that data for use with CounterPoint SQL.

Data Dictionary*

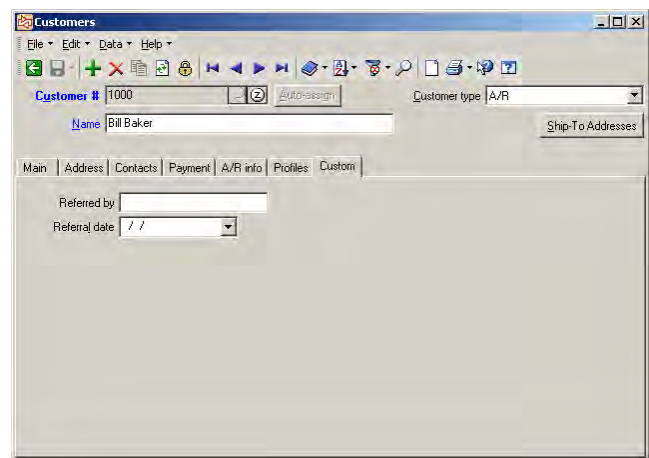
The Data Dictionary allows you to easily customize CounterPoint’s appearance and behavior. You can change your information in one place, and your change is reflected on every screen and report. For example, you can display “Client” instead of “Customer” or “Department” instead of “Category.”

You can also define “rules” to control screen behaviors, such as specifying minimum or maximum values for numeric fields.

Custom Fields*

Custom fields allow you to easily record, track, and view additional information on existing CounterPoint forms. Custom fields are automatically available in Zooms, LookUps, and Filters.

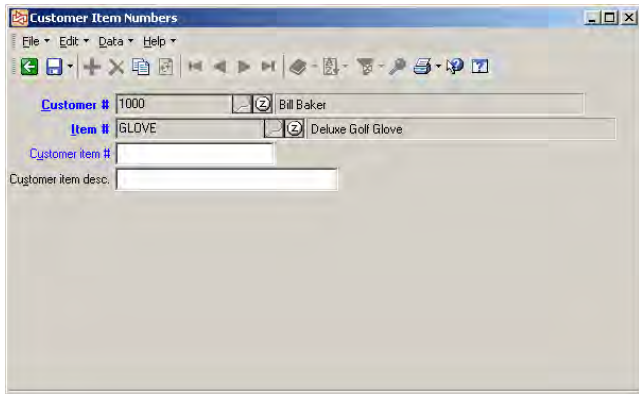
For example, if you wanted to track referral names and dates, you could define custom fields for “Referred by” and “Referral date” and add them automatically to the standard Customers screen.



Custom Screens*

Custom screens allow you to create new, user-defined screens within CounterPoint. Custom screens fully support LookUps and Filters.

For example, if you wanted to track customer-specific item numbers, you could create a custom screen that includes customer number, item number, the customer's item number, and a description.

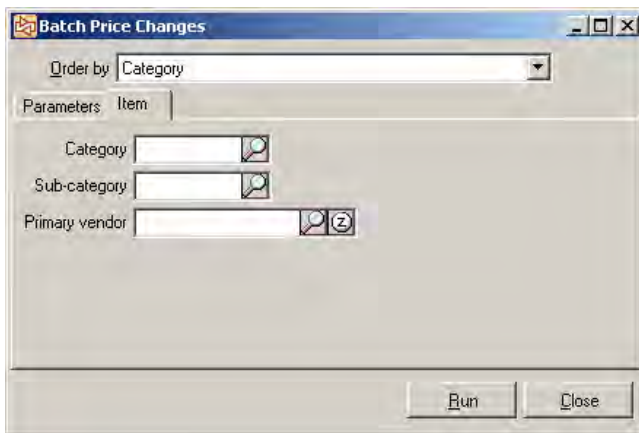


Custom screens can be attached seamlessly to the CounterPoint main menu, to a Touchscreen Ticket Entry button, or to any toolbar. You can even add a button to the toolbar on the Customer maintenance screen that when clicked, displays the customer's unique item numbers.

Custom Programs*

CounterPoint will create a user-friendly “front end” for your custom programs. Custom programs and applications can be created using any number of development tools and can be run from the CounterPoint main menu for a consistent interface.

For example, you could create a Visual Basic application named Batch Price Changes that changes the Price-1 values for a group of items up or down by a specific percentage.



Using a “standard looking” CounterPoint screen, you can specify the category, subcategory, or vendor to change, as well as the percentage by which Price-1 should change.

CounterPoint then passes these values to your Visual Basic application which changes the Price-1 values for the group of items.

* With the Express edition, most customizations require the services of a CounterPoint Business Partner. With the Enterprise edition, any authorized user can customize CounterPoint using the built-in tools.

COUNTERPOINT OPTIONS

CounterPoint Options give you access to additional features that enhance the Base System. Options may be purchased with the Base System, or later as your business needs change.

CREDIT CARDS OPTION

Overview

The Express and Enterprise editions include credit card processing with the CounterPoint Merchant Program (CMP). Express also includes processing with Paymentech (the **Credit Cards Option** is not required for processing with Paymentech in the Express edition).

With the **Credit Cards Option**, you can choose to process through a CounterPoint Preferred Processor.

Preferred Processors

CounterPoint supports credit card processing through any of the Preferred Processors:

- First Data North (FDMS North)
- First Data South (NaBANCO)
- Vital (VisaNet)
- Paymentech
- Any bank compatible with a Preferred Processor

Using a CounterPoint Preferred Processor ensures compliance with rapidly changing standards and access to the most favorable rates, as well as industry classifications (Retail, Mail-order/Telephone-order, and Ecommerce), AVS, CVV2/CVC2, dial-up processing, purchase/corporate cards, and CPGateway.

Visa CISP Compliance

CounterPoint is approved by Visa as a CISP-Validated Payment Application. 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.

Capabilities

Capabilities of the **Credit Cards Option** are identical to those described under **Credit Cards** (page 26).

RECEIVABLES OPTION

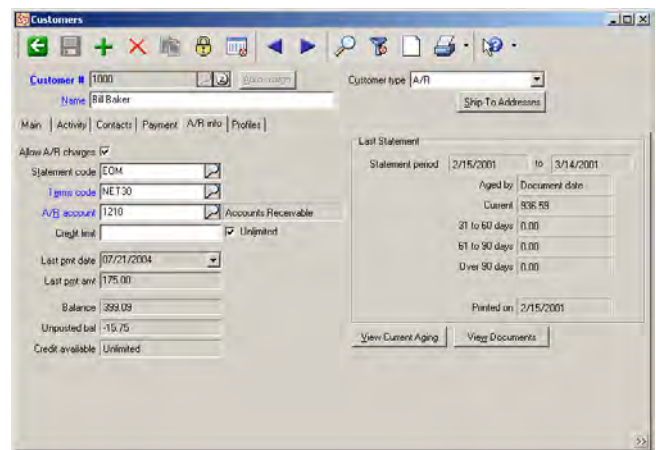
Overview

Complete customer tracking is an integral part of CounterPoint. The **Receivables Option** adds charge sales, receivables tracking, cash receipts processing, finance charges, account aging, and statement printing.

The Express edition includes receivables functionality in the Base System. For the Enterprise edition, the **Receivables Option** is required in order to process receivables.

Customer Accounts

Charge customers are “open-item” type accounts. Customer terms and prompt payment discounts may be based on a number of days (“net 30” or “2% 10, net 30”), or proximo terms based on a specific day of the month (“2% 10th, net 30th”).



Credit Limits and Controls

Credit limits ensure that customers do not exceed management’s guidelines for open credit. For a charge sale, the customer’s credit limit is checked, and only authorized users may override the credit limit.

Statements

Statements are normally printed as part of a month-end process. Statements may be limited to customers

within particular statement groups and/or to customers with particular minimum balances and past due statuses.

A standard statement form may be printed, or the statement format may be customized with Crystal Reports Designer (purchased separately). Customer information, ticket details, activity detail of invoices and payments, aging, and dunning notices can be printed on the standard statement form.

Cash Receipts

When entering cash receipts, a customer's payment may be applied to an individual document, selected documents, or automatically applied to any unpaid documents (starting with the oldest documents). Open item detail may be viewed on screen.

You may revise prior cash receipts by reapplying A/R documents so you can, for example, change the amount previously applied to an invoice.

Valid discounts are calculated automatically, and writeoffs are allowed. Discounts and writeoffs can be charged to the default G/L account or to any valid G/L account.

Authorized users can accept cash, check, credit card, or debit card payments on a customer's A/R account from ticket entry.

Debit/Credit Memos

Customer Adjustments allow simplified processing of back-office debit and credit memos that are not appropriate for **Point of Sale** processing. Adjustment documents may be self-applied, open, or may be applied to an existing document.

Aging

Up to five aging periods may be defined, along with a number of days (such as 30, 60, 90, etc.). Documents may be aged by invoice date or by due date. Statements and the Aging report allow aging by number of days, as well as for a specific range of dates, and provide separate totals for debit and credit amounts.

You can view a customer's current aging or the aging that was printed on the last statement.

The Aging report provides an aging summary per customer, or the complete document detail, and allows selection of just those customers with high balances and/or past due accounts.

The Aging report may be printed in order by customer number, name, or sales rep.

SERIAL NUMBERS OPTION (ENTERPRISE ONLY)

Overview

Serial number tracking provides a detailed record of each piece of merchandise—when it was received, what it cost, which customer bought it, when it was bought, warranty expiration, etc. Serial number tracking is beneficial to any business that sells big-ticket items, tracks product warranties, or deals in regulated commodities.

Serial numbers can be entered in inventory adjustments, quick receivings, purchase order receivings, quick transfers, transfers, and ticket entry (including same-day sales and returns).

Detailed historical activity is retained for each serial number transaction (receiving, sale, etc.). Historical details are available on reports, views, and Zooms.



Serial Number Tracking

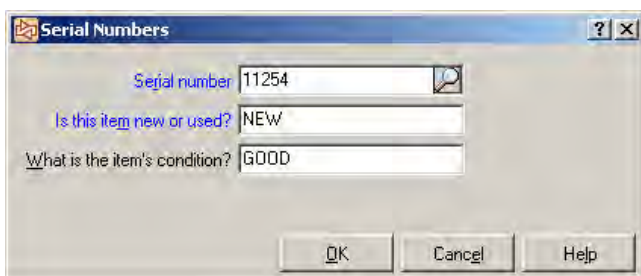
Items may be defined as “Always serialized” or “Sometimes serialized.”

“Always serialized” tracking allows you to exercise tight management control over the movement of quantities for the item. Serial numbers must be specified for every transaction (receiving, transfer, sale, etc.). You may only sell serial numbers that are actually in stock. Always serialized tracking ensures that there is a serial number associated with each item on hand.

“Sometimes serialized” tracking provides looser management controls. Recording of serial numbers during receiving (or other transactions) is optional. To ensure that you keep good records, you may specify for each item whether serial numbers are required when selling and returning. The sometimes serialized tracking method is useful for businesses that don’t track in-stock serial numbers, but may want to record serial number information at the time of sale.

Serial Prompts

Serial prompts allow you to collect additional information. For example, you could define a serial prompt code to be used in receivings that requests the “classification” and optionally requires the user to enter either “New” or “Used.”



You may use the same prompt codes for all serialized items, or you may associate different prompt codes with different items. Serial prompt information is retained with the transaction detail and is available for viewing and reporting.

Costing Method

For accounting purposes, you may use the serial cost to account for the specific cost of each individual serial number or the average cost. CounterPoint supports serial costing for Always serialized items.

Zooms

From Item Zooms, you can display a list of serial numbers and the current status of each serial number.

From the Serial Number Zoom, you can display basic information for the serial number as well as historical transaction detail.



Reports

The Serial Numbers report may be printed for sold, missing, or unsold items, and may be organized by vendor, item, or customer.

Individual serial numbers and the associated reference information may be printed on applicable inventory reports.

ADVANCED PRICING OPTION (ENTERPRISE ONLY)

Overview

The **Advanced Pricing Option** offers advanced pricing capabilities including price-by-location, 6-

level prices, oversize pricing for apparel, and custom pricing for price calculations.

Price-by-Location

Price-by-location allows an item to have a different price at each selling location. For example, your downtown store can charge higher prices than your uptown store.

6-Level Prices

Tiered, multi-level pricing automatically selects a particular price level based on the specific customer making the purchase and the quantity being sold.

In the CounterPoint Base System, each inventory item may have up to three price levels for the item's stocking unit and for each of its five alternate units. The **Advanced Pricing Option** expands the number of price levels for each unit from three to six.

Item number	Location	Grid dimension 1	Grid dimension 2	Grid dimension 3
ADM-SCD	MAIN	*	*	*

Stocking unit is EACH

Regular price	Alt-1 Prices	Alt-2 Prices	Alt-3 Prices	Alt-4 Prices	Alt-5 Prices
399.99	389.99	379.99	369.99	359.99	349.99
					339.99

Oversize Pricing (Price-by-Cell)

Oversize pricing for gridded (apparel) items allows you to charge a higher or lower price for each cell (color/size combination) of a gridded item.

Pricing rules (described in **Inventory**) are used to assign a surcharge (or discount) of a dollar amount, a percentage increase/decrease, or a fixed price for each cell. For example, you could define a rule that determines "all X-Large in the category SHIRT for vendor 123 are Price-1 plus \$5" or "all BLUE colors of the item DRESS are Price-1 less 10%."

Custom Pricing

Advanced users may use custom SQL stored procedures to further customize price calculations.

Custom pricing using stored procedures is valuable if your pricing rules require formulas (e.g., 10% off Price-1 minus one dollar) that cannot be described using the standard calculation methods.

MULTI-SITE/HUB OPTION (ENTERPRISE ONLY)

Overview

Multi-Site is an integral part of any business that has more than one store. Multi-Site enables a CounterPoint Hub (the main office) and one or more Remotes (other stores) to operate independently during the day and periodically exchange information. Each site may "subscribe" to a user-defined set of data (a "work set") so that it receives just the inventory, store, and customer information that it needs.

Information is exchanged (replicated) through a dial-up, WAN, or Internet connection. Replication can be scheduled to take place periodically during the day or as an overnight process.

Multi-Site Benefits

Multi-Site operation of multiple stores offers many benefits, including:

- Independent operations across multiple sites
- Automatic, unattended, remote-site updating
- Cost-effective exchange of information across multiple sites
- Multi-location data integrity
- Data remains synchronized across multiple sites

Exchanging Information

The CounterPoint Hub and each remote site operate independently and periodically exchange (or replicate) information using PDRE (PeerDirect Replication Engine) software included with **Multi-Site**.

The Hub contains a complete database (all data for all sites). Remotes can also contain complete databases, or they can contain site-specific work set databases.

During a replication session, PDRE gathers all changes made to a database since the last replication session and replicates those changes with the other site via TCP/IP. PDRE automatically initiates

contact to ensure that each site gets all the data it needs, based on the site's subscribed work set.

Replication can be scheduled to take place periodically during the day or as an overnight process. Data is replicated bi-directionally in a single session.

Log files for each session can be viewed using any text editor, or you can set up a Windows task to automatically email logs at a certain time every day to report the status of the replication.

Managing Multiple Sites

Manage all servers and workstations at each site from a central location. CounterPoint includes Altiris software that enables a single computer (the Notification Server) to control the installation of software updates, database changes, and file distribution. The Notification Server "talks to" the other computers in the Multi-Site environment and automatically keeps them all up-to-date.

Work Sets

Multi-Site uses work sets to manage the CounterPoint database for each site. Each site may subscribe to a user-defined set of data so it receives just the inventory, store, and customer information it wants. Work sets are established for each location and for each store.

For example, the MAIN location work set contains just the data that pertains to the MAIN location (inventory, transaction history, etc.), and the EAST store work set contains just the data that pertains to the EAST store (customers, ticket history, etc.).

Work sets offer many benefits, including:

- **Speed**—Replication for each site is fast. Each site only replicates the data it needs
- **Size**—Site-specific databases are smaller, thereby increasing CounterPoint's speed and reducing the server requirements
- **Convenience**—Forms, LookUps, reports, etc., only display the data relevant to that site
- **Security**—One site cannot alter another site's data if it is not subscribed to the work set

To further reduce data transmission and data storage requirements, a site can subscribe to the "master" data

and not subscribe to the "history" data. For example, EAST may wish to see WEST's inventory, but not see (or update) WEST's inventory history.

Options

Options that are purchased for a Hub are also purchased and available for each Remote.

Affected Applications

Virtually all areas of CounterPoint are involved in **Multi-Site**. When an item is added at one site, it is automatically added at all sites. When a customer's address is changed, that change is reflected at all sites having that customer on file. All appropriate changes are updated throughout CounterPoint.

OFFLINE TICKET ENTRY OPTION (ENTERPRISE ONLY)

Overview

The **Offline Ticket Entry Option** provides lane redundancy and ensures fault tolerance so clerks can continue to ring up sales if the connection to the CounterPoint server is lost.

Offline Ticket Entry is useful during network outages, sidewalk sales, scheduled server maintenance, or for any situation in which the server is unavailable. Offline mode may be used as the normal mode of operation for "sometimes-connected" workstations such as portable workstations or kiosks.

Offline Mode

In offline mode, clerks ring up sales in the normal manner, but the tickets are saved to a local database instead of the main CounterPoint server's database. When the server becomes available, the workstation database is synchronized with the server, and the offline tickets become part of the server's database.

In offline mode, you can:

- Open and close cash drawers
- Enter sale and return tickets, orders, layaways, holds, quotes, pay-ins, pay-outs, and pay-on-accounts
- Authorize credit card (EDC) transactions
- Add new customers on-the-fly

Other CounterPoint functions are not available in offline mode.

ADDITIONAL TOPICS

Radiant Systems offers additional products and services that complement those of our CounterPoint Business Partners.

BUSINESS PARTNERS

CounterPoint SQL is available exclusively from CounterPoint Business Partners who provide complete business solutions that include software, equipment, services, training, and ongoing support.

SYSTEM CONFIGURATION

CounterPoint is available in single-user and multi-user versions, and operates in both single-site and multi-store environments. CounterPoint workstations can either be standalone or attached to a network.

With the Enterprise edition, you can have multiple stores and multiple companies all running the same CounterPoint software. Each company can have a unique name, account number structure, and various other system-wide attributes. WAN (Wide Area Network) support is provided for Citrix and Windows Terminal Server.

MINIMUM REQUIREMENTS

- ✦ Workstations can run on Windows XP Professional or 2000. The minimum memory for a workstation is 512MB.
- ✦ Servers can run on Windows XP Professional, 2000, or Windows Server 2003. A server can also function as a workstation. The minimum memory for a server is 512MB.
- ✦ Microsoft Desktop Engine 2000 (MSDE 2000) is included with CounterPoint for systems with up to five users and up to a 2GB database. Microsoft SQL Server 2000 (MSSQL) is required for more than five users, larger databases, and for Multi-Site Hubs. (MSSQL is purchased separately.)

POINT-OF-SALE HARDWARE

An open architecture ensures compatibility with hardware from Radiant Systems as well as from a variety of other manufacturers.

By choosing Radiant Systems as the single source for your integrated hardware and software solutions, you reduce your implementation risks and optimize the technology solution for your environment.

Radiant Systems Hardware

Radiant Systems offers a comprehensive line of hardware solutions designed especially with CounterPoint users in mind. Our hardware is built to last in the harshest retail and wholesale environments.



Our approach is simple: *reliable and compatible solutions with low total cost of ownership.* Cost-effective maintenance plans keep your hardware in first-rate condition while lowering your overall technology costs.

Radiant's full line of hardware includes compact workstations with easy-to-use touchscreen interface,

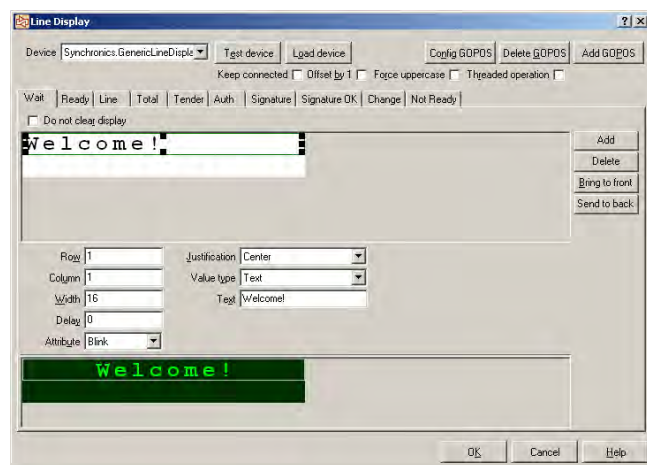
powerful back-office servers, handheld wireless tablets, indoor and outdoor kiosks, and more.

CounterPoint-compatible workstations include:

- ❖ **P1550 Workstation (Premium Model):** The P1550 is Radiant's most advanced all-in-one workstation. It features key innovations such as a high-bright 15" touchscreen, the latest Intel® technology, passive cooling, and innovative cable management.
- ❖ **P1220 Workstation (Value Model):** The P1550 is Radiant's affordably priced all-in-one workstation. It features a 12.1" high-bright touchscreen, the latest Intel technology, and a small footprint with flexible mounting options

Peripheral Devices

CounterPoint supports a wide range of peripheral devices.



CounterPoint works with:

- ❖ **Receipt and invoice printers**—Various types of printers are used to output receipts and invoices, validate checks, and print other types of documents.
- ❖ **Cash drawers**—Electronic cash drawers can be connected directly to the computer's serial or parallel ports, or through a point-of-sale printer with cash-drawer kickout ports. The Enterprise edition also supports compulsory cash drawers.
- ❖ **Barcode readers and scanners**—Scanners allow high-speed, accurate input of inventory items, and can also be used to scan in other barcoded information such as gift cards, customer numbers, etc.

- ❖ **Customer pole ("line") displays**—These devices display change due and can also display sale amounts, item descriptions, and prices.
- ❖ **Multiple monitors**—Take advantage of the multi-monitor support that's built into Windows to display a separate screen image to your customers during checkout. Customer display monitors can display advertisements, ticket information, item images, change due, customer details, etc.
- ❖ **Magnetic stripe card readers**—Track 1 and Track 2 magnetic stripe readers are supported for credit card authorizations. Keyboard-transparent card readers may also be used for shopping cards and identifying employees or customers.
- ❖ **PIN pads**—PIN pads are required for debit cards and/or EBT food stamps.
- ❖ **Signature capture (ENTERPRISE ONLY)**—Obtain customer signatures electronically when processing credit cards, A/R charges, etc.
- ❖ **Check readers**—Check readers may be used in conjunction with check processing to pass MICR information to the processor.
- ❖ **Programmable keyboards**—Specialized keyboards are useful for simplified data entry. They may be used in place of or in conjunction with standard alphanumeric keyboards.
- ❖ **Touchscreen monitors**—Any touchscreen monitor that's compatible with Windows will work with CounterPoint.
- ❖ **Handheld data-collection terminals**—Data collected by portable data-collection terminals may be imported into CounterPoint for physical counts, etc.
- ❖ **Weight scales**—CounterPoint may request a weight from a serial scale, or transmission may be initiated manually.

Express Certified Devices

To simplify setup for commonly-used devices, a series of pre-defined *Express Certified* device definitions are installed with CounterPoint. The Express edition works with any of the *Express Certified* devices.

The Enterprise edition works with any of the *Express Certified* devices as well as other devices.

CounterPoint communicates with peripheral devices using the manufacturer's OPOS drivers or the Generic OPOS drivers included with CounterPoint. OPOS is the industry standard for communicating with point-of-sale hardware.

Visit www.CounterPointPOS.com/expresscertified for an up-to-date list of certified devices.

ADDITIONAL SERVICES

Radiant Systems offers ecommerce, credit card processing enhancements, training, technical support, and an annual User Conference to help you get more out of your CounterPoint system.

CPOnline

CPOnline is an ecommerce and Web-hosting service designed especially for CounterPoint merchants.

You can use CounterPoint to publish inventory, customers, and pricing information to your CPOne store with a minimum of effort and expense. Then, you can process and fulfill orders received online through your CounterPoint system. With CPOne, your inventory, customers, and pricing are always in sync.

CPOnline combines the essential tools of ecommerce into one simple package, including member-specific items and pricing, eNewsletters, Froogle™ submissions, automatic email notifications, real-time credit card authorizations, package tracking, and a wide range of payment and shipping options.

Visit www.CounterPointOnline.com for additional information.

CPGateway

CPGateway enhances credit card processing for CounterPoint merchants. With CPGateway, you can authorize credit cards, debit cards, EBT food stamps, stored value cards, and checks over the Internet in less than two seconds.

CPGateway allows you to obtain authorizations from your processor using the Internet instead of dialing out for each authorization. This method is faster and more reliable than dial-up communications.

CPGateway is suitable for businesses of all sizes. High-volume businesses will benefit from fast authorizations all year long. Lower-volume businesses can reduce monthly fees by using CPGateway only during their peak seasons.

CPGateway offers:

- 2-second authorizations for credit cards, debit cards, EBT food stamps, stored value cards, and checks
- Internet-based service
- Faster settlement times
- Compatibility with CPOne (for real-time authorizations in your ecommerce store)
- CISP compliance
- Simple setup
- Economical fees
- Ease of use
- Reliability
- Security
- One Internet connection for multiple workstations
- Compatibility with the CounterPoint Merchant Program (CMP), First Data North, First Data South, Vital, and Paymentech
- Automatic fallback using CPDialup
- Direct American Express authorizations instead of routing through processors (reduces bank fees)

You can try CPGateway for free with your new CounterPoint system.

Visit www.CPGateway.com for more information.

CounterPoint Subscription Service

The CounterPoint Subscription Service (CSS) automatically keeps your CounterPoint system up-to-date. It is required during the first year, and is strongly recommended in future years to get the most out of your investment and minimize your maintenance costs.

With CSS, you receive all feature enhancements (updates and corrections) as they are added to CounterPoint, along with updated documentation. CSS also ensures that your CounterPoint system remains CISP-compliant. Plus, you can access the CounterPoint Users Forum and other user-only areas of our Web site.

CounterPoint Users Forum

The CounterPoint Users Forum is the official forum for you to share questions, suggestions, and information with other users at forum.synchronics.com.

HelpDesk

HelpDesk provides supplemental support to help ensure the successful operation of your CounterPoint system. An annual HelpDesk agreement provides access to telephone and email support whenever you need it—24 hours a day, 363 days a year!

Each plan includes a specific number of prepaid support hours. Ask your CounterPoint Business Partner about signing up for HelpDesk to supplement the primary support services you already receive from your Partner.

Training

Comprehensive training courses cover all aspects and features of CounterPoint and provide discussion for the best way to integrate features with your business.

Visit www.CounterPointPOS.com/training for up-to-date training schedules and course descriptions.

CounterPoint User Conference

Join us for our annual CounterPoint User Conference (typically held in February).

You can meet the people behind the software, learn new things that your system can do, and “talk shop” with hundreds of other CounterPoint users. The entire Conference is geared toward helping you get more out of your CounterPoint system.

Visit www.CounterPointPOS.com/conference for more information.

www.CounterPointPOS.com

Visit our Web site, www.CounterPointPOS.com, for additional information on CounterPoint.

You’ll find information about new features and software updates, as well as contact information, support resources, training schedules, the CounterPoint Users Forum, and much more.

Thank You

Thank you for your interest in CounterPoint from Radiant Systems! We look forward to providing you exceptional products and services.

Call us today at (800) 852-5852, and we’ll put you in touch with a CounterPoint Business Partner in your area. Your Partner will give you a free software demonstration and show you how CounterPoint SQL fits your business needs.

Radiant Systems, Inc. is a leader in providing innovative technology to the hospitality and retail industries. Offering unmatched reliability and ease of use, Radiant's hardware and software products have been deployed in over 60,000 sites across more than 100 countries. Radiant has approximately 900 employees worldwide, 325 certified sales and service partners and over 1800 field service representatives. Founded in 1985, the company is headquartered in Atlanta with regional offices throughout the United States as well as in Europe, Asia and Australia.



For more information, please visit us at
www.CounterPointPOS.com or contact us at 800.852.5852

COUNTERPOINT

COUNTERPOINT V7 FUNCTIONS & FEATURES



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INTRODUCTION

At Radiant Systems, we attribute our longevity and success to our emphasis on customer service, our strong relationships with our CounterPoint Business Partners, and our dedication to product quality.

The Company

Radiant Systems, Inc. (www.radiantsystems.com) is a leader in providing innovative technology to the hospitality and retail industries. Offering unmatched reliability and ease of use, Radiant's hardware and software products have been deployed in over 60,000 sites across more than 100 countries.

Radiant has approximately 900 employees worldwide, 325 certified sales and service partners, and over 1,800 field service representatives. Founded in 1985, the company is headquartered in Atlanta with regional offices throughout the United States as well as in Europe, Asia, and Australia.

CounterPoint

CounterPoint V7 helps you streamline your point-of-sale, stay on top of your inventory, keep track of your customers, improve your purchasing decisions, manage your accounts, lower your costs, and boost your profits.

Base System and Options

Right out of the box, the CounterPoint Base System is fully-loaded with the essential features you need to handle every aspect of your business.

CounterPoint Base System		
Point of Sale	Inventory	Customers
Purchasing	Labels	Ecommerce
Sales History	Timecards	Credit Cards
Gift Registry	Frequent Shopper	Grids/Apparel
Mail	Accounting Interface	System

Options add specialized functions to your system and can be purchased with the Base System, or later as your business needs change.

CounterPoint Options		
Basic Accounting	Order Entry	Serial/Lot Number Tracking
Receivables	Data Interchange	Credit Cards
SQL Connection	Offline Ticket Entry	Open to Buy
Rentals	Kits (Prebuilt/Miscellaneous)	Price Pack
Cost Pack	Modem Server	WAN/Workgroup
Multi-Currency P.O.	Wireless	

Architecture

CounterPoint works with whatever platform you do with full support for a variety of operating systems, including Windows®, NetWare®, Unix/Linux, and Citrix® MetaFrame®. Source code is also available.

CounterPoint Business Partners

CounterPoint is available exclusively from CounterPoint Business Partners who provide complete business solutions that include software, equipment, services, training, and ongoing support.

By choosing Radiant Systems as the single source for your integrated hardware and software solutions, you'll reduce your implementation risks and optimize the technology solution for your retail or wholesale business.

What Are You Waiting For?

Call (800) 852-5852 today. We'll put you in touch with a CounterPoint Business Partner right away.

COUNTERPOINT BASE SYSTEM

The CounterPoint Base System contains an incredible suite of applications that provide the basic functions you need to run your daily business operations.

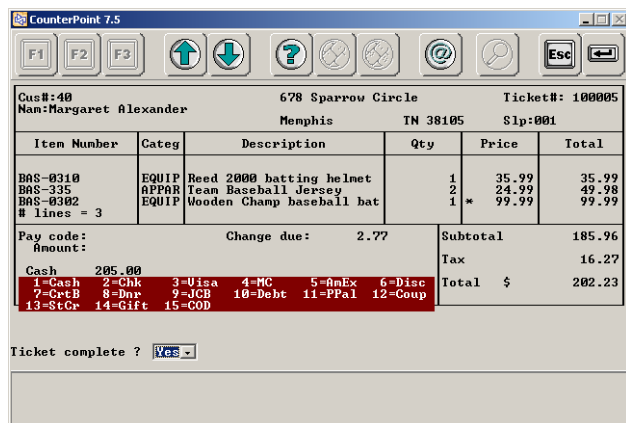
POINT OF SALE

Overview

Point of Sale provides fully integrated cash register functions on a computer workstation. It also gives you a full complement of management controls and reports to help you operate your business profitably and securely. **Point of Sale** works well in a variety of retail, wholesale, and mail-order environments. Users can choose from Regular or Touchscreen Ticket Entry.

Regular Ticket Entry

The heart of **Point of Sale** is Ticket Entry. A check-out person only needs to learn one simple screen. Because the screen is designed to look like a sales ticket, training your clerks is quick and easy.



CounterPoint 7.5

F1 F2 F3 [Navigation Icons] Esc

Cus#:40 678 Sparrow Circle Ticket#: 100005
Nam:Margaret Alexander
Memphis TN 38105 Stp:001

Item Number	Categ	Description	Qty	Price	Total
BAS-0310	EQUIP	Reed 2000 batting helmet	1	35.99	35.99
BAS-335	APPR	Team Baseball Jersey	2	24.99	49.98
BAS-0302	EQUIP	Wooden Champ baseball bat	1 *	99.99	99.99
# lines = 3					
Pay code: Change due: 2.77			Subtotal	185.96	
Amount:			Tax	16.27	
Cash 205.00			Discount	0.00	
1=Cash 2=Chk 3=Visa 4=MC 5=AmEx 6=Disc			Total \$	202.23	
7=CrB 8=Deb 9=JCB 10=Debt 11=PPal 12=Coup					
13=StCr 14=Gift 15=COD					

Ticket complete ? ☒ Yes

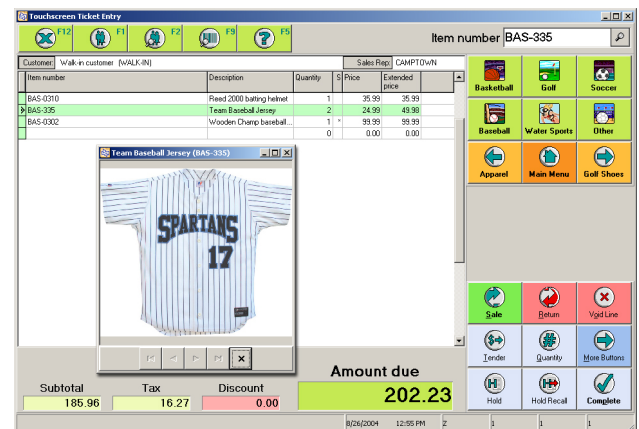
Touchscreen Ticket Entry

In a Windows environment, CounterPoint provides a simplified user interface for Ticket Entry that is based on large buttons and is suitable for touchscreen, mouse, keyboard, and scanner input.

Touchscreen Ticket Entry is user-configurable, so you may control button placement, the number of button rows and columns, the button text, and even the graphic that appears on each button. You can set up one touchscreen layout to be shared by

all registers, or create unique layouts for particular registers.

Touchscreen Ticket Entry also allows you to associate image, audio, or video files with each item and/or customer that may be optionally or automatically displayed each time the item is sold or returned or the customer is referenced.



Touchscreen Ticket Entry

Item number BAS-335

Customer: Walk-in customer (WALK-IN) Sales Rep: CAMPDOWN

Item number	Description	Quantity	Price	Extended price
BAS-0310	Reed 2000 batting helmet	1	35.99	35.99
BAS-335	Team Baseball Jersey	2	24.99	49.98
BAS-0302	Wooden Champ baseball bat	1 *	99.99	99.99
		0	0.00	0.00

Team Baseball Jersey (BAS-335)

Amount due

Subtotal 185.96 Tax 16.27 Discount 0.00 Total 202.23

Buttons: Basketball, Golf, Soccer, Baseball, Water Sports, Other, Apparel, Main Menu, Golf Shoes, Scale, Return, Void Line, Tender, Quantity, More Buttons, Hold, Hold Recall, Complete

User Passwords

Passwords ensure that access to CounterPoint is restricted to the proper users. Through passwords, you may authorize a user for specific functions such as price overrides or ticket voids, or you may restrict a user to a specific store or location.

Customers

You can select a customer by entering the customer's number, company name, telephone number, zip code, customer card, or just a portion of the first or last name. You may also designate a walk-in customer with a single keystroke. For charge sales, the customer's credit limit is checked, and only authorized users may override the credit limit.

You can zoom in on the customer's account to see balance owed, credit limit, last payment date, account aging, and even detailed sales history.

New customers can be added on-the-fly from Ticket Entry, and customer numbers can be as-

signed automatically. Unlimited pages of notes can be displayed for a customer. A specially identified page of notes can be automatically displayed whenever you access the customer.

Inventory

Sales and returns can be entered on the same ticket. Items are identified by typing the item number or scanning a barcode. Items can also be looked up by entering a partial item number, partial description, vendor number, vendor item number, category, subcategory, alternate lookup number, or any keyword in the item description.

You may zoom in on inventory to see what is on-hand, committed, on order, backordered, and in-transit for your location or other stocking locations. If an item is out of stock, you may select one of up to eight substitute items, or items may be shipped from an alternate location.

Unlimited pages of item notes may be defined for an item and viewed during Zooms. This allows the clerk to more fully inform the customer about the product. A page of notes can be automatically displayed for an item to encourage the clerk to power-sell related items: “Would you like some tennis balls with that racquet?”

Pricing

Merchandise is priced accurately and automatically, based on list price, quantity breaks, customer discounts, a markup on cost, or even a “two-fer.” Group discounts can be based on quantity, weight, or volume.

Sale prices can be date- and time-activated for limited-time item promotions. Sale prices can specify a price for a particular item or a discount percentage for an entire category/subcategory of items.

Contract pricing can establish special prices for certain customers on certain items for a specific time period. A contract price can specify a price for a particular item or a discount for an entire category.

Items can be priced and sold by alternate selling units. For example, you can stock an item by the EACH and sell it by either the EACH or the CASE.

Coupons

CounterPoint supports a variety of coupon types that allow you to discount merchandise by a dollar amount, a percent, or a user-specified value. CounterPoint will optionally validate the coupon’s requirements so that it will only be tendered if certain qualifications are met (e.g., “buy a tree” or “any purchase over \$100”).

You can also use fixed-price coupons so you can, for example, issue an “any sweater – only \$10” coupon for sweaters that you sell in the \$15 to \$20 range. The value of the coupon would be determined by the price of the item.

Serial and Lot Number Tracking

With the addition of the **Serial/Lot Number Tracking Option**, items can be sold by unique serial number or by lot number (group). Features include finding the oldest serial number, viewing all serial numbers and reference information, and generating automatic serial numbers. The **Serial/Lot Number Tracking Option** is more fully described on page 30.

Kits

When selling a single item, Loose kits prompt you with a list of related items that can be sold together. You can also define “automatic” loose kits (“linked PLUs” or “tagalong items”) which, when sold, automatically add the associated items to the ticket. Automatic loose kits can be used for bottle deposits or for other charges that should always be attached to a particular item.

The **Kits Option** adds Prebuilt kits and Miscellaneous kits. Miscellaneous kits, when sold, reduce the on-hand quantities of their components and allow optional component substitution. The **Kits Option** is more fully described on page 31.

Store Credits, Gift Certificates, Gift Cards, and Stored Value Cards

Store credits and gift certificates can be issued, printed, partially redeemed, reissued, voided, and combined with other documents. Rechargeable gift cards and shopping cards (stored value cards) with magnetic stripes are also supported.

Full Multi-Site support is provided for store credits and gift certificates.

Commissions

Sales commissions, if used, are calculated for each item on the sales ticket based on either sale amount or gross profit. Commissions may be tracked by ticket or by line item, and may be split across multiple salespeople on one ticket. Commissions can be paid on sales or on paid invoices only.

Commissions due are reported daily in **Point of Sale** and historically in the Commissions Due Report in **Sales History**.

Payment Types

Up to 18 payment types can be defined, and may be individually set to open the cash drawer, allow change to be given, and require validation entries such as a credit card or driver's license number.

Up to three different types of payment can be accepted on a ticket. End-of-day reports provide reconciliation information for each type of payment. Historical data can be retained and reported on for each payment type. You can also print a deposit slip (with as many pay codes as you require on each deposit slip).

Multi-Currency

Multi-Currency allows the setup of foreign currencies with associated exchange rates, and the tendering of foreign currencies for **Point of Sale** and **Order Entry** transactions. Change may be issued using domestic currency or foreign currency.

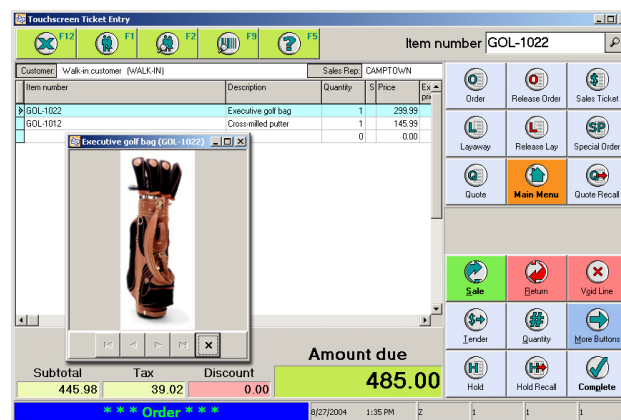
Taxes

Taxes are calculated automatically based on the taxable status of the merchandise and the customer. Tax figures are printed on end-of-day reports and can be retained for historical purposes. Tax calculations can be overridden by authorized users on a per-ticket basis, or individual line items can be set to "no-tax." An entire ticket can be set to "no-tax" by entry of a tax registration number. Tax can be a percentage of the sale amount, amount per piece, or a combination. For multi-location systems, an item's tax can be different for each location.

Canadian PST/GST calculation is supported. Eligible items purchased with food stamps are tax-exempt.

Orders

A complete ticket or selected line items can be placed on order for later delivery. An optional deposit can be accepted, and an order document can be printed for use as a customer receipt, packing list, or work order.



Full support is provided for orders, backorders, and special orders. A direct link to **Purchasing** allows you to place vendor orders to meet customer requirements, including drop-shipments from vendor to customer.

Reference information can be entered for each line on an order to indicate purchase orders placed with vendors, or as internal control notes for warehousing or manufacturing. Open orders reports can be organized by order number, customer, inventory item, ship date, sales rep, or reference.

An order can be retrieved by customer name, order number, or even the customer's P.O. number. Once an order is retrieved, you can accept an additional deposit or print a copy. Order lines can be added, changed, or removed; serial and lot numbers entered or altered; kit components edited; prices changed; or the entire order cancelled (with or without a refund).

Orders and backorders can be batch-invoiced or individually invoiced, or selected line items can be released. At release time, a copy of the original order can be retained if the customer wishes to have

a standing order. Backorders can be automatically filled from available inventory.

Order processing works for pure retail as well as for retail-delivery, retail-assembly-delivery, retail-special order, retail-wholesale, wholesale, and wholesale-manufacturing operations. Counter-Point provides the tools necessary to convert **Point of Sale** orders into **Order Entry** orders.

Additional wholesale order processing capabilities are available using the **Order Entry Option**, more fully described on page 35.

Layaways

Layaways and related payments due, payments received, taxes due, and inventory activity can be easily entered, reported on, and monitored. Reports and inquiries on outstanding layaways are available by customer name, layaway number, and inventory item. Layaways can be altered and partially released. Layaways are complete when full payment is received and the goods are delivered, or the layaway is cancelled (with full or partial refund).

Holds and Quotes

A ticket can be placed on indefinite hold and then later recalled for editing and invoicing by document number or customer name. Customer quotes can be printed and retained indefinitely, and can be reviewed and edited prior to finalizing the sale. Old holds and quotes may be purged. Holds and quotes do not commit inventory.

Ticket Numbering

Ticket numbers are normally assigned sequentially by the system. Alternatively, user-assigned ticket numbers may be entered. Each register can have an independent series of ticket numbers, or all registers can issue tickets from a single series of numbers.

Daily Reports

Multiple daily reports (including X-tape and Z-tape) can be generated for each register and run at any time. Each report's parameters are user-specified and provide end-of-day balancing, summary sales reporting, and sales and profitability analysis by department, user, and salesperson.

Additional analysis is available by tax code, type of payment, time of day, etc. Sophisticated exception reporting allows a manager to monitor danger zones without having to pore through voluminous reports.

Exception reports are available for critical areas such as price overrides, commission overrides and splits, discounts, no-tax tickets, voids, pay-outs, ticket reprints, merchandise returns, and cancelled layaways.

Payment overages and shortages are reported in daily and management reports. Also, the Flash Sales report offers a one-page snapshot of sales across multiple stores.

Register Readings

An instantaneous summary of store-level or register activity is available on the manager's inquiry screen. This inquiry displays the day's sales activity, and shows the exact amounts of cash, checks, and other tender expected to be found in the cash drawer.

Pay code	Description	Ant. received	Pay code	Description	Ant. received
Cash	Cash	872.98	Debt	Debit Card	.00
Chk	Checks	402.89	PPai	PayPal	.00
Visa	Visa	2,457.31	Coup	Coupon	.00
MC	Mastercard	.00	StCr	Store Cred	.00
AmEx	Am Express	293.59	Gift	Gift Cert	.00
Disc	Discover	.00	COD	COD	.00
CrtB	Carte Blan	.00	Food	Food Stamp	.00
Dnr	Diners Clb	.00	PNT	Points	.00
JCB	JCB	.00	A/R	A/R Charge	.00
Total		4,026.77			

Beginning cash	.00	Paid in amt	.00	Sales	3,567.99
Current balance		Paid out amt	25.00	Tax	283.78
Cash	872.98	Returned amt	89.97	Shipping	.00
Non-cash	3,153.79	Discount amt	24.85	Total	3,851.77

End-of-Day Processing

The end-of-day function can be run for any register while other users continue to check out customers. End-of-day processing automatically updates inventory, customer, and financial records, and can be tailored by the user for the style of reporting and the amount of history retention desired.

Special Functions

In addition to sales, returns, orders, and layaways, Ticket Entry also handles:

- Adding and changing customer information on-the-fly

- Adding new inventory items on-the-fly
- Bad check tracking
- Cash drops
- Check cashing
- Locking and unlocking of registers (including automatic register locking)
- Pay-ins and pay-outs to/from the register
- Payments on customer accounts
- Payments on orders and layaways
- Quote printing and retention
- Ticket voids
- Validated returns (lookup a ticket from history and return items on that ticket)

History

CounterPoint can retain historical information for management reporting in detailed (line-by-line) form and in daily summary form.

Detailed history by customer and item can be retained indefinitely and is limited only by disk space. A complete history of a customer's sales activity can be printed or viewed, showing every item purchased, transaction dates, and prices paid. Similarly, you can review an item's detailed history. A duplicate invoice can be produced months or even years after the actual sale is recorded.

In addition to detailed history, date-summarized history can be printed for item categories, users, salespersons, registers, etc. Summary history can be retained indefinitely by compressing history into weekly, monthly, or annual figures. Historical reports can provide valuable information such as a comparison of sales for Easter week this year with Easter week last year.

More information regarding history is provided under **Sales History** on page 21.

Tailoring

Extensive tailoring of the Ticket Entry process is available. The following are a few of your options:

- Changes in the taxable status of an item
- Display item or entire ticket cost

- Entry of free-form comments
- Entry of predefined ship-to addresses
- Entry of purchase order numbers
- Entry of user-defined miscellaneous charges
- Fractional prices (e.g., \$1.375 per LB)
- Fractional quantities (e.g., 1.625 feet)
- Line-at-a-time printing of receipts
- Open cash drawer with a no-sale
- Reason codes for returns and price overrides

With the appropriate tailoring, **Point of Sale** works well for a wide variety of retail operations. Each user is equipped with a system that perfectly fits his or her business requirements.

Forms Printing

Up to three printing devices can be defined per register, including a 40-column receipt printer, full-width invoice printer, warehouse picking printer, or check validation printer. Invoices may be printed at time of sale or from historical records.

Forms may be printed at the completion of the sale, or one line at a time while the sale is being recorded. Cross-line category totals (e.g., "Parts," "Labor," etc.) may be printed on tickets, invoices, and other forms.

CounterPoint allows user-defined print formats. A number of receipt layouts, picking tickets, and preprinted invoice forms are included. Users may also design forms to meet their specific requirements.

Optional Peripherals

A **Point of Sale** cash register is actually a computer workstation. Each checkout station can support optional peripheral devices such as:

- Electronic cash drawers
- Barcode readers and scanners
- Invoice printers
- Receipt printers
- Combination invoice/receipt printers
- Customer displays (for change due)
- Weight scales
- Programmable keyboards
- Magnetic stripe readers (for credit cards or ID cards)

- Check (MICR) readers
- Handheld data-collection terminals
- Touchscreen monitors
- Modems (for card and check authorizations)

Peripherals are defined using file maintenance and are not limited to a single manufacturer. CounterPoint gives you the flexibility to connect your hardware to serial or parallel ports. Peripheral devices are more fully described on page 48.

Built-In Credit Card Processing

Credit card processing under the CounterPoint Merchant Program (CMP) is included in the CounterPoint Base System, and is more fully described under **Credit Cards (CMP)** on page 25. CMP processors will transfer settled charges to your local bank. Other compatible processors are described in **Credit Cards Option (Non-CMP)** on page 41. For complete information on available services and fees, contact your CounterPoint Business Partner.

Credit card processing allows you to swipe a credit card through a magnetic stripe reader, automatically authorize a credit card sale from the Ticket Entry screen, verify an address, and electronically settle funds. You may also retain a credit card number in a customer's file to be charged at the appropriate time. Supported cards and services include Visa, MasterCard, Discover, American Express, Diners Club, Carte Blanche, and JCB. For receipts and invoices, you may print just the last four digits of the card number.

With the **Modem Server Option**, multiple registers may share a telephone line and process multiple credit card transactions more quickly by maintaining an active phone connection to the processor.

An optional CPGateway service is available for fast (2-second) Internet credit card authorizations.

Built-In EBT Food Stamp Processing

EBT food stamp processing is available via CPGateway with CMP, First Data North, or Vital. EBT requires the use of PIN pads and magnetic stripe card readers.

Built-In Check Authorization

CounterPoint includes check authorization capabilities compatible with TeleCheck and Certegy.

Benefits

Point of Sale provides valuable benefits to any business that desires to:

- Provide clerks with up-to-date inventory and customer information
- Keep up-to-the-minute inventory quantities
- Keep track of what's selling and what's not
- Update customer balances automatically
- Reduce costly checkout errors and shrinkage
- Improve audit controls and accounting efficiency
- Improve accuracy of sales analysis reports
- Electronically authorize credit cards
- Automatically calculate commissions due
- Track sales and employee performance by time of day
- Operate profitably and securely

INVENTORY

Overview

Inventory is the backbone of CounterPoint. It is the means by which all items are identified, priced, and tracked. **Inventory** is designed to help businesses maintain optimum inventory levels, control inventory costs, and track merchandise turns. It provides the tools needed to minimize inventory levels and out-of-stock conditions, and maximize valuable management information and profitability.

Inventory items are set up using a single-screen maintenance function. A number of different quick setup options are available, including defaulting of fields from template items, copying entire new items from existing items, automatically assigning item numbers and barcodes, and more.

Inventory valuation is provided at Average cost and at Retail. The **Cost Pack Option** allows valuation at Standard, LIFO, or FIFO.

Multiple stocking locations are supported. Locations may be reported separately, together, or in location groups. A location group of up to 48 locations may be defined for reporting and merchandise allocation.

Item numbers of up to 15 characters are supported. Each item number identifies a unique kind of inventory with an associated description, category, price, cost, and other informational fields.

Support is provided for “normal” inventory, as well as gridded (apparel color/sized) items. Adding the **Serial/Lot Number Tracking Option** allows you to track serialized and lot-controlled items.

Item Information

Categories, subcategories, and up to four user-defined classification methods may be established for grouping items. These classifications are validated to ensure correct setup of information.

An item may have unlimited pages of notes attached to it. These notes may be viewed by the user, printed on user-defined forms when the item is sold, and even be set to automatically display when the user sells the item (valuable for power-selling related items).

An item may also have:

- A weight assigned. Item weights can be totaled and printed on user-defined forms.
- Up to two user-defined profile fields for collecting additional item information.
- Up to eight substitute items that are suggested for sale when the item is not available.
- Up to 12 seasonal min/max stocking levels that change over the course of the year.
- Multiple barcodes and up to three alternate selling units (e.g., 6PAK, BOX, CASE, EACH).
- A primary vendor and an unlimited number of alternate vendors. For each vendor/item combination the system tracks purchasing costs, the vendor’s item number, and other valuable information.

Lookups

Items may be looked up by entering an item number, barcode, partial item number, partial description, vendor number, vendor item number, category, subcategory, or any keyword in the item description. A filter may be enabled to limit your search to only matching data.

Kits

Capabilities for defining and processing Loose kits are included. A Loose kit allows the user to specify a single item at time of sale, and the system suggests a list of related items to be sold. Additional kitting capabilities for Miscellaneous (retail) kits and Prebuilt kits are provided with the **Kits Option** (described on page 31).

Barcodes

Barcodes of up to 20 characters are supported, and an item may have up to eight primary and 100 secondary barcodes. Barcodes may be attached to a specific selling unit. For example, one barcode may indicate CASE, while another barcode indicates EACH. A unique barcode is supported for each individual color/size combination for a gridded (apparel) item.

Barcodes may be manually entered, or automatically generated by the system. Both manufacturer and in-house barcodes are supported. Barcodes may be printed on labels and scanned during checkout, when taking a physical count, when receiving merchandise, and in other functions.

Random-weight barcodes allow for variable weight items, such as meat or cheese. Ticket Entry recognizes random-weight barcodes and automatically calculates the correct quantity (weight). Tare weights (for containers) are also supported.

Pricing and Units

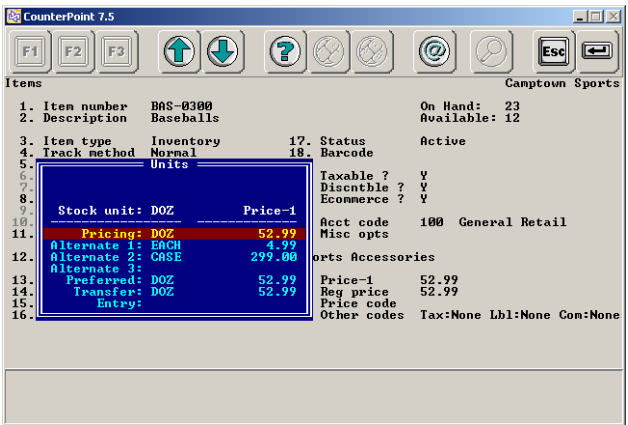
Pricing of items can be set up very easily by simply assigning each item a selling price. Or you may take advantage of the many different pricing options available within the system.

An item may be priced by its stocking unit or have a separate pricing unit. For example, you may sell paper by the REAM, at a certain price per THOU sheets.

Group or “two-fer” pricing allows you to sell multiple units of an item for a single price (e.g., three for a dollar). You can also set a price for each unit when less than the group quantity is purchased.

Each item may be assigned a price code and up to three price levels (or six price levels with the **Price Pack Option**). The price code determines the basic pricing rules for the item—whether the item’s price is selected from one of the price levels or whether it is based on the quantity purchased, the category of customer, or a combination of those factors. The calculated price can be one of the price levels, a discount percentage off of a price level, or a markup from cost. Group discounts can be based on quantity, weight, or volume.

An item may also have up to three alternate selling units, each with its own price code and discounting structure. For example, an item that is stocked by EACH might also be sold by 6PAK, BOX, and CASE.



An item may also have an entry unit to simplify conversion calculations. For example, if you sell tile by EACH and by BOX, and your customer wants to cover a 150-square-foot room, you can enter “150,” and the system will convert that to either the appropriate number of EACHs or BOXs.

Promotional sale prices can be set for specific items, or an entire category or subcategory can be sold at a percentage discount. A sale has specific starting and ending dates (and times), and multiple sales can be

set up in advance to activate automatically. For example, an item’s CASEs could be on sale, even though EACHs are still sold at the normal price.

Contract prices can be set for specific customers. A customer’s contract may have prices for specific items as well as discount percentages for entire categories or subcategories of merchandise. A contract has an identifying contract number and starting and ending dates, and specifies whether to use the contracted price or the lowest price.

The **Price Pack Option** supports oversize pricing for gridded (apparel) items, allowing you to charge (for example) a higher price for an Extra Tall.

Prices for groups of items may be changed automatically, based on vendor, category, subcategory, or user-defined criteria. Changes can be made by a specific dollar amount or by a percentage. Prices can optionally be rounded to the nearest cent, or to match a list of price points, such as \$7.95, \$8.49 and \$8.95. A log of automatically changed prices can be printed.

Location-specific prices (with the **Price Pack Option**) allow an item to be sold at different prices at different locations.

A variety of price list formats are available, with multiple sort options. In addition, a customer price list can be printed that shows the customer’s name and actual prices (and quantity breaks) that a specific customer should receive.

Markdowns

Full support is provided for scheduling and maintenance of markdowns. Each item’s regular price and current selling price (Price-1) are tracked. Full markdown reporting is provided. Complete support is also provided for the Retail Inventory Method. You can schedule, count, take, and report on markdowns for one or multiple locations.

Taxes

Each item can be set up as normally taxable or normally nontaxable. This value can be overridden when the item is sold, if the user is authorized to perform tax overrides. Taxable codes may also be

set up for item-specific taxes. Item-specific taxes can be assessed in addition to (surtax) or in place of the regular sales tax. Taxes can be a percentage of the sale amount with a maximum, or a set dollar amount per unit.

An item can have a totally different tax structure for each selling location or for different customers.

Accounting

Accounting codes may be defined and assigned to items for complete control over which general ledger accounts are charged for inventory, receivings, sales, cost of goods sold, returns, cost of goods returned, transfers, etc.

Full support is provided for profit center by location. Transferring goods can cause accounting distributions to decrease inventory value at the “from” profit center and increase inventory value at the “to” profit center.

Food Stamps

Items may be defined as food stamp eligible. Food stamp eligible items may be paid for with food stamps which render the sale of those items tax-exempt.

Commissions

Each item can be assigned a commission code to determine whether commission is calculated on selling price or on gross profit. Different commission rates may be used for sales at different price levels, and for sales by different sales reps. Commissions are described under [Sales History](#) on page 21.

Physical Inventory

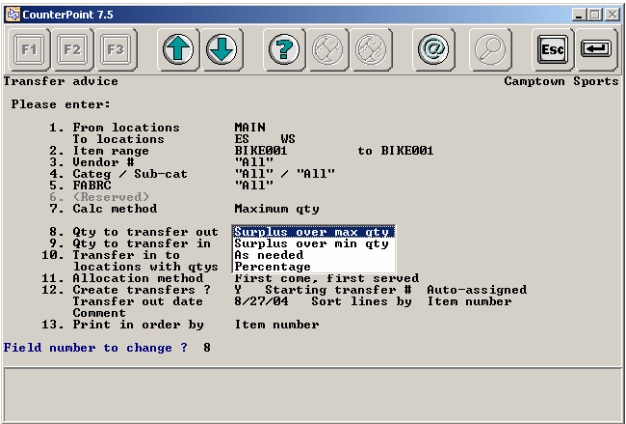
A complete physical inventory subsystem is provided for streamlined physical counts and variance reporting. Support is provided for importing count transactions from text files created by handheld data-collection devices.

Transfers

A transaction processing system is provided for initiating and tracking inventory transfer activity and in-transit quantities. A transfer-out may be entered manually and reviewed prior to posting, and may be accompanied by a user-defined transfer form. The completion of the transfer is accom-

plished by a transfer-in transaction and an optional transfer reconcile step. Full Multi-Site support is provided for electronic transmission of transfer documents with remote site completion.

The Transfer Advice report can provide a list of suggested transfers for up to 48 locations, using the maximum-quantity, replenishment, or profile methods of calculation.



The Transfer Advice report can automatically create transfer transactions which may be reviewed and edited prior to finalizing as transfer-out documents.

Reports

An extensive set of inventory reports is provided to meet the needs of a variety of different businesses. A variety of price list formats are provided for different purposes, including one that allows customer-specific reporting of prices.

The Inventory Valuation Report shows your current inventory position from a number of different points of view. The Historical Inventory Valuation Report allows you to produce a similar report for earlier time periods. Reports such as the Inventory Status Report, Stock Status Report, Usage Report, and Inventory Analysis Report can provide valuable and concise views of your inventory.

The Inventory History Report provides a detailed transaction log of historical inventory activity. The Purchasing Advice Report shows suggested purchases and can create purchase orders (described under [Purchasing](#)). The Transfer Advice Report shows suggested transfers and can create transfer documents.

Merchandising Reports

Merchandising reports are oriented toward the historical reporting of inventory groups, such as vendors, categories (departments), or subcategories. Reporting is based on user-defined calendars for years, seasons, months, and weeks. Merchandising reports include:

- **Retail Inventory Value**—Shows beginning and ending balances for a group of items along with all activity that affected those balances during the specified time period including receipts, sales, transfers, adjustments, markdowns, and discounts.
- **Hot/Cold Analysis Report**—Ranks items, vendors, or categories to show what's hot and what's not. Ranking may be based on sales dollars, units sold, turn rate, Gross Margin Return on Investment (GMROI), gross profit, gross profit percent, weeks of supply on hand, or percentage sold. Reporting may be in terms of units, cost, or retail.
- **Current/Prior Year Analysis Report**—Compares this year's overall performance of a group of items with the previous year's performance. Information reported includes sales dollars, units sold, turn rate, sell-thru-%, markdown-%, and GMROI.
- **Consolidated Grid Report**—Shows current inventory status and historical sales for an item or group of items. This report allows you to analyze the performance of individual colors and sizes across items with identical color/size grids.
- **Six Week Item History Report**—Shows unit sales by week for an item or group of items and highlights current selling trends. This report can be valuable in deciding whether to mark-down or reorder a particular item. Information is focused on unit movements, sell-thru-%, weeks-supply-on-hand, markdown performance, and profitability.

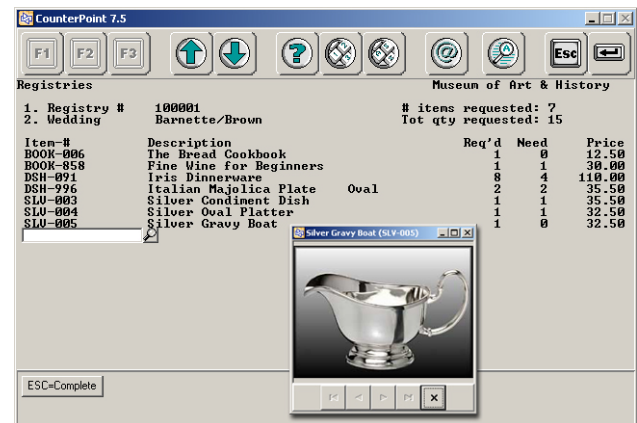
Multi-location users may analyze information based on user-defined location groups. Groups may be reported on in three formats (examples are shown for three locations):

- **Merged**—For each line on the report, Loc 1, Loc 2, and Loc 3 values are combined and printed on one line.
- **Separate**—The entire report prints for Loc 1, then the entire report prints for Loc 2, then for Loc 3, followed by grand totals for all locations.
- **Detailed**—For each line on the report, a detail line prints for Loc 1, for Loc 2, for Loc 3, then a total for the three locations.

GIFT REGISTRY

Overview

CounterPoint provides the tools necessary to track and process a gift registry. You can track information about events (weddings, showers, etc.), the people involved, and specific items that have been registered and/or purchased for the event.



In addition, you can access a full range of registry functions from **Point of Sale**. And you can print a Suggested Items report, ship a gift, and print a summary of what gifts have been purchased and by whom. Kits and registries work well together to simplify the handling of gift groups, such as place settings or layettes.

Reports

The Registry Report allows printing of summary information or complete detail for each registry, including the individual gifts purchased, optionally showing prices and/or costs.

PURCHASING

Overview

CounterPoint **Purchasing** provides excellent features for controlling purchases and receivings, including returns to vendors. **Purchasing** utilizes a single, easy-to-learn, easy-to-use screen for all purchasing and receiving functions.

New purchase requests (unapproved P.O.s) are entered with a minimum of keystrokes using system-assigned or user-entered P.O. numbers. The approval process optionally prints user-defined P.O. forms.

On-order quantities for items are updated automatically by CounterPoint. New vendors, items, and stocking locations may be set up “on-the-fly.”

During receiving, P.O.s may be retrieved by P.O. number or vendor. A P.O. may be received in full with minimal data entry, or selected lines may be received. Unreceived goods may be backordered or cancelled.

During receivings you can add more lines to a P.O., and you can create new items and stocking locations.

With the **Serial/Lot Number Tracking Option**, serial and lot numbers may be specified during receiving.

Full support for multiple foreign currencies can be added with the **Multi-Currency Purchasing Option**.

Receiving documents may be printed on user-defined forms. For merchandise that arrives without a P.O., a P.O. may be created on-the-fly during the receiving process.

An item may have unlimited vendors, each with its own cost and purchasing unit. Future cost changes and special (deal) costs can be entered ahead of time, along with dates these price changes go into affect. Costs and quantities may be entered on a P.O. per the vendor’s unit, and may be printed on user-defined forms. Costs and quantities may be entered on a P.O. per the vendor’s unit, and may be printed on user-defined forms. Costs for a receiving can be corrected after posting. Setup of vendor/item data occurs automatically as part of normal **Inventory** and **Purchasing** usage.

Grids and Apparel

Full support is provided for two-dimensional color/size (apparel) grids during P.O. entry, forms printing, viewing, receivings entry, and reports. Merchandise may be ordered by user-defined pre-packs or size runs.

Multi-Location Purchasing

Full support is provided for Multi-Site purchasing and receiving. P.O.s may originate at the Hub and may be received at the Satellites against an electronic P.O.

The user may control whether or not purchase requests may originate at the Satellites, and whether or not Hub approval is required before Satellite P.O.s are finalized.

Allocated P.O.s

P.O.s may be created with preset merchandise allocations for up to 48 locations. Merchandise allocations may be optionally edited during receiving and then transfers from the receiving location to the destination locations may be automatically created.

Automatic Purchasing

Restocking orders may be automatically calculated and created by CounterPoint. The suggested order amount takes into account current inventory levels, commitments, backorders, in-transit merchandise, open P.O.s, desired stocking levels, and vendor minimum order requirements. Reorders may be calculated three ways:

- ❖ **Min/max**—Orders an item up to its desired maximum stocking level when it falls to its minimum (reorder) level.
- ❖ **Replenishment**—Orders enough of an item to replace what was sold during a specified time period.
- ❖ **Days of supply**—Orders enough of an item to ensure that inventory will last a specified number of days. You determine which time period to use for estimating the sales rate, so you can (for example) buy enough to last through year-end assuming you sell 10% more than you did last Christmas.

P.O.s may be created based on the item's primary vendor, the vendor with the lowest cost, or a specific vendor.

Allocated, multi-location P.O.s may be created automatically for a group of locations.

Views and Reporting

A detailed history of P.O. receivings and cancellations may be retained for viewing and reporting. Open P.O.s may be viewed or printed showing quantity ordered, received, and backordered. Complete reporting on outstanding P.O.s is provided by a number of reports, including the Open P.O., On Order by Month, and the P.O.s to be Received Report.

CounterPoint 7.5

View open P.O.'s Museum of Art & History

P.O.# 100000 Order date: 8/27/04
Vendor: ACM Adams-Cap Museum Products Location: MAIN Main Store

Item #	Qty-ord	Unit	Cost(USD)	Ext-cost	Comment
HAN0001	41	EACH	8.50000	348.50	
SIU-005	10	EACH	16.52000	165.20	
SIU-004	5	EACH	12.50000	62.50	For Christmas rush

Description Silver Oval Platter

Order date 8/27/04
Qty ordered 5 EACH
Deliv-date <None>
Cancel-date <None>
Qty received
Qty prev rec
Cost per USD 12.50000

ESC=Exit zoom

Electronic Orders

You can print user-defined P.O. forms for your vendor or output the form to a text files suitable for use in electronic ordering. Full Electronic Data Interchange (EDI) requires purchase of third-party translator and communications software.

Accounts Payable Interface

Received P.O.s and Returns to Vendor (RTVs) may be vouchered directly into Accounts Payable. Invoices may be vouchered to the original vendor or a third-party factor. A report of unvouchered receivings is provided.

Landed Cost

Extra charges (freight, etc.) may be entered during receivings and optionally included in landed inventory cost.

Drop-Shipped P.O.s

A purchase order may be designated as “drop-shipped,” and a shipping address may be entered for that P.O. To minimize data entry, the shipping address may be copied from a customer order entered in **Point of Sale** or **Order Entry**. On-hand inventory is not affected by the completion of a drop-shipped P.O.

Special Orders

P.O. lines may be copied from a customer's order entered in **Point of Sale** or **Order Entry**. This link allows special ordering from vendors to meet the needs of individual customers.

You can also automatically create purchase orders for multiple vendors from **Point of Sale** and **Order Entry** orders. For multiple customers ordering merchandise from a single vendor, you can create a separate P.O. for each customer, or you can consolidate multiple customer orders on a single P.O.

Returns to Vendor (RTVs)

RTVs may be entered, reviewed, and posted to record the return of merchandise to a vendor. The user specifies whether the RTV should reduce on-hand inventory. RTVs may also be vouchered into Accounts Payable to record credits with a vendor.

P.O. On-the-Go

Many retailers travel to market to meet vendors, evaluate merchandise, and place purchase orders. P.O. On-the-Go allows the buyer to carry along a laptop computer to enter purchase orders, set up new vendors, and add new inventory items. With the addition of a modem, the buyer can dial into

the main office's Multi-Site Hub computer system and upload new vendors, items, and purchase orders. Without a modem, the buyer can upload information to the Hub using direct transfer.

A P.O. On-the-Go remote site configuration includes all CounterPoint functions except **Point of Sale**, **Order Entry**, and **Labels**, and allows the buyer to perform P.O. entry, open-to-buy planning (with the **Open to Buy Option**), merchandising reports, and additional inventory viewing functions to enable the buyer to effectively plan and execute purchases.

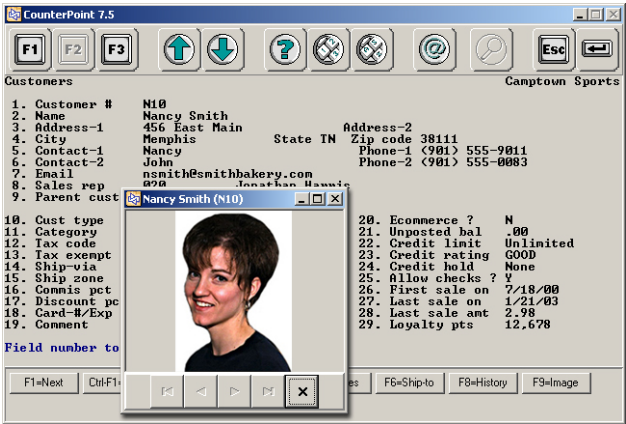
CUSTOMERS

Overview

Complete customer tracking is included as an integral part of the CounterPoint Base System. Each customer may be set up with user-defined profile information. Complete customer sales history is available in detail or monthly summary form. The **Receivables Option** adds charge sales, receivables tracking, revolving charge, and statement printing to the **Customers** application.

Customer Information

A customer may be defined as a business or an individual. Customers may be set up using standard maintenance functions, or on-the-fly while using **Point of Sale** or **Order Entry**.



Basic customer information includes name, address, email, and up to two contact names and phone numbers. A customer may be assigned to a specific user-defined category to determine the appropriate

price level for that customer, or to group that customer with other similar customers for reporting and analysis.

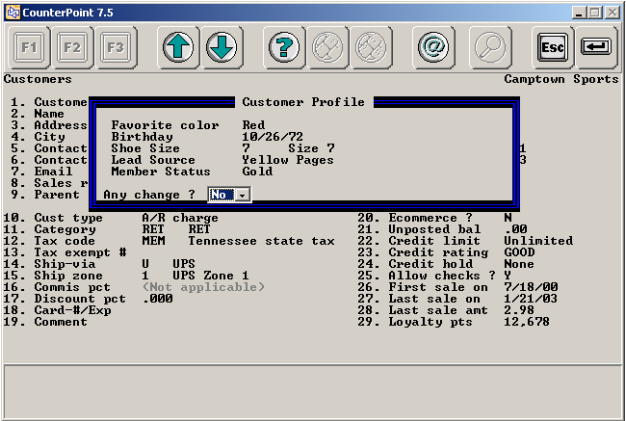
Customers are identified by customer numbers of up to 12 characters in length. Customer numbers may be manually entered or assigned automatically. When a new customer is added, much of the basic information is copied from a user-defined template customer to reduce errors and speed up the entry process.

Customers may be retrieved using a variety of lookup methods: customer number, company name, telephone number, ZIP code, customer card, sales rep, email address, or just a portion of the first or last name.

Unlimited pages of notes may be retained, viewed and printed for a customer. If desired, a specially identified page of notes can be automatically displayed whenever the customer is accessed in **Point of Sale** or **Order Entry**.

Customer Profiles

Customer profiles allow you to build a valuable database of the key customer features you want to track to assist you in analysis and marketing. Up to 15 user-defined profile fields may be tracked for a customer, such as birthday, weight, shoe size, membership status, lead source, etc.



Each user-defined profile field is set up to only allow certain types of information. For example, "birthday" would only allow date entries between a specified range of dates, "weight" would only allow numeric entries between a specified range of values, etc. In addition, you may set up user-defined profile codes to

ensure that (for example) “membership status” is selected from a list of valid user-defined values.

Sales Reps

Each customer may have a responsible sales rep assigned. **Point of Sale** and **Order Entry** may be configured to allow crediting of a different sales rep for an individual sale to the customer.

Taxes

Customers may have multi-level tax codes assigned that indicate special tax rates or taxing authorities. If applicable, the customer’s tax exemption number is retained by the system.

For states that do not use conventional arithmetic to calculate sales tax, CounterPoint allows you to enter a table of taxes that apply to the “penny” portion of the sales tax.

Shipping Information

Each customer may have a preferred shipping method. A customer may also have a default ship-to address that is different from the primary address, and/or a number of alternate ship-to addresses. Each shipping address may have its own tax code, preferred shipping method, and specific ship-to notes that can be printed on invoices.

Credit Controls

Customers may be set up as “A/R charge” (with the **Receivables Option**), or as “non-charge” (cash). If you don’t wish to keep individualized records on certain purchasers (such as walk-in customers), one or more “miscellaneous cash” customers may be set up.

Credit limits ensure that customers do not exceed management’s guidelines for open credit. In addition, individual customers may be prevented from making charge sales, payments by check, any kind of sale, or even from placing orders.

A credit card and expiration date may be retained for a customer, and may be retrieved automatically when paying for a purchase.

Account Management

Account Management provides a single-menu selection from which you can perform a number of

valuable customer service and credit management functions. For example, after identifying the customer, you can view customer information, notes, credit information, aging, open and closed items, and ticket history.

You can attach notes to the customer that will automatically display in Account Management, and you can print customer statements.

Reports

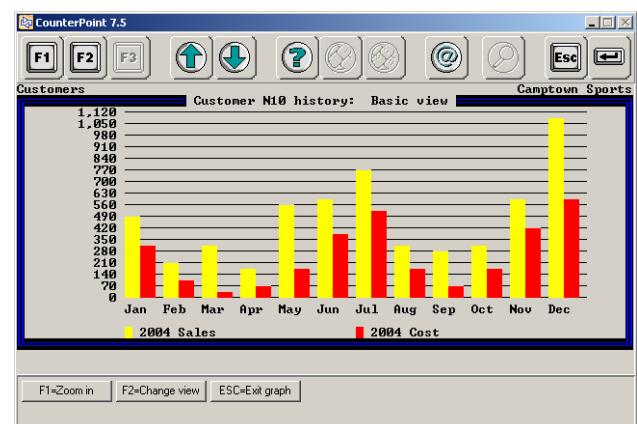
Customer listings are available, organized by number or name, to show basic customer information, notes, and historical purchases. Customers may be included in reports based on their categories or their profiles.

Labels

Labels can print user-defined customer labels. Labels may be printed for all customers, or only for certain customer categories or profiles. Customer mailing labels may also be printed for customers who purchased certain merchandise within a selected time period. The ability to print selected groups of labels is useful for conducting targeted promotions to specific groups of customers.

History

A multi-year monthly summary is available for each customer, showing sales, cost, profitability, commissions, payments, finance charges, number of sales, and average sale amounts. Monthly summaries may be graphed, viewed, or printed.



A complete detailed history may be obtained for a customer, showing every line item sold or summarizing individual categories of merchandise. His-

torical information is available with **Sales History**, more fully described on page 21.

Mass Emails and Mail Merge Utilities

The **Generate Email Address List** and **Generate CSV Customer List** utilities make it easy to send promotional mailings to a group of customers.

Use the **Generate Email Address List** utility to create a list of customer email addresses which you can then copy and paste into your email software. This utility provides a variety of selection criteria, including customer number, customer category, profile fields, and last sale date. These criteria allow you to tailor each email address file to fit the desired demographic profile. Similarly, you can use the **Generate CSV Customer List** utility to create a customer mailing list file which you can merge with letters, labels, faxes, or email messages.

FREQUENT SHOPPER

Overview

Frequent Shopper customer loyalty programs allow you to reward customers for their business and encourage them to purchase more frequently and in higher dollar amounts. Loyalty programs also help show your customers that you value their business.

Loyalty programs come in all shapes and sizes, but the basic concept remains the same. Points are awarded to each customer based on purchases. These points can be awarded based on:

- Number of visits (purchases)
- Total dollars spent
- Dollars spent on purchases of specific merchandise (or categories of merchandise)
- Quantity purchased of specific merchandise (or categories of merchandise)

When a customer has accumulated enough points, you can reward that customer with merchandise, discounts, gift certificates, or the achievement of a status that provides more favorable pricing.

Item Number	Categ	Description	Qty	Price	Total
		Loyalty Points			
		Customer balance			18,893
		Eligible amount		45.00	
		Eligible points		9,000	
		Max points allowed		9,000	
		Pay code: 13 Points		Amount due: 48.94	
		Points: 45			
				Subtotal	45.00
				Tax	3.94
				Total	\$ 48.94

1-Cash	2-Chk	3-Card	4-Gift	5-Coup	6-StCr
8-OR	9-AMEX	10-Disc	11-CAN\$	12-Peso	13-Pnt
14-Debt					

Add	Backup	Dup	Hold	Input	Lock	Risc	Notax	Order
Pay	Quote	Return	Subtotal	Total	Void	Layaway	External	Zoom

Earning and Redeeming Points

Loyalty points are earned in **Point of Sale** and **Order Entry** by purchasing certain products or categories of products. Formulas for earning points are flexible and may be based on dollar amounts or quantities. Limited-time bonus point promotions are also supported. Point adjustments may be processed by authorized users.

Points may be redeemed for certain products or categories of products. Flexible formulas are provided for assigning redemption point values to products or categories of products.

Evaluating Customer Points

Customer points are visible on customer screens, Ticket Entry and Order Entry Zooms, and user-defined forms. Batch processing is provided so that customer points may be evaluated and a customer may “graduate” to a different category.

Complete historical reports for the earning and redemption of points are provided for customers and may optionally include ticket detail. Batch processing is provided so that points may be automatically issued or removed for groups of customers.

LABELS

Labels allows you to design and print labels for merchandise and customers with full support for barcode printing. Predefined label formats are provided.

Overview

Labels may be printed directly from CounterPoint. No third-party label printing software is required.

A wide array of labeling features includes:

- Barcode printing
- “One-up” or “multi-up” labels
- Ability to print customer or item notes
- Ability to print user-defined free text
- Ability to print labels up to 99 columns wide and 20 lines high
- Ability to print date and time on item labels
- Option to print to disk for integration with word processing, database, or spreadsheet packages
- User-defined format control characters for access to special manufacturer-specific printing features

Labels may be printed for on-hand inventory, or automatically (via tags) as part of the normal inventory ordering, receiving, or transfer processes.

Inventory labels can be printed for on-hand items, receivings, or transfers. Labels may be printed for customers based on category or customer profiles, or from history based on merchandise purchased during a specific time period.

Predefined Labels

Predefined label layouts are compatible with standard labels. Layouts are supported for pressure-sensitive labels, split (two-up) pressure-sensitive labels, butterfly labels, and perforated hangtags. Predefined layouts are compatible with direct thermal and thermal transfer printers, including the Barcode Blaster, Barcode Blazer, and LS models from Cognitive Solutions, Inc., and the Eltron LP+ and TLP series of printers.

CounterPoint may be used with a wide variety of printers. Predefined layouts and compatible labels are provided to simplify setup for these popular Cognitive Solutions and Eltron printers.

Graphical WYSIWYG Label Designer

In a Windows environment, you can also use “external” label formats which you can define using the NiceLabel Pro label design software (purchased separately).

NiceLabel Pro is a “what you see is what you get” (WYSIWYG) label designer from NiceWare that

allows you to easily create custom labels that you can print to any Windows printer. To simplify this process, CounterPoint includes several sample “external” labels that you can modify to suit your particular needs.

Setup

You can control the size of the physical label, the fields you want to print, and their placement on the label. Actual printing is a simple one-step process using the custom formats you have designed.

Label Count Control

You can control the number of labels by requesting a specific quantity. Or you can let the system print (for example) three labels for each piece received, one label for each piece on hand, or one label for each item on hand which is on sale. For most activities, the software automatically calculates and prints the desired number of labels.

Specific support is provided for high-speed printing of multiple copies of a single label for the Cognitive Solutions and Eltron series of printers.

Barcodes

Barcodes can be printed directly to virtually any laser or dot matrix printer. A quick-test function is provided to aid in initial setup.

Supported barcode symbologies are UPC-A, UPC-E, EAN/JAN-13, EAN/JAN-8, Code 39, Extended Code 39, Code 128, Interleaved 2 of 5, Codabar, and Zip+4 Postnet.

You can control barcode height, width, ratio, checksum, supplemental, and text under bar printing. Up to six multi-up barcode labels can be printed.

Coded Costs

Coded cost information can be encrypted and printed on labels ensuring that the cost information is readable by the user but not by the customer.

Tags

A tag can be generated (within the computer) from a number of functions within CounterPoint. Tags can be used to print actual labels immediately or at a later time. For example, in [Purchasing](#), tags may

be created automatically as part of the posting of a new P.O. or as part of receiving a P.O. Once created, tags are easily printed, reprinted, or deleted. A report is available listing all outstanding tags.

Notes

Information from customer notes and item notes can be printed on labels. This feature provides a way to print text associated with specific items and customers. For example, **Labels** could print an item's hazardous materials notes.

Serial Numbers

With the **Serial/Lot Number Tracking Option**, serial and lot numbers may be printed for transactions, and serial numbers may be printed for on-hand inventory.

Customer Profile Fields

In addition to customer notes, **Labels** can print customer profile information, such as the customer's birthday or color preferences, or whatever information has been retained in the customer's profile.

Membership ID Cards

Labels may be printed for customers or employees to serve as membership or ID cards, with optional machine-readable (barcoded) identification.

Targeted Mailings

Mailing labels may be generated for customers who meet certain historical sales criteria, such as all customers who bought more than \$100 worth of merchandise at store 1 from categories D, E, or F, between June 1st and July 15th last year.

GRIDS AND APPAREL

Overview

A grid can be one- or two-dimensional, with up to 20 colors (rows) and 50 sizes (columns). An item can have up to 1,000 unique color/size combinations, each of which is called a cell. When a new item is set up, its grid (color/size) layout is also established. New items may also be set up by copying existing items and grids to reduce setup time and opportunities for errors.

COLOR/SIZE	S	M	L	XL	Total
Red	50	48	50	50	198
Blue	50	120	130	110	410
Total	100	168	180	160	608

Throughout CounterPoint, items can be viewed, processed, and printed in grid format. Using grids instead of a large number of separate items reduces the user effort and the computer resources required.

Apparel

Apparel capabilities are woven throughout CounterPoint. CounterPoint offers the ease of use, features, and merchandising information essential for profitable soft goods retailing.

In soft goods, a single inventory item (a "style") can be stocked in multiple colors and sizes (or widths and lengths, etc.). Support is provided for one- or two-dimensional grids for tracking soft goods merchandise.

Barcodes

Each cell of a gridded item can have a unique barcode. This feature allows goods to be scanned throughout the system, reducing entry time and errors. Cell barcodes may be entered by the user, automatically assigned by the system, or imported from the vendor (using the **Data Interchange Option**).

Purchasing

In **Purchasing**, gridded items can be quickly placed on order and easily tracked. Reorders may be calculated automatically by the system to meet model-stock levels, or entered manually. P.O.s may be printed in grid format on user-defined forms. Receivings are quick; only exceptions are entered.

For multi-location retailers, allocated P.O.s may be issued to a vendor, with deliveries intended for multiple locations.

Labels

Labels allows you to print hangtags or pressure-sensitive labels for ordered, received, on-hand, or on-sale goods. Labels may be generated on demand, or automatically as part of the ordering or receiving process.

User-defined labels can contain descriptive information, pricing, coded costs, and cell barcodes. A number of predefined label formats are provided that are compatible with standard labels.

Seasonal Items

Seasonal items can be removed or discontinued at the end of the season, but merchandising history may be retained indefinitely. For reorderable items, you can establish the model stock for each cell for each stocking location.

Markdowns

Support is provided for scheduling, maintenance, and reporting of markdowns.

Retail Inventory Method

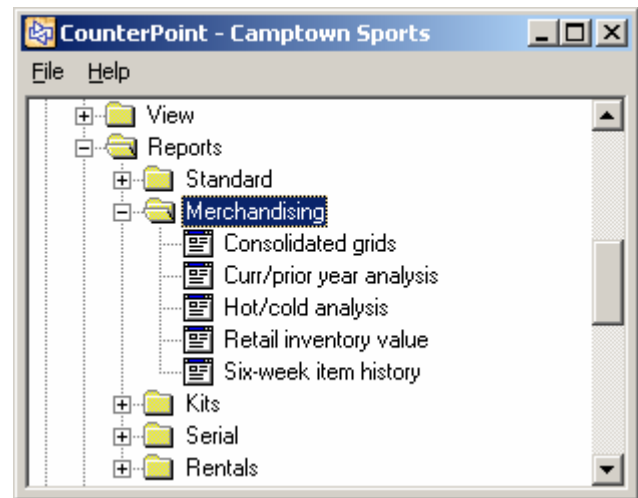
Full support is provided for the reporting of inventory value using the Retail Method. The Retail Inventory Value report presents inventory in terms of retail, cost, or units, and shows beginning balances, receipts, sales, transfers, markdowns, discounts, adjustments, and ending balances.

Open to Buy

The **Open to Buy Option** allows you to enter merchandise plans by department and class or by vendor and department. Plans are by month, by store, and may be entered manually or derived from historical data. Views and reports of budgets, comparatives, actuals, and open-to-buy amounts are user-defined.

Merchandising Reports

The **Inventory** application provides a series of merchandising reports that are valuable for analyzing groups of merchandise, such as vendors, categories (departments), or subcategories.



Merchandising reports provide essential information to make decisions on whether to markdown or reorder, and can be run for one location or multiple locations. Various reports are provided to focus on management information such as sales, unit movements, turn rates, GMROI, profitability, weeks of supply on-hand, and sell-thru-%.

Oversize Pricing

With the **Price Pack Option**, you can charge extra for specific colors and sizes, such as \$3 more for Extra Tall or 15% more (or less) for Neon Green.

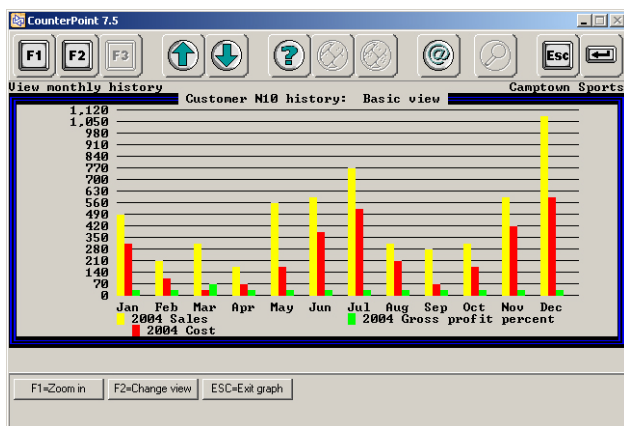
SALES HISTORY

Overview

Sales History retains and manages historical sales data, and allows you to graph, view, and report those sales in monthly summary or detailed form. It also provides commissions reporting and management.

Monthly History Views

In **Inventory**, history is retained for items, locations, inventory (item/location combinations), categories, vendors, commission codes, and tax codes. In **Customers**, it is retained for customers, categories, and tax codes. Additional histories are retained for users, sales reps, stores, registers, drawers, and reason codes.



Graphical, four-color views may also be printed or displayed on screen.

Monthly totals are available for multiple years based on user-defined calendars. Customer history includes sales, charges, costs, commissions, payments, finance charges, number of tickets, gross profit percent, and average sale per ticket, while Item history includes quantity sold, quantity returned, sales, costs, gross profit percent, average price, and percentage returned.

User-defined reports are also available for presenting monthly history, along with percent-of-total and percent-of-prior-year figures.

Ticket History View

CounterPoint retains detailed history of every sale/return ticket. LookUps may be organized by ticket number, customer/date, customer/item, or item/ticket. Individual tickets may also be retrieved by ticket number, customer number, customer name, or the customer's P.O. number. Once the matching tickets have been located, you can examine them a few at a time, zooming in for details as needed.

The screen shows a list of tickets under the title 'View ticket history'. The customer is 'N10' and the starting date is '8/30/04'. The list includes columns for Str Ticket, Date, User, Stp Lines, P.O. number, Loc, and Total. Ticket 10609 is highlighted. A 'Ticket header zoom' window is open, showing detailed information for ticket 10609, including date, user, sales rep, post date, and a breakdown of lines, payment, subtotal, discount, tax, freight, and total.

Field	Value
Date	8/27/04 16:43
User ID	Z
Sales rep	020
Post date	8/30/04
No. of lines	1
Location	MAIN
Profit center	100
Payment	Cash
Subtotal	146.81
Discount	.00
Tax	11.81
Freight	.00
Total	146.81

You can see as much detail as you want—totals, individual lines, or details of a specific line, such as color/size, reference information, or serial numbers.

The screen shows a zoomed-in view of item 1060001. The title bar shows 'CounterPoint 7.5' and the window title is 'View ticket history'. The customer is 'N10' and the date is '8/30/04'. The item description is 'Running suit, ladies'. The zoomed-in view shows details such as quantity, price, ext-price, cost, and location.

Field	Value
Item number	1060001
Description	Running suit, ladies
Qty	1
Price	189.95
Ext-price	189.95
Cost	119.46000
Location	MAIN
Profit center	100

Ticket History Report

A summary or complete audit-level report of ticket history may be printed in order by ticket number, customer number, customer name, P.O. number, or date.

Historical invoices may also be reprinted using **Point of Sale** or **Order Entry**.

Sale Items Report

The Sale Items report allows you to gauge the results of a promotional sale by comparing it to the performance of those items during a reference period. Normal price, off-price, and on-sale information is presented for units, sales dollars, and gross profit.

Commissions Due

Commission calculation and reporting offer a wide variety of options. Default commissions may be based on a commission rate associated with the sales rep, the customer, the item, or the particular sales rep/item combination. Item-related commission rates may vary based on the price level at which the item was sold. Commissions may be a percentage of the sale amount or the gross profit. Gross profit may be calculated using the actual accounting cost or a standard cost assigned to the item.

There may be one sales rep on a ticket, the ticket may be split across up to three sales reps, or different sales reps may be credited for individual line items.

You may report commissions due in a summary format, or a line may be printed detailing each invoice. You can even show allocated sales amounts for split-commission tickets.

Commissions may be due at the time of sale or, for A/R charge sales, due only after the invoice has been fully paid by the customer.

Flash Sales Report

A one-page recap provides a summary of activity across multiple stores, showing the number of tickets, sale amounts, and profitability. The Flash Sales Report may be run for a single day or a range of days for one or more stores.

Sales Analysis by Item, Customer, and Sales Rep

Three reports are provided for basic sales analysis: Sales Analysis by Item, Sales Analysis by Customer, and Sales Analysis by Sales Rep. These reports may be run for a selected range of items, customers, stores, and dates.

Up to three time periods may be included on a single report to provide a comparative performance analysis.

The Customer report may be printed in order by customer number, customer name, customer category, sales rep, state, or zip code. Alternatively, customers may be ranked based on sales or gross profit.

The Item report may be printed in order by item number, description, category, vendor, or account code. Alternatively, items may be ranked based on sales or gross profit.

The Sales Rep report may be printed in order by sales rep, store, or department. Alternatively, sales reps may be ranked based on sales or gross profit.

Sales Analysis by Item/Customer and Customer/Item

Two reports, Sales Analysis by Item by Customer and Sales Analysis by Customer by Item, provide cross-analyses of what merchandise is being sold and who is purchasing that merchandise. Each of

these reports may be run for a selected range of items, customers, stores, and dates.

The Item/Customer report shows each selected item (or vendor or category) and lists the customers who made purchases, along with the applicable sales, quantities, profitability, and percent-of-totals figures.

The Customer/Item report shows each selected customer and lists the items (or vendors or categories) that were purchased, along with the sales, quantities, profitability, and percent-of-totals figures.

Management History

Date-summarized historical reporting is provided for six different classifications: registers, item categories, payment methods, users, sales reps, and tax codes.

Summary history can be retained indefinitely by compressing history into weekly, monthly, or annual figures. Historical reports can provide valuable information such as a comparison of sales for Easter week this year with Easter week last year.

When applicable, hourly (time-of-day) performance breakdowns may be printed.

Data Management

Facilities are provided to remove historical information that is no longer needed for reporting and viewing.

Commission detail may be purged by date and customer. Detailed ticket history may be purged as required for selected ranges of dates, customers, and stores. Monthly history may be purged for specific years, for specific types of history. Management history may be purged for a range of dates or compressed into weekly, monthly, or annual figures.

TIMECARDS

Overview

The **Timecards** application allows employees to clock in and out of the system using CounterPoint workstations, and provides reports for subsequent payroll processing.

Features

Users may clock in and out as many times as required during the day. If necessary, a user may enter an unmatched clock-in or clock-out. A warning is provided to the user on the screen and is printed on the management reports.

When a user clocks in or out, the operating system's date and time are stamped into the file to ensure accurate timekeeping records.

Individual users may be set up for automatic notification if they attempt to use CounterPoint and have not clocked in.

An authorized user (manager) may print the Clock-in/Clock-out Report, which shows the time worked for all users, in summary or detail form. The manager also has the ability to manually correct clock-in and clock-out entries.

You may combine data from multiple stores into a single file for consolidated reporting and payroll processing, or process timecard information for individual stores.

Timecards offers an integrated, reliable approach to recording time worked, and streamlines operations all the way from point of sale to payroll processing.

ACCOUNTING INTERFACE

Overview

You can use CounterPoint's **Basic Accounting Option** (more fully described on page 46), or you can integrate with software from a number of accounting software companies, including Microsoft, Intuit, Sage, Exact, Red Wing, and others. CounterPoint interfaces with each accounting package's data files. It does not share a menu with other accounting packages.

General Ledger

CounterPoint account numbers are mapped to corresponding G/L account numbers, by setting up either mapping rules that pertain to all accounts, or specific mapping accounts on a one-to-one exception basis. Accounts may be set up by importing

accounts from G/L. Reports are provided to verify that G/L accounts and CounterPoint accounts are properly aligned.

G/L account numbers may be up to 50 characters and organized in up to eight segments.

The Distribution Report may be printed in order by account number or by posting source. A summary version is available, or the detail of every transaction may be printed, providing a complete audit trail back to the individual posting journals and document numbers that created the distribution.

Distribution activity can be transferred automatically into G/L in summary or detail form, providing a complete audit trail from G/L. Out-of-balance interfaces and duplicate postings may be prevented.

Accounts Payable

CounterPoint **Inventory** and **Purchasing** track vendor information. The Accounts Payable (A/P) package is used to track payables and issue checks. CounterPoint vendors may be set up automatically from existing A/P vendors or created automatically from CounterPoint vendors. A report is provided to verify that CounterPoint and A/P vendors are properly synchronized.

After a CounterPoint P.O. has been received, that receiver may be vouchered into A/P as an invoice (a payable). Automatically-created A/P invoice vouchers are identical to those that are manually entered, but require less work on the part of the user. Accounting distributions are also passed automatically into A/P, along with the invoice vouchers.

Return to vendor (RTV) transactions may also be vouchered into A/P and appear as vendor credits. Invoices may be vouchered to the original vendor or to a different third-party factor.

Factors

Received P.O.s may be vouchered into A/P using a third-party factor for payment, instead of the actual vendor who supplied the merchandise.

Payroll

The **Timecards** application outputs a text file containing employee clock-in/clock-out entries. This format is compatible with some third-party payroll packages. The Timecards Edit List provides actual hours worked.

Payment History and Bank Deposits

A complete history of all payments tendered from all customers may be retained in the Payment history file. Payment history may be viewed and reported by customer and by date.

The view by customer allows you to see (for example) the detailed history of an individual customer's payments on account, deposits against orders, etc. The view by date allows you to see the detail of what was deposited into a bank account on a particular day.

Deposit management functions allow you to define up to four bank accounts. As part of daily processing, you can group payment activity from one of more sources (**Point of Sale**, **Order Entry**, and **Receivables**) onto a single deposit slip.

A complete history of deposit slips is available for viewing and reporting. The Deposit History report can be used for reconciling bank account history, and can be printed in summary or detail format.

Inventory

CounterPoint includes an integrated, full-featured, **Inventory** application. Although most accounting vendors offer an inventory package, CounterPoint does not work directly with those inventory packages. For certain applications, it may be valuable to pass information between CounterPoint **Inventory** and the third-party inventory package.

The **Data Interchange Option** allows the creation and updating of CounterPoint inventory items (item number, description, price, etc.). Most third-party inventory packages can create text files suitable for importing using this Option.

The CounterPoint Base System is also capable of importing and processing transactions (receivings and adjustments) from text files. Some third-party

inventory packages can create these compatible transaction text files.

Data can be exported from **Inventory** using the File Utilities that are part of the Base System using the ODBC connectivity provided with the **SQL Connection Option**.

CREDIT CARDS (CMP)

Overview

CounterPoint's Base System includes credit card processing under the CounterPoint Merchant Program (CMP).

Credit Cards (CMP) provides electronic draft capture (EDC) capabilities in **Point of Sale** and **Order Entry** by allowing you to swipe a credit card through a magnetic stripe reader, automatically authorize a credit card sale, verify an address, and electronically settle funds to your bank. Electronic check authorization, debit card processing, and EBT food stamps are also provided.

Benefits

The benefits of integrated credit card processing include:

- Visa CISP Compliance
- Rapid, automatic charge authorizations
- Faster checkout times
- Reduced customer frustration
- Fewer errors and fewer chargebacks
- Reduced cost of accepting credit cards
- No hand-recording of card information
- No paper slips to deposit at the bank
- No rekeying of card information
- No separate credit card terminal

For information on available processing services and fees, call your CounterPoint Business Partner and ask about the CounterPoint Merchant Program. CMP processors will transfer settled card charges to your local bank.

CounterPoint also includes check authorization compatible with Certegy (formerly Equifax, formerly Telecredit) and TeleCheck.

Full support is provided for multiple industry classifications, including Retail, Mail-order/Telephone-order (MOTO), and Ecommerce.

An optional CPGateway service is available for fast (2-second) Internet credit card authorizations.

Visa CISP Compliance

CounterPoint is approved by Visa as a CISP-Validated Payment Application.

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.

Supported Cards

Supported cards and services include Visa, MasterCard, American Express, Discover, Diners Club, Carte Blanche, JCB, and check guarantee.

Debit Card Processing

Complete debit card processing is included in CounterPoint. Debit card processing with DUKPT support requires the use of PIN pads and is available for [Point of Sale](#).

EBT Food Stamp Processing

EBT food stamp processing is available via CPGateway with CMP, First Data North, or Vital. EBT requires the use of PIN pads and magnetic stripe card readers.

Address Verification

Address Verification (AVS) is supported for merchants who process under the CounterPoint Merchant Program or any of CounterPoint's Preferred Processors. CVV2/CVC2 provides additional AVS information by sending the extra three or four digits printed on the back of the card to the processor.

AVS is used for card applications, such as mail-order, where the physical card is not present and the risk of fraud can be reduced by confirming address information.

AVS processing does not affect whether or not the charge is approved. Instead, it informs the user whether or not the address provided by the customer matches the address information on file with the credit card company so that the merchant can decide whether or not to process the order. AVS is available for [Point of Sale](#) and [Order Entry](#).

Hardware Requirements

Requirements for credit card processing are a modem, a dial-up phone line, and (typically) a magnetic stripe card reader. The card processor determines the modem speed and the card reader requirements. CounterPoint is compatible with any Hayes-compatible modem and Track 1 and Track 2 card readers (either serial or keyboard wedge). Card processors require a Track 2 card reader for debit.

Check authorization uses the same modem and dial-up phone line. A MICR check reader is optional. MICR readers are quicker and more accurate than manual data entry. MICR processing is supported with Certegy, TeleCheck, and CMP processors.

Under Unix/Linux, one serial port with a modem can be shared by multiple users. On a Windows or NetWare network, each workstation requires a modem. The [Modem Server Option](#) allows multiple workstations to share a single modem. For low-volume applications, multiple modems may share a single phone line.

Support is provided for the Verifone series 101, 201, 1000, and 2000 PIN pad models. To ensure proper programming and operation, these units should be obtained from PNC Merchant Services. Additional hardware information is provided in the [Point-of-Sale Hardware](#) section on page 48.

CPGateway service requires an Internet connection.

Functional Description

Self-test functions are provided for modems and card readers to verify proper operation.

During Ticket Entry, the credit card is swiped through the magnetic stripe card reader. Card information is read, and a phone call is placed to

authorize the charged amount. The processor returns an authorization number or a decline. Capabilities are provided for call retry and for a backup phone number. Up to three different credit cards can be used on one ticket.

Authorization only commits the cardholder's credit line. Funds are not actually transferred.

Invoices and receipts print the credit card information required by the processor. User-defined receipts can support one- or two-part paper with a signature line, as well as an abbreviated sales draft that omits the printing of the merchandise sold. For added security, you can optionally mask credit card numbers and expiration dates so that only the last four digits are retained in history and printed on receipts and reports.

After Ticket Entry is complete, the Draft Capture Enter function allows revision of charge transactions, as well as entry of manual transactions.

The Authorize function allows batch-authorization of manually entered transactions, as well as Ticket Entry transactions that were not authorized due to operational problems at the time of sale.

The Pre-Settlement List allows the user to review and balance the day's activities.

The Settle function allows the user to initiate electronic transfer (settlement) of funds with the processor daily. For most card types, settled funds are transferred (via ACH) to the user's local bank within two business days.

Other Costs

In addition to software costs, typically there are costs for telephone line installation and monthly usage, the purchase of modems, magnetic stripe card readers, cabling, and the services of a qualified technical person to install the equipment and test the configuration.

The optional CPGateway service has startup and monthly transactional fees (www.CPGateway.com).

Alternative Card Processors

Credit Cards Option (Non-CMP) offers alternative compatible card processors to ensure that CounterPoint is compatible with the vast majority of U.S. banks. These alternative processors are more fully described on page 41.

ECOMMERCE

Overview

Opening an online store is easier than you think.

Ecommerce capabilities are built into CounterPoint and are compatible with CPOnline, a Web-hosting and ecommerce service designed especially for CounterPoint merchants.

Because CPOnline is fully integrated with CounterPoint, you can maintain your brick-and-mortar store and your online store at the same time. There's no costly double entry.



CPOnline is suitable for merchants of all sizes. With CPOnline, you can publish CounterPoint's inventory and customer information to your online store. Shoppers place orders online, and the orders are imported into CounterPoint for processing and fulfillment.

Capabilities

CPOnline capabilities include:

- A complete Web site and shopping cart

- Real-time credit card authorizations with CPGateway
- Special member pricing, member-only items, and customer-specific discounts
- Online account access where shoppers can view their order status (A/R charge customers can also view their available credit and account status)
- Automatic email notifications to shoppers when orders are shipped
- Package tracking
- Easy-to-use Store Management Web site where you can maintain and configure your online store
- Secure, electronic importing into CounterPoint **Point of Sale** and **Order Entry**
- **Automated Data Transfer** (Premium Feature) exchanges data in unattended mode
- **Tax Rate Lookup by ZIP Code** (Premium Feature) accurately calculates tax rates based on the ZIP code of the order

Marketing Tools

Get noticed—and stay noticed. CPOnline includes the marketing tools you need to make your online store a profitable endeavor.

- **eNewsletters** keep customers informed about upcoming sales, special offers, and new items, and include links to items in your storefront
- **Discounts and promo codes** drive traffic to your store with flexible discount options
- **Froogle® data transfers** increase your Web presence and help shoppers locate items in your store
- **Featured items** encourage impulse buys
- **Tell-a-friend emails** let your shoppers email their friends about items on your storefront
- **Affiliate programs** reward Web sites that advertise your products or provide links to your storefront

Security

Security is provided through SSL, an industry standard that employs the latest 128-bit encryption technology to encrypt sensitive information—like your customers' names and credit card numbers—for safe transfer over the Internet.

Requirements

The only requirements for CPOnline are a CounterPoint system, a Windows workstation with Internet access, and a Web browser.

Ecommerce and credit card functions are built into CounterPoint. Additional capabilities are available when using the **Order Entry Option**. CPOnline is available for all CounterPoint environments, including Windows, NetWare, and Unix/Linux.

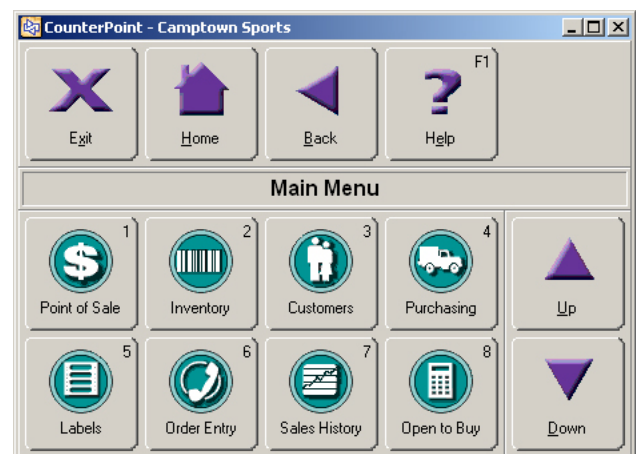
SYSTEM

Overview

The **System** application provides basic functions that are used throughout CounterPoint.

Menus and Users

Integrated, four-level menu access is provided for all system functions. Supplemental menus may be user-defined. Users may choose from multiple menu styles, including the “Buttons” style menu suitable for touchscreen.



Each user is identified and tracked by the system. Password and detailed function level security is provided for each authorized user. Function level security includes capabilities such as whether the

user is authorized to view cost information, void a ticket, override a credit limit, etc.

Companies

Multiple companies are allowed, and authorized users can switch between companies.

Each company is defined with basic information such as company name and address, account number structure, whether sales reps and commissions are used, and various other system-wide values.

Printers

Up to 15 public printers and 15 private printers are available to each user. Reports may be displayed, printed, or spooled to disk. Spooled reports may be stacked, then printed or deleted as a group.

Lookups

The F9 Lookup key is available at every validated entry field to pop up a list of valid choices. For example, when a customer number (item number, etc.) is requested, F9 presents the customer list. The user can choose to view the customer in the desired order-by number, name, phone number, zip code, etc.

Logs and Playbacks

All **File Utilities** operations and abnormal system activities are recorded in the system log file and may be viewed at any time.

Calendars

User-defined calendars control the retention of monthly history and the analysis of historical data.

Calendars may correspond to actual calendar years, or may be set up for any desired time period.

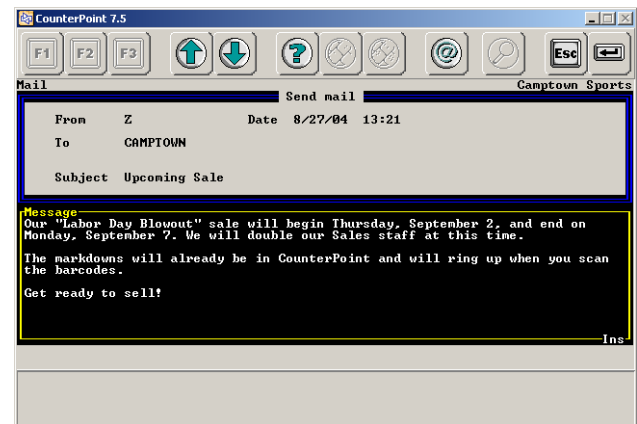
Mail

CounterPoint **Mail** allows you to send electronic mail to other CounterPoint users.

Mail is an easy-to-learn application: only a few keystrokes are required to create and send a mail message to another user.

When new mail is received, notification is automatic. New mail may be quickly retrieved and read, and a reply sent. Mail may be saved, discarded, and/or printed.

Mailing lists containing groups of users, or all users, may be created. Mail may be addressed to individual users, to mailing lists, or to a combination of users and mailing lists.



Mail is fully integrated with Multi-Site, so messages can be exchanged across multiple CounterPoint sites.

Mail is designed for use with CounterPoint, and does not attempt to provide all of the features of the more feature-rich, complex, standalone email packages. If your email requirements include complex features such as MHS-compliance, a number of excellent third-party email packages are available to meet those needs.

Upgrade Utility

CounterPoint includes utilities to upgrade data from other software packages, including previous versions of Synchronics software, StoreKare, Great Plains, and RealWorld.

You can also use the CSV data utility to export CounterPoint V7 data to formatted comma separated value (.CSV) files that are suitable for import into CounterPoint SQL. This utility, coupled with the Upgrade Data utility included with CounterPoint SQL, provides a simple upgrade path from CounterPoint V7 to CounterPoint SQL and ensures a smooth transition between applications.

Summary

The CounterPoint Base System includes the built-in functions required to ensure that your business software is both usable and secure.

COUNTERPOINT OPTIONS

CounterPoint Options give you access to a wide array of features that enhance the Base System. Options may be purchased with the Base System or later as your business needs change.

SERIAL/LOT NUMBER TRACKING

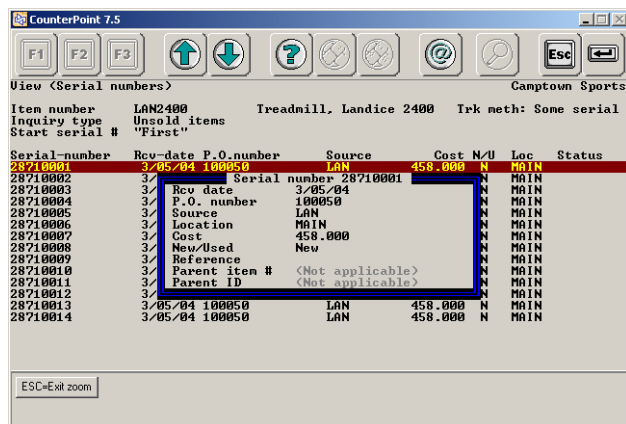
Overview

Serial number tracking provides a detailed record of each piece of merchandise—when it was received, what it cost, which customer bought it, when it was bought, warranty expiration, etc. Serial number tracking is beneficial to any business that sells big-ticket items, tracks product warranties, or deals in regulated commodities.

Lot numbers are used to track distinct groups of inventory within a given product. Lot tracking is useful for products such as pharmaceuticals and limited-shelf-life products, or chemicals which are tracked within individual containers.

Serial Numbers

Both sold and unsold (in-stock) serial numbers are tracked. Serial number status and history can be viewed for sold and unsold serial numbers. Serial numbers may be looked up by item number and serial number, or simply by serial number. Serial valuation features allow you to account for the real cost of each individual serial number.



The screenshot shows the 'CounterPoint 7.5' window with the 'Serial numbers' view selected. The window title is 'Camptown Sports'. The 'Item number' is 'LAN2400', 'Inquiry type' is 'Unsold items', and 'Trk meth' is 'Sone serial'. The 'Start serial #' is 'First'. A table of serial numbers is displayed with columns: Serial-number, Rcv-date, P.O.number, Source, Cost, N/U, Loc, and Status. The first row is highlighted in red. A blue box highlights the 'Serial number' column for the first row.

Serial-number	Rcv-date	P.O.number	Source	Cost	N/U	Loc	Status
28710001	3/05/04	100050	LAN	458.000	N	MAIN	
28710002							
28710003							
28710004							
28710005							
28710006							
28710007							
28710008							
28710009							
28710010							
28710011							
28710012							
28710013	3/05/04	100050	LAN	458.000	N	MAIN	
28710014	3/05/04	100050	LAN	458.000	N	MAIN	

Each serial-numbered item is classified as “always serialized” or “sometimes serialized.” Always serialized items allow tight management controls; the serial number must have previously been received into stock before it can be sold. Sometimes serial-

ized items offer optional serial number entry and less rigid controls.

Each serialized item has two user-defined warranty terms to automatically calculate warranty expiration dates, such as 30 days parts and one year labor.

Serial number handling features are smoothly integrated with transaction processing, including receivings, sales, transfers, and adjustments. Simplified handling is provided for lists of serial numbers, consecutively numbered serials, and automatically generated serial numbers.

Reports

Individual serial numbers and the associated reference information may be printed on all applicable inventory reports, including all posting registers and the Physical Count Worksheet. Serial reports can be printed for sold and unsold items and can be organized by vendor, item, or customer.

The Flooring Report allows tracking of each serial number by source, usually a third-party finance company. This report can list those goods that are supposed to be present in inventory (for floor checking), as well as those goods that were sold during a specified period of time, so that the finance company can be paid.

Serial numbers can be loaned and returned. The Serial Numbers on Loan Report provides loan status by the responsible party.

Lot Numbers

A lot is a distinct group of inventory within a given product. Applications include tracking:

- Pharmaceuticals
- Fabrics
- Food
- Regulated commodities
- Scrap

- Color-matched products
- Products with a limited shelf life
- Wire, chemicals, or other products for which multiple spools or containers are tracked

Each lot-controlled item is set up for either balance or detail tracking. Lot Balance tracks the identity of each lot and its quantity on-hand, available, and sold. Lot Detail tracks lot balance information and, in addition, retains the detail for every lot transaction processed.

Lot history can be viewed or printed. The view function gives both a summary and a detailed inquiry of lots, including quantity and date information. The Lot Report is available in detail and summary form and can show selected items, location, vendor, category, or customer.

You can purge unwanted lot information.

Point of Sale and Order Entry

Serial and lot numbers are handled throughout **Point of Sale** and **Order Entry**, beginning with document entry and continuing with forms printing, reporting, and posting. You can view available numbers, default to the oldest numbers, automatically allocate available inventory, and generate new sequential numbers.

In **Point of Sale**, each line item may have up to 28 serial numbers or up to 14 lot numbers assigned. In **Order Entry**, an unlimited list may be assigned.

Kits

Serial/Lot Number Tracking is fully compatible with the **Kits Option**. An assembled kit can be identified by serial or lot number, and can even have multiple components that are identified by serial or lot number. Serialized components can be swapped.

Full inquiry and reporting of assembled kit and component serial numbers is provided.

KITS

Overview

A kit is an inventory item made up of one or more component items. The CounterPoint Base System

supports Loose kits (lists of connected items that are automatically suggested at time of sale) and “automatic” Loose kits (lists of connected items that are automatically added to the ticket at the time of sale). Automatic loose kits can be used for bottle deposits or for other charges that should always be attached to a particular item.

The **Kits Option** adds Miscellaneous kits, which when sold, reduce the on-hand quantities of their components. You control whether component substitutions are allowed at time of sale and whether such changes affect the selling price.

The **Kits Option** also adds Prebuilt kits, including a Simple Kit, Tracked Kit, and Component-Tracked Kit. Assembly, disassembly, and modification of Prebuilt kits takes place prior to time of sale using a quick, one-step transaction process, and provides full support for serial numbers, lot numbers, and detailed component history tracking.

Kit Types

A kit model is defined for each kitted item and specifies the parent product and a list of components. Five distinct types of kits are supported.

- **Loose Kit**—A Loose kit is not actually a kit, but a list of related items. This list of items is automatically suggested for sale when the kit is sold in **Point of Sale** or **Order Entry**. Loose kits are available in the CounterPoint Base System.
- **Miscellaneous (Retail) Kit**—A Miscellaneous kit is not assembled prior to sale. Instead, when it is sold, on-hand quantities of its component items are deducted from inventory. Miscellaneous kits offer user-defined component substitution at the time of sale. You can indicate whether substitutions are allowed for each component of the kit and, if so, how the substituted item affects the price of the kit. Miscellaneous kits have a wide variety of applications for different businesses.
- **Simple Kit**—A Simple kit is a parent and a list of components that are assembled into inventory before it is sold. When the parent is assem-

bled into inventory, its component parts are deducted from inventory.

- **Tracked Kit**—A Tracked kit offers Simple kit capabilities as well as serial/lot number tracking for the kit's parent and component items.
- **Component-Tracked Kit**—A Component-tracked kit offers Tracked kit features and retains a detailed historical record of every component actually used to build the kit.

Kit Models

A kit model can be established for any inventory item. Special handling is provided to account for the cost of labor and overhead.

The kit model specifies which components are used, the quantity for each component, which components can be substituted during the assembly or sale of a kit, which components print on the customer's invoice, and which changes to components affect the kit's price.

A multi-level kit model can be established; a kit can be a component of another kit. However, only a single level of the model is processed for a given report or transaction.

Retail Kit Applications

Miscellaneous (retail) kits are useful when the product sale should cause component parts to be deducted from inventory. They are also useful when there is a standard set of options (components) and substitutions are allowed at time of sale.

The sample kit shown below illustrates some of these features:

Deluxe Stereo Package

- | | |
|---|---------|
| - Acme stereo | 1 Each |
| - Grade B speakers | 2 Each |
| - Installation | 3 Hours |
| - Extended warranty | 3 Years |
| - Speaker wire | 20 Feet |
| - Warning: Loud music causes hearing loss | |

In our example package, the stereo is mandatory and cannot be altered at time of sale. A serial number entry is required for the stereo. A different grade of speaker may be substituted, but the kit price will only increase, not decrease (Grade A speakers cost more, but Grade C cost the same).

Installation is required, but the hours can be altered and the kit price is adjusted accordingly. The extended warranty is optional. When sold, speaker wire is deducted from inventory, but not printed on the invoice. Other components, including the environmental impact warning, are printed on the customer's invoice.

Assembling Prebuilt Kits

Prebuilt kits (Simple, Tracked, and Component-tracked) are assembled into inventory using the kit model and any user-entered component substitutions. During assembly, kit inventory is increased and component inventory decreased. Reports highlight nonstandard usage or costs. All accounting distributions are automatic and are based on user-defined options.

After a kit has been assembled, components can be added or removed. Capabilities are also provided to disassemble a kit. When disassembled, a Component-tracked kit can return to inventory the exact components used during assembly.

Work Orders

A complete work order subsystem allows you to initiate the assembly of goods from component inventory.

Serial and Lot Number Tracking

Serial and lot number tracking is fully supported with the addition of **Serial/Lot Number Tracking**. An assembled kit can be identified by serial or lot number, and can even have multiple components that are identified by serial or lot number. Serialized components can be swapped.

Full inquiry and reporting of kit and component assembled serial numbers is provided.

Reports

A number of reports are available, including the Kit List, Where Used Report, Component Usage Report, Tracked Kit Inventory Report, and the Material Requirements Report.

Material Requirements Planning

The ability to plan and meet inventory needs is critical to a successful business. The Material Requirements Report (MRP) aids in accurate planning.

To run the report, the user enters a list of products to build, and specifies how many of each to build. The report shows which products can be built, how many of each can be built, what components are required, and for which components there are shortages. To facilitate planning, the report can even suggest a quantity to build for each product, based on current customer orders or on inventory levels.

PRICE PACK

Overview

The **Price Pack Option** offers advanced pricing capabilities, including 6-level prices, price-by-location, and apparel oversize pricing.

6-Level Prices

Tiered, multi-level pricing allows a particular price level to be automatically selected based on which customer is making the purchase and what quantity of an item is being sold.

In the Base System, each inventory item may have up to three price levels per selling unit.

The screenshot shows the CounterPoint 7.5 software interface. At the top, there are function keys F1, F2, F3, and several navigation icons. Below this, the window title is "CounterPoint 7.5" and the text "Camptown Sports" is visible. The main area displays item information for "1. Item number APP-1920" and "Aloha print swim trunks". It shows "Stocking unit: EACH", "Average cost: 10.99000", and "Last cost: 10.99000". There are two tables: "Item Prices" and "Oversize SIZES".

Selling prices	Per EACH
Price-1	34.99
Price-2	33.99
Price-3	32.99
Price-4	31.99
Price-5	30.99
Price-6	29.99

COLR/SIZE	
S	.00
M	.00
L	.00
XL	2.00

At the bottom of the "Oversize SIZES" table, there is a prompt "Any change ?" with a dropdown menu showing "No".

The **Price Pack Option** expands the number of price levels from three to six per selling unit.

Price-by-Location

An item's selling price may be affected by a number of factors—the customer making the purchase, the quantity sold, any promotional sales or contract prices in effect, and other factors.

Price-by-location lets an item have a different price at each selling location, so that (for example) your downtown store may charge a higher price than your uptown store. Price-by-location also allows you to run promotional sale events at a particular store without affecting other stores.

Oversize Pricing

Oversize pricing is supported for gridded (apparel) items, allowing you to charge (for example) a higher price for an Extra Tall.

Each size may be individually assigned a surcharge (or discount) of either a dollar amount or a percentage increase. Each color may also be assigned a dollar or percentage surcharge (or discount).

For example, a shirt might have a price of \$29.95. Extra Talls are \$5 higher, and of the five colors, the "Bulls" version sells for a 10% premium. A "Bulls" in Extra Tall is an extra \$5 plus a 10% premium.

This approach to oversize pricing is extremely simple to set up and maintain, without having to individually alter the price of each unique color/size (cell).

COST PACK

Overview

The CounterPoint Base System supports Average Cost Valuation and the Retail Inventory Method. The **Cost Pack Option** allows inventory accounting using Standard Cost, LIFO, or FIFO valuation.

Standard Cost

Each inventory item is assigned a standard cost. Inventory is received and sold at standard cost. Any differences are charged as distributions to the pur-

chase variance account. Inventory valuation reports are available at average cost and standard cost.

LIFO/FIFO

Inventory transactions are costed and accounting distributions are recorded based on actual inventory layer cost, using the last-in or first-in layer, as appropriate. Valuation reports are available at average cost and at layer cost, including detailed layer reporting by location.

RECEIVABLES

Overview

Complete customer tracking is an integral part of the CounterPoint Base System. The **Receivables Option** supplements **Customers** by adding charge sales, receivables tracking, cash receipts, finance charges, revolving charge, and statement printing.

Customer Information

Charge customers may either be open-item or balance-forward. Customer terms and prompt payment discounts may be based on a number of days (such as “net 30” or “2% 10, net 30”), or proximo terms based on a specific day of the month (such as “2% 10th, net 30th”). A warning is issued during cash receipts if a duplicate is entered. Multiple A/R accounts are supported.

Credit Controls

Credit limits ensure that customers do not exceed management’s guidelines for open credit. In addition to credit limits, individual customers may be prevented from making charge sales, payments by check, any kind of sale, or from placing orders. Only authorized users may override credit limits.

Each customer’s highest-balance and average-days-to-pay are calculated by the system and can be viewed.

Statements

Statements are normally printed as part of the month-end process. Statements may be limited to customers within particular statement groups and/or to customers with particular balances and past due statuses.

Statement formats are user-defined. A few of the optional items that can be printed on statements are:

- Customer information
- Messages
- Dunning notices
- Invoice detail
- Payment detail
- Merchandise and price detail
- Aging
- Revolving charge minimum payments
- Discounts (for example, “Deduct \$\$\$ if paid by 03/21/2007”)
- Cash Receipts

The cash receipts system is built for speed and accuracy. Prior to applying cash receipts for open item customers, the Cash Receipts Worksheet or the Unapplied Items Report may be printed. Or customer open item detail may be viewed on-screen during the cash application process. During entry of cash receipts, functions are provided for retrieval of individual apply-to documents or the oldest document, and for automatic cash application.

Valid discounts are calculated automatically, and writeoffs are allowed within user-defined limits. Special functions are provided to completely write off documents, void previous receipts, apply existing credit memos along with cash receipts, and reapply existing credit memos without a cash receipt. Optional batch control is available for transaction processing. Deposit slips may be printed.

Finance Charges and Revolving Charge

Customers may be assessed periodic finance charges on their outstanding balances. A variety of calculation methods and options are available.

For balance-forward customers, revolving charge is supported, including the calculation of minimum payment amounts using either the statement balance or the average daily balance method.

Debit/Credit Memos

The Customer Adjustments function allows simplified processing of back-office debit and credit memos

that are not appropriate for **Point of Sale** or **Order Entry** processing. Optional batch control is available.

Aging

Up to five aging periods may be defined, along with a number of days (such as 30, 60, 90, etc.). Documents may be aged by invoice date or by due date. Statements and the Aging report allow aging by number of days, as well as for a specific range of dates and provides separate debit and credit totals.

Customer agings may be viewed throughout the system. You can display the last aging performed, the aging that was printed on the last statement, or the current aging.

The Aging report provides an aging summary for selected customers or the complete document detail, and allows selection of customers with high balances and/or past due accounts. The Aging report may be printed in order by customer number, name, or sales rep.

The Charges and Payments by Month report provides a brief month-by-month recap of each charge customer's purchases and payments.

Parent/Child Receivables

With the **Receivables Option**, you can process cash receipts for a parent customer with payments applied to documents from child customer accounts.

For example, assume that company ABC (the parent) pays for merchandise purchased by companies DEF and XYZ (the children). You can process a check from ABC for \$300 and apply that one receipt to both DEF's invoices and XYZ's invoices.

You may print statements and aging reports for an individual child customer, or a consolidated statement for the parent that includes all child customers. Parent customer records and monthly history may be updated when child activity takes place. You may specify whether to include parents, children, or both on reports.

Account Management

Account Management provides a single-menu selection from which you can perform a number of

valuable customer service and credit management functions.

You may attach notes that will automatically display in the Account Management functions. And you can print a statement for the displayed customer.

Open Items

For open item customers, fully paid open items may be periodically purged from the system. For balance-forward customers, open item detail may be periodically purged, leaving a balance brought forward for the customer.

Purged open items may be retained in a closed item history file and are available for viewing and reporting. Detail may be viewed for open items and closed items, organized by document number or by apply-to number.

Sales History

A multi-year monthly summary is available for each customer, showing sales, cost, profitability, commissions, payments, finance charges, number of sales, and average sale amounts. Monthly summaries may be graphed, viewed, or printed.

ORDER ENTRY

Overview

Order Entry and **Point of Sale** perform essentially the same functions: processing customer orders and invoices. The **Order Entry Option** is designed to meet the needs of wholesale distributors and mail-order businesses. **Order Entry** processes customer orders, prints picking tickets and invoices, and tracks back-orders. **Order Entry** supports orders, invoices, credit memos, quotes, RMAs, and standing orders.

CounterPoint allows you to create orders in **Point of Sale** and convert them to **Order Entry** orders for batch processing. This is helpful to businesses with retail and wholesale divisions because they can use one system for the management of both operations.

Workflow

Order Entry workflow is organized around entering orders, printing picking tickets, selecting completed

orders for invoicing, and batch printing invoices. “Two-step” orders may have individual lines selected prior to invoicing. Invoices and credit memos are handled as “one-step” operation and selection is not required.

Entering Orders

Order entry is a three-screen process in which the user completes “header,” “line item,” and “totals” screens. User interaction is designed for ease of use, speed, accuracy, access to features, and clear presentation of information.

With Turbo Entry you can dramatically speed up order entry by reducing keystrokes. During setup, you specify which entry fields are skipped and auto-filled with default values. For example, if you normally use the default values for customer terms, item descriptions, and prices, those fields are skipped in initial entry, but may be edited. Only the fields that you deem “required” need to be entered.

The following screens show the basic process:

CounterPoint 7.5
Orders <Enter> Camptown Sports

Order #: 100000 Cust #: N10 Loc: MAIN Order date: 8/30/04
Type: Order Nancy Smith Pick date: None

Subtotal 156.95 7. Comm % 5.00
1. Freight .00 7. «Override»
2. Freight .00 Pay-code Amount
3. Disc % 5.000 7.85 8. Deposit 3 Visa 149.10
4. Tax .00 Card # 4005530000000019
Invoice total 149.10 Exp Date 0606
Deposit applied 149.10
Amount due .00 9. Final pmt None

5. # ship labels 1
6. # COD labels 0

	Lines	Quantity	Ext-price	Cost	Weight
Ordered:	4		156.95	56.20	7.000
To-ship:	4	5	156.95	56.20	7.000

Field number to change ?

F1=Totals F4=Tracking F5=Notes F6=Ship-to F8=Hold

Header

CounterPoint 7.5
Orders <Enter> Camptown Sports

1. Order # 100000
2. Order type Order
3. Order date 8/30/04

4. Customer # N10 5. Ship-to 3
Name Nancy Smith Nancy Smith
Address 1 456 East Main 55 North Carroll St
Address 2
City/St/Zip Memphis TN 38111 Chicago IL 60664
Country

6. Email nancy@yahoo.com
7. Pricing cat RET
8. Sales rep 020
9. P.O.# 56684

13. Terms N30 Net 30
14. Tax code OST Out of state sales
15. Location MAIN Central

16. Pft ctr 100
17. Apply-to <Not applicable>
18. Promo Fall2004

10. Ship date ASAP
11. Ship-via F2D FedEx 2-day
12. Ship zone 1 UPS Zone 1

Field number to change ?

F5=Notes F6=Zoom F8=Hold

Line Item Entry

CounterPoint 7.5
Orders <Enter> Camptown Sports

Order #: 100000 Cust #: N10 Loc: MAIN Order date: 8/30/04
Type: Order Nancy Smith Pick date: None

Line #: 40

1. Item number	2. Description	3. Location	4. Qty ord	5. Price	6. Cost per EACH	7. Ext-prc	8. Ship date	9. Ship date	10. Sales rep	11. Profit ctr	12. Reference
APP-3700	Atlanta Braves cap	MAIN Central	1	29.99	18.82000	<Ordered> 29.99	ASAP	ASAP	020	100	Ship to father

On hand: 295 Available: 296 On order: 0

Ordered: 4 To-ship: 4

Quantity 5

Ext-price 156.95

Field number to change ?

F1=Next line F3=Delete line F5=Change item number

Line Item Summary

CounterPoint 7.5
Orders <Enter> Camptown Sports

Order #: 100000 Cust #: N10 Loc: MAIN Order date: 8/30/04
Type: Order Nancy Smith Pick date: None

Item number	Description	Qty ord	Price	Ext-price
APP-1920	Aloha print swim trunks	1	31.99	31.99
APP-3205	Sun visor	2	12.99	25.98
EQ0-3501	All-weather binoculars	1	68.99	68.99
APP-3700	Atlanta Braves cap	1	29.99	29.99

Ordered: 4 Lines 4 Quantity 5 Ext-price 156.95

To-ship: 4

F1=Add F2=Change F5=Notes F6=Ship-to ENTER=Continue

Totals

Customers

You can select a customer by entering the customer’s number, company name, telephone number, zip code, or just a portion of the first or last name. For charge sales, the customer’s credit limit is checked, and only authorized users may override the credit limit.

A Zoom on the customer’s account shows all pertinent information, including balance owed, credit limit, last payment date, account aging, and even a detailed sales history. New customers can be added while entering the order, and customer numbers can be assigned automatically.

Unlimited pages of notes can also be retained for a customer and displayed in Order Entry. If desired, a specially identified page of notes can be automatically displayed whenever you access the customer.

Inventory

Sales and returns can be entered on the same order. Items are identified by typing the item number or by scanning a barcode. Items can also be looked up by entering a partial item number, partial description, vendor number, vendor's item number, category, subcategory, alternate lookup number, or any keyword in the item description.

You may zoom in on inventory to see what's on-hand, committed, on order, backordered, and in transit for your location or other stocking locations. If an item is out of stock, you may select from up to eight substitute items, or ship items from an alternate location.

Unlimited pages of item notes may be defined for an item and viewed during Zoom to allow you to more fully inform the customer about the product. A page of notes can be automatically displayed for an item to encourage power-selling related items: "Would you like some potting soil with those plants?"

Pricing

Merchandise is priced accurately and automatically, based on list price, quantity breaks, customer discounts, or a markup on cost. Group discounts can be based on quantity, weight, or volume.

Sale prices can be date- and time-activated for limited-time item promotions. Sale prices can specify a price for a particular item, or a discount percentage for an entire category/subcategory of items.

Contract pricing can establish special prices for certain customers on certain items for a specific time period. A contract can specify a price for a particular item or a discount percentage for an entire category of items.

Items can be priced and sold by alternate selling units. For example, you can stock an item by the EACH and sell it by either the EACH or the CASE.

Pick Verify

CounterPoint allows warehouse users to easily verify that the items picked for an order match the items to be shipped.

A warehouse user can record picked quantities and verify them against the original order within CounterPoint. Picked quantities can be entered using a workstation or a barcode scanner, or the quantities can be imported from a file created by a handheld data terminal. Pick verify requires both **Order Entry** and **Data Interchange**.

Serial and Lot Number Tracking

With the addition of the **Serial/Lot Number Tracking Option**, items can be sold by unique serial number or by lot number (group). Supported features include unlimited serial and lot numbers per line, finding the oldest serial number, viewing all serial numbers and reference information, and automatic serial number generation.

Grids and Apparel

Full support is provided for soft goods and one- or two-dimensional color/size (or width/length, etc.) grids.

Kits

Loose kits allow you to order a single item prompting the system to suggest a list of related items that could be ordered. The **Kits Option** adds Prebuilt kits and Miscellaneous kits. Miscellaneous kits, when sold, reduce the on-hand quantities of their components, and offer optional component substitution.

Order Numbering

Order numbers are normally assigned sequentially by the system. Alternatively, user-assigned order numbers may be entered. All workstations assign orders from a single series of numbers.

Payment Types

Up to 18 payment types can be user-defined, and may be individually set to require validation entries such as a credit card or license number.

Multi-Currency

Multi-Currency allows the setup of foreign currency exchange rates, and the tendering of foreign currencies for **Point of Sale** and **Order Entry** transactions.

Taxes

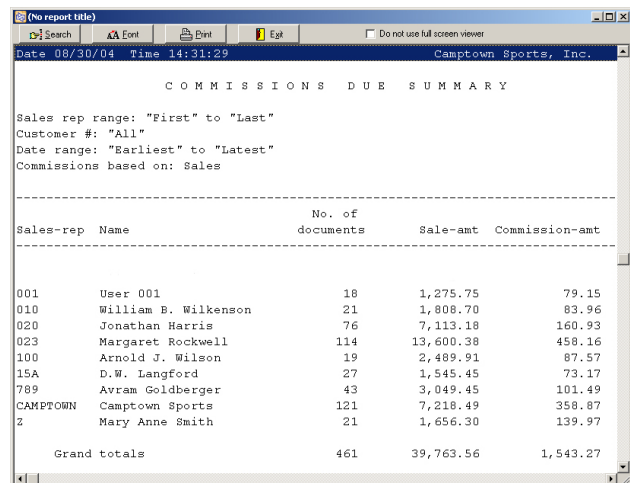
Taxes are calculated automatically based on the taxable status of the merchandise and the customer. Tax calculations can be overridden by authorized users on a per order basis, or individual line items can be set to “no-tax.” An entire order can be set to “no-tax” by entry of a tax registration number.

Tax can be a percentage of the sale amount, an amount per piece, or a combination of the two. For multi-location systems, an item’s tax can be different for each location.

Canadian PST/GST calculation is supported.

Commissions

Sales commissions, if used, are calculated for each item on the order based on either sale amount or gross profit. Commissions may be tracked by order or by line item and may be split across multiple salespeople on one order. Commissions can be paid on sales or on paid invoices only. Commissions due are reported in the Commissions Due Report in [Sales History](#) on page 21.



Sales-rep	Name	No. of documents	Sale-amt	Commission-amt
001	User 001	18	1,275.75	79.15
010	William B. Wilkenson	21	1,808.70	83.96
020	Jonathan Harris	76	7,113.18	160.93
023	Margaret Rockwell	114	13,600.38	458.16
100	Arnold J. Wilson	19	2,489.91	87.57
15A	D.W. Langford	27	1,545.45	73.17
789	Avram Goldberger	43	3,049.45	101.49
CAMPTOWN	Camptown Sports	121	7,218.49	358.87
Z	Mary Anne Smith	21	1,656.30	139.97
Grand totals		461	39,763.56	1,543.27

History

The system can retain historical information for management reporting in detailed (line-by-line) form.

Detailed history by customer and item can be retained indefinitely, limited only by disk space. A complete history of a customer’s sales activity can be printed or viewed, showing items purchased, transaction dates, and prices paid. Similarly, you can review an item’s detailed history.

A duplicate invoice can be produced months or years after the actual sale is recorded. More information regarding history is provided under [Sales History](#) on page 21.

Quotes

Quotes can be entered, printed, and saved. Quote numbers may be sequentially assigned by the system or entered by the user.

Quotes can be converted into orders or cancelled. A report of quotes can be printed. Quotes do not commit inventory.

RMAs

Return Merchandise Authorizations (RMAs) can be entered, printed, and saved. RMA numbers may be sequentially assigned by the system, or entered by the user. RMAs can be converted into credit memos or cancelled. A report of RMAs can be printed. RMAs do not commit inventory.

Extra Charges

In addition to user-defined miscellaneous charges, [Order Entry](#) offers entry of Freight. Freight may be automatically calculated based on the total sale amount or the total weight. Other supplemental charges may be processed as line items.

Out-of-Stock Conditions

[Order Entry](#) supports three distinct quantities on a line item: quantity ordered, quantity to ship, and quantity backordered.

The system can be configured to respond to an out-of-stock condition in a number of ways: automatically canceling the line; backordering the balance; backordering the entire line; or presenting these and additional choices, including selecting a different stocking location and ordering a substitute item.

Automatic Backorder Filling

As inventory becomes available, backorders can be automatically filled and prioritized by ship date. Picking tickets can be automatically printed.

Orders

An optional deposit can be accepted, and an order document can be printed for use as a customer receipt, packing list, or work order.

Full support is provided for orders, backorders, and special orders. A direct link to **Purchasing** allows you to place vendor orders to meet customer requirements, including drop-shipments direct from vendor to customer.

Reference information can be entered for each line on an order to indicate purchase orders placed with vendors, or as internal control notes for warehousing or manufacturing. Open orders reports can be organized by order number, customer, inventory item, ship date, sales rep, or reference.

You can view the customer's ticket (i.e., invoice) history so you can see open orders and shipment history simultaneously to quickly answer the question, "Did my order ship?". Open orders reports can be organized by order number, customer, inventory item, ship date, sales rep, or reference.

Order lines can be added, changed, or removed; serial and lot numbers entered or altered; kit components edited; prices changed; or the entire order cancelled. When entering or changing orders, you may page up and page down through all three screens.

Notes

You can enter notes on an order for internal tracking purposes. You can print a selected page of notes on user-defined forms.

Invoicing

Invoices are generated in batches for one-step invoices and credit memos. Invoices are generated for selected lines on two-step orders. Invoice numbers may be assigned by the system, or the order number may be used for the invoice number.

Posted invoices are retained in **Sales History** and are available for viewing and reporting.

User-defined Forms

All print formats are user-defined, and you can select the default formats for orders, quotes, and

RMAs. Invoices, orders, quotes, credit memos, and RMAs may be batch-printed to produce documents such as acknowledgments, packing slips, labels, etc.

You can configure the system to suggest automatic form printing each time you complete a new order. Individual prompting options may be set up for new orders versus changed orders and for different types of documents (orders, invoices, credit memos, etc.).

Cross-line category totals (e.g., parts, labor, etc.) may be printed on orders, invoices, and other forms.

Built-In Credit Card Processing

Credit card processing under the CounterPoint Merchant Program (CMP) is included in the CounterPoint Base System. For information on available services and fees, contact your CounterPoint Business Partner and ask about the CounterPoint Merchant Program. CMP processors will transfer settled charges to your local bank.

Capabilities are more fully described under **Credit Cards (CMP)**. Additional card processors are described under the **Credit Cards Option (Non-CMP)**.

Standing Orders

Standing orders allow you to enter an order once and cycle bill it multiple times for periodic billings at regular intervals, including the ability to set a time limit (term) or maximum amount for each recurring order.

Point of Sale

Order documents created in **Point of Sale** may be transferred out of **Point of Sale** and into the **Order Entry** system for subsequent processing.

Multi-Site

Order Entry is compatible with Multi-Site. Orders may be entered at Satellite locations and transmitted to the Hub for fulfillment and invoicing. Invoices may not be printed at the Satellite locations.

Labels

Labels allows printing of user-defined labels for customer shipping, based on a user-entered quantity.

DATA INTERCHANGE

Overview

Data Interchange allows you to retrieve information from a text file for use in CounterPoint and includes the ability to import customers (**Customer Import**), as well as inventory items and related information (**Inventory Import**). It also allows you to import **Point of Sale** or **Order Entry** line items from a handheld data-collection device or a remote checkout location.

Customer Import

Customer Import uses data from an external text file to create new records in the customer file and to update existing customer records.

Inventory Import

Inventory Import uses data from an external text file to create new records in the Item file, the Inventory file, and in a number of related files. Data for existing item records can also be updated. **Inventory Import** lets you convert inventory data from third-party accounting systems or from manufacturers' inventory and pricing data.

Applications

There are a number of valuable applications for **Data Interchange**:

- Upload initial item or customer data
- Revise existing items or customers
- Set up new items using manufacturer-supplied data
- Enter items for a gift registry
- Process manufacturer price updates
- Convert data from a third-party package
- Mass-modify existing data (example: change all category X items to category Y)
- Import **Point of Sale** or **Order Entry** line items

Data Integrity

Data Interchange validates all data to ensure the integrity of the system. The standard export/restore functions provided with the **File Utilities** application do not validate data or automatically update the associated data files as **Data Interchange** does.

During import, each field can be loaded with data from the text file, with a constant, or with a system default value. Math can be performed on numeric fields (add, subtract, multiply, divide), and text manipulation can be performed on alphanumeric fields (concatenation).

Data Interchange can process text files with multiple types of records and can even identify valid new records and valid update-only records. **Data Interchange** can be run unattended to process multiple text files and extract all required information.

An optional report can show either a complete list of items added and updated, or just errors.

Simple to Use

The basic setup and use of **Inventory Import** is outlined below:

- Review the printed data descriptions provided by the manufacturer
- Type in the dictionary that describes the manufacturer's text file
- Look at the Items screen and decide where you want each data field to come from
- Type in the import specification to relate Item fields to dictionary fields
- Run the import

Summary

Data Interchange allows you to use valuable data from manufacturers and other sources within CounterPoint. **Data Interchange** saves you time and money.

OPEN TO BUY

Overview

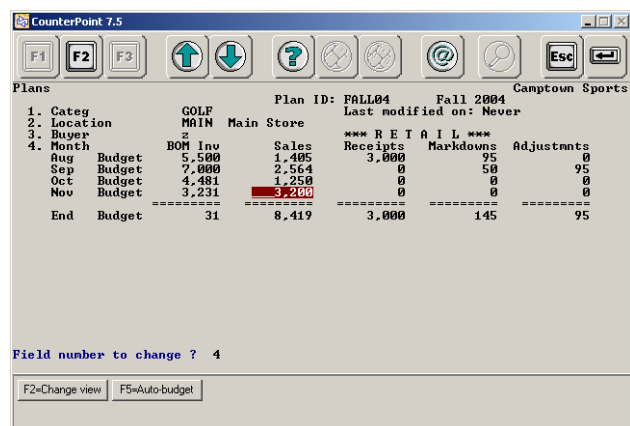
Open to Buy refers to merchandise budgeted for purchase during a certain time period that has not yet been ordered. Open to Buy is also the process of planning merchandise sales and purchases.

The **Open to Buy Option** is a merchandise planning tool that assists you in setting budgets for sales activity and merchandise inventory levels, and monitoring the current status of the open-to-buy

amount (the amount remaining to be ordered to meet the budget).

Plans

Open-to-buy planning is performed on a classification level, not at an item number (SKU) level. Merchandise plans may be established and organized by department and class, vendor and department, department, or vendor.



1. Categ	2. Location	3. Buyer	4. Month	Budget	BOM Inv	Sales	Receipts	Markdowns	Adjustments	End Budget
Aug	Budget	5,500	1,405	3,000	95	0				
Sep	Budget	7,000	2,564	0	50	95				
Oct	Budget	4,481	1,258	0	0	0				
Nov	Budget	3,231	3,200	0	0	0				
End	Budget	31	8,419	3,000	145	95				

Plans may be set up for an individual store or for a location group of up to 48 stores. Plans may be entered manually, or automatically rescaled from historical data, using prior budget or actual figures.

Plans may be budgeted using retail dollars (selling price), purchase cost, or units (quantity). Each plan is broken down by classification by month and, optionally, by store. Plans may be created globally, then split across multiple stores.

Budgets and Actuals

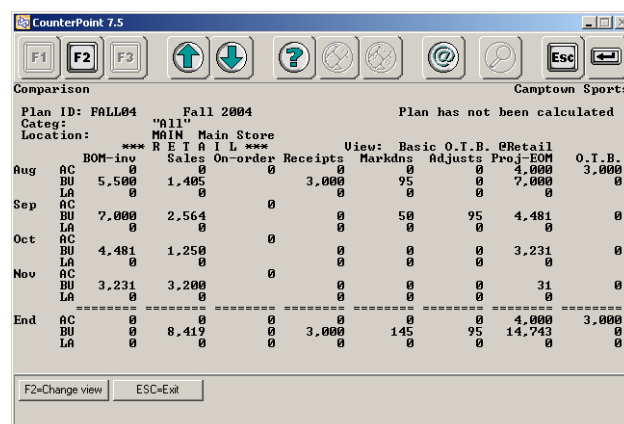
A plan contains budget figures for beginning-of-month inventory levels, projected sales, receipts, markdowns, adjustments, and end-of-month inventory levels.

The calculate function integrates the actual figures into the plan using information from outstanding purchase orders and merchandise history.

Views

The Open to Buy what-if screen allows you to view the current open-to-buy situation (a consolidation of budgets and actuals) and note what effect new or cancelled P.O.s would have on the open-to-buy status.

A series of user-configurable comparison screens allow for the presentation of this-year/last-year, budget/actual, and open-to-buy information expressed as retail dollars, costs, or units.



1. Categ	2. Location	3. Buyer	4. Month	Budget	BOM Inv	Sales	Receipts	Markdowns	Adjustments	End Budget
Aug	Budget	5,500	1,405	3,000	95	0				
Sep	Budget	7,000	2,564	0	50	95				
Oct	Budget	4,481	1,258	0	0	0				
Nov	Budget	3,231	3,200	0	0	0				
End	Budget	31	8,419	3,000	145	95				

User-configurable comparisons allow you to choose what you view using the following elements:

- Sales
- Receipts
- On order
- Markdowns
- Adjustments
- Freshness %
- Gross profit \$ or %
- BOM inventory
- EOM inventory
- Open-to-buy amount
- Stock-to-sales ratio
- Avg sales \$ per unit
- Avg cost \$ per unit
- Markdown to sales %

Figures may be displayed at retail, cost, or units:

- This year's budget
- Last year's budget
- Actual as % of budget
- This year's actual
- Last year's actual
- Actual as a % of last year

A user-configurable report provides capabilities similar to those described for the view screens.

CREDIT CARDS (NON-CMP)

Overview

Processing under the CounterPoint Merchant Program (CMP) is provided in the CounterPoint Base System. With the **Credit Cards Option (Non-CMP)**, you can choose to process through one of CounterPoint's Preferred Processors.

Preferred Processors

CounterPoint supports credit card processing through any of the Preferred Processors:

- First Data North (FDMS North)
- First Data South (NaBANCO)
- Vital (VisaNet)
- Paymentech
- Any bank compatible with a Preferred Processor

Using a CounterPoint Preferred Processor ensures compliance with rapidly changing standards and access to the most favorable rates, as well as industry classifications (Retail, Mail-order/Telephone-order, and Ecommerce), AVS, CVV2/CVC2, dial-up processing, purchase/corporate cards, and CPGateway.

Visa CISP Compliance

CounterPoint is approved by Visa as a CISP-Validated Payment Application. 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.

Capabilities

Capabilities of the **Credit Cards Option (Non-CMP)** are identical to those described under **Credit Cards (CMP)** beginning on page 25).

MODEM SERVER

Overview

The **Modem Server Option** allows Windows workstations to share modems for EDC authorizations and settlement transactions. It is designed to be used in high-volume network environments.

By leaving the phone connection open after completing one card authorization, **Modem Server** allows subsequent authorizations to take place more rapidly.

Setup

Modem Server is a separate application that runs on a CounterPoint workstation. In a typical configuration, a dedicated workstation acts as the Modem Server for multiple client registers. (While

you can use the Modem Server computer as a Ticket Entry workstation, you may find that Ticket Entry performance is unacceptably slow.)

You can view the current status of all Modem Servers from any CounterPoint workstation. This shows:

- How long the server has been running
- General performance statistics
- Recent requests made to Modem Server and their results

Authorization

When you accept payment in Ticket Entry using one of the EDC pay codes, the workstation will automatically contact the appropriate Modem Server. The Modem Server then obtains the authorization and returns it to the requesting workstation.

With **Modem Server**, processing time for each authorization can decrease to as little as three to five seconds. (Actual performance varies widely and depends on the service level of the card processor, quality of the phone lines, modems, and many other factors.)

OFFLINE TICKET ENTRY

Overview

The **Offline Ticket Entry Option** provides lane redundancy (also called fault tolerance) so that registers can continue Ticket Entry operations in Offline mode in the event that a connection to an operational server is lost.

Offline Ticket Entry is also useful when holding sidewalk sales, when operating a portable kiosk, and in wide-area network (WAN) configurations.

Offline Mode

In Offline mode, tickets are captured on local disk drives at each register. When the server becomes operational again, the workstations can upload the offline tickets, which can then be imported into the server's data files.

When CounterPoint is running in Offline mode, you can:

- Open and close cash drawers
- Enter sales and return tickets
- Authorize EDC transactions
- Enter pay-in and pay-out transactions
- Enter pay-on-account tickets
- Enter sales against existing registries
- Award loyalty points
- View ticket history and monthly history
- View register readings

Offline operations are supported for Windows workstations as well as for Unix/Linux systems.

Uploading Offline Tickets

CounterPoint provides the tools necessary to upload offline tickets into the server's data files and automatically checks for duplicate ticket information. Ticket data is deleted from the local offline data files as it is written into the upload file.

CounterPoint allows you to preview the uploadable data files and run a report of the uploaded files.

RENTALS

Overview

The **Rentals Option** allows you to enter rentals, rental returns, deposits, and late fees so that you can track the status and history of your rental inventory.

Assigning Rental Items

You define which items in your inventory are rentals. Rental items are not considered part of your normal inventory. They can be rented, but not sold.

Each rental item is assigned to a rental category. Rental categories allow you to define basic rental policies for groups of rental items, including:

- Up to four rental units per category (e.g., hours, days, weeks)
- Default rental period
- Late fee policies, including cutoff time for returns and maximum late fee
- Deposit policy
- Whether rental charges are due at the time of rental or time of return

Each specific unit of a rental item is tracked by a unique rental ID that can be manually entered or automatically assigned. For example, if you have 25 bicycles available for rent, you would set up a single item for bicycles, and assign a different rental ID to each bicycle. You can then rent out each bicycle (i.e., each rental ID) individually, and CounterPoint will track the rental, the return, any deposit amount, and any late fee for that particular bicycle.

The screenshot shows the 'CounterPoint 7.5' window with a 'Rentals' tab selected. The form contains the following data:

1. Rental ID	RENT00012		
2. Description	Golf Cart Rental		
3. Item number	CART001	Golf Cart	
	Category:	GOLF	Golf
4. Location	MS	Main Store-	Aux
5. Status	Available		
6. Date acquired	3/09/02	10. First rented on	None
7. Original cost	550.00000	11. Last rented on	None
8. Current cost	550.00000	12. Last activity on	None
9. Price-1/DAY	Default		
13. Comment			

Below the form is a 'Field number to change ?' dropdown menu and a row of buttons: F1=Next, F2=Tags, F3=Delete, F5=Notes, F8=History.

For each rental ID, you can also maintain:

- Description
- Date first rented
- Unlimited notes
- Original cost

Viewing Rental Status

At any time, you can view the current status of each rental ID (available, rented, reserved, out-of-service, or inactive). You can also view information about its current rental (customer, rental terms, when it is due back, etc.), its previous rental (customer, when it was returned, etc.), and any current reservation information.

Reservations

The **Rentals Option** allows you to open multiple reservations at one time, so you can schedule rental inventory for your customers by the week, day, or hour.

When making reservations, you may view existing reservations to ensure the rental item is available for the requested time period. If there is a conflict with an existing reservation, you may choose another time period, schedule the rental anyway through an

override, or ask for a list of rental items that are available for the specified time period.

CounterPoint can also assign a confirmation number when a reservation is made. You can retrieve reservations using either the confirmation number or the rental ID.

Additionally, when making a reservation, a function key is provided to immediately reserve an item, without entering date/time information.

Reports

The following reports are available for rentals:

- **Rental Category List**—Provides basic information on each rental category.
- **Rental ID List**—Provides information on individual rental IDs.
- **Rental Status Report**—Provides status information for individual rental IDs.
- **Rental Performance Report**—Allows you to see how well a rental category or specific rental ID is performing.
- **Rental History Report**—Provides detailed rental and return history for particular rental IDs.

Changes in Rental Inventory Value

Rental inventory is considered an asset that is distinct from for-sale inventory. Most companies treat rental inventory as a depreciable business asset.

CounterPoint records the acquisition and disposition of rental inventory using a maintenance screen (not a posting process) and does not create accounting distributions for these activities. Changes in rental inventory value (e.g., depreciation) should be calculated outside of CounterPoint and then may be entered into CounterPoint using **Inventory / Rentals**.

SQL CONNECTION

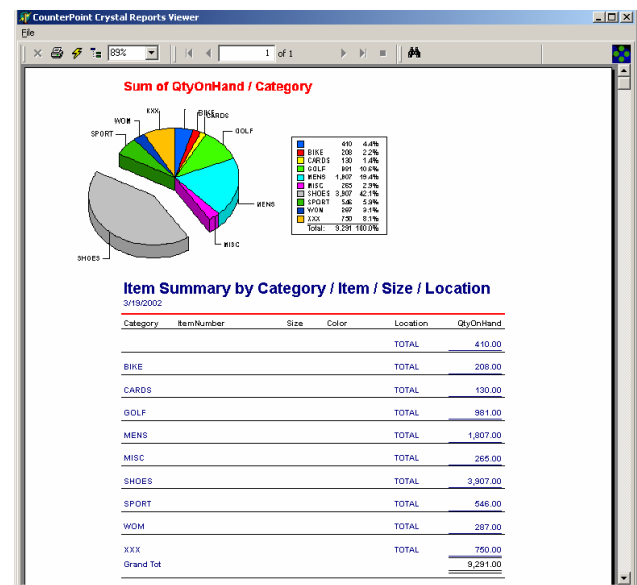
Overview

The **SQL Connection** provides access to your data via ODBC so that you can use tools such as Microsoft Excel, Microsoft Access, and Crystal Reports.

The **SQL Connection** lets you easily access and display real-time CounterPoint data in charts, graphs, and tables. It allows you to run a client application, such as Microsoft Excel, and view the CounterPoint data files in the format you want.

As you create your own spreadsheet reports, they automatically become available on the **SQL Connection Reports** menu. A Refresh menu selection is provided to display updated data values.

The **SQL Connection** can also be used with tools such as Crystal Reports, Microsoft Access, or Visual Basic to produce more sophisticated applications that access the CounterPoint data files directly to present information.



Crystal Reports

Crystal Reports is a valuable tool for defining your own reports and presentations of your business information. The **SQL Connection** provides the tools you need to access your CounterPoint business records using Crystal Reports. (Crystal Reports is purchased separately.)

Crystal reports can be output to paper, to a file on disk, or viewed interactively on the screen. Interactive screen displays provide very powerful capabilities to view summarized information, then “drill down” for more detail in a particular subject area. Reports and displays can include text as well as graphical information, such as charts and images.

A complete listing of CounterPoint tables in “English” format is provided, along with linking information that is valuable for reports that require multiple tables. CounterPoint is installed with four sample Crystal reports. Reports designed using Crystal will appear automatically on the SQL Connection Menu (the same place where you can run Excel reports).

Store	Sales Rep	Cust #	Cust name	Ticket #	Ticket date	Item #	Description	Quantity	Sale amt
020	P10	Fred Brown	00000000003100	010318	05/25/1999		Bag, Golf Jr.	2.00	57.90
020	P10	Fred Brown	00000000004100				Price	1.00	0.95
001			Glove, All Weather Jr.					2.00	57.90
Grand totals:								2.00	57.90

WAN/WORKGROUP

Overview

Wide-area networks (WANs) allow users at remote sites to run CounterPoint from a single server, connecting to a single database. The **WAN/Workgroup Option** provides features to support the unique requirements of a WAN or Unix environment.

Let's say your WAN server is in Miami and your West store is in Los Angeles. You can configure CounterPoint so that your Los Angeles users only see West inventory, have their own series of West order numbers and P.O. numbers, and operate on Pacific time. This is accomplished using “workgroups”.

Workgroups

A workgroup is a way to define users who have similar requirements. For example, all Miami users are associated with the South store/location, and all Los Angeles users are associated with the West store/location.

Each workgroup has its own set of control files with its own location, store, profit center, order numbers, P.O. numbers, etc.

A workgroup may have a “local time offset” so that your Los Angeles users will see screens and reports in Pacific time instead of Eastern time.

WAN Security

Environment variables allow you to configure the Miami workstations so that they can only use the workgroup for the South store/location. You can also restrict unauthorized users so they can only process transactions for their own store/location.

Offline Ticket Entry and WANs

When your communication lines go down, your WAN will not function. For Windows systems, the **Offline Ticket Entry Option** lets you continue critical Ticket Entry functions when the WAN server is inaccessible or not operational.

To continue operations locally (like in Los Angeles), the **Offline Ticket Entry Option** uses local copies of the critical data files, such as items, customers, etc.

You can send periodic net changes for the Item, Inventory, Serial, and Customer files to keep the Los Angeles workgroup up to date. This approach to transmitting net changes (only the information that changed since the last transmission) for specific locations is similar to that used in polled Multi-Site environments.

WIRELESS

With the **Wireless Option**, you can run CPWireless (a scaled-down version of CounterPoint designed for PDAs) on handheld, wireless PDA devices. Update your CounterPoint system in real-time from the sales floor, the warehouse, or even the parking lot. With the Wireless Option, you can enter mobile tickets (line-busters), receivings, transfers, price verification, price updates, physical count, and more.

CPWireless extends your CounterPoint system to handheld, wireless PDA devices. PDAs connect to CounterPoint using 802.11 wireless technology. Your in-house CPWireless Web Server manages communications between the handheld PDAs and your CounterPoint system.

Compatibility

CPWireless is compatible with handheld devices running the Palm or Pocket PC operating systems. CPWireless works with CounterPoint on Windows, Unix/Linux, and NetWare systems. Both manual entry and barcode scanning are supported.

Mobile Tickets

Mobile Tickets provides “line-busting” functionality and allows your sales people to walk the floor with the customer to provide mobile customer sales and service—without being tied to the checkout register.

The Mobile Tickets application lets you create Hold tickets that can be quickly looked up and retrieved at a CounterPoint workstation. Setup options allow Hold tickets to have either sold or ordered lines. Mobile Tickets is valuable for many types of businesses, including service-oriented retailers and/or retailers with large floor areas, such as lawn/garden centers or department stores.

Item Functions

Basic item lookups and inquiries are available using manual or scanned entry, by item number, barcode, vendor item number, or a variety of keyword lookup methods. You may enter Price-1 changes for the Stocking and Alternate units. You can see quantity-on-hand information and enter a “quick count” to create a physical count transaction to correct inventory. You can also create tags for printing later in CounterPoint.

Receivings

You can use CPWireless devices to process receivings and update your CounterPoint **Purchasing** and **Inventory** records. This feature allows you to receive purchase orders, add lines to purchase orders, update prices and costs, receive P.O.s, and even create tags for received items directly from your CPWireless handheld device.

Physical Count

You can use CPWireless to perform a physical count and upload your physical count data into CounterPoint for review and posting. Physical counts can be performed either by scanning the

counted items or by entering the item numbers and quantities. CPWireless simplifies taking inventory by removing the process of writing down physical count quantities and manually entering the data into CounterPoint.

You can configure CPWireless to automatically create physical count transactions for counted items, and you can configure it to track physical counts for particular zones (areas in your warehouse or stocking location) so you can more easily audit your physical counts.

Authorized users can upload physical count data and review, edit, and upload the physical counts entered by other users. All CPWireless physical count entries that are uploaded to CounterPoint are also stored in an external audit file. Authorized users can review this file from within CPWireless or export it to a third-party application, such as Microsoft Excel, for sorting and analysis.

MULTI-CURRENCY P.O.

Full support is provided throughout **Purchasing** for multiple foreign currencies. You can define a “home currency” for your company and a default “P.O. currency” for each vendor. Each P.O. has a P.O. currency and exchange rate. Miscellaneous charges can be entered using either the home or P.O. currency. P.O.s can be vouchered using either the home currency or the P.O. currency.

P.O. Costs

Throughout CounterPoint, P.O. costs are presented in terms of the P.O. currency—purchase requests, receivings, adjustments, history, and other views and reports reflect the P.O. currency. P.O. costs are presented in home currency when appropriate, or when multiple P.O.s are presented at one time.

BASIC ACCOUNTING

Overview

The **Basic Accounting Option** adds Accounts Payable, General Ledger, and Check Reconciliation to your CounterPoint system. **Basic Accounting** is

designed to meet the entry-level accounting requirements of a small business.

Basic Accounting is fully integrated with your existing CounterPoint system to give you better control over your business:

- Issue Accounts Payable checks to the same vendors you use for **Inventory** and **Purchasing**.
- Use the same accounts for General Ledger that you use for other CounterPoint functions.
- Produce financial statements in General Ledger from the distributions created by other CounterPoint functions.
- Define bank accounts to report information from Accounts Payable checks, bank deposits, and Check Reconciliation entries.

Basic Accounting does not require you to run any month-end or year-end processes. You can optionally restrict transactions that are outside of the current year.

Accounts Payable

Use Accounts Payable to record invoices (create new payables) and track monies owed to your vendors. You can subsequently process payments and issue computer-generated checks to pay those invoices. You may also record payments made using manually issued checks and/or credit cards.

Payables may be entered manually (typically for non-inventory expenses) or vouchered from received purchase orders (for inventory).

Enter an invoice and issue a check in a single, simplified transaction. You can even cut a check to a miscellaneous vendor on-the-fly, without creating a new vendor.

A variety of views and reports are available to manage your unpaid invoices, and to see detailed history of invoices, payments, and discounts for both unpaid and paid invoices. You can also view monthly history for purchases from and payments to your vendors. Reports include the Vendors list, Open Items, Aging, Cash Requirements, Cash Planning, Unvouchered Receivings, G/L Reconciliation, Vendor History, and 1099 reports.

General Ledger

Use General Ledger to define your chart of accounts and classify accounts for financial reporting purposes.

Distributions from CounterPoint functions are easily interfaced to create journal entries. You may also enter journal entries manually or import transactions from an external file.

You can view and report detailed General Ledger activity for current and prior years, or view monthly summaries. Use the pre-defined financial statements for Balance Sheet and Profit & Loss reporting to show the current month and year-to-date information. You can also define your own statements for current or prior years and compare the actual results to budgets, variances, and percentages. Statements may be printed or exported to a spreadsheet.

Other reports include the Trial Balance, Distribution, Budgets, and Journal Entry History report. Users who require advanced financial reporting can use the **SQL Connection Option** to extract financial information.

Check Reconciliation

Check Reconciliation accepts and reports checkbook activity from Accounts Payable and deposit detail from CounterPoint's **Payment History / Deposits History**. You can also use Check Reconciliation to manually record deposits or other checking account activity, such as withdrawals, service charges, interest, adjustments, or transfers. Complete checkbook activity details can be retained for multiple bank accounts.

Check Reconciliation allows you to group and mark checks that have cleared the bank so that you can reconcile your records to your bank statement.

Reports include the Checkbook History report which shows detailed activity for each bank account and includes beginning and ending balance, deposits, checks, service charges, etc., and the Reconciliation report which presents cleared items, outstanding items, beginning/ending balances, and discrepancies.

ADDITIONAL TOPICS

CounterPoint may be configured to offer a choice of operating environments. Radiant's additional products and services complement those of our CounterPoint Business Partners.

BUSINESS PARTNERS

CounterPoint software is available exclusively from CounterPoint Business Partners who provide complete business solutions that include software, equipment, services, training, and ongoing support.

SYSTEM CONFIGURATION

CounterPoint is available in single-user and multi-user versions, and operates in a single-site or multi-store environment. Configurations are available for Single-Sites, Multi-Site Hubs, Remote Store Satellites, and P.O. On-the-Go laptops.

CounterPoint is hardware-independent and takes an open-architecture approach to ensure compatibility with a variety of computer platforms and point-of-sale peripheral devices.

CounterPoint functions well in a wide variety of operating environments, including Windows, NetWare, Unix/Linux, and Citrix. Minimum equipment configurations are shown below for these environments.

Minimum Requirements

- The minimum recommended CPU is a Pentium. The minimum supported CPU is a 486.
- Supported Windows workstations include Windows 98, NT, XP, and 2000. Minimum memory for a Windows workstation is 32MB (or whatever is required to run Windows comfortably).
- In a multi-user environment, supported servers include NetWare, Windows NT, XP, 2000, and 2003 Server. Minimum memory for a server is 64MB. A server running Windows NT, XP, or 2000 can also function as a workstation.
- Supported Unix/Linux systems include SCO Open Server, Red Hat Linux, and SCO UnixWare.

- Pervasive.SQL is included as part of CounterPoint for Windows and is required for proper operation. Unix/Linux systems do not use Pervasive.

POINT-OF-SALE HARDWARE

An open architecture ensures compatibility with hardware from Radiant Systems as well as from a variety of other manufacturers.

By choosing Radiant Systems as the single source for your integrated hardware and software solutions, you reduce your implementation risks and optimize the technology solution for your environment.

Radiant Systems Hardware

Radiant Systems offers a comprehensive line of hardware solutions designed especially with CounterPoint users in mind. Our hardware is built to last in the harshest retail and wholesale environments.



Our approach is simple: *reliable and compatible solutions with low total cost of ownership.* Cost-effective maintenance plans keep your hardware in first-rate condition while lowering your overall technology costs.

Radiant's full line of hardware includes compact workstations with easy-to-use touchscreen interface, powerful back-office servers, handheld wireless tablets, indoor and outdoor kiosks, and more.

CounterPoint-compatible workstations include:

- **P1550 Workstation (Premium Model):** The P1550 is Radiant's most advanced all-in-one workstation. It features key innovations such as a high-bright 15" touchscreen, the latest Intel® technology, passive cooling, and innovative cable management.
- **P1220 Workstation (Value Model):** The P1550 is Radiant's affordably priced all-in-one workstation. It features a 12.1" high-bright touchscreen, the latest Intel technology, and a small footprint with flexible mounting options

Peripheral Devices

CounterPoint supports a wide range of peripheral devices.

S = Serial connection

P = Parallel connection

K = Keyboard-transparent

- **Programmable keyboards (K)**—Specialized keyboards are useful for simplified data entry. They may be used in place of or in conjunction with standard alphanumeric keyboards.
- **Barcode readers and scanners (K)**—Scanners allow high-speed, accurate input of inventory items and other barcoded information such as order numbers, customer numbers, etc.
- **Magnetic stripe card readers (S, K)**—Track 1 and Track 2 magnetic stripe card readers are supported for credit card authorization. Keyboard-transparent card readers may also be used for identifying employees or customers.
- **Check readers (S, K)**—Check readers may be used in conjunction with check processing to pass MICR information to the processor.
- **Handheld data-collection terminals**—Data collected by portable data-collection terminals may be transported to the system by various methods. CounterPoint can import text files

for physical counts, adjustments, P.O. receivings, remote checkout, gift registries, etc.

- **Invoice and Receipt printers (S, P)**—Various types of printers are used to output user-defined forms for printing receipts and invoices, validating checks, and printing other documents.
- **Cash drawers (S, P)**—Cash drawers can be connected directly to the computer's serial or parallel ports, or through a point-of-sale printer with cash-drawer kickout ports.
- **Handheld wireless PDA devices**—Connect wireless handhelds to your CounterPoint system to enter mobile tickets, receivings, physical count, and more.
- **Touchscreen monitors**—Any Windows-compatible touchscreen monitor works with CounterPoint.
- **Customer pole displays (S, P)**—These devices display change due and can also display sale amounts, item descriptions, and prices.
- **PIN Pads (S, K)**—PIN Pads are required for debit card processing. Support is provided for the Verifone series 101, 201, 1000, and 2000 models.
- **Modems (S)**—Modems are used for credit card and check authorizations and for polling environments. For credit card processing in a Unix/Linux environment, a single modem may be shared by multiple workstations. In a Windows environment, each workstation requires its own modem, or the **Modem Server Option** may be used to share modems.
- **Weight scales (S, K)**—CounterPoint may request a weight from a serial scale, or transmission may be initiated manually.

In addition to the connection methods shown, some Unix/Linux workstations provide support for a local printer output and/or the wedging of input devices between the terminal and the computer.

MULTI-SITE

Overview

Multi-Site capabilities are an integral part of CounterPoint, enabling a Hub and one or more satellites

to operate independently during the day, and synchronize nightly by efficiently exchanging information. CounterPoint configurations are available for Multi-Site Hubs, Remote Store Satellites, and P.O. On-the-Go laptop systems.

Polled Multi-Site processing is an alternative to WAN Operations (see [WAN/Workgroup Option](#) on page 45).

Multi-Site Benefits

Multi-Site operation of multiple stores offers many benefits, including:

- Reliable, independent operations across multiple sites
- Cost-effective information exchange across sites
- Multi-location data integrity
- Automatic, unattended, remote-site updating
- Data remains synchronized across multiple sites
- Audit log of all activity
- Audit log of any errors along with recommended corrective actions

Unattended Nightly Processing

At each Satellite, as part of the normal end-of-day process, Multi-Site gathers and compresses the day's sales activities, purchasing/receiving activities, transactional activities, and any database changes into a Satellite transmission file. Nightly, the Hub polls each Satellite and retrieves its transmission file. (Alternatively, the Satellites can call the Hub.)

At the Hub, **Multi-Site** consolidates the individual Satellite files and prepares a "packet" for transmission to the Satellites. This packet contains only the information that has changed, thus minimizing the amount of data that is transmitted. Packets include data changes due to activities such as sales, returns, receivings, and transfers, along with new inventory items, price revisions, new and changed customers, customer address changes, email messages, etc.

The Hub then polls and updates each Satellite. In the morning, every store is up-to-date with current information, and the Hub has complete and current accounting information for all stores. Logs

documenting all overnight activities are created automatically at the Hub and the Satellites.

All of this is done unattended, overnight, with no operator intervention. CounterPoint provides batch and event controls to prevent duplicate and skipped transmissions. The Event History report presents the key events that take place in your Multi-Site system in a chronological order. The Operations Status report tells you whether your daily operations took place as expected, allowing simplified monitoring of historical activity.

Detecting Data Changes

Automatic change detection is built into virtually every data file. This means that CounterPoint can quickly and reliably identify every record that has changed and transmit only changed records during overnight processing.

Configuration

In a **Multi-Site** system, each site is an independent CounterPoint computer system, eliminating the need to rely on a dedicated communication link. The main location is a Hub configuration, with built-in support for some number of Satellites.

Capabilities are built into CounterPoint to simplify the implementation, monitoring, and maintenance of a multi-location system. Multi-Site utilities synchronize the Satellites with the Hub, and provide summarized or detailed reports of the contents of the transmission files and the overnight activity logs.

Operating Systems

Multi-Site works across multiple operating environments and allows the exchange of data between Windows and Unix/Linux systems.

Options

Most Options that are purchased for a Hub are automatically activated at the Satellites. Notable exceptions include **Credit Cards**, **SQL Connection**, and **Offline Ticket Entry** Options.

Communications

Multi-Site includes BLAST software for high-speed, error-correcting communications. BLAST allows automatic polling, automatic retry (when

telephone lines are not functioning properly), and extensive diagnostic features.

An asynchronous modem and dial-up telephone line are required. High-speed modems are recommended to minimize transmission times.

The Hub initiates polling to obtain information from the Satellites. For systems with many Satellites, or with mobile Satellites, polling may be Store-initiated.

Internet Polling

Polling may also be performed via the Internet.

Internet polling is part of the standard overnight processing, following the existing conventions for Hub-initiated and Store-initiated communications.

Internet polling requires a reliable Internet Service Provider (either a direct or dialup).

Affected Applications

Virtually all of the CounterPoint applications are involved in **Multi-Site**. When an item is added at one site, it is automatically added at all sites. When a customer's address is changed, that change is updated everywhere.

Mail is transmitted to all sites. **Point of Sale** and **Order Entry** sales and orders are transmitted from the Satellites to the Hub. Purchase orders and transfers may be initiated at one site and completed at another site. **Timecards** information may be collected at the Satellites and forwarded to the Hub for consolidated reporting and processing.

Summary

Multi-Site is a field-proven solution for multi-location retailers and has been in use since 1988. **Multi-Site** ensures successful installations, proper system controls, data integrity, and satisfied users across multiple locations.

ADDITIONAL SERVICES

Radiant Systems offers ecommerce, credit card processing enhancements, training, technical support, and an annual User Conference to help you get more out of your CounterPoint system.

CPOnline

CPOnline is an ecommerce and Web-hosting service designed especially for CounterPoint merchants.

You can use CounterPoint to publish inventory, customers, and pricing to your CPOnline store with a minimum of effort and expense. Then, you can process and fulfill orders received online through CounterPoint. With CPOnline, your inventory, customers, and pricing are always in sync.

CPOnline combines the essential tools of ecommerce into one simple package, including member-specific items and pricing, eNewsletters, Froogle™ submissions, automatic email notifications, real-time credit card authorizations, package tracking, and a wide range of payment and shipping options.

Visit www.counterpointonline.com for more information.

CPGateway

CPGateway enhances credit card processing for CounterPoint merchants. With CPGateway, you can authorize credit cards, debit cards, EBT food stamps, stored value cards, and checks over the Internet in less than two seconds.

CPGateway allows you to obtain authorizations from your processor using the Internet instead of dialing out for each authorization. This method is faster and more reliable than dial-up communications.

CPGateway is suitable for businesses of all sizes. High-volume businesses will benefit from fast authorizations all year long. Lower-volume businesses can reduce monthly fees by using CPGateway only during their peak seasons.

CPGateway offers:

- 2-second authorizations for credit cards, debit cards, EBT food stamps, stored value cards, and checks
- Internet-based service
- Faster settlement times
- Compatibility with CPOnline (for real-time authorizations in your ecommerce store)

- CISP compliance
- Simple setup
- Economical fees
- Ease of use
- Reliability
- Security
- One Internet connection for multiple workstations
- Compatibility with the CounterPoint Merchant Program (CMP), First Data North, First Data South, Vital, and Paymentech
- Automatic fallback using CPDialup
- Direct American Express authorizations instead of routing through processors (reduces bank fees)

You can try CPGateway for free with your new CounterPoint system.

Visit www.cpgateway.com for more information.

CounterPoint Subscription Service

The CounterPoint Subscription Service (CSS) automatically keeps your CounterPoint system up-to-date. It is required during the first year, and is strongly recommended in future years to get the most out of your investment and minimize your maintenance costs.

With CSS, you receive all feature enhancements (updates and corrections) as they are added to CounterPoint, along with updated documentation. CSS also ensures that your CounterPoint system remains CISP-compliant. Plus, you can access the CounterPoint Users Forum and other user-only areas of our Web site.

CounterPoint Users Forum

The CounterPoint Users Forum is the official forum for you to share questions, suggestions, and information with other CounterPoint users at forum.synchronics.com.

HelpDesk

HelpDesk provides supplemental support to help ensure the successful operation of your CounterPoint system. An annual HelpDesk agreement provides access to telephone and email support whenever you need it—24 hours a day, 363 days a year!

Each plan includes a specific number of prepaid support hours. Ask your CounterPoint Business Partner about signing up for HelpDesk to supplement the primary support services you already receive from your Partner.

Training

Comprehensive training courses cover all aspects and features of CounterPoint and provide discussion for the best way to integrate features with your business.

Visit www.synchronics.com/training for training schedules and course descriptions.

CounterPoint User Conference

Join us for our annual CounterPoint User Conference (typically held in February).

You can meet the people behind the software, learn new things that your system can do, and “talk shop” with hundreds of other CounterPoint users. The entire Conference is geared toward helping you get more out of your CounterPoint system.

Visit www.synchronics.com/conference for more information.

www.synchronics.com

Visit our Web site, www.synchronics.com, for additional information on CounterPoint.

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