



## CounterPoint SQL V8.3.9 (September 2009)

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### Accounting

- **QuickBooks 2009 direct interface**

This version of CounterPoint includes a direct accounting interface to QuickBooks 2009, allowing you to transfer distributions and voucher receivings to your General Ledger and Accounts Payable modules. You can also use this interface to import accounts from your General Ledger into CounterPoint and to exchange vendor information between Accounts Payable and CounterPoint.

Direct interfaces to QuickBooks 2003 through 2008 are still supported.

The QuickBooks 2009 accounting interface require QuickBooks Foundation Classes (QBFC) 5.0 or later.

- **QuickBooks Canada 2008/2009 direct interface**

CounterPoint now includes a direct accounting interface to QuickBooks Canada 2008 and 2009, allowing you to transfer distributions and voucher receivings to your General Ledger and Accounts Payable modules. You can also use this interface to import accounts from your General Ledger into CounterPoint and to exchange vendor information between Accounts Payable and CounterPoint.

Direct interfaces to QuickBooks Canada 2005 through 2007 are still supported.

The QuickBooks Canada 2008/2009 accounting interface requires QuickBooks Foundation Classes (QBFC) 5.0 or later.

 The QuickBooks Canada 2008 direct interface was released in a V8.3.8 Service Pack.

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- **Sage BusinessWorks 2009 direct interface**

This version includes a direct accounting interface for Sage BusinessWorks 2009, which allow you to transfer distributions and voucher receivings to your General Ledger and Accounts Payable modules. You can also use this interface to import accounts from your General Ledger into CounterPoint and to exchange vendor information between Accounts Payable and CounterPoint.

Direct interfaces to BusinessWorks 5.0 through v8 are still supported.

✎ This feature was released in a V8.3.8 Service Pack.

#### ▪ **Peachtree 2009 export interface**

This version includes an export accounting interface for Best Software's Peachtree 2009, which allows you to transfer distributions and voucher receivings using a pre-defined Data Transformation Services (DTS) package.

Export interfaces for Peachtree 2005 through 2008 are still supported.

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### Point of Sale

#### ▪ **User-entered discounts**

CounterPoint SQL now allows authorized users to enter ticket and line-item discounts in **Ticket Entry** and **Touchscreen Ticket Entry**. User-entered ticket and line-item discounts are indicated on receipts, included on all relevant reports, and reflected in the corresponding accounting distributions for discounted tickets and items.

This feature provides support for basic discounting practices that are commonly used by most merchants, negating the need for custom modifications that were required to implement similar functionality in previous versions.

To allow users to enter ticket and line-item discounts, you must first define the corresponding discount codes using the new **Discounts Codes** window. For each discount code, you must specify whether the discount code represents a **Line Item** discount or a **Ticket** discount, the amount or percentage of the discount, and whether users can change the default discount amount or percentage. In addition, you can define a minimum qualifying amount for each discount code to determine the minimum price for a **Line Item** discount or the minimum ticket subtotal for a **Ticket** discount.

You can authorize users with appropriate Point of Sale security codes to enter ticket and line-item discounts, and to override the maximum discount amount and maximum discount percentage values that you define for each store. Finally, you may specify whether items are eligible for discounts using the new **Discountable** check box on the Items window.

✎ All items are discountable by default.

In **Ticket Entry** or **Touchscreen Ticket Entry**, authorized users can apply a single **Line Item** discount code to each line and a single **Ticket** discount code to each Point of Sale document (including tickets, orders, and layaways). Ticket and line-item discounts "stack,"

allowing both types of discount to apply to a single line. For example, if you apply a \$5 discount to a \$100 item, and then apply a 10% discount to the ticket, the total discount for that line item will be \$14.50  $((100-5) \times 10\%)$ .

When you print a receipt for a ticket that includes discounts, each line-item discount appears directly below the corresponding line and the applicable ticket discount appears after all lines, above the **Subtotal** amount. In addition, a discount summary appears at the bottom of the receipt to indicate the total amount of all discounts on the ticket (i.e., "You saved \$14.50").

#### ▪ **Scrapping items during returns**

Previously, when a customer returned an item that was broken, defective, or otherwise could not be resold, you were required to enter and post an inventory adjustment to "scrap" the item.

In this version, you do not have to manually process inventory adjustments to remove scrapped items from inventory. Instead, you can scrap an item while you are entering a return in **Ticket Entry** or **Touchscreen Ticket Entry** by specifying a valid **Scrap** reason code for a return line. When you post a ticket with a **Scrap** reason code, CounterPoint automatically creates and posts the necessary inventory adjustment transaction to remove the scrapped item from inventory and make the appropriate accounting distributions.

#### ▪ **Login for each ticket enhancements**

Previously, when the **Login for each ticket** option was selected, a delay of several seconds occurred between the completion of each ticket and the appearance of the **Ticket Entry Login** window. In this version, this delay is significantly reduced, providing better performance to merchants using this option.

✎ Performance increases may vary, depending on hardware and network configurations.

In addition, when this option was in use, the **Ticket Entry Login** dialog appeared whenever a user closed the **Quote Recall, Hold Recall, Process Orders**, or **Process Layaways** dialog, requiring the user to log in again, even though no ticket was completed. In this version, the user is no longer required to log in after closing any of these dialogs.

#### ▪ **Point of Sale Exceptions report**

This version includes the Point of Sale Exceptions report, which allows you to track the ticket count, average ticket amount, drawer overages and shortages, hours worked, and other daily statistics for each user, as well as the number of Point of Sale exceptions—including price and tax overrides, voided tickets, cash drops and cash loans, manual credit authorizations, and so forth—that each user performed over a specified period.

This report allows you to more easily monitor and manage your users' activity in CounterPoint, helping you to identify patterns that

might necessitate additional training or indicate potential security concerns.

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## Inventory

### ▪ **BOGO/twofer pricing**

CounterPoint SQL now allows you to define "BOGO" (e.g., "buy one, get one free" or "buy one, get one for 50% off") and "twofer" (e.g., "2 for \$1.00" or "3 for \$5.00") price rules for individual items or groups of items. You can also use BOGO/twofer price rules to define "stepped" or "copy shop" pricing (e.g., buy the first 10 for \$.10, the next 10 for \$.09, and so forth), along with a variety of similar pricing schemes that allow items sold in specific quantities to be given different per-unit prices.

This feature provides much greater pricing flexibility than was available in previous versions, allowing you to easily offer your customers a broad range of common pricing scenarios.

When you define BOGO/twofer price rules, you can specify whether the customer must purchase an entire group of items to qualify for the BOGO/twofer price, or whether any quantity will qualify. You can also control how CounterPoint will apportion each BOGO/twofer price across the items in the group. In other words, you can define a .34/.33/.33 split or a .49/.49/.02 split for a "3 for \$1" price rule.

Further, you can define filtering criteria to determine when each BOGO/twofer price rule is in effect and whether the price rule only applies to particular stores, customers, and so forth.

Finally, you can combine BOGO/twofer pricing with mix-and-match codes to allow customers to purchase items from a particular category, sub-category, or vendor to qualify for the BOGO/twofer price, instead of requiring them to buy a specific item (e.g., "buy ANY three candy bars for \$1" versus "buy three Snickers bars for \$1").

✎ You must use the **Promotional Prices**, **Special Prices**, or **Contract Prices** windows to define BOGO/twofer price rules. You cannot define BOGO/twofer pricing using **Item Prices** or **Planned Promotions**.

### ▪ **Margin-driven pricing**

Previously, you could define a minimum profit percentage for each item category and sub-category in CounterPoint. However, the values you specified were informational only; CounterPoint did not calculate prices based on these values.

In this version, CounterPoint allows you to define **Minimum margin** and **Target margin** values for each item category and sub-category, and then set **Price-1** values for your items based on these margins. In addition, every **Price-1** field throughout CounterPoint now includes an easy-to-read, visual indicator of whether its current value is above, between, or below the minimum and target margin

values for the corresponding category or sub-category.

These enhancements allow you to monitor and dynamically adjust your item prices to ensure that you are meeting your store's profit margin goals.

Any user who is authorized to enter or view cost information will now see a *margin button* attached to each **Price-1** field in CounterPoint. This button displays the  icon if the current **Price-1** value exceeds the **Minimum margin** and **Target margin** for the item's category or sub-category; the  icon if the price is above the **Minimum margin**, but below the **Target margin**; and the  icon if the price is below both margins.

 You can change the background colors for these icons on the **Pricing** tab of the **Inventory Control** window.

You can move the mouse pointer over the margin button to see the **Current margin**, **Minimum margin**, and **Target margin** for an item. If you change the value in a **Price-1** field, the margin button's icon is updated instantly to let you know the status of the new price.

You can also click the margin button to display the **Set Price** dialog, which allows you to enter a **New Price-1** or **New Margin** for the item. When you enter a **New Margin**, CounterPoint calculates the **New Price-1** value for the item, based on the item's cost. You can also specify a **Rounding value** to automatically round the price to a specific decimal value (e.g., to ensure that the price ends in .99 or .49).

#### ▪ Reason codes for inventory adjustments

CounterPoint now allows you to define reason codes for use with inventory adjustment transactions. Each adjustment reason code identifies the rationale for an adjustment. For example, you might define an adjustment reason code of **BROKEN** to assign to adjustments made for broken items, or **CORRECTION** for adjustments made to correct receiving errors.

For each adjustment reason code you define, you must also specify the **Account** and **Profit center method** that CounterPoint will use by default for inventory adjustments to which you assign that reason code.

When you create an inventory adjustment transaction, you can select an **Adjustment reason code** to explain the transaction. You can also import inventory adjustments with valid **Adjustment reason code** values.

#### ▪ Prompting for tag-along item kit components

Previously, when a user added the parent item of a tag-along item kit to a ticket, all of the kit's component items were added to the ticket automatically. In this version, you can assign a **Component prompt** to any of the components of a tag-along item kit. This feature allows a user to decide, at the time of the sale, whether to add each prompted component to the ticket when the user sells the parent item in **Ticket Entry** or **Touchscreen Ticket Entry**.

☑ Component items for which **Component prompt** values are not defined are still automatically added to the ticket when a user sells the parent item.

#### ▪ **Grid tab on the Items window**

Previously, clicking the **Grid Info** button on the **Items** window or the **Quick Items** window displayed the **Grid Definition** dialog, which allowed you to define grid dimensions for your gridded items, as well as to generate cell-specific barcodes.

In this version, the **Items** and **Quick Items** windows have been updated to include the **Grid** tab, which allows you to define or copy grid dimensions as you are creating a gridded item, rather than requiring you to save the item first, and then access a separate dialog to define the grid.

The **Grid** tab does not allow you to create cell-specific barcodes; instead, you can use the new **Barcodes** tab on the **Items** and **Quick Items** windows to define barcodes—including cell- and unit-specific barcodes—for your items.

☑ The **Grid Info** button has been removed from the **Items** and **Quick Items** windows, as it is no longer necessary.

#### ▪ **Substitute Items tab on the Items window**

Previously, clicking the **Substitute Items** button on the **Items** window or the **Quick Items** window displayed the **Substitute Items** dialog, which allowed you to define valid substitute or replacement items for each item you stock.

In this version, the **Substitute Items** dialog appears as a tab on the **Items** and **Quick Items** windows, allowing you to assign valid substitutes to your items without requiring you to access a separate dialog.

☑ The **Substitute Items** button has been removed from the **Items** and **Quick Items** windows, as it is no longer necessary.

#### ▪ **Barcodes tab on the Items window**

CounterPoint SQL V8.3.8 introduced the **Barcode Management** window, which allows you to manage multiple barcodes for each of your items simultaneously. Previously, you could access the **Barcode Management** window by clicking the **Barcodes** button on the **Items** window or the **Quick Items** window.

In this version, the **Barcode Management** window appears as a tab on the **Items** and **Quick Items** windows, allowing you to create or generate barcodes while you are creating an item, rather than requiring you to save the item first, and then access a separate window to define barcodes.

✎ The **Barcodes** button has been removed from the **Items** and **Quick Items** windows, as it is no longer necessary.

You can still access the **Barcode Management** window by selecting **Inventory > Barcode Management**.

#### ▪ **Simplified automatic barcode generation**

In this version, the **Generate item barcodes** and **Generate cell barcodes** buttons on the **Barcode Management** window have been replaced by a single **Generate barcodes** button. Clicking this button displays the new **Generate Barcodes** dialog, which allows you to define item-specific, unit-specific, and cell-specific barcodes for your items.

This feature simplifies the process of generating barcodes by consolidating all relevant functionality into a single, unified dialog.

✎ The **Generate barcodes** button also appears on the new **Barcodes** tab on the **Items** window and the **Quick Items** window.

#### ▪ **Barcode types**

In CounterPoint SQL V8.3.8, specifying a **Barcode ID** when you assigned a barcode to an item was made optional.

In this version, to reflect the fact that they are no longer required and to better describe their purpose, the term **Barcode ID** has been changed to **Barcode type** throughout CounterPoint, including all field labels and window titles.

You can assign a **Barcode type** to any barcode to attach a meaningful, plain-English label or descriptor to each of your barcodes. For example, you might use a barcode type of CASE for an alternate unit barcode or ACME for a vendor-specific barcode. Using barcode types makes it easier to identify and categorize your barcodes, particularly for items that have multiple barcodes assigned to them.

#### ▪ **Inactive items**

In this version, you can use the **Status** field on the **Items** window to designate items as **Inactive**. Unlike **Discontinued** items, items that are **Inactive** cannot be added to tickets, orders, purchase requests, receivings, or quick receivings.

This feature allows you to retain item records and historical data for items that you no longer sell, while preventing them from being sold or purchased.

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#### **Item Zoom improvements**

In this version, the standard **Item Zoom** has been modified to allow you to more easily view relevant quantity values for gridded items and to enhance the layout and functionality of the **Monthly History** area.

When you click the **View Grid** button on the **Item Zoom** window, the **View Gridded Item** dialog now displays the **Min qty**, **Max qty**, **Qty on hand**, **Qty committed**, **Qty on PO's**, and **Qty on BO** values for each cell at each location by default. You are no longer required to select each of these quantity columns separately from the **View** menu.

✎ You can still customize the **View Gridded Item** dialog to display specific quantity columns by selecting **Custom** from the **View** menu and choosing the columns you want to display.

When you click the **Monthly History** button, you can now choose to view a specific category of monthly history, including **Sales**, **Returns**, **Quantity**, **Tickets**, **Average ticket**, and **Percent returns**. In addition, the Monthly History area is now sorted by stocking location and year, with a separate column for each month's values (i.e., **Jan**, **Feb**, **Mar**, and so forth).

#### ▪ **Model Stock tab on the Inventory window**

Previously, clicking the **Model Stock** button on the **Inventory** window displayed the **Model Stock** dialog, which allowed you to maintain the minimum and maximum quantities and change the **Stocked** status for each cell of your gridded items.

In this version, the **Model Stock** dialog appears as a tab on the **Inventory** window, allowing you to maintain model stock information for your gridded items without requiring you to access a separate dialog. In addition, the **Model Stock** tab lets you select a **Status** option (i.e., **Active**, **Discontinued**, or **Deactivated**) for each cell of a gridded item.

✎ The **Model Stock** button has been removed from the **Inventory** window, as it is no longer necessary.


#### ▪ **Viewing inventory detail across locations**

This version of CounterPoint SQL includes the **Inventory Detail** window, which allows you to review the **Status**, **Price-1**, **Qty available**, **Qty committed**, **Qty on hand**, and other relevant quantity values for a single item or a range of items for a single location or across all of your locations. This window is designed to help you make purchasing, pricing, and stocking decisions by providing a snapshot of your inventory throughout your company.

#### ▪ **Printing labels for specific grid cells**

Previously, when you printed labels for a gridded item using the **Item Labels** window, CounterPoint generated labels for all grid cells. In this version, you can specify only the cells for which you want to print labels and the number of labels you want to print for each cell. This feature allows you to easily create only the labels you need, reducing the potential for wasted label stock.

To print labels for specific grid cells, select a gridded item on the **Item Labels** window, click the  button next to the **Label quantity** field to display the **Item Labels - Grid** dialog, and then enter the **Quantity** of labels to print for each grid cell.


 If you select the **Use quantity from database** check box on the **Item Labels** window, the **Quantity** values on the **Item Labels - Grid** dialog will be determined by the actual quantity on hand for each cell.

#### • **Printing unit-specific labels**

Previously, when you printed item labels for an item with alternate units, CounterPoint automatically generated labels for the item's stocking unit only. In this version, you can print unit-specific item labels by selecting a unit from the new **Units** field on the **Item Labels** window. This feature allows you to easily generate labels with the appropriate unit-specific barcodes for those items you sell in multiple units.

#### **New!** • **Inventory Grid Overview Report**

CounterPoint now includes the Inventory Grid Overview report, which allows you to quickly review quantities for your gridded items at the cell level, along with the quantity sold, sales amount, average and extended cost, gross profit percentage, and markup percentage values for each gridded item. This report summarizes inventory and sales history information for gridded items in a readable and efficient format.

 The Inventory Grid Overview report only includes gridded items. You cannot generate this report for normal (i.e., non-gridded) items.

#### **New!** • **Including cell detail on Inventory Status reports**

Previously, you could include cell-level detail for gridded items on the Inventory Status report only if you selected one of the three (**Location Detail**) options from the **Report** list on the **Inventory Status** report parameter window.

You can now always include cell-level detail on the Inventory Status report, in grid or list format, regardless of which **Report** option you choose. This enhancement allows you to review quantity allocations for your gridded items at the cell level without separating those quantities by location.

#### **New!** • **Including cell detail on the Inventory Analysis report**

You can now include cell-level detail on the Inventory Analysis by Item report by selecting the appropriate option from the **Cell detail** list on the **Inventory Analysis** report parameter window. This enhancement allows you to rank and analyze your gridded items by cell, instead of by item.

**New! ■ Including cell detail on the Inventory History report**

You can now include cell-level detail for gridded items on the Inventory History report by selecting the **Include Cell Detail** option from the **Report** list box on the **Inventory History** report parameter window. This enhancement allows you to review posted, inventory-related transactions (e.g., sales and returns, adjustments, receivings, transfers, and so forth) for your gridded items by cell, instead of by item.

**New! ■ Sell-through Rate report**

CounterPoint now includes the Sell-through Rate report to provide an overview of how well your items are selling based on each item's sell-through percentage, which compares the total amount of inventory that was available to sell during a particular period to the quantity that was actually sold to customers. The report also indicates the Gross Margin Return On Investment (GMROI) and turn rate for each item.

The Sell-through Rate report lets you easily identify items that are performing well and those that are performing poorly, which can assist you in making pricing, marketing, and purchasing decisions. You can also opt to include cell-level detail for gridded items on the Sell-through Rate report, allowing you to track the performance of your gridded items by color/size.

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**Customers****■ Excluding fully-paid tickets from A/R statements**

Previously, A/R customer statements always included all A/R documents, including tickets that have been fully paid.

In this version, you have the option of omitting fully paid documents when you generate A/R customer statements. With this option, statements will only include tickets and other A/R documents that are not fully paid, simplifying each statement and reducing the potential for confusion about which documents still have outstanding balances.

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**Purchasing****■ Forecast-driven replenishment**

You can now create seasonal forecasts for your items, allowing you to more accurately estimate future demand based on historical sales,

using proven forecasting methods. Once you have created a forecast, CounterPoint can use the forecast data to calculate and set the ideal minimum and maximum quantities for your items. In addition, you can generate purchasing advice based on the updated minimum and maximum values to ensure that you have the forecasted quantities on hand for each period or season.

This feature allows you to more easily evaluate your inventory needs, dynamically adjust minimum and maximum quantities, and automatically replenish your stock to meet changing demand for your items.

✎ This feature relies on the aggregated historical data that is generated by the **CounterPoint Data Mart Update** scheduled task. If you are not already aggregating data for Dashboard, you must schedule this task to aggregate forecast data.

Use the new **Forecast** window to define a forecast for a specific time period. For each forecast, you must specify the calendar year, starting season, and number of seasons (up to 12) for which you want to estimate demand. You must also specify the year and season to base the forecast on, or indicate that you want to evaluate all historical data, as well as whether you want to consider items on incoming transfers in the forecast calculations. In addition, you can define the usual criteria (category, sub-category, and so forth) to filter the items in the forecast.

When you have defined a forecast, you can click the **Create Forecast** button to calculate the **Forecasted qty** for each item during each season you specified. If necessary, you can increase or decrease each **Forecasted qty** by a percentage or a specific amount to account for upcoming promotions or other factors that may affect demand. You can also view a graph of the forecast for each item.

Use the new **Purchasing Advice with Dynamic Min/Max** window to calculate minimum and maximum quantities and generate purchase requests from a particular forecast. When you click the **Generate Min/Max** button on this window, CounterPoint calculates new minimum and maximum quantities for the items in the selected forecast, based on the **Safety stock**, **Reorder point**, and **EOQ** (i.e., economic order quantity) for each item. When these calculations are complete, you can select the items you want to update, save their new minimum and maximum quantities, and then generate the Purchasing Advice report—and the corresponding purchase requests—for those items.

✎ The **Safety stock**, **Reorder point**, and **EOQ** values for each item are determined by the **Annual Holding Cost** and **Ordering cost** you specify on the new **Dynamic Min/Max** tab of the **Inventory** window, along with the **Lead time** defined for item's primary vendor on the **Vendors** window. If these values are not specified, they are calculated automatically when you click the **Generate Min/Max** button.

#### ▪ **Margin-driven pricing**

As described in [Margin-driven pricing](#) under [Inventory](#), you can now specify minimum and target margins for item categories and sub-categories, and then set prices for your items based on those values. In a related feature, CounterPoint now allows you to set **Price-1** values for your items based on the corresponding minimum and target margins during receiving.

If you are authorized to view or enter cost information in CounterPoint, the **Lines** tab of the **Receivings Enter** window now displays the **Last cost** and **Received unit cost** for each item on a receiving, along with the applicable minimum, target, and current margin values. The **Lines** tab also includes a **Price-1** field with a margin button, which allows you specify a new price for each item on the receiving directly.

In addition, authorized users can click the new **Suggest Prices** button on the **Receivings Enter** window to automatically calculate new **Price-1** values for all items on the receiving, based on the corresponding **Target margin** values and rounded to the **Rounding value** (e.g., .49 or .99) that you specify.

These enhancements allow you to easily determine whether the current **Price-1** values for the items you are receiving meet your defined profit goals and make any necessary price changes before you post the receiver.

- **Generating purchasing advice for lowest-cost vendors**

Previously, when you generated purchasing advice, CounterPoint automatically used the primary vendor for each item that it recommended for purchase, regardless of which vendor offered you the lowest cost for those items.

In this version, you can generate purchasing advice for your lowest-cost vendors by selected **Lowest cost** from the new **Vendor** field on the **Purchasing Advice** report parameter window. This feature helps you ensure that you are paying the lowest possible amount for the items you are restocking.

When you select this option, the **Vendor #** for each item on the Purchasing Advice report indicates which vendor currently offers the lowest cost per stocking unit for that item. When you click the Generate button on the **Purchasing Advice** window, CounterPoint automatically creates purchase requests for those vendors.

- **Generating purchasing advice for a specific vendor**

You can now generate purchasing advice for a single vendor by selecting the **Select** option from the new **Vendor** field on the **Purchasing Advice** report parameter window, and then specifying the vendor. This feature simplifies the process of ordering from a particular vendor by allowing you to quickly determine which items you need to restock from that vendor.

With a specific vendor selected, when you print or preview the Purchasing Advice report, it will include only items with a vendor item record for that vendor. Similarly, when you click the **Generate** button on the **Purchasing Advice** window, CounterPoint will create a single purchase request for the selected vendor.

- **Generating purchasing advice using purchasing units**

You can now generate purchasing advice using purchasing units, instead of stocking units, by selecting the **Vendor** option from the new **Units** field on the **Purchasing Advice** report parameter window. This feature allows you to replenish items using your vendors' preferred units, without requiring you to modify the resulting purchase requests.

With this option selected, the quantity and unit values for each item on the Purchasing Advice report, and on the resulting purchase requests, will be based on the **Purchasing unit** in the corresponding vendor item record.

✎ The **Purchasing unit** for each vendor item must also be defined as a valid alternate unit in the corresponding item record.

#### ▪ **Consolidating lines on purchase requests**

Previously, CounterPoint did not consolidate identical lines on purchase requests. In other words, if a user entered a new line for an item that was already on an existing line, CounterPoint kept those lines separate, making purchase requests more difficult to read and complicating the receiving process, since each line had to be received separately.

In this version, you can now choose to consolidate lines on purchase requests for all items, gridded items only, or non-gridded items only. With these settings, whenever a user enters a new line on a purchase request for the selected type of item, CounterPoint determines whether an identical line—that is, a line with the same **Item number**, **Unit**, **Unit cost**, **Line delivery date**, and **Line cancel date** values (and **Location**, for allocated purchase orders)—already exists. If so, the two lines will be consolidated.

This feature makes it easier to determine what is being ordered and simplifies the receiving process, since each item will only appear on a single line.

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#### **Simplified entry of gridded items on purchase requests**

When you add a gridded item to a purchase request on the **Purchase Request Enter** window, you can click the **Suggest Qty** button on the **Purchase Request - Grid** dialog have CounterPoint automatically fill in the **Qty** value for each grid cell. Previously, these suggested quantities were determined using the **Maximum** calculation method, which sets the quantity to order for each cell to the exact amount necessary to bring the quantity on hand up to its maximum value.

In this version, the **Purchase Request - Grid** dialog includes a number of new fields that allow you to select the calculation method to use for suggested quantities (i.e., **Maximum**, **Replenishment**, or **Days of Supply**), specify how CounterPoint should adjust the suggested quantities, and define a historical period on which to base suggested quantities (for the **Replenishment** and **Days of Supply** methods). These new fields let you control how CounterPoint calculates suggested quantities for gridded items in the same way you define parameters for the Purchasing Advice report.

In addition, by default, the grid cell table on the **Purchase Request - Grid** dialog now displays the suggested quantity, adjusted suggested quantity, minimum and maximum quantities, quantity on hand and quantity on order for each grid cell. These new columns make it easier for users to assess the quantity to order for each cell.

Finally, each row in the grid cell table now represents a single cell (i.e., **Color/Size** combination). These rows are automatically sorted by the first grid dimension (or by **Location**, followed by the first grid dimension, for allocated purchase requests), making it easier for users to enter quantities by cell.

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## Hardware

- **Radiant Thermal Receipt Printer (Bixolon SRP-350 Plus)**

This version of CounterPoint includes OPOS and Windows support for the Radiant Thermal Receipt Printer (i.e., the Bixolon SRP-350 Plus). The Radiant Thermal Receipt Printer is an economical, high-speed receipt printer that includes both USB and serial interfaces.

- **WAN support for Ingenico i6550 payment terminals**


This version of CounterPoint includes a new OPOS driver for the Ingenico i6550 payment terminal. This driver provides reliable performance and improved stability, ensuring consistent operations and allowing merchants to use the i6550 in WAN (i.e., Windows Terminal Services and Citrix) environments.

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## Credit Cards Option

- **Canadian debit card support**

This version of CounterPoint SQL allows you to process Canadian debit cards—as well as Visa, MasterCard, and American Express transactions—through Moneris Solutions, which has been certified as a supported processor.

 Moneris Solutions does not support check processing, EBT food stamps, address verification or card identification services, or stored value cards. In addition, only **Retail** merchants can process transactions through Moneris Solutions; **MOTO** and **Ecommerce** merchants are not supported.

To process Canadian debit and credit card transactions through Moneris Solutions, you must obtain an Ingenico i3070 Secure PIN Entry Device (SPED) from Moneris. Credit and debit card transactions will be transmitted directly to Moneris from the SPED via the Internet,

bypassing CounterPoint's normal authorization and settlement process.

In addition, to comply with the requirements of Canada's Interac Association, you can now configure CounterPoint to print a receipt for each failed Canadian debit transaction.

✍ You must purchase and register the Credit Cards Option to process Canadian debit and credit card transactions through Moneris Solutions.

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## Gift Registry Option



### Gift registries (Enterprise only)

In this version of CounterPoint SQL, you can create and manage gift registries for your customers, allowing them to request and purchase gifts for occasions such as weddings, baby showers, and so forth. This feature enables you to offer a valuable and commonly-used service to your customers while driving traffic to your store.

Use the **Manage Gift Registries** window to define and maintain gift registries. You can specify up to two registrants for each gift registry, one of whom must have a customer record on file. Each registry must also be associated with a specific, user-defined **Occasion** code (e.g., WEDDING, BABY, BIRTHDAY, and so forth). In addition, you can specify the date of the occasion, the city and state in which the occasion will take place, and the shipping address to which gifts purchased from the registry can be sent. Finally, you can make each gift registry available to online customers in your CPOne store.

✍ Online store gift registry support is scheduled for a future release of CPOne.

You can add items to a gift registry by entering them manually or by importing them from a handheld scanner. The latter method allows registrants to scan the items they are requesting, as opposed to filling out a printed form. When a gift registry is complete, you can print a copy of the registry for the registrant(s) to take home.

When a customer comes into your store to purchase a gift from a registry, you can print a copy of the registry for the customer to reference while shopping. This report indicates how many of each item were requested, how many have been purchased, and each item's unit price. A customer can purchase items from different gift registries on the same ticket, along with items that are not from a gift registry. If an item the customer is purchasing isn't on the registry, you can even add it to the registry as a "surprise" gift.

When you complete a ticket that includes one or more gift registry items, the corresponding registry is updated automatically, ensuring that subsequent gift registry reports are up-to-date and reducing the likelihood of duplicate purchases.

- ☒ You must purchase and register the Gift Registry Option to use this feature.

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## Kits/Bills of Material Option

- **Miscellaneous kits (Enterprise only)**

CounterPoint SQL now supports miscellaneous kits, which allow you to associate any number of component items with a single, "miscellaneous" (i.e., **Non-inventory** or **Service**) parent item. When a user sells the parent item in **Ticket Entry** or **Touchscreen Ticket Entry**, the associated components are added to the ticket automatically.

Unlike tag-along kits, each component of a miscellaneous kit is not treated as an individual line item. Instead, all of a miscellaneous kit's components are grouped together below the parent item, which means that the component lines cannot be separately edited, moved, or deleted. Further, the total price of a miscellaneous kit is always based on the parent item's price, which is allocated among the component items in proportion to each one's individual **Price-1** value.

When you define a miscellaneous kit, you can specify whether users can substitute **Any Items** or **Defined Substitutes** only for each component (or **Other Grid Cells** for gridded components). You can also indicate whether the total price of the kit will be adjusted to account for price differences between the substitute item and the component, along with the price basis for the adjustment (i.e., **Price-1** through **Price-6**).

- ☒ When a user substitutes an item for a component of a miscellaneous kit, CounterPoint calculates any price adjustment for the substitution and indicates the resulting increase or decrease in the **Line item price** column for the corresponding component line.

Sales of miscellaneous kits are tracked by parent item and by component item, for inclusion on all relevant sales reports, while accounting and cost distributions are only generated for component items (i.e., not parent items).

- ☒ You must purchase and register the Kits/Bills of Material Option to use this feature.

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## Offline V2 Option

- **Working in offline mode during version updates (V8.3.9 Service Pack)**

Previously, when you updated an Offline V2 environment to a new version of CounterPoint, you were required to suspend all CounterPoint operations until your server and all of your offline workstations were updated.

As of this version of CounterPoint, if you are updating from V8.3.8, users will be able to continue working in offline mode on registered Offline V2 workstations while you update your server database, reducing downtime during the update process. Any tickets entered in offline mode will be converted to the new data format when you update your offline workstations.

✘ If you are updating from V8.3.7, you still cannot work in offline mode while the server database is being updated, as tickets entered in offline mode in a V8.3.7 database will not be converted properly to the new V8.3.9 data format.

This feature will be delivered in a V8.3.9 Service Pack.

### ▪ **Defining a database maintenance window**

In this version, you can use the Radiant Management Console to specify a daily maintenance window for your Offline V2 server database. During the specified time period, the Radiant CounterPoint Service (formerly known as the Radiant Synchronization Service) will suspend all operations, allowing you to perform any SQL Server maintenance functions that require complete access to your server database.

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## System

### **New!** • **Workstation registration**

You can now *register* physical workstations in CounterPoint, associating them with the specific company for which they are registered. Further, you can restrict a company to registered workstations only, effectively preventing users from accessing the company database using an unauthorized (i.e., unregistered) computer. This feature makes it easier to control which computers can access your company database, allowing you to better manage your company's security policy.

### ▪ **Work Center**

This version of CounterPoint SQL includes the **Work Center**, which allows you to view, create, and post a variety of document types—including cash receipts, inventory adjustments, purchase requests, receivings, transfers, and so forth—from a single, centralized interface. This feature simplifies the management of your workload, providing a snapshot of open documents and allowing you to complete the enter/edit/post process without requiring you to access multiple, separate window.

The **Work Center** window displays summary information for open (i.e., unposted) documents in a spreadsheet-like format, filtered by batch and document type. You can click any **Document #** to view and edit the document on the corresponding document entry window,

provided you are authorized to edit the selected document type. In addition, you can click the **New Document** button, and then select a document type to create a new document directly from the **Work Center** window.

The **Work Center** also allows you to post open documents, either singly or in batches. Clicking the **Post Document(s)** button posts the individual documents you have selected, while clicking the **Post Batch(es)** button posts all documents in the corresponding batches.

#### ▪ **Message Center enhancements**

Previously, CounterPoint SQL allowed you to send "pop-up" messages to individual users or to broadcast messages to all users. However, you could not send a message that did not instantly appear on users' desktops. Further, the message creation and message viewing functions were split into two separate windows.

In this version, the **Messages** and **Message Center** windows have been consolidated into a single window, providing a unified interface for sending and reading messages. The new **Message Center** has also been significantly enhanced to include many of the capabilities of traditional e-mail clients, making it a more robust and useful internal messaging system.

The **Message Center** window allows you to view your **Inbox**, which displays summary information for the messages you have received, and the **Sent Items** view, which lists the messages you have sent. You can double-click a message in the **Inbox** or the **Sent Items** view to read the message in a separate window, or you can choose to display the **Reading Pane**, which allows you to read each message in the **Message Center** window itself.

To create a new message, click the **New Message** button, choose the recipients (either individually or in user-defined groups), type and format your message, and then click **Send**. You can assign each message a priority (either **High** or **Low**) and you can designate any message as an "instant" message, which will pop up on the recipient's desktop.

When you receive a message from a CounterPoint user, a notification icon appears in your Windows system tray (accompanied by an optional, user-specified sound). You can double-click this icon to automatically display the **Message Center** window, and then click the **Reply**, **Reply to All**, or **Forward** button to respond to a message.

#### ▪ **Starter Data changes**

In this version, the Starter Data database has been significantly enhanced, simplifying the process of creating and configuring a new company using Starter Data as a template.

For example, Starter Data now includes a number of additional pre-defined user roles (e.g., **Admin**, **Supervisor**, and so forth), along with appropriate security codes and menu codes for each role. These roles provide an ideal starting point for new users, allowing you to create user record that are based more closely on each user's job function with minimal modifications.

In addition, Starter Data includes additional pay codes, form groups, and return reason codes, along with basic loyalty program, gift certificate, and store credit configurations.

- **LookUps remember the last selected record**

In this version, whenever you perform a lookup, the last record you selected from the corresponding **LookUp** window is selected by default, regardless of that record's position. For example, if you looked up the ZOOT SUIT item on the **Item LookUp** window, the next time you perform an item lookup anywhere within CounterPoint, the ZOOT SUIT item will be selected.

This enhancement is particularly useful when you are creating a number of new records by copying an existing record, since you no longer have to search for the item you are copying each time you create a new record. For example, if you are adding hundreds of shoes with the same grid dimensions and stocking levels to your inventory, each time you create a new item record and click the **LookUp** button next to the **Copy from item number** field, you can simply click **OK** to copy the same item over and over again.

- **Microsoft SQL Server 2008 (V8.3.9 Service Pack)**

CounterPoint SQL V8.3.9 will support Microsoft SQL Server (MSSQL) 2008 Enterprise Edition and Standard Edition.

✎ CounterPoint still includes SQL Server 2005 Express (SSE), as SQL Server 2008 Express is not currently supported.

This feature will be delivered in a V8.3.9 Service Pack.

- **Windows Server 2008**

Microsoft Windows Server 2008 compatibility testing of CounterPoint SQL and Radiant Point of Sale devices, along with various third-party software and hardware, is ongoing.

CounterPoint SQL has been tested with Windows Server 2008 on 32-bit and 64-bit servers in LAN and WAN environments and all known software issues have been addressed in V8.3.9. However, many of the third-party applications and components that CounterPoint relies upon cannot be certified at this time, due to a number of outstanding issues that were identified during testing.

✎ Testing of Windows Server 2008 in Multi-Site environments will begin when the DataXtend Replication Engine (DXRE) is certified for use with Windows Server 2008, which is scheduled to be announced by the end of 2009.

In addition, although we have tested Point of Sale devices in 32-bit and 64-bit Windows Server 2008 LAN and WAN environments, certification of many of these devices is still pending, due to known issues with third-party hardware and drivers.

We are working with vendors and manufacturers to obtain updated software components and drivers that will support Windows Server 2008 in all environments.

Refer to [Windows Server 2008 Certification](#) for more information about known issues with various third-party components and devices in Windows Server 2008 environments. The Windows Server 2008 Certification page will be updated continuously, as the certification status of each software component and Point of Sale device changes.

Refer to the updated [CounterPoint SQL V8.3.9 Installation Guide](#) for instructions for installing CounterPoint SQL in 32-bit and 64-bit Windows Server 2008 environments.

✎ We do not currently plan to test or certify other 64-bit operating systems for use with CounterPoint SQL, including the 64-bit editions of Windows Server 2003, Windows XP, and Windows 7.

## ▪ WebHelp

In this version, all CounterPoint SQL online help is provided in the WebHelp format. WebHelp appears in CounterPoint's integrated browser window (or in your default Web browser, if you access it from the **Start** menu), providing a consistent look-and-feel and ensuring compatibility with Windows Vista, Windows 7, and future operating systems. In addition, WebHelp automatically supports modern browser features, including breadcrumb navigation and text resizing.

Also, because WebHelp is delivered as a collection of HTML files, instead of as a compiled **.chm** file, the WebHelp format allows you to implement custom online help topics for specific windows and fields by directly modifying or replacing the corresponding **.htm** files.

✎ You should carefully track which help topics you customize in this manner, as all help topics will be overwritten when you update to a new version.

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## Customization

### ▪ HTML totals in Touchscreen Ticket Entry

You can now use XML-compliant HTML to customize the content and layout of the totals panel of the **Touchscreen Ticket Entry** window and the totals area of the **Amount** dialog that appears when you enter a payment in **Touchscreen Ticket Entry**. This feature allows you to easily tailor the information that appears in these areas to meet your specific needs, in the same manner as you can customize the totals area of the **Ticket Entry** window.