CounterCRM

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Customer Lookup

Overview

The Customer Lookup provides you with a sortable, searchable table of customers that you are the salesrep for. From this table, you can enter the CounterCRM module for any one customer at a time by clicking on their Customer Number.

From within a customer's CounterCRM module, you can return to the Customer Lookup to select another customer's data to load.

Only customers that you have been appointed the Salesrep for will show up in this table.

Targeted Customers

This is the initial customer listing view and contains a complete list of customers assigned to a user's sales rep ID (or, all customers if viewing as an admin user) whose accounts have been flagged for one of 5 reasons

- - These customers have been manually flagged to show in the targeted listing.
- 30 - These customers have a 30 day balance owing that exceeds the max allowable 30 day balance.
- 60 - These customers have a 60 day balance owing that exceeds the max allowable 60 day balance.
- 90 - These customers have a 90 day balance owing that exceeds the max allowable 90 day balance.
- - These customers have a percentage sales decrease greater than the max allowable sales decrease.

> All max values can be set in the CounterCRM maintenance and will default to the values set at a sponsor level in **CP2 Admin > Server Settings**

All Customers

This is a listing of all customers assigned to the user's sales rep ID. If the user is a manager level user, then it will be all customers assigned to sales reps for which they are the manager. Admin users can see ALL customers

Dashboard

Customer Summary

The Customer Summary currently offers 12 quick glances at your sales with this customer on a month-over-month basis. Each one of these stats is referred to as a "tile", and appear in numerous places throughout Counterpoint Cloud Platform

All "% From last month" values are calculated up to the current day of the month.

For example: if today is July 15th, the main values are calculated based on sales from July 1st to July 15th, while the "From last month" values are calculated based on sales from June 1st to June 15th.

Because of this, you may see fluctuations throughout the week as the number of business days elapsed in a month will differ as weekends occur.

Customer

Displays the customer's account number and the name associated with it.

Sales Rep

Displays the name of the sales rep associated with this customer. If there is no Counterpoint Cloud Platform user associated with the sales rep number, the number is displayed instead.

Total Invoices

The total number of invoices that have this customer associated with them from the start of the current month.

Net Sales

The total sum of the values of the invoices (less returns) that have this customer associated with them from the start of the month.

Gross Sales

The total sum of the values of the invoices (before returns) that have this customer associated with them from the start of the month.

Last invoice

Amount and date of the last invoice for this customer

Last Payment

Amount and date of the last payment this customer made

Credit Limit

Credit limit set in Counterpoint for this customer as of last night.

Avg GP%

The GP from all of the invoices that have this customer associated with them from the start of the month.

Online Sales

The total sum of the values of the invoices that have this customer associated with them from the start of the month, and have autoeat associated with them as the clerk.

Industry Group

If applicable, the industry group that this customer belongs to. Otherwise, will display as "N/A"

Discount Group

Displays the discount group that this customer belongs to.

Credit Rating

Credit rating within Counterpoint as of last night

Current

Displays the outstanding balance that this customer is carrying.

30 Days

Displays the outstanding balance that this customer is carrying from 30 days ago.

60 Days

Displays the outstanding balance that this customer is carrying from 60 days ago.

90 Days

Displays the outstanding balance that this customer is carrying from 90 days ago.

Customer Actions

These three buttons are action items for the customer being maintained

Create Order

View Customer In FlightDeck

Open the active customer in the FlightDeck Dashboard tab, with all dashboard metrics only applying to this customer

Add Customer to Focus

Clicking this button will add or remove the current customer from being manually flagged in the **Targeted Customers** list.

View Notices

View any current notes assigned to this customer

Monthly Sales History

A graph that is a month by month breakdown of the customer's sales used to quickly highlight sales trends. The graph is a stacked bar graph that will represent both in store and online sales, comparing them to the previous year.

Recent Activity

The recent activity panel gives you a quick glance at some of the different items that can be associated with a customer - notes, messages, calls, and alerts. Any tabs with active or unread messages will have an alert box next to the heading with the number of open items contained within.

Recent Messages

Shows up to 4 of the most recent messages associated with the customer. Also shows the number of unanswered messages as a badge on the Recent Messages button.

Offers quick access to the message creation screen and auto-fills the Customer ID value through the "New Message" link in the top right of the panel.

Recent Notes

Allows you to see up to 5 of the most recent notes associated with this customer, as well as who created them and their timestamp.

Offers quick access to the Notes page via the "Create Note" link in the top right of the panel

Recent Calls

Shows the three most recent calls with the phone number stored in this customer's profile. Offers the start date, end date, and time elapsed for the phone call.

For a more detailed breakdown of all calls, the "Go to full Call Log" link is located in the top right of the panel.

This section is only available to those who are utilizing a phone package from AMS.

Customer Alerts

The customer alerts section shows a list of all of the conditions in which an alert can be triggered for a customer. The sum of the number of alerts is shown as a badge on the Customer Alerts button.

Any values that are configurable on a per-customer basis are editable via the "Edit Customer Alerts" button in the top right of the panel.

If enabled, on the first of the month, a report will be emailed to the address associated with your sales rep account detailing all of the customers who triggered alerts.

30 Day Performance

This alert tracks the total value of sales for the last full month, and compares it to the previous month. If there is a decrease in sales greater than the threshold value, an alert is generated.

The threshold value can be changed on a per-customer basis via the "Edit Customer Alerts" link in the top right of the panel, and falls back to a global value that can be changed in the server settings.

Account Debts

These alerts track the total debt for a customer over 3 values (30, 60, 90 days) and generates an alert for each if the value is greater than the threshold. The threshold for each of the 3 potential alerts can be changed in server settings.

Uploaded Files

Displays any files specifically uploaded for this customer

Past Month Sales By ACA Category

The Past Month Sales By Class graphs give you a quick visual representation of the breakdown of your sales so far this month, compared to this day of last month for the given customer.

This graph relies in the Class that is associated with each product. Any products that have been sold to this customer that do not have class values associated with them will not appear in this chart.

If you have had any returns made in a different month from the original purchase, it is possible for some classes to have negative values. This will shift the range of values that the chart displays.

Past Month Sales By Category

The Past Month Sales By Category graphs give you a quick visual representation of the breakdown of your sales so far this month, compared to this day of last month for the given customer.

This graph relies on the values associated with the categories for each product. As categories consist of a 3 character ID in Counterpoint, that code will be displayed for each value here.

If you have had any returns made in a different month from the original purchase, it is possible for some categories to have negative values. This will shift the range of values that the chart displays.

Online MTD Sales Summary

These statistics are pulled directly from autoecat.com.

Summary Tiles

These tiles represent some specific values as they pertain to the current user's online browsing and buying habits

autoecat Lookups By Month

This is a total of the number of autoecat lookups this user made, broken down by month for the past 6 months.

Top Lookups by Product Line

This is a total of the number of autoecat lookups this user made, broken down by the catalogue defined product types based on the autocare ACES standard

Last Catalogue Access

The last date this customer logged into autoecat

MTD Lost Sales

A total count of the number of online lost sales that have been registered to this account. This does include automated lost sales triggers.

Sales Summary By Filter

The Sales Summary By Filter Table allows you to drill into the sales of a customer, offering monthly and yearly comparisons.

Columns

The following columns are present in every table under this panel:

MTD Sales

The total value of all sales for this row so far this month.

MTD $ Difference ($ Diff.)

he difference in sales so far this month compared to last month.

MTD % Difference (% Diff.)

The difference in sales so far this month compared to last month, as a percent value.

MTD GP%

The gross profit so far this month, as a percent value

MTD GP% Difference (Diff.)

The difference in gross profit so far this month compared to last month, as a percent value.

MTD% Returns ($ Ret.)

The number of items that have been returned this month compared to the number of items that have been bought this month, as a percent value

YTD Sales

The total value of all sales for this row so far this year.

YTD $ Difference ($ Diff.)

The difference in sales so far this year compared to last year.

YTD % Difference (% Diff.)

The difference in sales so far this year compared to last year, as a percent value.

YTD GP%

The gross profit so far this year, as a percent value

YTD GP% Difference (Diff.)

The difference in gross profit so far this year compared to last year, as a percent value.

YTD% Returns (% Ret.)

The number of items that have been returned this year compared to the number of items that have been bought this year, as a percent value

Tables

The following tables are available within this Sales Summary By Filter panel

Category

A listing of each category that has been sold to the parent customer with the category and description available. Drills down on the "Category" column.

Category > Part

A listing of each part that belongs to the parent category, that has been sold to the parent customer with the item code and description available.

ACA Category

A listing of all the available ACA categories for which you've sold a product within the current time frames, with the category and description being available. Drills down on the "Category" column.

ACA Category > ACA Subcategory

A listing of all the available ACA subcategories related to the parent ACA category for which you've sold a product to a customer within the current time frames, with the SubCategoryID and SubCategory Name available. Drills down on the "SubCategoryID" column.

ACA Category > Category

A listing of all your product categories for which a product has been sold to the customer that matches the parent ACA Category within the current time frame.

Class

A listing of all the classes for which a product has been sold to this customer, within the current time frames.

Class > Subclass

A listing of all the subclasses related to the parent class for which you've sold a product to a customer within the current time frames, with the subclass name available.

Customer Notes

The CounterCRM Notes section allows you to read and write notes on a per-customer basis that integrate back into the note system you already know from COUNTERPOINT.

Receiving Notes

Every night as part of the data processing procedure, a copy of all the notes from COUNTERPOINT are loaded into the Counterpoint Cloud Platform database. From here, we display the notes for a customer on both the dashboard portion, and the notes portion of the module in their original form. This includes the name of the person who creates the note, the time it was created at, and the contents of the note.

If a note is created in COUNTERPOINT in the middle of the day, it will appear on the Counterpoint Cloud Platform after the nightly data processing procedure has occurred.

Creating Notes

Creating notes can be done from the "New Note" button on the notes page of the CounterCRM module. Here you have a form to create a note with which is then passed back to Counterpoint, usually within 5 minutes.

To maintain compatibility with COUNTERPOINT, there are some limitations set on the length and style of the note you can create. When creating a note, keep the following in mind:

- Your note is limited to 3 lines
- Each line is limited to 72 characters
- If a line exceeds 72 characters, it is broken into 2 lines

While the Counterpoint Cloud Platform attempts to modify your note to fit these requirements, there are a few cases where it will be unable to do so, and you will receive an error while trying to create your note.

Call Log

The Call Log page displays all recorded calls between your phone system and the phone number associated with the customer when your integration with a COUNTERPOINT Unified Communications platform is enabled.

Each entry in the call log includes the phone numbers involved, the duration, the disposition, and the date. Optionally, if you chose to include extended storage for call logs in your COUNTERPOINT Unified Communications platform a link to recording of the call will be available.

> Note that in certain conditions, it is possible for a lengthy call to have a disposition of "MISSED". This usually occurs when a transfer is involved (to a parking spot, or otherwise) and the customer hangs up. Unfortunately all "MISSED" calls are assigned a talk time of "0 Seconds", which is misleading.

The "Call Log" panel can be accessed from either the CounterCRM module, or through QuickDial.

If you believe there is an issue with your Phone System, it may be better to contact AMS with your question for assistance with looking into your phone logs.