CP2 Admin

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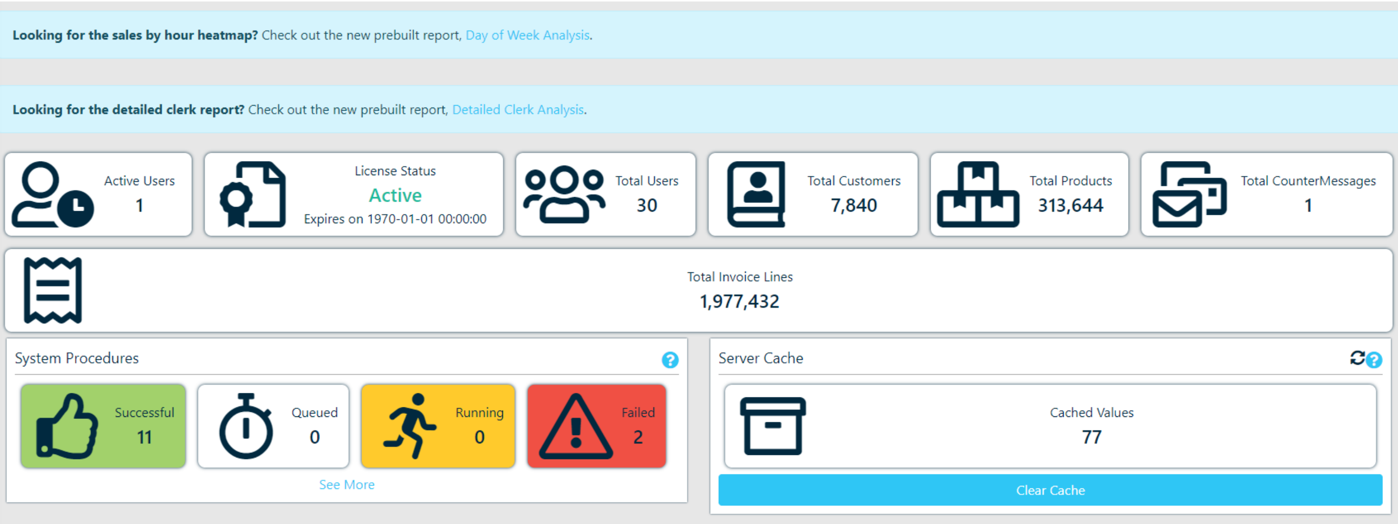
Admin CP

Overview



The Admin CP page provides you with a quick, at-a-glance view of some of the important statistics and metrics of the Cloud Platform as a whole, and how your data has been loaded, etc.

Info Tiles

Active Users

The total number of users currently logged in to your instance of the Counterpoint Cloud Platform

License Status

Current status of your Counterpoint Cloud Platform license

Total Users

Total number of users set up in your instance of the Counterpoint Cloud Platform

Total Customers

Total unique customers loaded in your instance of the Counterpoint Cloud Platform

Total Products

Total unique products loaded in your instance of the Counterpoint Cloud Platform

Total CounterMessages

Total number of outstanding CounterMessages

Total Invoice Lines

Total number of invoice lines loaded in your instance of the Counterpoint Cloud Platform

System Procedures

This panel shows a status of the automated system procedures that are run. By clicking the **See More** link, you can view the detail of these procedures and trigger a restart of any failed procedures

Server Cache

The Counterpoint Cloud Platform uses caching in order to improve performance. This panel shows how many different datasets and queries have been cached. If, for some reason, old data is being loaded and displayed you can optionally clear this cache in order to force the server to pull fresh data queries.

Address Book

User/Email combos input into the address book will appear for all users to select from when sending a message via Counter Message.

Typically, it is a good idea to enter your own support/counter emails into the address book, as an easy way for your salesreps to be able to contact whoever is monitoring them.

If there are no email addresses entered here, the address book will appear empty when a salesrep tries to use it to add an address.

Admin Alert

An admin alert is a message that is displayed to all salesreps on their landing page after they log in. This allows one way communication between you and all of the salesreps you have on staff that they'll be greeted with when they log in.

As you edit the alert message ,the alert on the screen should update in real time, displaying exactly how the message will display when your salesreps see it. There are 4 different styles of alerts available, for varying levels of severity.

Additionally, once you are ready to save your message, there are 2 different buttons which will do so:

- **Update Quietly** - this saves the update, and requires salesreps to go back to their home page to check for a new message.
- **Update With Alert** - this saves the update, and generates a system alert for each salesrep notifying them that a new admin alert has been posted, lasting for 12 hours.

Server Settings

The values in the server settings page are used across your version of the Counterpoint Cloud Platform to change the way some pieces react, as well as enable/disable some elements of it.

> **Warning:** Your copy of Counterpoint Cloud Platform heavily relies on some of the settings on this page. Before you change a value, take the time to read through the documentation and make sure you completely understand the value you are changing. It is possible to do permanent damage to your data from here, or render your Cloud Platform inoperable. If you do render your Cloud Platform inoperable, there may be additional billing charges associated with restoring your access.
> Also note that it is possible to input an invalid value here, and break sections of your Counterpoint Cloud Platform installation.
> If you have any doubts, contact AMS before making any changes.

- Warning on Admin Settings Page

Generally speaking, it is a good idea to leave this page alone and let AMS handle the changing of any settings.

Audit Log

The Audit Log contains a list of auditable events that have occurred in your instance of the COUNTERPOINT Cloud Platform over the past 90 days.

Time	User	IP Address	Type	Message
2021-09-01 09:06:42	AMS	209.52.85.100	User Login	AMS logged in successfully with their password using a browser (Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/92.0.4515.159 Safari/537.36).
2021-09-01 08:13:10	AMS User	209.52.85.100	User Login	AMS User logged in successfully with their password using a browser (Mozilla/5.0 (Windows NT 6.1; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/92.0.4515.159 Safari/537.36).
2021-08-31 18:43:18	AMS Test Account	209.52.85.114	User Login	AMS Test Account logged in successfully with their password using a browser (Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/92.0.4515.159 Safari/537.36).

Event Types

The following is a list of event types that are logged in the Audit Log:

- A user successfully logging in via a browser
- A user successfully logging in via the CP2 Desktop Application
- A user automatically being logged in via the CP2 Desktop Application
- A Manager logging into another user's account via Manager CP
- A user creating a generic CounterMessage
- A user creating a CounterMessage tied to a customer
- A user signing a WebReport
- A user changing their email address
- A user changing their password
- A user changing their name
- A Procedure being run manually

Procedures

What is a Procedure?

A procedure is an operation that can be done on a regular basis - typically nightly, and it usually involves modifying or updating your data so that you get a better quality analysis on the COUNTERPOINT Cloud Platform.

These procedures are run on "workers", which wake up and process data when there is a procedure waiting to be run. This allows for multiple procedures to run at the same time if necessary, and reduces the impact that running a procedure during store hours can have for other users.

Procedure Statuses

There are 4 statuses that a procedure can be in at any given time:

Successful: The procedure ran and finished as expected, encountering no errors.

Failed: The procedure did not finish as expected, and encountered an error during processing.

Queued: The procedure has not yet run, but is scheduled to as soon as resources are available.

Processing: The procedure is currently running.

Running a Procedure

> **Note:** There are two different types of procedures: legacy procedures, and modern procedures. Only modern procedures can be run manually by an admin. If you need assistance with legacy procedures, please contact AMS.

An admin user has the ability to see the current status of all procedures, as well as manually trigger a process to run. This should be done carefully, as it may have side-effects that change the data other users of yours see.

Most procedures are scheduled to automatically run - if you think one or more procedures need to be run at a different time or frequency, contact AMS for assistance in changing their schedule.

The ability to manually run a procedure is mostly used as a recovery option in case something goes wrong with the overnight data upload. Alternatively, some procedures are used to clean up or remove old data and are not run regularly. Consult the table below for an explanation of what each procedure does. If you are still not sure whether running a procedure is a good idea, contact AMS for assistance.

Procedure List

Procedure Name	Procedure Description	Default Frequency
ACADataMapping	Maps products to their ACA data classes and subclasses. If this is not done regularly new products will not be mapped and will show up under the "Null" ACA class.	Daily (If Enabled)
annualSalesCalc	Calculates the number of annual sales for the previous 12 months, as well as the 13-24 month range. This is used to generate old stock reports.	Daily
CPMailerReports - Daily	Sends out all of the CPMailer daily reports.	Daily
CPMailerReports - Monthly	Sends out all of the CPMailer monthly reports.	Weekly
CPMailerReports - Weekly	Sends out all of the CPMailer weekly reports.	Monthly
discountCodeTable	Builds a table of all possible discount code values. Required for any analysis that offers a breakdown by discount code.	Daily
FillCustomerNames	Fills in the customer name on any ship to values that do not have an assigned name with that of the root customer.	None
FillDeletedCustomerIndustryType	Fills in the industry type on any ship tos that do not have an assigned value with that of the root customer. This is typically caused by a ship to being deleted.	Daily
IndustryTable	Builds a table of all possible industry codes. Required for any analysis that offers a breakdown by industry type.	Daily

monthlyProc	Calculates the inventory position based on last night's upload and saves it as the historical value for the month that "yesterday" fell in. **You probably do not want to run this manually.**	Monthly (1st)
productsFromHistory	Adds non-stocking products from your sales history into the products database. This is required for any analysis that groups sales by product to function correctly.	Daily
territoryTable	Builds a table of all possible territory codes. Required for any analysis that offers a breakdown by territory type.	Daily
updateGoals	Updates goal calculations for all goals that have been added.	Daily

Corporate Goals

Overview

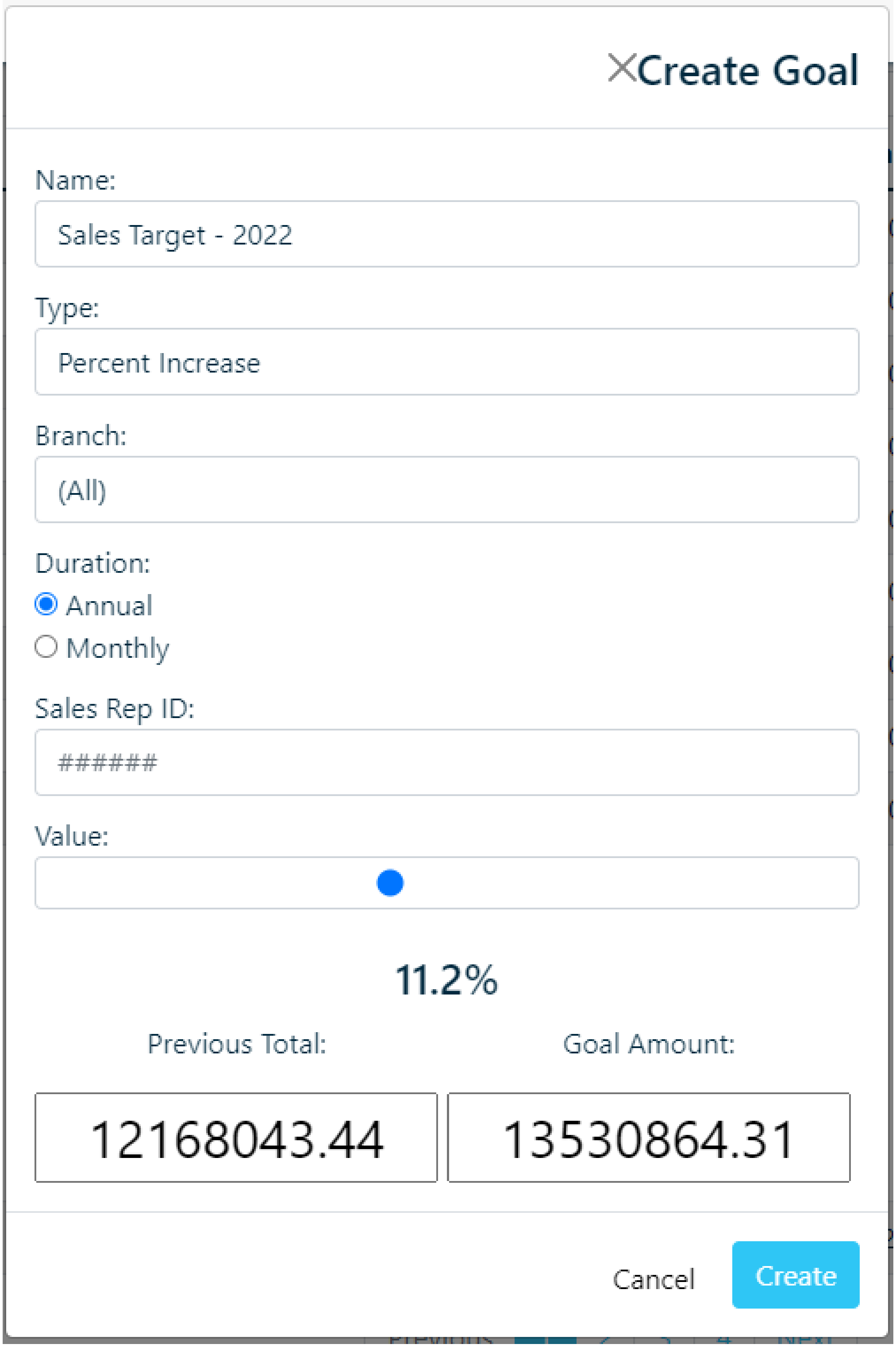
The corporate goals page shows a listing of ALL goals set up for your company, but also allows you to set a company wide goal for all users to see.

Listing

This listing will show all goals set up for your company, whether they are company wide or sales rep specific. You can view the details of any goal, or assign any goal as a primary goal here.

Setting up a new corporate Goal

At the bottom of the listing is a **New Goal** button. Clicking this will present you with the goal setup page.



When setting up a corporate goal, the following should be filled in:

- Name - The name that will show associated to this goal
- Type - Percent increase, which will set a percentage increase of sales over last year
- Branch - Optionally pick a single branch for this goal to be assigned
- Duration - Either a single month's goal, or an annual goal which will create 12 monthly goals
- Sales Rep - For a corporate goal, the sales rep is not set.
- Value - The percentage of increase you would like the sales to increase by

Once a corporate goal is set, all of your users will be able to view it and/or apply it to their account as a primary goal with prominent placement on the homepage.

> Goals are calculated on a nightly basis, so immediately after setting up a goal, it will not be visible.