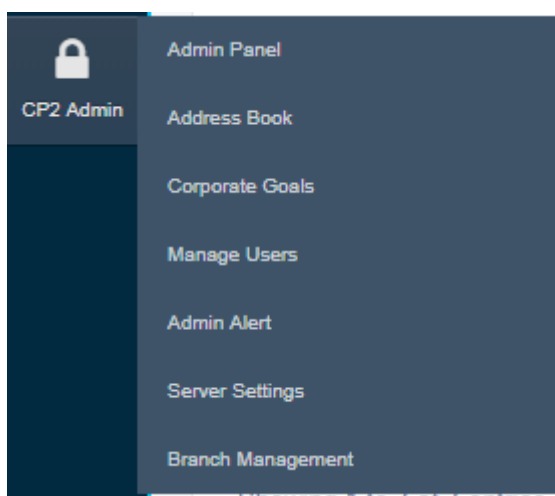


Beta V 1.1.0

The following is a listing of the updates released in the Countpoint Cloud Platform (CP²)

Branch Classification

We have introduced the ability for you to group your branches by Region, Type and Size. As an admin user, you will now have access to the Branch Management module



Entering into Branch management will give you a listing of all of your branches, and optional drop-down boxes to assign your branches to the various groups.

Branch Management

Branch Count

7

Region Count

3

Type Count

2

Size Count

3

Branch

Region

Type

Size

Branch Management

Show 10 entries

Search

ID	Name	Region	Type	Size
01	Auto-Chak	Chilliwack	Retail Store	None
04	Auto-Vedder	Vedder	Retail Store	None
05	HH-Vedder	Vedder	Retail Store	None
06	Machine Shop	Other	Warehouse	None
07	Abbotsford	Other	Retail Store	None
08	HH-Chak	Chilliwack	Retail Store	None
09	BSJ - Coq	Other	Retail Store	None

Showing 1 to 7 of 7 entries

Previous

1

Next

Submit

To create classifications, you can navigate into any of the Region/Type/Size headings to create new categorizations that can then be assigned to branches

Branch Management

Branch Count

7

Region Count

3

Type Count

2

Size Count

3

Branch

Region

Type

Size

Type

Value	Count
Retail Store	6
Warehouse	1

Add New Value:

Add Value...

Submit

Modified Flightdeck

The FlightDeck Dashboard has been modified to focus solely on performance indicators and allow you to filter what data is used to make up your Key performance indicators. The default view is a month to date total for all accounts under your control with comparatives to the same period last year.

The new features allow you to click on the 'Current View' tab to adjust that view

◀ Current View: January 2019

Clicking the punch-out will present you with the various filtering options available to you

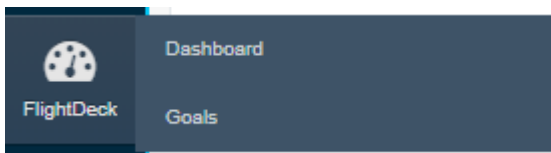
Time	Branch	Customer
Relative <ul style="list-style-type: none">● MTD (Month over Month)● MTD (Year over Year)● Year to Date● Previous 30 Days● Previous 60 Days● Previous 90 Days	Completed <ul style="list-style-type: none">● January 2019● December 2018● November 2018● October 2018● September 2018● August 2018● July 2018● June 2018● May 2018● April 2018● March 2018● February 2018	Current Window: 2019-01-01 - 2019-01-31 Previous Window: 2018-01-01 - 2018-01-31 Customer: All Salesperson: All

Submit

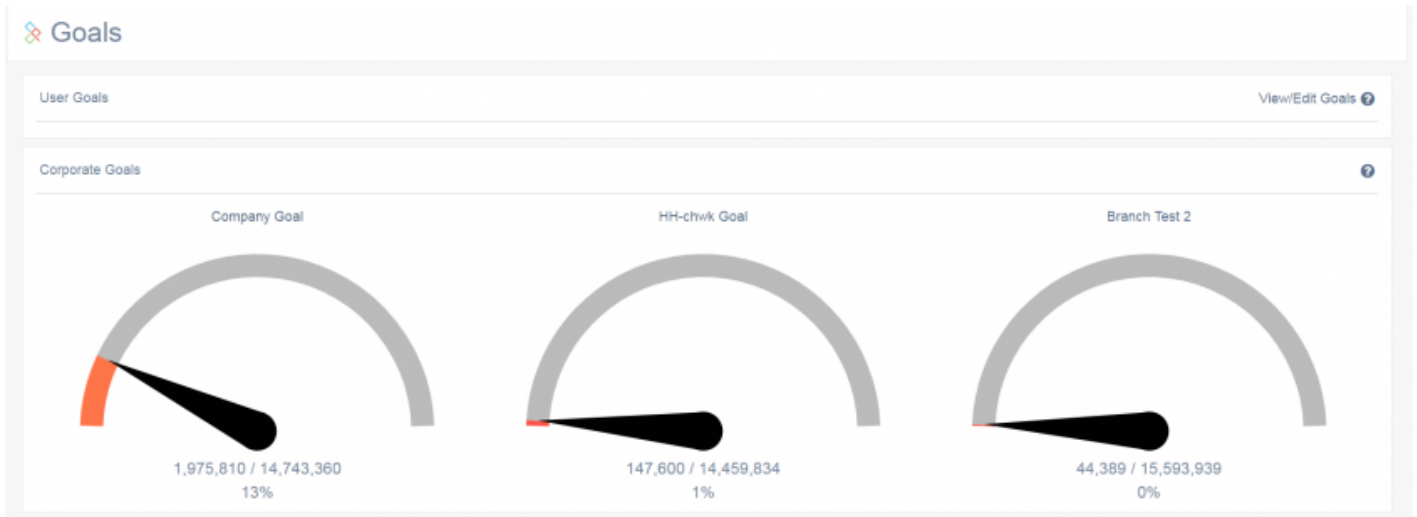
This includes changing the current period being analyzed, the comparative period it is analyzed against, the specific branch or branches that are to be included as well as specific customers to be used. As you select the options and press the submit button, your dashboard indicators will be updated with these filters.

Enhanced Goals

With the migration of flightdeck to a more indicator focused model, the goals have been moved to their own subsection.



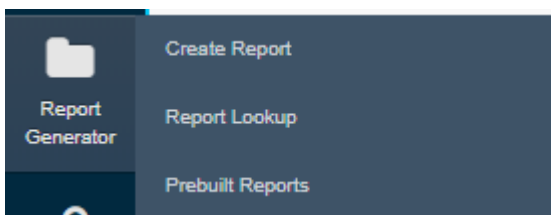
Navigating to the goals page will now present you with all of the current active goals applicable to your account



Clicking the name of any of the goals will present you with the goal detail, and clicking the **View/Edit Goals** link will let you add/maintain the goals

Pre-built Reports

Another piece of the old dashboard was the drill-down customer sales table. This has now been moved to a section that will be expanded on in future releases.



Under the report generator module, a new **Prebuilt Reports** sub-module is available. At the moment, the details sales drill-down tables is the only new report listed

Prebuilt Reports



Sales Table

The sales table report allows you to drill down from a high-level overview of your sales, all the way down to the part number.

\

As feedback is received, custom reports will be placed here for user consumption.

Expanded Report Generator

The basic Sales and Inventory reports have had numerous new detail fields, as well as aggregate fields added. Some to note are First Item Sale, Last Item Sale, Total of current 12 months sales, Total of Previous 12 months sales, all price levels and transaction types along with numerous others.

- ☐ Category
 ☐ Part Number
 ☐ Class ID
 ☐ ACA Part Terminology ID
 ☐ ACA Category ID
 ☐ ACA Subcategory ID
 ☐ Average Cost
 ☐ Item Description
 ☐ Subclass ID
 ☐ Price 1
 ☐ Price 2
 ☐ Price 3
 ☐ Price 4
 ☐ Price 5
 ☐ Last Cost
 ☐ Core Price
 ☐ EHC
 ☐ Base Cost
- ☐ Inventory Category
 ☐ Inventory Part Number
 ☐ Branch
 ☐ Quantity On Hand
 ☐ Quantity On Order
 ☐ Minimum
 ☐ Maximum
 ☐ Reorder Allowed
 ☐ Supplier

3 I would like to include the following Aggregate values columns:

Aggregate SUM()

- ☐ SUM(Quantity On Hand)
- ☐ SUM(Quantity On Order)
- ☐ SUM(12 Month Quantity Sold)
- ☐ SUM(Previous 12 Month Quantity Sold)
- ☐ SUM(Price 1)
- ☐ SUM(Price 2)
- ☐ SUM(Price 3)
- ☐ SUM(Price 4)
- ☐ SUM(Price 5)
- ☐ SUM(Last Cost)
- ☐ SUM(Core Price)
- ☐ SUM(EHC)
- ☐ SUM(Base Cost)

Aggregate AVG()

- ☐ AVG(Quantity On Hand)
- ☐ AVG(Quantity On Order)
- ☐ AVG(Price 1)
- ☐ AVG(Price 2)
- ☐ AVG(Price 3)
- ☐ AVG(Price 4)
- ☐ AVG(Price 5)
- ☐ AVG(Last Cost)
- ☐ AVG(Core Price)
- ☐ AVG(EHC)
- ☐ AVG(Base Cost)

Other Aggregates:

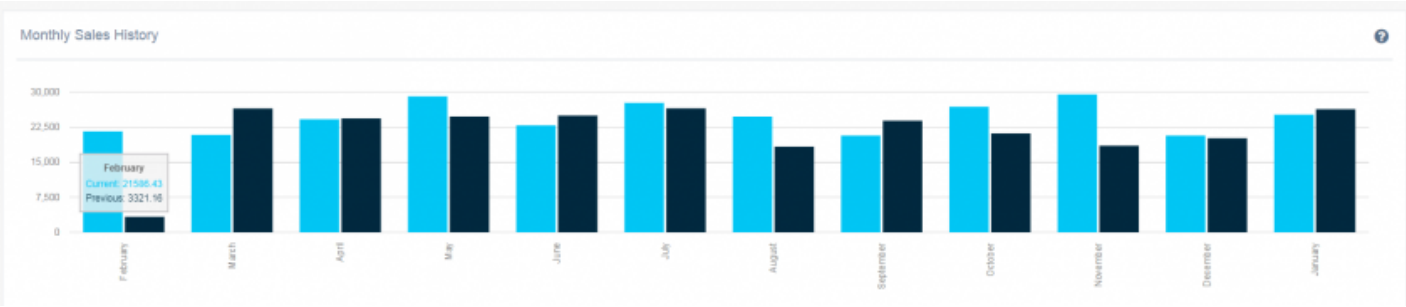
- ☐ COUNT(Quantity On Hand)
- ☐ COUNT(Quantity On Order)
- ☐ First Sale Date
- ☐ Last Sale Date

Overnight Reporting

The weekly and monthly emailed reports within CPMailer have been modified to compare the current week/month to the same week/month of last year.

CounterCRM

A minor addition to the CounterCRM module includes a new 'Monthly Sales History' graph that displays the customer's sales by month over the past 12 months with a comparison to the previous year



Sales comparisons have also been updated to represent a year-over-year comparison

Revision #2

Created 26 February 2019 16:03:26 by Jim

Updated 4 June 2020 23:58:36 by Jim