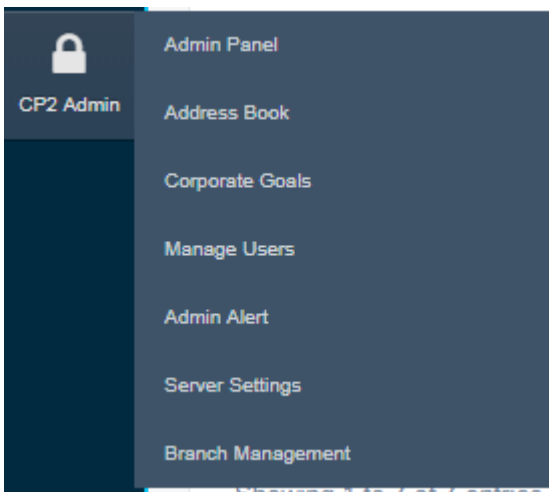


Beta V 1.1.0

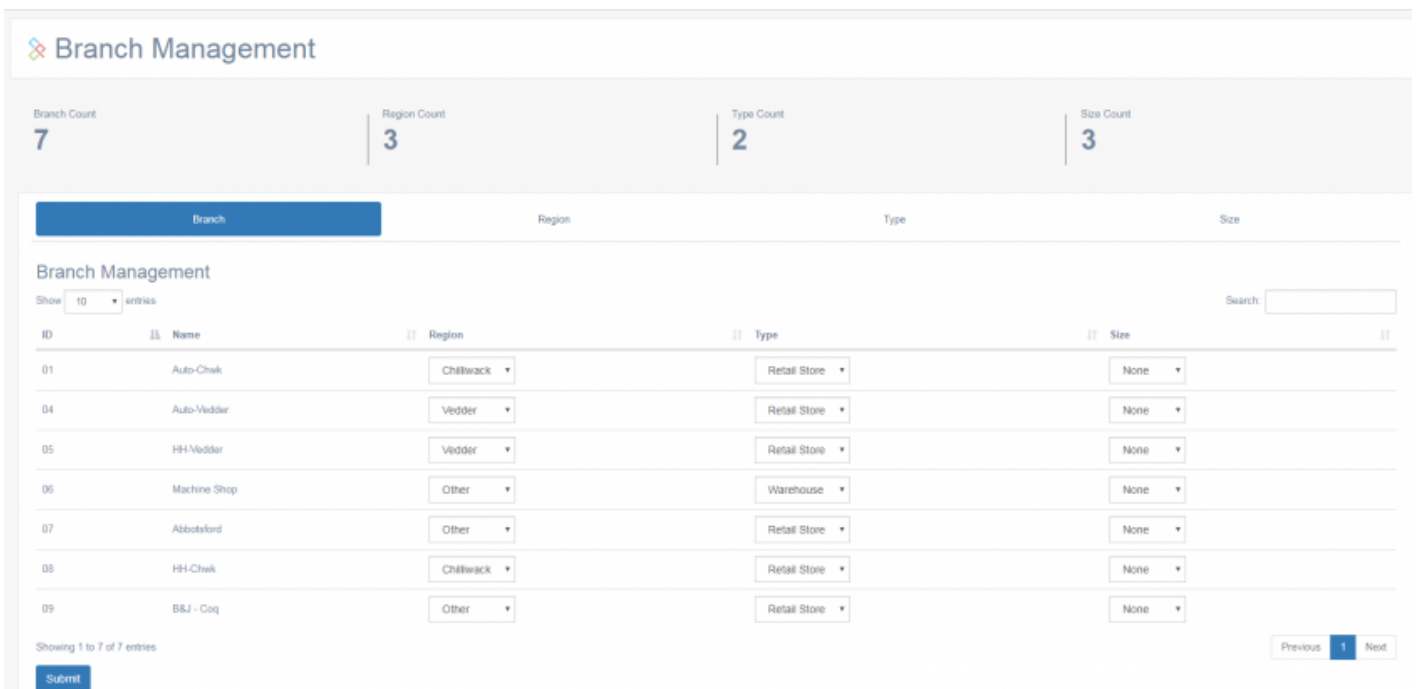
The following is a listing of the updates released in the Countpoint Cloud Platform (CP²)

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



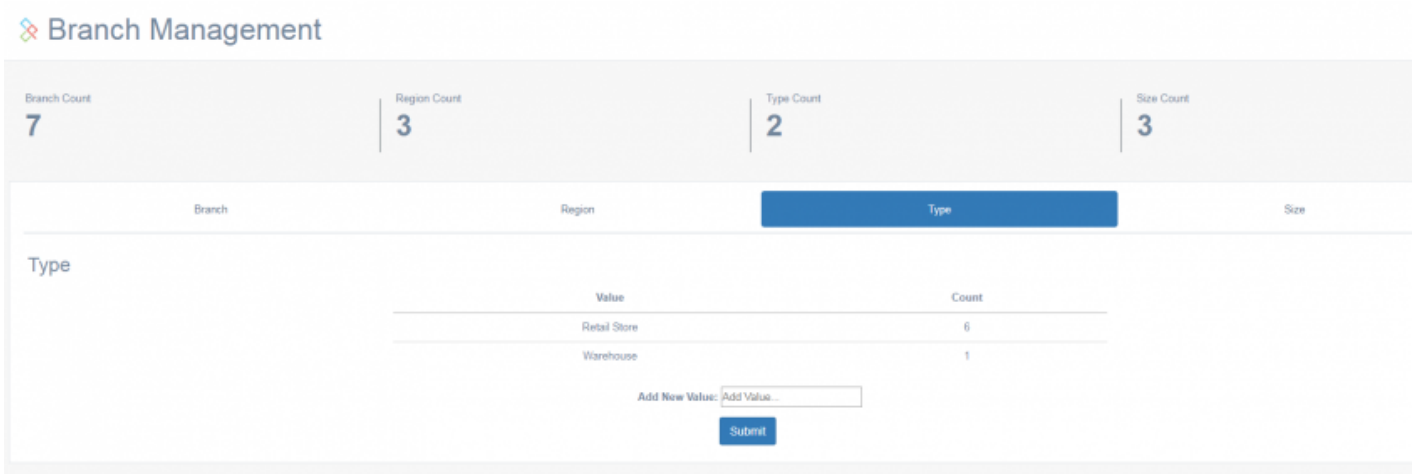
Entering into Branch management will give you a listing of all of your branches, and optional drop-down boxes to assign your branches to the various groups.



A screenshot of the Branch Management interface. At the top, there are four summary cards: Branch Count (7), Region Count (3), Type Count (2), and Size Count (3). Below these is a table with columns for Branch, Region, Type, and Size. The table contains 7 entries. At the bottom, there is a 'Showing 1 to 7 of 7 entries' message and a 'Submit' button.

ID	Name	Region	Type	Size
01	Auto-Check	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-Check	Chilliwack	Retail Store	None
09	BSJ - Coq	Other	Retail Store	None

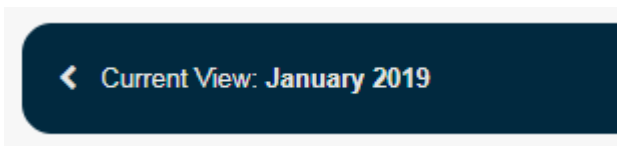
To create classifications, you can navigate into any of the Region/Type/Size headings to create new categorizations that can then be assigned to branches



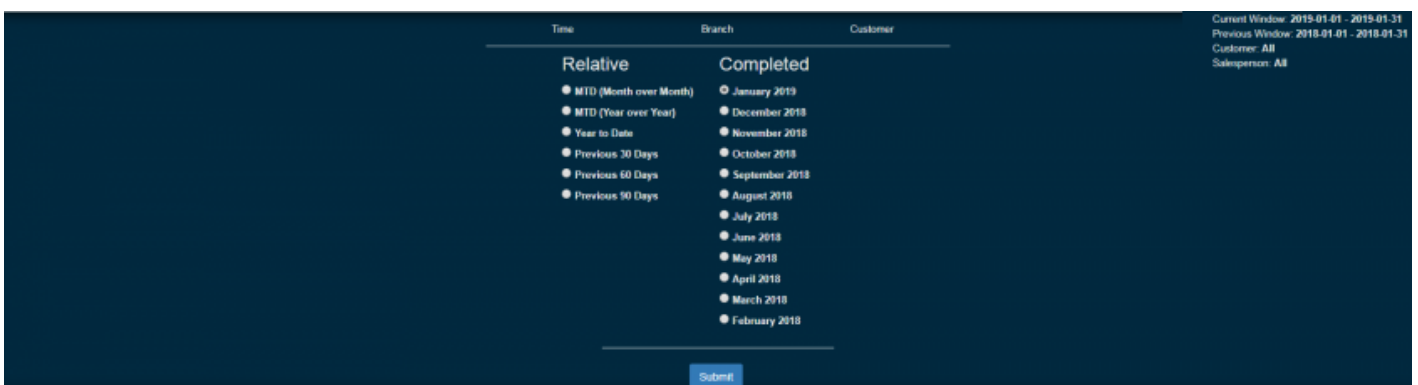
Modified Flightdeck

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



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

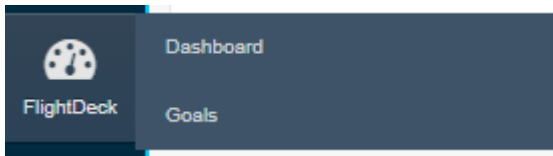


This includes changing the current period being analyzed, the comparative period it is analyzed against, the specific branch or branches that are to be included as well as specific customers to be

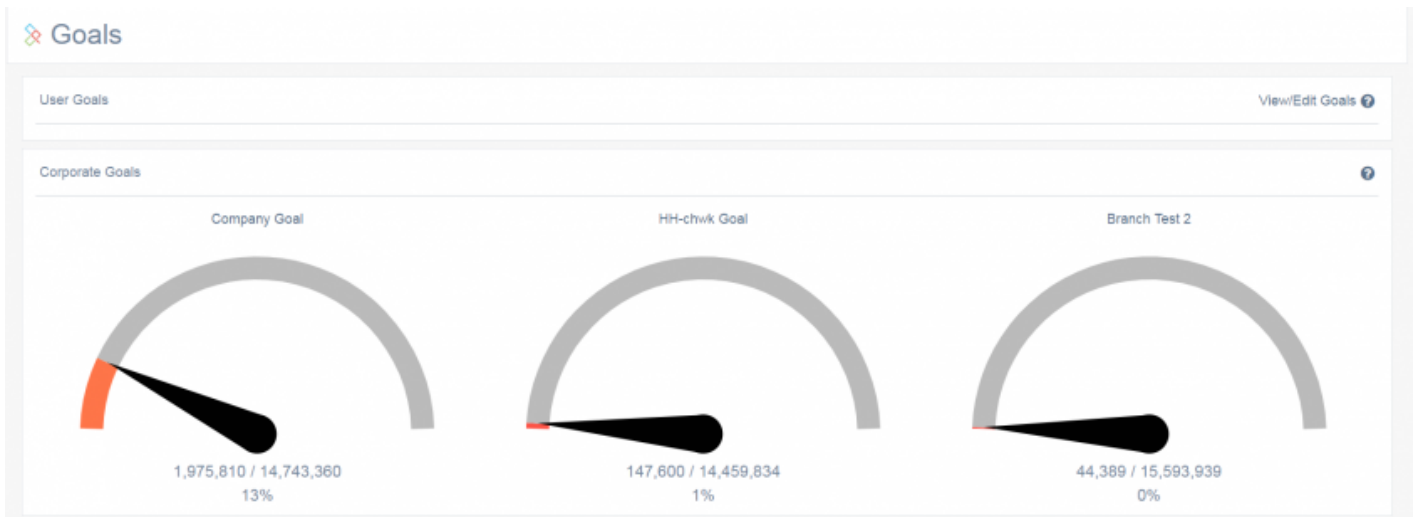
used. As you select the options and press the submit button, your dashboard indicators will be updated with these filters.

Enhanced Goals

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



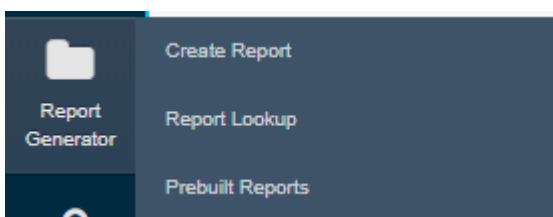
Navigating to the goals page will now present you with all of the current active goals applicable to your account



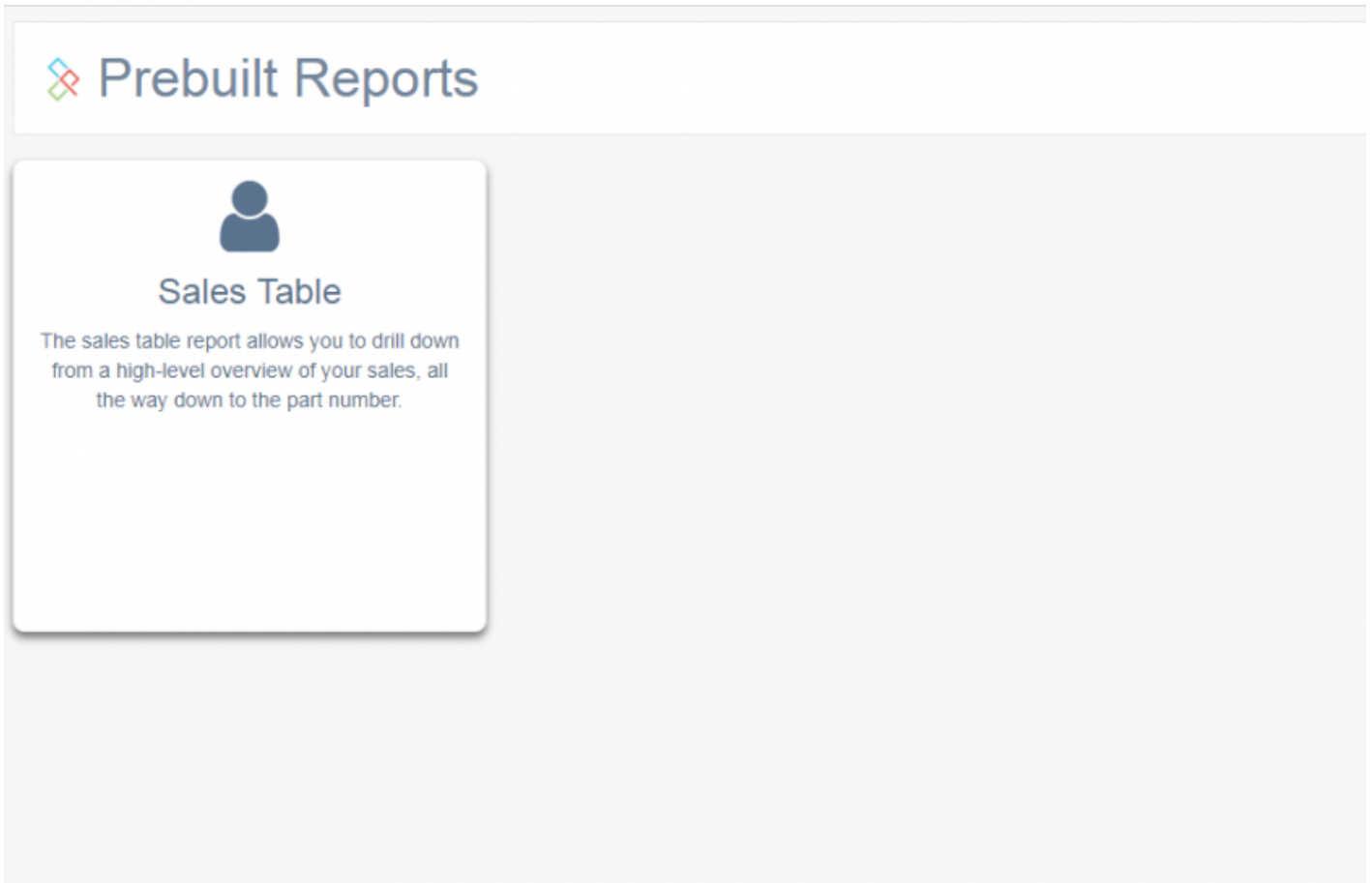
Clicking the name of any of the goals will present you with the goal detail, and clicking the **View/Edit Goals** link will let you add/maintain the goals

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



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:

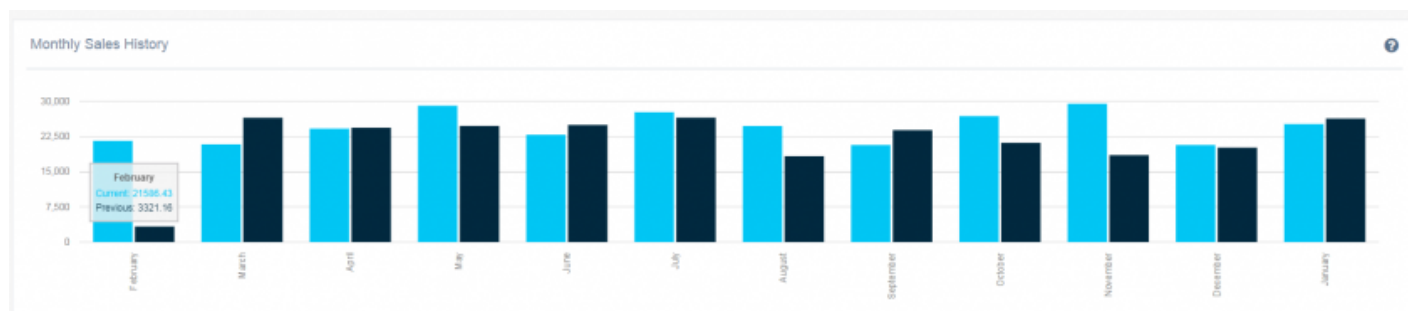
- COUNT(Quantity On Hand)
- COUNT(Quantity On Order)
- First Sale Date
- Last Sale Date

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 2019-02-26 16:03:26 UTC by Jim

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