Module Details

FlightDeck

FlightDeck Dashboard

Enabling the FlightDeck Dashboard gives a user access to sales either tied to their salesrep id, or all sales in the case of a manager for branches which they have permission to. Users can filter the data by time periods, branches, and specific customers.

Inventory Dashboard

Enabling the Inventory Dashboard gives a user access to all of the inventory data for all branches which they have permissions to access. This includes total inventory value, various value breakdowns, old/low stock tables, and value comparisons against company totals.

Sales Goals

Enabling the Sales Goals module allows a user to track the progress of a branch, or of their own sales performances over a period of a given month or year.

CounterCRM

Customer Directory

The Customer Directory module allows a user to lookup a customer based on their other information. With access to the Customer Dashboard module, clicking on a customer will load into their CounterCRM Dashboard.

Customer Dashboard

The Customer Dashbord breaks down sales for a given customer similar to the FlightDeck Dashboard module. In addition the Customer Dashboard module serves as a central point for seeing information from the other CounterCRM modules, CounterMessage messages, and imported data on jDispatch deliveries.
Note: Requires access to the Customer Lookup module to function properly.

Notes

The Notes module of CounterCRM imports notes assigned to a customer in COUNTERPOINT and displays them. The Notes module also allows for the creation of additional notes for a specific customer, with the ability to return a note back to COUNTERPOINT available in a future version.

Note: Requires the Customer Directory and Customer Dashboard modules to function properly.

Delivery History

The Delivery History module imports a history of deliveries made to the customer, via jDispatch.

Note: Requires the Customer Directory and Customer Dashboard modules to function properly.

Call Log

The Call Log module provides a history of calls involving the customer, imported from your AMS Unified Communications platform.

Note: Requires the Customer Directory and Customer Dashboard modules to function properly.

Invoice History

The Invoice History module provides a history of invoices tied to a customer. Also includes the ability to recall an invoice PDF file thats to integration with your COUNTERPOINT web server.

Note: Requires the Customer Directory and Customer Dashboard modules to function properly.

Counter Message

Counter Message Core

The CounterMessage module provides a quick, auditable method to send a message to an email address entered in the address book of your Counterpoint Cloud platform. Message is sent via email and offers a method for the recipient to reply to the message, automatically archiving the message and generating an alert for the user who sent it.

ECAT Analysis

ECat Core

The ECat Analysis module provides a breakdown of online sales, part lookups, and lost sales that occur through the autoecat.com website.

Note: This module does **NOT** respect branch permissions at this time. Granting access to this module grants permission for all branches.

Resource Center

Resource Center Core

The Resource Center module provides a quick way to upload files into the Counterpoint Cloud Platform either for your own use in the future, or to be made public for other users to see.

CPMailer

CPMailer Core

The CPMailer Core module allows a user to view and edit their own daily/weekly/monthly CPMailer messages based on any of the blocks available on the system.

CPMailer Manager

The CPMailer Manager module allows a user to modify the CPMailer messages of users that they are the assigned manager of. This also allows the creation and management of CPMailer Users.

Note: Requires the CPMailer Core module to function properly.

CPMailer Special

The CPMailer Special module allows a user access to enable/disable the special reports (such as monthly/weekly customer alerts) on a company-wide basis.

Report Generator

Customer Reports

The Custom Reports module allows users to create their own reports based on all of the information available in the Counterpoint Cloud Platform. this also includes the ability to save and rerun previous reports.

Note: Saved reports are available to all users who have access to this module, however the branch restrictions of users will still apply.

Note: This module does not respect a users salesrep permissions. By granting access to this module, you are granting a user access to the sales data of all salesreps.

Prebuilt Reports

The Customer Reports module grants access to prebuilt reports added to the Counterpoint Cloud Platform to be run against your data. These reports offer unique breakdowns and perspectives into

performance in ways that do not fit into other modules or formats.

CP2 Admin

Admin CP

The Admin CP module grants access to some information specific to your Counterpoint Cloud Platform, such as billing cycle and registered users.

Address Book

The Address Book module grants access to editing the address book used within the CounterMessage module.

Corporate Goals

The Corporate Goals module grants permission to create corporate goals, which are then visible to all users.

Admin Alert

The Admin Alert module grants access to the ability to modify and enable/disable the message that is displayed to all users on the first page after login.

Server Settings

The Server Settings module grants access to all of the settings that can be changed for your Counterpoint Cloud Platform.

Note: The settings in this module can have disastrous effects on the performance of the Counterpoint Cloud Platform, and restoring issues caused by carelessness in this module may have additional billing costs.

Branch Management

The Branch Management module grants permission to edit the categories and groupings of branches that all users are able to use to quickly select groups of branches throughout the Counterpoint Cloud Platform.

CP2 Manager

Manager Core

The Manager Core module grants a user access to invite new users to the Counterpoint Cloud Platform, and allows them to edit users that have been assigned to them.

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