V 1.4.3

New Features/Improvements

Below is a complete listing of the new features included in this version

New Flightdeck Data Filter Period

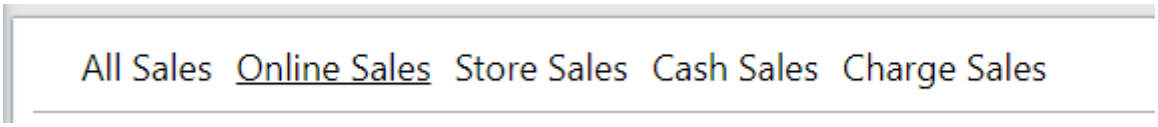
- Ability to display FlightDeck data for the past 12 months, compared to the previous 12 months

Additional Sales Flightdeck Metrics

We've added a number of new KPIs and sales metric breakouts to the Sales Flightdeck dashboard

Cash/Charge Breakdown

Additional breakouts of Cash and Charge totals have been added to the top sales panel switcher in addition to Online/In-Store



Monthly Sales Breakdown

A breakdown of sales, by month, for the past 12 months. The graph compares the past 12 to the previous 12 by month and stacks in-store and online sales

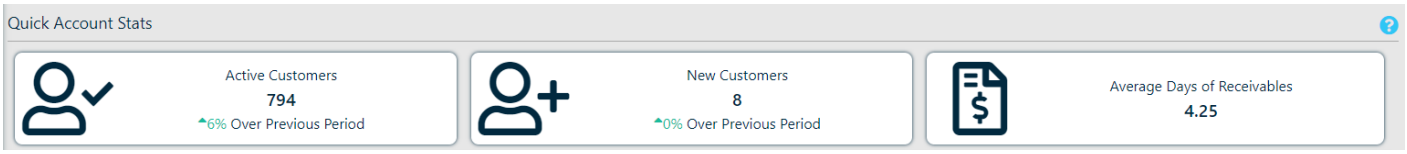


Sales By Sales Rep

A new bar graph to display sales by sales rep for the period selected in the filters

Account-Based Metrics

New tiles reporting number of active customers, number of new customers and the current average days of receivables.



Additional Inventory Flightdeck Metrics

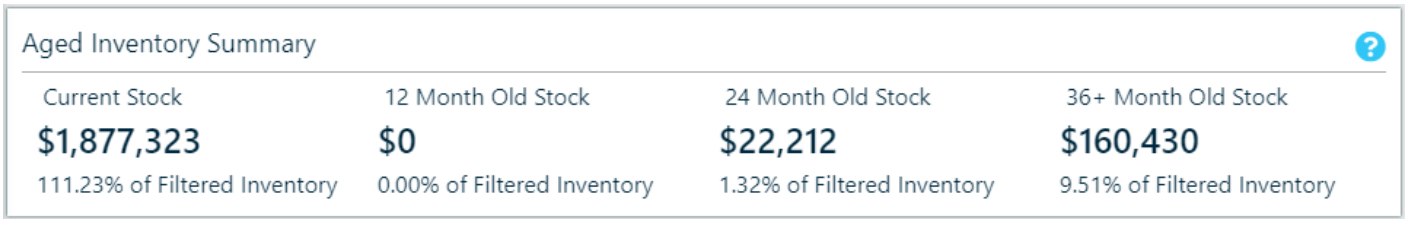
All new metrics in the inventory dashboard will update based off of the values entered in the data filters.

Past 12 Month Inventory Value

A graph has been added to display trends in average inventory value over the past 12 months.

Aged Inventory Summary

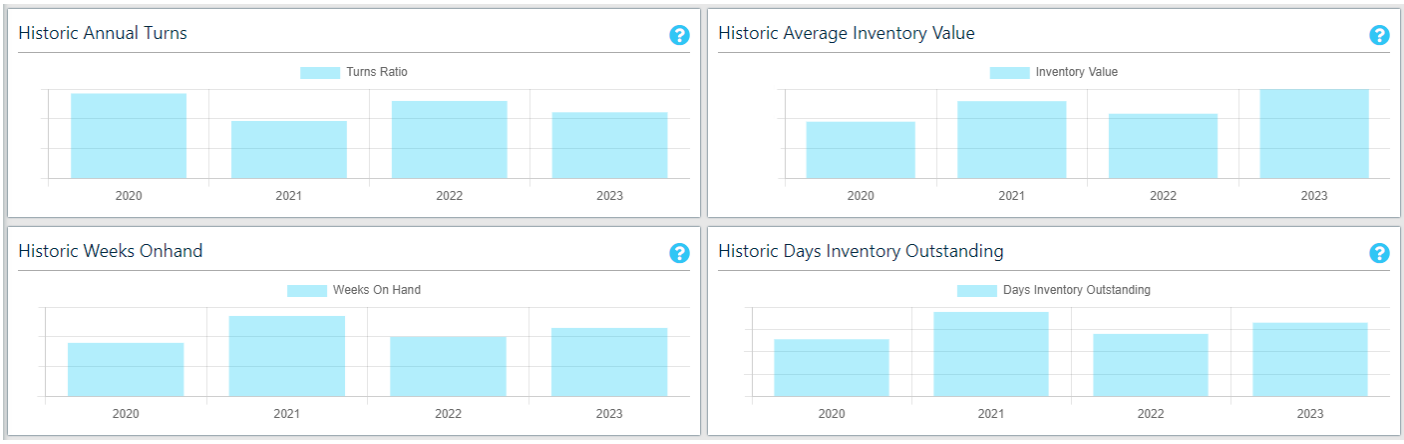
We've added in a new 'Aged Inventory Summary' panel to give you quick visibility of your inventory aging, up to 3 years. This panel also reacts to the filters you have set for your inventory Flightdeck.



Historic Graphed Metrics

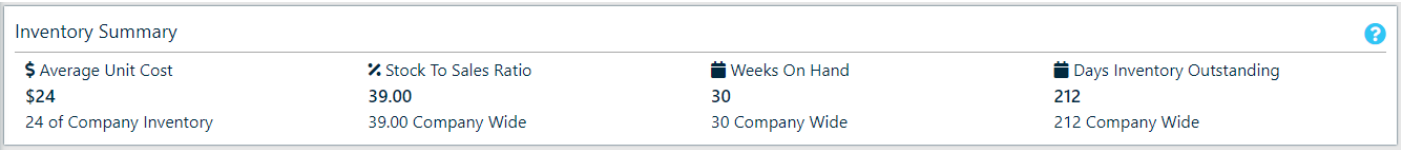
We've added in 4 new graphs to show historic trends in:

- Inventory Value
- Inventory Turns Ratio
- Days of Inventory Outstanding
- Weeks of Inventory On Hand



Additional Summary KPI Panel

We've also added in another summary panel of inventory metrics for the previous 12 months



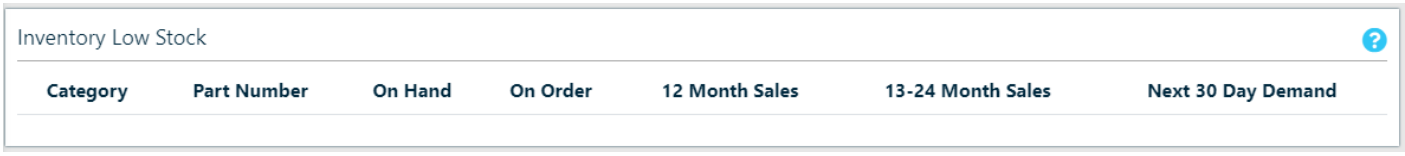
This panel includes:

- Average Unit Cost - Average cost of a single unit based on entire inventory value divided by number of units onhand
- Stock to Sales Ratio - Average inventory value / Total sales for the past 12 months, represented as a percentage
- Weeks On Hand - Average inventory value / Total cost of sales for the past 12 months * 52 weeks
- Days Inventory Outstanding - Average inventory value / Total cost of sales for the past 12 months * the number of days in the year

Updates to Low Stock Table

Also in your Inventory Flightdeck dashboard, we have added 2 new columns to the Low Stock table

- **13-24 month sales:** The total sales of this item between 1 and 2 years
- **30 day demand:** Based on sales, this is the demand of product needed in the next 30 days



More Custom Report Fields

Aggregate Fields

We have added a number of new aggregate fields to the custom reports:

- **Combined Customer/Ship To Name:** A field that will combine multiple ship-to names into one column when running a report on account only
- **Total Charge Sales:** A calculated total value of charge sales for your selection
- **Total Cash Sales:** A calculated total value of 'cash' (non charge) sales for your selection
- XX Day Aged Charge Sales - Total charge sales values, aged to correspond with Customer aged AR balances
- **Total Returns in Dollars**
  - Product Returns
  - Core Returns
  - Warranty Returns
- **Total Defective Onhand:** A calculated total of the defective onhand based on your report criteria
- **Total Lost Sales:** A calculated total of the lost sales based on your report criteria
- **Total Customer Backorder:** A calculated total of the customer backorders based on your report criteria
- **Total Supplier Backorder:** A calculated total of the supplier backorder based on your report criteria

New Type of Aggregate Field

We have added a new **Historic Sales** group of fields, which include a number of segmented total values

> These fields still adhere to the date range filter, so to get accurate values you must select a date range that would include the selected dates. For example, to get 'Total Sales - 3 Year', your date range must go back over 3 years.

- **Total Sales -** We have added fields to break provide Total Sales $ by the following:
  - Per month for the past 6 months
  - Total Sales - 1 Year
  - Total Sales - 2 Year
  - Total Sales - 3 Year
  - Previous 12 months total

    - YTD total
    - Previous YTD total
- **Total Quantity -** We have added fields to break provide total quantity sold by the following:
    - Per month for the past 6 months
    - Last 12 months total
    - Previous 12 months total
    - YTD total
    - Previous YTD total
- **Charge Sales - Month**: We have added in the ability to add in charge sales totals, specifically by month, for the past 6 months

Additional Sales Fields

- Levy Cost
- Levy Value

Additional Customer Fields

- Credit Limit
- Credit Rating
- Date Created
- AR System Type
- Customer Type
- Has Statement
- Contracts Allowed

ALL Inventory Fields

We have also added in all fields found within the COUNTERPOINT inventory. This includes all fields present in the product maintenance screen within Counterpoint

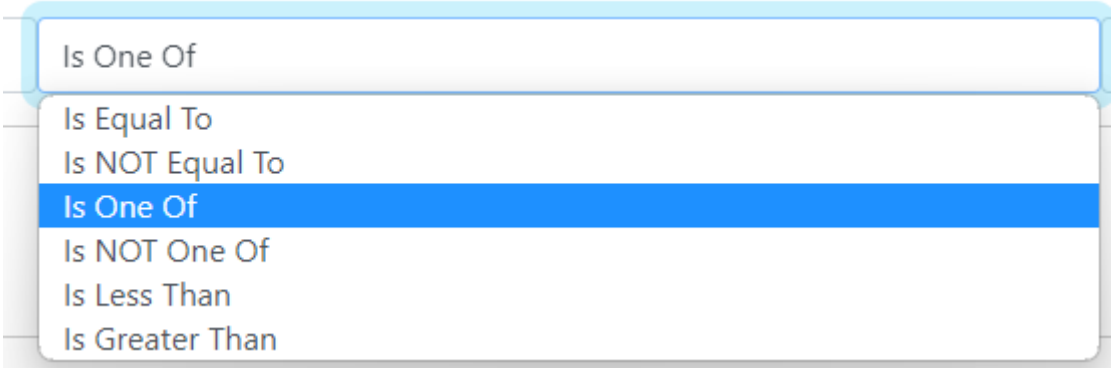
Field Descriptions

We have made a number of updates to the summary / aggregate field descriptions to better identify their data and use.

Custom Report Enhancements

New Filters

Custom reports now have the ability to add a 'Not Equal To', 'Is One Of' or 'Is NOT One Of' filter

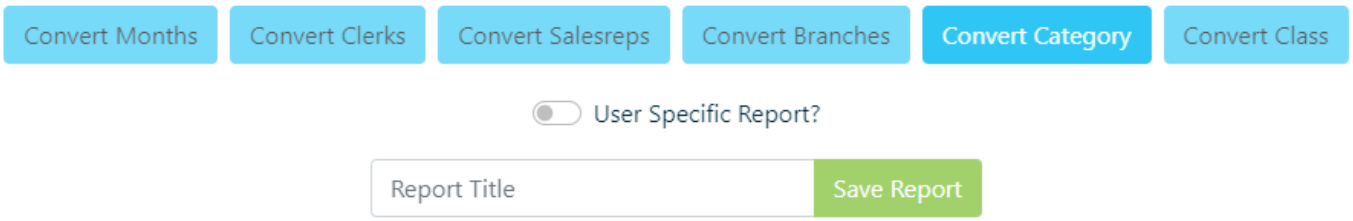


- Is NOT Equal To: The listings will not be returned for any records not matching this criteria
- Is One Of: Listings will be returned for any values matching one of the listed options. Options must be separated by a pipe "|" symbol
- Is NOT One Of: Listings will NOT be returned for any values matching one of the listed options. Options must be separated by a pipe "|" symbol

This new feature also extends to allowing users to filter on 'not empty' or 'empty', by entering a space in the **Value** field.

User Specific Reports

- When saving a report, you can opt for the report to be 'User Specific', meaning that only the user who created the report will see it in the saved reports listing.



Web Report Enhancements

- Added column sorting and filtering to the web report listing

Web Reports

Name	Date	Signatures
Name	Date	Signatures
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-07	0 / 0 (0)
Selenium Test Schema	2022-12-06	0 / 0 (0)
Selenium Test Schema	2022-12-06	0 / 0 (0)

Previous 1 2 3 4 5 ... 87 Next

New Prebuilt Reports

- Added in a Cloud equivalent to the Counterpoint Stock Status Report. This report requires a category be entered and can be run for one or many branches



- Added a new 'Sales History By Product Group' report which shows the same sales values as in the Sales History By Category report, but groups them by Product Group



- Added a new 'Consolidated Sales' report which shows current sales compared to last year, as well as a 4 month breakdown of sales increase/drop. Also includes current inventory value.



Historic Inventory Predefined Report Update

- Modified the report to add columns for a 3rd year of history

General Predefined Report Enhancements

- Style changes to the predefined report landing page

- Modifications to some of the predefined report descriptions
- Modified the filtering on the sales listing table to be a 'contains' type search vs. an exact match.
- Modified the Historic Sales report to follow the standard branch filters used throughout the dashboard.
  - No longer limited to a single branch
- Modified the detailed invoice search/listing report with the following
  - Increased number of records per page
  - Modified the font for easier reading
  - Changed the category field to report category code vs. category name

Monthly Inventory Quantity Tracking

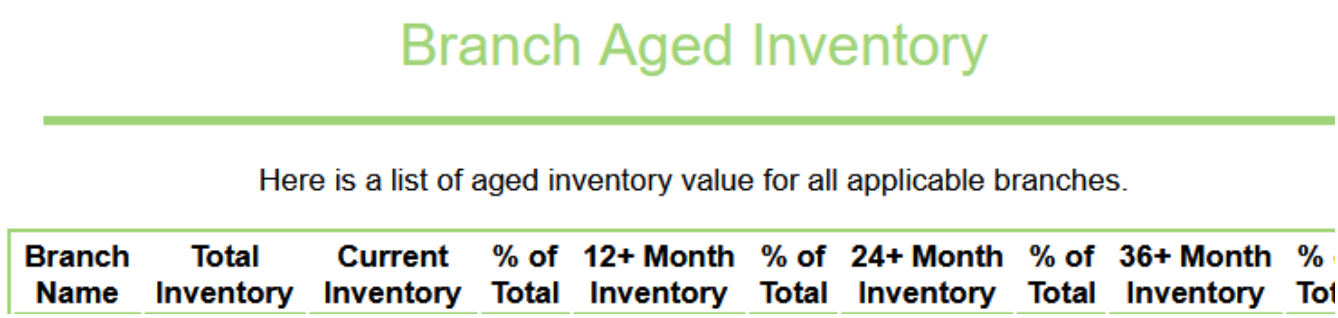
In addition to tracking the monthly inventory valuation, we will now also be tracking monthly onhand totals by category. The historic reporting on this will be available in a future release

CPMailer Enhancements

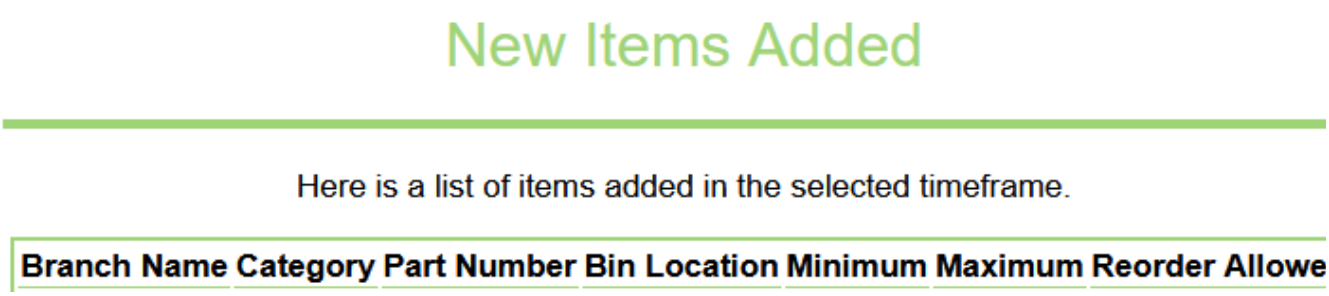
- Changed email headings for better readability
- Addition of a new class of CPMailer overnight reports. 'By Branch' reports will email you the specified reports, broken out by branch, based on your allowed branches.



- Addition of a new 'Aged Inventory Value' report which will show a breakout of the aging of inventory, up to 36+ months, based on today



- Addition of a 'New Items' added, showing items added to the system for the timeframe of the report



CounterCRM Enhancements

- Added new customer information tiles
  - Credit Rating
  - Last Invoice (Amt & Date)
  - Last Payment (Amt & Date)
  - Credit Limit
- Added new 'Customer Annual Statistics (Past 12 Months, Year-over-Year)' tiles beneath the monthly sales breakdown

CounterCRM Changes

- Style changes to make for easier reading of customer notes.
- Style changes to customer information tile icons
- Style changes to make for easier reading of customer alerts.

QuickDial Enhancements

- Added new customer information tiles
  - Credit Rating
  - Last Invoice (Amt & Date)
  - Last Payment (Amt & Date)

    - Credit Limit

Bug Fixes

- Fixed the rounding of GP% in the prebuilt historic sales report
- Fixed the CounterCRM listing to group all customer's by Account number when more than one ship-to is available.
- Fixed a bug in the CounterCRM summary page causing the JDispatch 'All Time Deliveries' count to return blank
- Corrected the monthly sales breakout labels in CounterCRM as they were shifted off by a month
- We have modified a number of the custom field report names to make their meaning more obvious.
- Fixed a bug where ship-to numbers with different names would split when a custom report was only supposed to report on account
- Corrected table heading in Prebuilt Historic Sales report
- Fixed documentation links on all prebuilt reports
- Fixed logo size on CounterMessage reply page
- Fixed font color in CounterMessage email
- Fixed a styling bug that showed web report heading with white text on a white background
- Fixed a styling bug in the user registration screen
- Fixed a styling bug in the web report listing screen
- Fixed layout inconsistencies in Admin alert and Address book maintenance pages
- Minor style changes on e-cat analysis page to bring it in line with other page styles
- Minor style changes on 'Current Filter' selection tab
- Corrected a problem where the clerk analysis page would not show properly when there were $0 in web sales
- Corrected a problem in the Hourly sales analysis report where the stacked graph would not display if there were $0 sales on a given day
- Fixed a bug in the daily sales 'radar' graphs that incorrectly displayed Saturday sales as Sunday
- Fixed a bug in QuickDial which caused the page to not render properly on certain account
- Corrected the 'Forecasted Annual Turns' calculation as it was reporting too high in some cases.

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