V 1.4.4

Overview

In this latest update for our online business analytics platform, Counterpoint Cloud, we've focused on enhancing three key components.

Firstly, we've introduced Outstanding and Historic purchasing information. This feature empowers you to gain deeper insights into your purchases and supplier performance, providing you with valuable data to optimize your business decisions.

Secondly, we've conducted a comprehensive review of all CounterCRM pages, ensuring an exceptional mobile experience. We've also added new features to equip your sales representatives with the essential information they require while on the go or at a customer's location.

Lastly, we've put the finishing touches on our QuickDial module and seamlessly integrated Counterpoint Cloud with the AMS VoIP solution. This integration allows your clerks to access extended customer information and streamline order creation by simply answering the phone.

We're excited to introduce these improvements, which we believe will greatly enhance your experience with Counterpoint Cloud and help you make more informed business decisions.

Mobile-First Style Updates

We have made a large number of improvements, across the board in the Counterpoint Cloud Platform, to make the application more friendly on your mobile device.

Key focuses for this project were to ensure tables were accessible (notice the blue + symbol on table rows), graphs were automatically resized and that button contents and fonts were legible on all devices.

While these changes have been made in all modules, you will notice the greatest improvements within the CounterCRM and FlightDeck modules.
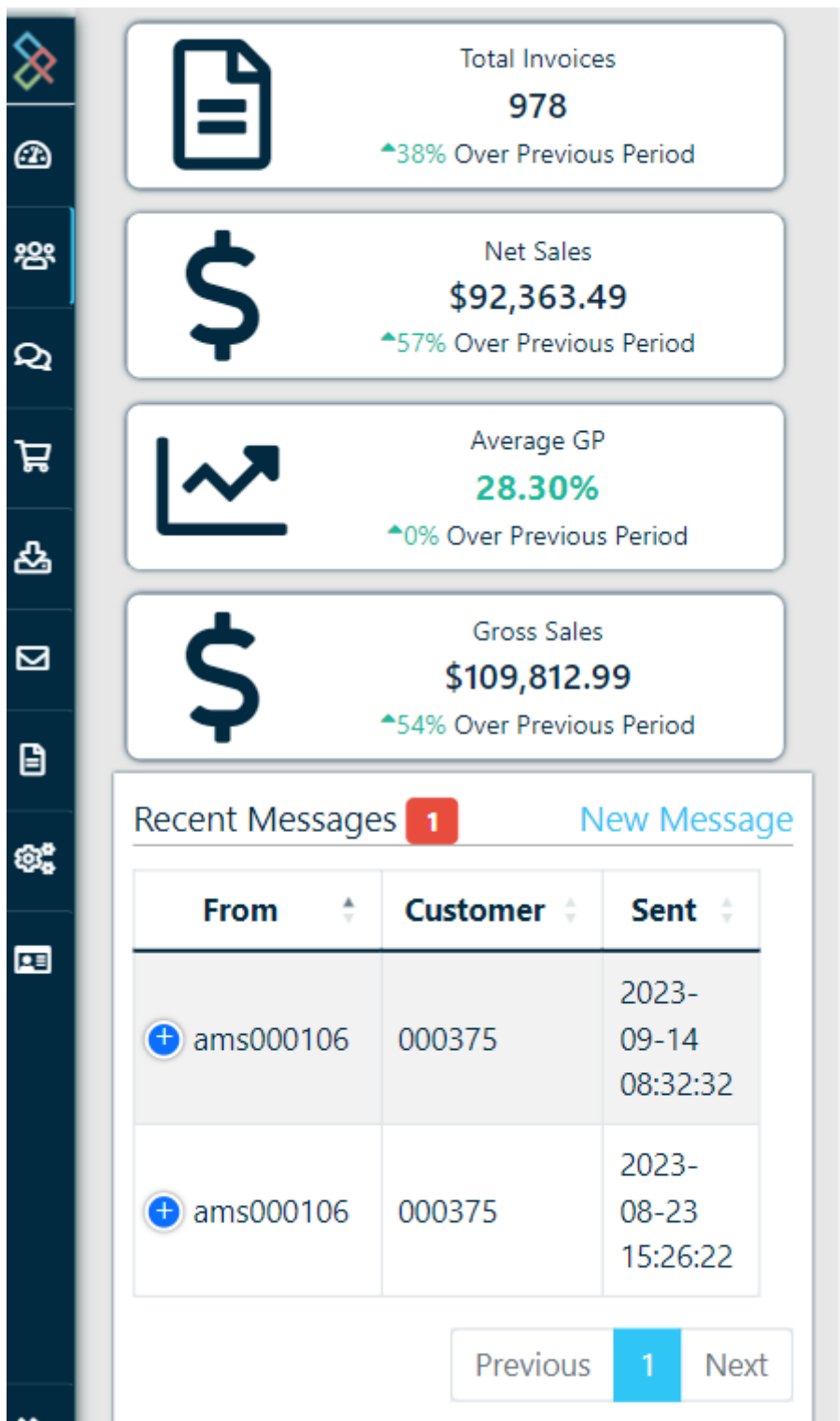
CounterCRM

Launch an autoecat session

A new customer action button that will launch a new session of autoecat (in a new window) and automatically log you in as the selected customer.

Once logged in, you can browse the catalogue as the customer, showing their pricing and place an order as if you were them.

CounterMessages Listing

The 'Recent Messages' tab has been updated to show both open and closed messages, as well as replacing the message 'Hash' with the current status of the message.

We have also updated the message preview link to open the selected message in a new browser tab.

PBX Integration

All customers who currently have an AMS VoIP solution deployed have had their PBX integration activated within the Cloud Platform. This means that all inbound and outbound calls to a customer's primary phone number will be available for review in both the CounterCRM and QuickDial modules, allowing you to confirm call volumes and duration for customers as well as confirm who a customer may have spoken with.

Recent Calls

- 2023-09-21 15:39:39 - MISSED (0 Seconds)
  (604) 430-5677 -> 1127
- 2023-09-21 12:24:16 - ANSWERED (39 Seconds)
  (604) 430-5677 -> 1125
- 2023-09-21 11:19:01 - ANSWERED (1 Minute 25 Seconds)
  (604) 430-5677 -> 1126
- 2023-09-21 10:00:45 - ANSWERED (1 Minute 7 Seconds)
  (604) 430-5677 -> 1125
- 2023-09-21 08:54:57 - ANSWERED (3 Minutes 22 Seconds)
  (604) 430-5677 -> 1226

Additional CRM Updates

- Added new 'Total Owing' tile to the CRM 'Quick Statistics'

Custom Reporting - Purchasing data

We have imported ALL current and historic purchasing data into the custom report generator. This has resulted in the creation of 2 new types of custom reports

- **Outstansding POs** - These reports will pull from all current and outstanding purchase order data, linked into inventory data
- **Purchase History -** These reports will pull from all receiving data, linked into inventory data
- **Supplier Data** - All fields from your supplier screen is available on both purchasing reports.

Each of these reports contain all possible purchasing fields available as detailed fields, and basic aggregate fields under the calculated fields section.

QuickDial Updates

Overview

For CP2 users who also have implemented an AMS PBX VoIP solution, the Counterpoint Cloud Platform app has been updated with a number of enhancements around QuickDial.

The QuickDial integration module allows a tie-in between your phone system, the cloud platform and, in turn, the Counterpoint invoicing screen.

In an integrated scenario, a 'QuickDial' information page will pop up when you answer your phone, for the customer whose number is associated with the Caller ID. Within this page you get a number of key metrics

- Customer statistics like last payment, industry type, sales rep, account balances
- Month to date sales
- YTD sales graph, by month
- Current deliveries
- Detailed invoice history

You can also opt to launch an autoecat session as that user, or even launch a Counterpoint invoice session as that customer.

Update Details

The updates to QuickDial in this release are related to app security, performance and porting recent CRM updates into the QuickDial module.

As well, we have made enhancements to the handling of calls answered in 'fail-over' or call-center scenarios, where the call is being answered in a location different than the one it was originally destined for. These enhancements ensure that the Counterpoint session opened from the QuickDial screen is launched in the originally dialed branch

Windows Application

We have also released a new version of our Windows application. This utility allows you to launch the Counterpoint Cloud Platform right from your desktop!

The app is available for download here: https://counterpoint.cloud/app.php

Once installed, the application will auto-update with any future releases.

FlightDeck Inventory Dashboard

- We have updated both the Low Stock and Old Stock tables to consider product demand instead of only considering product sales.
- Modified the Old Stock table to include Supplier Code and Supplier Name, as well as changed the category field from Name to code.

Bug Fixes & Behind the Scenes Updates

- Fixed a bug when adding new notes to a customer
- Modifications to data export routines to address problems with items sold in tenths
- Modified the nightly 'non-stocked' import routine to apply the default product group from Category to non stocked items.
- Fixed a bug in the CounterCRM recent call log wherein only the most recent call was showing.
- Fixed code regression that caused JDispatch location and signature pop-ups to no longer work,
- Standardized the delivery detail screens between QuickDial and CounterCRM
- Fixed a bug causing the 'new note' button in QuickDial to work intermittently
- Fixed a bug that caused the current call badges in QuickDial to show with an incorrect style applied.
- Modified the flightdeck to remove unnecessary data metrics when viewing with an account applied
- Fixed a bug that was causing the CounterCRM "Monthly Sales By" graphs to show yearly totals vs monthly
- Enhanced the nightly export routines to better handle control characters within the product description.
- Fixed the Average Days Receivable tile as it was reporting invalid values.

Revision #15
Created 12 September 2023 16:03:50 by Jim
Updated 5 October 2023 00:20:48 by Jim