V1.3.0

This release takes aim at a number of new and very exciting features aimed at adding efficiencies for your counter staff. This release also takes us out of our beta testing and to a production/live infrastructure.

QuickDial

- Seamless integration between your AMS PBX phone system, and your ***COUNTERPOINT*** point-of-sale by way of the ***COUNTERPOINT*** cloud platform.
- QuickDial launches as soon as you answer a call, using the CallerID to find the customer.
- Ability to launch a ***COUNTERPOINT*** invoice session for a customer directly from QuickDial with one click
  - Launch a customer invoice, or invoice for specific ship-to
- Single screen with many pieces of customer specific info at your finger-tips
  - Customer account status
  - Delivery run/run time info
  - Detailed invoice search
  - Integration with JDispatch for visibility of current deliveries
  - Last ecat access
  - Pop-up notices for important notes on account
- Seamless ability to assign unlimited additional contact phone numbers to an account

Sales FlightDeck updates

- Changes to values/headings in top card for more clarity on meaning
- Ability to customize field headings
- Persistent visibility of current data filters

Inventory FlightDeck updates

- Add last cost to old stock report
- Add validation against 'date added' into old stock report
- Introduction of 12 month and 24 month old stock KPI cards to inventory flightdeck
- Persistent visibility of current data filters

CounterCRM enhancements

- Ability to import call logs from AMSPBX system into CP[2]
  - Includes Call date, duration and recording (if available)
- Ability to assign 'pop-up' notes in the QuickDial page
- Introduction of sales-rep 'focus' list.
  - Ability to manually add customers to your focus list
  - If enabled, 'focus' customers are listed first for quick access when browsing CRM
- Customer specific sales alert targets
  - Override the system defaults on
    - Sales decrease threshold
    - 30 day overdue threshold
    - 60 day overdue threshold
    - 90 day overdue threshold

Revamp of CPMailer management and new reports

A number of enhancement to the overnight reporting module

- Redesign of the report assignment screen
- New 'Web Report' type
  - Users are sent an email and can log in to view the report
  - Can create 'audited' web reports which require signatures
- Introduction of a number of new overnight reports
  - Top 10 Categories
  - Top 10 Classes
  - Top 10 Customers
  - Top 10 Gaining Categories
  - Top 10 Gaining Classes
  - Top 10 Gaining Customers
  - Top 10 Gaining Industries
  - Top 10 Industries
  - Top 10 Losing Categories
  - Top 10 Losing Classes
  - Top 10 Losing Customers
  - Top 10 Losing Industries
  - Low Margin Report
- Users who have an associated salesrep ID on their account can receive most of the existing report types only for their sales, via a second column of "User" blocks.
- Expansion of backend API to allow custom reports to be sent from your Point-Of-Sale system to users via the cloud platform via a simple .csv upload
  - Recipient management all done through the platform

ResourceCenter Rework

The ResourceCenter module has been rewritten to take advantage of some additional security measures. This also sets up some nice improvements and features we can introduce in the near future, stay tuned!

New fields in custom report generator

- Introduction of unique invoice count as a summary value in Report Generator

Updates to Prebuilt Reports

- Sales table now has the ability to adjust the comparative date ranges beyond just MTD/YTD.

Admin Updates

- Admin users aren't required to know the user's password if they wish to change it.

Bug Fixes & Improvements

- Implementation of Redis for speed improvements
- Refactoring of queries for speed improvements
- Use default branch in prebuilt reports to present default values without needing to select
- Users can now reset their own password via a link sent to the email address they registered with
- You will now be redirected to the login page if your session has expired
- Big performance upgrades when revisiting a loaded page

Revision #14
Created 2020-07-10 16:26:20 UTC by Jim
Updated 2020-11-05 16:49:11 UTC by Tyler