** COUNTERPOINT® Version 6+

Release Overview

The upcoming release of COUNTERPOINT will consolidate for the first time in several years a number of features that have not been considered mainstream, meaning only certain customers got certain features based on their requests. This was a strategic mistake as in many cases this has held AMS back from being more aggressive in the software development cycle. This release of Version 6+ will move all customers to the same version, making support, training and new development rollout easier and allow for more frequent updates, which is why we plan to move to a quarterly software release update schedule. Bugs will be released as completed. The listing below may well contain features you already have and use but also others you may not be aware of or have forgotten are available. All active links will take you to a more detailed overview of the specific enhancements.

We encourage you, once settled into Version 6+ to submit to us any functionality you would like to see added or changed for consideration in a future release. We will also be releasing a list of the currently planned updates for 7.1 shortly.

Functionality & Highlights

Point-of-Sale

- **Credit Card Integration enhancements:** For those dealing with Global, Moneris and Digitech changes have been made to eliminate Suspended transactions prior to day end.
- **Improvements to outstanding quote handling:** Including deletion upon Invoicing.
  - In addition the Quote / Order search combined: When keying in a customer number, instead of the ‘Open Orders for This Customer’ prompt, counter-staff may be presented with any combination of a [A/O/P/Q/N] prompt, allowing them to quickly view any [O]pen Orders, [P]acking Slips or [Q]uotes. Other options include [A]ll or [N]one
- **Improvements to handling of over credit limit customers:** For transactions that put customer over their credit limit on completion of an invoice the system will offer to keep the order as a quote instead of losing it which can be recalled by searching for a PO # containing CH(Credit Hold).

- **Gift Receipt Option:** If activated, when finalizing an invoice, the user will prompted to print a gift receipt.
- **Support of User Defined Lost Sale Reason codes:** With drop down selection list.
- **Standard Comments and General Charges:** This provides the ability to apply standard comments to an invoice using the “G” line type.
  The General Charges feature allows the ability to accept deposits by a pre-set percentage, a default value or a manually keyed amount at the time of sale.
  The General Charges also provide the ability to add an automatic charge to all invoices, such as a Fuel Surcharge

- **The ability to change the PO number:** After the invoice has been completed.
- **Change PO# on Zslip:** For those using Zslips the PO# can now be changed during the billing process in instances where the customer only issues a PO# when the order is complete.
- **New Customer Notes Options:** More flexibility for creating customer notes such as notes that can be automatically printed on the invoice, such as delivery instructions or who has singing authority.
- **The Branch Stock Inquiry access:** Shift/F4 from within the billing screen has been enhanced. You can now also create stock transfers from a branch. These transfers can be for a single item at the time you enter the inquiry, or you can create and add to a running transfer for completion at a later time.
- **The ability to ADD a non-stocked part number automatically:** From the Price Book, meaning receiving and returns have been made significantly easier.
- **Add part to invoice using your Customers Part Number:** For customers who have an internal part numbering system, and order from you with those parts, there is now the ability to invoice them with those part numbers, which are tied to your real part number. Will also modify the “customer to your part #” link if you transfer your part to a new number. The order can be keyed by their part # or yours and will print both numbers on their invoice.
- **Control of Specials and Contract pricing from one maintenance routine:** With the inclusion of both Price Level and Discount group as possible filters to add Contracts/Specials via 4. Sales Desk > 8. Administration > 2. Customer Pricing > 3. Contracts / Specials, there is the possibility to migrate all pricing matrixes and discounts into the Specials, and do all pricing/discount maintenance from that one screen. There is a migration routine that must be run by AMS prior to adopting this method.
- **Ability to prevent Counter Staff from lowering prices:** This feature is a new field in the clerk maintenance that, when activated, will prohibit the clerk in question from changing the selling price from within the invoice. Any price changes would need to be authorized by a user with authority to change prices by entering their PIN.
- **Multiple Bin # display on the billing screen** with the option to select which Bin the product was picked from.

- **Customer Fleet Vehicle tracking:** This is the ability to set up your customer's equipment/vehicle using their ID number with the parts it takes for ease of lookup.
- **Extra Invoice copies for specific customers:** Extra invoice copies are now parameterized by transaction type. So, for instance, you can have duplicate copies of invoices but not quotes.
- **CAPS Lock:** We have updated the PC software to automatically enable the CAPS lock when using Counterpoint. This means you do not need to toggle the CAPS lock on or off when going in/out of Counterpoint
- **Icons, Etc.**: Many of the menu icons have been updated and standardized

Enhancements to JDISPATCH:

- Inclusion of Pick Tickets in the transactions sent to the dispatching screen. Pick tickets will now be available for dispatch via the COUNTERPOINT dispatch module.
  - This provides the customer with an unpriced document.
- Delivery Runs: The delivery dispatch module now has the ability to assign customers to a delivery type, and a run. This allows you to keep cash sale transactions, and non-delivery customers out of the dispatching screen, cleaning up the process for your dispatcher. Delivery type and Run maintenance is handled in the 4. Sales Desk > 7. Delivery Dispatch menu, with delivery types determining whether an invoice is delivered or not, and a run number helping group customers in geographic runs. Once delivery types and runs are set up, they are assigned to a customer in the customer maintenance screen. We include 3 default delivery types [D]eliver, [P]ick-Up, and E[X]press. Both [D]eliver and E[X]press will be pushed to the delivery dispatch screen, which no delivery type or a [P]ick-Up delivery type will not.
- After all maintenance is done, the counter-staff will notice a 'Deliver' option when finalizing an invoice. Typing the 'D' key will give them the option to change the default value. The dispatcher & drivers can also select a run number when displaying invoices, but do not have to.
- If you are still not signed up with JDispatch, It is a full featured delivery tracking and signature capture module built to interact with COUNTERPOINT and the Counterpoint Cloud Platform. The best part? The base version is included with your COUNTERPOINT system! Keep track of deliveries and pick-ups, track driver locations and more.

  Information on JDispatch can be found online here.

Web order (autoecat.com) related Changes

- **Web order discounts:** Allows the setup of a global web order discount (by branch) to be applied to web orders. This discount is then printed on the invoice. However, the printed web discount is printed in place of the customer's regular discount (Both discounts still apply, only one prints).
- **Servicing Branch Fulfilment Changes:** Ensures that all web orders print at a customer's servicing branch. autoecat now passes through pre-defined messages to alert your counter staff of product availability and where to source out of stock items from.

- **Pick up in store enhancements**: Pick up in store orders are now available in the open order review screen. Customers can optionally also request a confirmation email
- **autoecat Desktop Browser**: The new autoecat browser is aimed at providing your counter staff the the best possible performance and most functionality possible when they use autoecat from within the billing system. Some of the key features of the new browser are:
  - Enhanced speed of browsing
  - Streamlined transfer of items from the catalogue / shopping cart and back into your invoice
- We have also been very busy upgrading your and your customer's online ordering experience as well. A complete listing of recent and ongoing changes to the autoecat.com website can be found here.

Customer Specific Changes

- **Core Billing flag for customers:** For those who are allowed to not pay core charges provided they return the core by a certain date, the number of days of the grace period is specified in a related data field. Specific Core statements can be produced for the customers flagged as being in the program.
- **The ability to suppress the printing of invoices:** For customers set to automatically receive their invoices by Email. In addition the ability to Email to multiple recipients has been added.
- **Consignment Inventory:** For customers purchasing high volumes of certain part numbers, they can be set up with an opening inventory balance that will only be billed when they reorder.
- **Enhancements to the Loyalty Rewards Program:** The system has been changed to allow the rewards to be based on Reward Points that is based on a Points/Dollar ratio that can be set by category. In addition, Invoices can now be Emailed to the VIP customer.

Inventory Control Changes

- **Product Maintenance Access Control:** A new parameter to set which fields certain users have access to within the Product Maintenance
- **Revised Maintenance Screen:** That has been enhanced to allow for a number of new fields related to the optional “Turns Based” purchasing logic.
  - Rename of Minimum to ROP.
  - New field to lock recalculation of the ROP for xx number of months.
  - New field for Last Price Update**:** Added on maintenance screen to show when the last price change was applied to the item.
  - Item is not returnable**:** A new flag to indicate if the item is not returnable to the supplier.
  - **Additional data fields to support imported product:**

    - Base Price and Base Core (Primarily for foreign currency): Addition of a ‘Base’ price and core. This is the price that was used to update your system pricing, before pricing parameters were added.
    - Duty rate
- **Ability to Chain Substitutes:** As part of the maintenance routine.
- **Quantity per barcode as part of product maintenance:** Addition of a quantity tied to a barcode, for use on items that come in and can be sold by a unit and/or case.
- **Kit Handling:** The two types of Kits supported:
    - **Manufactured Kits –** which are assembled from a group of parts then received into inventory for resale as the kit part number
    - **Counter Kits –** which are kits that are put together at the time of the sale the components removed from inventory when the sale is completed
- **Category Listing:** The category listing has been modified to produce an extract for import into excel with additional fields included.
- **Physical Count Bin Add:** Has been added to allow the adding of a new bin during a physical count.

Repair Shop Module

- **The ability to print Multiple Invoice copies by Customer**
- **New flexibility by the Integration of Edit Pad Pro for Work Order Labour Notes**
    - Spell Check
    - Auto Line Wrap
    - Adjustable Line Length
    - Increased Text/Labour line to 2000 characters, up from 480 at present.

Purchasing / Receiving

- **Booking and Special Purchase Order handling**
    - Suggested Order report breaks out On Order Quantity of both types
    - Reporting on New Purchase Order Types
- **RF Gun/Android Tablet Based Receiving capability**
- **Updated parameters for Critical Inventory report**
    - Include and report on items in a low inventory status based on minimum On Hand value
- **Enhanced Foreign Currency support:** Use of Base Price to maintain the suppliers cost before exchange, duty and freight.

Sales Analysis

- **Full Integration to Counterpoint.cloud that includes:**
    - **Nightly Sales Emails** - Formatted emails to report on a number of different sales metrics

    - Sales By Branch
    - Clerk Sales
    - 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
  - **FlightDeck**
    - Sales Analysis - Track sales metrics via an easy to read sales dashboard comparing current sales to previous
      - Sales by Day / Industry / Territory / Product Group
      - Online vs. In store sales
      - Cumulative Sales
    - Product/Inventory Analysis - Review overall inventory performance through the Inventory dashboard
      - Old / Invalid Stock
      - Inventory Value by branch / category / product type
    - Sales Goals - Set incremental sales goals by month / year
  - **CRM**
    - Easily review high level sales metrics, and detailed sales information by customer
    - Automatically track customers based on sales thresholds
    - Manually target customers to focus on
    - Track correspondence with customers through the CRM CounterMessages module
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  - **Web site ECAT Analysis**
    - KPI’s
      - % of Change
    - A full list of recent updates to the Counterpoint Cloud Platform is available online here
- **Hourly Sales extract**: Hourly sales extract is a routine that will analyze your hourly sales for a given time-frame, export the information to an excel template and present you with raw detail and graphed information on your hourly sales.
- **Price Override Reporting**: The Price Override reporting now allows for reporting over a period of time based on Customer, Sales Clerk, Range of categories and Override type.

- Price override report can also be automatically loaded to the counterpoint.cloud platform on a monthly basis for archiving and review

Accounts Receivable

- **A customer change log:** Has been added to allow Inquiry on what changes have been made to the customer's master data, when the change was made and by whom.
- **Ability to Switch between Customer Maintenance and Customer Analysis:** The Customer Maintenance and Customer Analysis have been enhanced to switching between with a single key stroke.
- **Customer Notes Edit/Inquiry:** The ability to access Customer Notes has been added to the Customer Analysis and Cash Receipts input.

Accounts Payable

- **Ability to Void a Cheque:**
  - Ability to void a cheque outstanding cheques
- **EDI Invoice Processing:**
  - The ability has been added to receive invoices electronically from vendors via an EDI transaction that can be selected for adding to a A/P transaction batch

General Ledger

- **Ability to Upload Budgets:**
  - Ability to upload budgets from Excel Spreadsheet
- **General Ledger Year End:**
  - The General Ledger Year End step has been incorporated into the Period 12 Month End to eliminate issues with order process being run between these 2 critical steps.

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