



## CounterPoint SQL V8.4.0 (September 2010)

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### Accounting

#### ▪ **Microsoft Dynamics SL v7.0 export interface**

This version includes an export accounting interface for Microsoft Dynamics SL v7.0 (formerly Solomon IV), which allows you to transfer distributions and voucher receivings using a pre-defined Data Transformation Services (DTS) package.

Export interfaces for Solomon IV 5.0/5.1 and Dynamics SL v6.5 are still supported.

☒ This feature was released in a V8.3.9 Service Pack.

#### ▪ **QuickBooks 2010 direct interface**

This version of CounterPoint includes a direct accounting interface to QuickBooks 2009, allowing you to transfer distributions and voucher receivings to your General Ledger and Accounts Payable modules. You can also use this interface to import accounts from your General Ledger into CounterPoint and to exchange vendor information between Accounts Payable and CounterPoint.

Direct interfaces to QuickBooks 2003 through 2009 are still supported.

☒ This feature was released in a V8.3.9 Service Pack.

#### ▪ **QuickBooks 2010 export interface**

This version includes an export accounting interface for Quicken 2010, which allows you to transfer distributions and voucher receivings using a pre-defined Data Transformation Services (DTS) package.

Export interfaces for QuickBooks 2000 through 2009 are still supported.

☒ This feature was released in a V8.3.9 Service Pack.

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#### ▪ **Sage Accpac 5.6 export interface**

This version includes an export accounting interface for Sage Accpac 5.6, which allows you to transfer distributions and voucher receivings using a pre-defined Data Transformation Services (DTS) package.

Export interfaces for Sage Accpac 5.1 through 5.5 are still supported.

✎ This feature was released in a V8.3.9 Service Pack.

#### ▪ **Sage BusinessWorks 2010 direct interface**

This version includes a direct accounting interface for Sage BusinessWorks 2010, which allows you to transfer distributions and voucher receivings to your General Ledger and Accounts Payable modules. You can also use this interface to import accounts from your General Ledger into CounterPoint and to exchange vendor information between Accounts Payable and CounterPoint.

Direct interfaces to BusinessWorks 5.0 through 2009 are still supported.

✎ This feature was released in a V8.3.9 Service Pack.

#### ▪ **Sage MAS 90 and 200 v4.3 direct interfaces**

CounterPoint SQL now includes direct accounting interfaces for Sage MAS 90 and MAS 200 v4.3, which allow you to transfer distributions and voucher receivings to your General Ledger and Accounts Payable modules. You can also use this interface to import accounts from your General Ledger into CounterPoint and to exchange vendor information between Accounts Payable and CounterPoint.

Direct interfaces to MAS 90 and 200 v3.x and v4.2 are still supported.

✎ This feature was released in a V8.3.9 Service Pack.

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### Point of Sale

#### ▪ **Importing freight**

In this version, when you import tracking numbers from a file generated by your shipping software (e.g., Worldship), you can now specify which field in the import file represents the freight amount for each order number in the file. This feature allows you to import freight charges directly into the corresponding orders, preventing you from having to manually add freight to each order before releasing it.

#### ▪ **New Point of Sale device framework**

In this version, CounterPoint's Point of Sale device framework and device-configuration functionality have been completely redesigned to improve the overall performance of Point of Sale devices and simplify the process of setting up and managing devices across multiple workstations.

The new device framework allows CounterPoint to communicate with each Point of Sale device independently, using a high-level interface that is tailored for each device. Thus, the new framework provides faster device response times and greater stability, while ensuring that CounterPoint can still run if a configured device is disconnected or inoperable for any reason.

In addition, device configuration data has been removed from the Windows registry and is now stored in the CounterPoint database, which allows you to configure Point of Sale devices for all of their workstations simultaneously, instead of requiring you to visit each workstation.

The new **Device Management** configuration tool allows you to easily assign devices to multiple workstations using a simple, drag-and-drop interface. To configure a Radiant-certified device, simply drag it to a workstation and specify the port to which it's connected. Since CounterPoint "knows" about certified devices, the appropriate settings (e.g., **Keep connected**, **Keep claimed**, and so forth) are pre-defined and set automatically when you assign the device to a workstation.

To streamline the configuration of workstations that use the same set of devices, you can create custom device "bundles" (or choose one of several pre-defined bundles), and assign them to all workstations that are similarly equipped. You can even set up "non-certified" devices as generic OPOS devices.

CounterPoint's new device framework supports the following Point of Sale devices:

- Receipt printers (using the new Radiant receipt format)
- Multiple MSRs per workstation (excluding keyboard wedge MSRs)
- Multiple line displays per workstation
- PIN pads
- Signature capture devices
- Printer-driven and POS-driven cash drawers
- MICRs
- Scales

✚ The older device configuration interface is still available for merchants who need to use OPOS or Crystal receipts, customer displays, custom Ingenico forms, or the Ingenico i3070 Secure Pin Entry Device (SPED) from Moneris.

## ■ Radiant receipts

This version of CounterPoint supports the new Radiant receipt format (**.rdlc**), which is fully compatible with OPOS receipt printers and includes most of the functionality of Crystal receipts, while offering superior performance over both previously-available formats (i.e., **.xml** and **.rpt**).

Further, you can create or modify Radiant receipts using the built-in, WYSIWYG receipt editor, without requiring you to purchase the Crystal Reports Designer. This editor provides all of the capabilities of the existing OPOS **Form Editor** in an easy-to-use, drag-and-drop interface. The new receipt format and editor also allow you to:

- Add images or company logos to your receipts
- Use formulas to modify ticket data and print the results
- Print individual grid cells or serial numbers under the corresponding item
- Include or exclude data based on any number of criteria
- Include aggregated data (e.g., number of items sold, subtotals, and so forth)
- Print barcodes anywhere on a receipt
- Print captured signature anywhere on a receipt
- Embed special characters to trigger special functions (e.g., opening a cash drawer) without

requiring the use of cryptic printer codes

Radiant receipts offer a simple, integrated, and comprehensive receipt solution that is suitable for most merchants, eliminating the choice between functionality and ease-of-use.

#### ▪ **Sending receipts via e-mail**

You can now send receipts to customers via e-mail, allowing you to offer your customers the convenience of electronic receipts while reducing consumption of receipt paper. You can create new customer records to capture e-mail addresses "on the fly" or add an e-mail address to an existing customer record during ticket completion, helping you stay more connected with your customers by ensuring that you obtain their contact information for future communications.

#### ▪ **Using the system beep as the open drawer alarm**

In this version, if you have configured CounterPoint to sound an alarm when a cash drawer is open and the specified **.wav** file cannot be played for any reason (e.g., the file cannot be found or the workstation lacks a sound card), the workstation's internal "system beep" is played instead.

This feature enables workstations that are not equipped with sound cards, such as the Radiant P1515 POS terminal, to alert users when they have left their cash drawers open after completing a ticket.

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## Order Management

New! ■

### **Order Management**

This version of CounterPoint includes comprehensive **Order Management** functionality that allows merchants to process multiple orders simultaneously—instead of one at a time—using a single, centralized interface. **Order Management** provides an efficient, task-oriented workflow that is designed to streamline order processing for structured, high-volume operations, including mail-order, telephone-order, and ecommerce merchants.

The **Order Management** window includes separate tabs for each stage that an order typically goes through (i.e., **Entered**, **Picked**, **Pick Verified**, **Invoiced**, and **Released**), as well as a tab for order lines that have been **Backordered**. These tabs display orders that include lines in the corresponding stage, filtered by location, customer, date, and other user-defined criteria.

✎ Because **Order Management** allows you to work with orders at the line level, individual orders can appear on multiple tabs, making it easy to see which lines on each order have been backordered, entered, picked, verified, invoiced, and released. For convenience, the **All Orders** tab lists all orders that match your filter criteria and indicates which stage(s) each of those orders is in.

Each tab on the **Order Management** window allows you to select multiple orders and perform one of the following tasks:

- Fill backorder lines
- Print picking tickets
- Verify picked quantities
- Generate invoices
- Release invoiced lines

Completing a task moves the selected orders into the next stage of the process. For example, the **Entered** tab allows you to print picking tickets for selected orders, moving them to the **Picked** stage, while the **Invoiced** tab allows you to move order lines to release tickets, marking them as **Released**.

The **Order Management** window also allows you to view detailed information for each order—including billing and shipping addresses, deposits, notes, and so forth—and to add, edit, or delete order lines, as necessary.

 This feature will be delivered in a V8.4.0 Service Pack.

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## Inventory

### ▪ **Merge Items utility**

CounterPoint now includes the **Merge Items** utility, which allows you to consolidate multiple item records that may have been inadvertently created for an item. The **Merge Items** utility combines all duplicate item record data, including inventory quantities, barcodes, vendor item records, and so forth. This feature can help you reduce the amount of redundant data in your database, speeding up sales, **LookUps**, and **Zooms**.

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### **Physical Count enhancements**

This version includes numerous enhancements that round out and expand CounterPoint's physical count functionality, making it more versatile and useful to a wider variety of merchants.

You can now freeze on-hand quantities by **Quantity on hand** or **Quantity available**, allowing you to choose whether to consider unposted inventory transactions in the frozen quantities and the resulting physical count transactions.

When you enter or import physical count quantities, you can now identify who counted each item and include free-form comments for each count quantity (e.g., which section of the count area the count quantity came from).

To better support serialized items, you can enter or import serial numbers for Sometimes serialized items when you enter or import count quantities.

You can also include a **Unit of measure** in physical count import files, allowing you to import an alternate unit (e.g., **BOX** or **CASE**) for each count quantity instead of a unit-specific barcode.

In addition, you can now save physical count import parameters, preventing you from having to

redefine the necessary parameters each time you import physical count quantities.

Finally, a number of improvements have been made to the available physical count reports, including the addition of subtotals by category on variance reports, and the ability to filter variance reports to only include items with variances greater than user-specified amounts.

#### ▪ **Price sheets**

In previous versions, CounterPoint only allowed you to modify prices for a single item at a time, which made effecting price changes for a entire group of items a time-consuming process.

This version includes comprehensive price sheet functionality, allowing you to select a group of items and apply price changes to all of the items on the price sheet simultaneously. Price sheets accommodate common price change scenarios, such as raising prices by 10% for all items you purchase from a particular vendor, or setting the prices for items in a particular category that haven't sold in the last 90 days to \$1.00.

You can create a price sheet for all locations, a single location, or a location group, and then add items to the price sheet using a variety of filtering criteria—including category, sub-category, vendor, last received date, last sold date, unit, grid dimension, and so forth.

Once you have added a group of items to the price sheet, you can modify their price values (i.e., **Price-1** through **Price-6**)—including cell-specific, unit-specific, and location-specific prices—by editing them directly or by calculating price changes automatically. Prices can be increased or decreased by an amount or percentage, based on a specific profit margin, or set to a fixed value.

When your price sheet is complete, you can apply the price changes or save the price sheet for later use. Applied price sheets are stored in history, allowing you to reuse them for recurring price changes. You can even automatically print labels for items whose prices have changed when you apply a price sheet.

Price sheets let you quickly and easily change multiple price values for multiple items simultaneously using a single, unified interface, without requiring you to edit each item record and modify its price individually.

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## Customers

#### ▪ **Sending customer statements via e-mail**

You can now send statements to A/R customers via e-mail, allowing you to offer your customers the convenience of electronic statements while reducing your consumption of physical supplies, including printer paper and ink. This feature also helps you stay more connected with your customers by ensuring that you obtain their e-mail addresses for future communications.

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## Ecommerce

## ▪ Adding and deleting lines on CPOne orders

CounterPoint now allows you to add and delete lines on orders that have been imported from CPOne and on the corresponding release tickets (i.e., CPOne invoices). This enhancement makes it easier to accommodate customers who place an order in your CPOne store, and then contact you to order additional items or cancel part of the order.

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## Sales History

### ▪ Dashboard displays items by Description

Previously, items were indicated on Dashboard pages by **Item number**, which could be difficult to associate with the corresponding items, particularly if those item numbers were auto-assigned.

Items are now identified on Dashboard pages by **Description**, making the Key Performance Indicators (KPIs) that include items (e.g., the **Top 20 Items** list on the **MarketBasket** page) easier to read and evaluate at a glance.

### ▪ New inventory metrics on Dashboard

The **Key Indicator** graphs on the **Company** and **Store** Dashboard pages now include inventory-related metrics that allow you to compare **Turns**, **GMROI**, and **Retail value** for the indicated periods to the previous year. These metrics can help you assess the performance of your inventory across your company or for a specific store, letting you see where you need to increase your turn rate and GMROI or reduce the retail value of your on-hand inventory.

### ▪ Sales Analysis by Discount code

The Sales Analysis by Group report now includes grouping options that allow you to track and analyze your sales by document or line-item discount code.

These options indicates the number and percentage of sales to which each discount code applied, along with the profit amount and percentage that was generated by sales that included those discount codes. This report can help you determine which discounts helped drive sales and which ones were less popular, enabling you to further refine your discount codes.

🚩 This feature was released in a V8.3.9 Service Pack.

### ▪ Today page on Dashboard

The CounterPoint SQL Dashboard now includes the **Today** page, which displays Key Performance Indicators (KPIs) for the current day's sales, including the total number of tickets, total dollars in sales, the average number of items per ticket, the average dollar amount of each ticket, and the

amount and percentage of profit generated so far.

The **Today** page differs from the **Day** page, which displays KPIs for a specific date, in that it is based on posted and unposted transactions, providing a real-time snapshot of all transactions that have occurred thus far on the current day. This means that merchants don't have to wait until the day's transactions are posted to gauge how well sales are going at any particular moment.

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## Multi-Site Option (Enterprise)

### ▪ **DataXtend Replication Engine v8.2**

The DataXtend Replication Engine (DXRE) facilitates the replication of changes between multiple databases in Multi-Site environments to synchronize data across the CounterPoint SQL network.

This release includes DXRE v8.2, which is compatible with 64-bit servers running Windows 7 or Windows Server 2008 and offers improved reliability and performance in all Multi-Site environments.

✍ If you are updating an existing Multi-Site environment from a previous version of CounterPoint, DXRE v8.2 will be installed automatically on your Hub and Remote servers when you install the CounterPoint SQL prerequisites during the update process.

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## Credit Cards

### ▪ **Requiring ZIP Code only for address verification**

Previously, if you enabled address verification services (i.e., AVS/AAV), you were required to supply a street address and ZIP Code to authorize each manually-entered credit card transaction. In this version, you can configure CounterPoint SQL to require only a ZIP Code for address verification purposes.

✍ This feature is available for all processors and card types.

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### **Support for partial authorizations and reversals**

To better support prepaid credit and debit cards, CounterPoint SQL can obtain an authorization for an amount that is less than the amount due for a ticket or order via CPGateway. For example, if the **Amount due** for a ticket is \$30.00 and the customer presents a prepaid credit card with a balance of \$25.00, CounterPoint will obtain an authorization for \$25.00, and then prompt the user to tender an additional payment for the remaining amount due.

In this version, partial authorizations are available for merchants processing with Radiant Payment Services, First Data North, RBS Lynk, or TSYS, as well as for AmEx Direct transactions.

✍ Partial authorizations are not currently supported for merchants processing with Paymentech,

First Data South, or Moneris Solutions.

In addition, CounterPoint supports full reversals of credit card authorizations for Visa, MasterCard, and Discover transactions, allowing authorized credit and debit card payments to be deleted from a ticket or order before the document is complete.

In this version, full reversals are available for merchants processing with Radiant Payment Services, First Data North, RBS Lynk, or TSYS. Merchant-initiated reversals for AmEx transactions are not supported.

✍ Full reversals are not currently supported for merchants processing with Paymentech, First Data South, or Moneris Solutions.

#### ▪ **Using card identification services without address verification**

Previously, you could not use card verification services (i.e., CVV2/CVC2/CID) if you were not also using address verification (i.e., AVS/AAV). This requirement meant that you had to verify a customer's address in order to verify the security digits on the back of the customer's credit card.

In this version, you can enable card verification services without first enabling address verification, allowing you to verify each credit card's security digits without requesting the customer's address.

✍ This feature is available for all processors and card types.

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### PCI DSS Compliance

#### ▪ **PCI-DSS-compliant passwords required**

In previous versions, the use of passwords was optional, allowing merchants to decide whether to require users to enter passwords to log in to CounterPoint. In this version, to better protect sensitive cardholder data, the use of PCI-DSS-compliant passwords is no longer optional for merchants who are processing credit card transactions.

All users must log into CounterPoint with a unique password that meets the minimum PCI DSS requirements for password length and complexity (i.e., passwords must include a combination of letters and numbers).

✍ Passwords are not required for merchants that are not processing credit cards or for **Demo** mode.

Other password settings—including the number of days passwords are valid, the number of unique passwords each user must create before re-using a particular password, and the number of unsuccessful login attempts allowed before a user is locked out of CounterPoint—must also meet minimum PCI DSS requirements.

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### Kits/Bills of Material Option

### ▪ Prompting for grid cells in kits

CounterPoint can now prompt users to choose the cell (e.g., Red/XL) for each gridded kit component automatically at the time of the sale, which means that users no longer have to manually change the default cell for each gridded kit component. This feature streamlines the process of selling kits, saves time at the register, and requires fewer steps for the user to remember.

### ▪ Prompting for serial numbers in tag-along kits

Previously, when a user sold a tag-along kit that included a serialized component, the user was not prompted to specify the serial number for that component, requiring the user to specify the serial number manually. In this version, CounterPoint prompts the user to specify the serial number for each serialized component automatically at the time of the sale, ensuring that serialized components are assigned the necessary serial numbers.

### ▪ Serialized items in miscellaneous kits

Previously, serialized items could not be components of miscellaneous kits. This restriction has been removed from this version, allowing you to include **Sometimes serialized** and **Always serialized** items in miscellaneous kit definitions. This feature makes miscellaneous kits more versatile, allowing merchants to more easily bundle serialized items with other items.

When a user sells a miscellaneous kit that includes a serialized component, the user is prompted to specify the serial number for that component automatically, ensuring that serial numbers are assigned to all serialized components.

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## System

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### **Data on Demand**

CounterPoint SQL now supports the ability to provide "data on demand" to Remote servers and offline workstations on an as needed basis. This new architecture means that Remote servers (in Multi-Site environments) and offline workstations will be able to access up-to-date inventory, customer, and sales data that resides on their "parent" servers in real time, eliminating the need to replicate and store that information on each workstation or Remote server.

Only essential data that is required to perform routine operations will continue to be stored on each Remote server or offline workstation, significantly reducing the size of each local database and the amount of data that needs to be replicated.

✍ The data being replicated remains under the merchant's control, but as the capability to provide Data on Demand expands, Radiant will encourage reducing the amount of redundant data replicated to Remote servers.

The initial V8.4.0 release includes Zoom improvements that were made possible by the new Data on Demand architecture. In subsequent releases and Service Packs, additional features will be introduced that take full advantage of this architecture.

#### ▪ **DBISAM 4.29**

CounterPoint relies on a third-party database program, DBISAM, to store Data Dictionary settings, resource locks, and various other system settings. CounterPoint now includes DBISAM 4.29, which provides increased stability, reliability, and compatibility with more recent operating systems.

When you update from a previous version, your Data Dictionary files will be updated to the new format automatically. Data Dictionary files from previous versions are not compatible with this version.

#### ▪ **File Sync**

CounterPoint V8.4.0 includes File Sync, which is a new component of CounterPoint Services that automatically synchronizes the content of the top-level directory on your Hub server to all Remote servers and offline workstations. Top-level directory synchronization occurs automatically as a background process during the night and can be initiated "on demand" for any server or workstation.

By automating the distribution of top-level files, File Sync allows you to modify data dictionary setting, create custom reports, update item or customer images, or make other top-level directory changes without having to manually copy top-level files to all of your servers and offline workstations.

#### ▪ **Radiant Management Console improvements**

The Radiant Management Console has been significantly enhanced for V8.4.0. In previous versions, it was primarily used to manage and monitor offline workstations. In this version, the Radiant Management Console has been expanded to allow you to manage server relationships, initiate top-level directory synchronization (i.e., File Sync), configure CounterPoint's new e-mail capabilities, and aggregate data used by Dashboard, forecasting, and certain reports.

#### ▪ **Sending reports via e-mail**

You can now send back office reports to user, customers, and vendors via e-mail, allowing you to easily share reports while reducing your consumption of physical supplies, including printer paper and ink. You can create new user, customer, or vendor record to capture e-mail addresses "on the fly," add an e-mail address to an existing record, or specify a "one use" e-mail address when you send a report.

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#### **Zoom improvements**

Zooms have always been a useful feature in CounterPoint SQL. However, in previous versions, all data displayed on **Zoom** windows had to be stored in the local database, which limited the data that was available for zooms in offline mode. Further, in order for users at a remote site to see sales history or inventory levels for other locations, all sales history and inventory data had to be replicated to the Remote server.

In this version, thanks to the new Data on Demand architecture, CounterPoint obtains zoom data from the most complete database in your network and displays the results in the **Zoom** window. This means that **Zoom** windows can display data from the local offline database, the Remote site server, or the Hub server, allowing you to "zoom" across your organization without having to store all data everywhere.

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## Offline Ticket Entry Option (Enterprise)

### ▪ **Offline Ticket Entry improvements**

The Offline V2 Option has undergone significant improvements in V8.4.0, allowing us to phase out the old Offline Ticket Entry Option. Consequently, Offline V2 has been renamed "Offline Ticket Entry."

For increased numbering flexibility, CounterPoint can now auto-assign user-defined **Next** number values to new records created in offline mode. CounterPoint also allows offline users to modify customer records, including any value they are allowed to edit (e.g., address, phone number, ship-to address, and so forth).

In addition, CounterPoint includes tools that allow you to compare the actual data that was received from an offline workstation to the data that was expected and to re-send data from an offline workstation without the risk of duplicated sales or credit card records.