Radiant Systems, Inc. is a leader in providing innovative technology to the hospitality and retail industries. Offering unmatched reliability and ease of use, Radiant’s hardware and software products have been deployed in over 60,000 sites across more than 100 countries. Radiant has approximately 900 employees worldwide, 325 certified sales and service partners and over 1800 field service representatives. Founded in 1985, the company is headquartered in Atlanta with regional offices throughout the United States as well as in Europe, Asia and Australia.
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INTRODUCTION

At Radiant Systems, we attribute our longevity and success to our emphasis on customer service, our strong relationships with our CounterPoint Business Partners, and our dedication to product quality.

The Company
Founded in 1985, Radiant Systems (NASDAQ: RADS) provides innovative store technology for the hospitality, petroleum and convenience, retail, and entertainment industries with more than 50,000 sites worldwide.
A publicly traded company since 1997, Radiant is headquartered in Atlanta with regional offices in Dallas, Los Angeles, Prague, London, Singapore, Melbourne, and Memphis.
Radiant has more than 900 employees worldwide and more than 125 certified sales and service providers. Backed by a global infrastructure, Radiant uniquely offers an end-to-end solution with the easiest to use and most reliable software and hardware in the industry.

CounterPoint SQL
CounterPoint SQL is a complete retail management solution that gives you power and control over every aspect of your business—point-of-sale, inventory, customers, purchasing, sales history, and more. CounterPoint includes powerful features and flexible options so you can run your business your way.

CounterPoint SQL Express
The Express edition is ideal for small, single-store businesses that want a powerful, yet economical solution. Express includes many of the same features as the Enterprise edition, and it’s compatible with CPGateway and CPOnline.

You can start with CounterPoint SQL Express and—when you’re ready—move up to Enterprise.

When you move up to Enterprise, you won’t need to convert data, change your business practices, reconfigure the software, or retrain your staff.

CounterPoint SQL Enterprise
The Enterprise edition can be used in any size business. It includes all the features available in Express, plus:

- Support for multiple locations
- Advanced customization utilities
- Expanded reporting tools
- Additional features including customer loyalty, backorders, special orders, offline ticket entry, markdown tracking, serial numbers, and more

Base System and Options
The CounterPoint Base System offers countless front-counter and back-office tools to your help business run efficiently and profitably.

Options add specialized functions to your system and can be purchased with the Base System, or later as your business needs change.

Which Edition Is Right for You?
CounterPoint is sold exclusively through a worldwide network of Business Partners. A Partner in your area will help you determine which edition is right for you.

The feature grid on the following page provides an overview of the functions and features included in the Express and Enterprise editions.
<table>
<thead>
<tr>
<th>CounterPoint SQL Base System</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small business (1-3 users)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Medium to large business</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Multiple companies</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Multiple locations</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Multiple workgroups</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Wide Area Network support</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Import/Export utilities</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Customization tools</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Unlimited database size</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**Point of Sale**

<table>
<thead>
<tr>
<th>Feature</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular or Touchscreen Ticket Entry</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sales, returns, orders, and layaways</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Holds and quotes</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ticket history</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Gift certificates and store credits</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Multiple currencies</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Manager overrides</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Crystal receipts</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>OPOS receipts</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Special orders and backorders</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Signature capture</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Drawer reconciliation</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Compulsory cash drawer close</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Commissions</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**Inventory**

<table>
<thead>
<tr>
<th>Feature</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotional pricing</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Three price levels</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Alternate selling units</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Physical count</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Multiple stocking locations</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Transfers between locations</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Markdown tracking</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Contract and special pricing</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**Credit Cards**

<table>
<thead>
<tr>
<th>Feature</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Built-in credit card processing</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support for additional processors</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>CPGateway</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**Ecommerce**

<table>
<thead>
<tr>
<th>Feature</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPOnline</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Upload items, prices, and customers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Shopping cart</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**Reports**

<table>
<thead>
<tr>
<th>Feature</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crystal Reports viewer</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Quick Reports</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>End of day reports</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Inventory analysis reports</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Merchandise analysis reports</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**CounterPoint SQL Options**

<table>
<thead>
<tr>
<th>Feature</th>
<th>EXPRESS</th>
<th>ENTERPRISE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Cards Option—Additional processors include First Data North, First Data South, Vital, and Paymentech*</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Receivables Option—Charge sales, receivables tracking, cash receipts, account aging, and statement printing</td>
<td>✓ **</td>
<td>✓</td>
</tr>
<tr>
<td>Serial Numbers Option—Detailed records of each piece of merchandise</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Advanced Pricing Option—Six price levels, price-by-location, oversize pricing, and custom pricing for price calculations</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Multi-Site/Hub Option—Multiple stores can operate independently and periodically exchange information</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Offline Ticket Entry Option—Ring up sales and process orders without a connection to the server</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

* Paymentech processing is built into the Express Base System and does not require the Credit Cards Option.

** The Receivables Option is included as part of the Express Base System.
SQL Technology

CounterPoint SQL is based on Microsoft SQL Server, an industry standard database that’s affordable and easy to use. Your business records (items, customers, history, etc.) are securely stored in the SQL database.

SQL technology provides reliable data storage and excellent performance. Plus it is highly scalable—from a small single-user system to hundreds of users with huge databases. SQL database operations take place at the server, so reporting and analysis is quick and easy, even with years of detailed data.

CounterPoint takes advantage of SQL transaction processing to protect your data. Even if your power goes out while posting transactions, SQL will “roll back” the transaction that was in progress so you can re-post without losing any data.

SQL data can be easily integrated into other applications, such as Microsoft Excel or Word. With the Enterprise edition, you can easily import and export data to and from any number of external sources.

Find It Fast

When you want to find information in CounterPoint, just type in what you know and let CounterPoint do the rest. LookUp functions are available for any information you’ve put into your system.

For example, you can use keyword LookUp functions to find any item with “blue” in the description, or any product in the “golf” category, or any customer whose phone number contains “1234.” LookUp lets you pick which fields you want to display in the list, and even in what order to present the records.

To narrow the scope of what displays in LookUp, you can “filter” the data. Filters let you see, for example, just the customers who live in your state, or just the items that sell for more than $100.

You can even assign names to your favorite Filters and LookUps (“Blue items,” “Golf products,” etc.) and save them for future use.

And when you don’t find the information you’re looking for, authorized users can add it on-the-fly from the LookUp window.

See It Your Way

When you want to see detailed information for an item (or customer, vendor, etc.), Zooms show you exactly what you want to see from anywhere in CounterPoint.

CounterPoint’s ready-to-use Zooms display basic information, such as an item’s description, category, and available stock, along with buttons that display additional details, such as recent sales and open orders.

You can also configure the Zooms to display just the information you want—no more, no less.

Reports, Reports, Reports

CounterPoint includes an extensive library of reports. Each report is designed to give you all the information you need to run your business.

CounterPoint reports and forms are designed using the industry-leading Crystal Reports engine. You can customize or add information to any CounterPoint report—without having to create new reports from scratch. (Report customization requires the Crystal Reports Designer, purchased separately.)

Getting Around

CounterPoint offers a choice of menu styles and toolbars for navigating through the system.
Authorized users may select their own menu style—whether it’s a button-style menu (excellent for single-click and touchscreen environments), a dropdown list, etc. To simplify usability and provide better security, you can assign users to limited menus with fewer selections. You can even change menu names or add new menu selections.

**Audit Trails**
Each time you post transactions, CounterPoint records the essential information. With a solid audit trail, you can go back at any time to see what was updated, when it was updated, and who updated it.

**Architecture**
Yes, CounterPoint provides the features you need to run your business profitably and securely.

But some of CounterPoint’s greatest strengths are not specific application features—they are the benefits of a solid and remarkably powerful architectural approach to software design.

CounterPoint’s architecture is based on a framework that provides a solid foundation for the applications and ensures consistency throughout the system.

With a consistent framework, you only need to learn a few basic concepts that you can apply system-wide. For example, once you learn how to “find,” “view,” “report,” etc., you can use that same knowledge for items, customers, vendors, and throughout every function in CounterPoint. The basics are easy to learn and, more importantly, easy to use.

**Customize CounterPoint Your Way**
You’ve dreamed about software that was designed especially for you—not for businesses that are “kind of like you,” but for you. Software that talks the way you talk and that works the way you work.

CounterPoint can use the same vocabulary that you use in your business. Perhaps you prefer “departments” instead of “categories,” or you use the word “members” instead of “customers.” Just make the changes in one place and CounterPoint uses your vocabulary for all screens and reports.

But it doesn’t stop there.

You can change more than the way CounterPoint looks. You can actually change the way it works. Speed up data entry by skipping fields you rarely use. Or change default messages to better fit your operation—“Selected item is not valid. See Rebecca in Operations for a valid item number.”

CounterPoint’s unique architecture lets you expand your system to include your own custom fields, screens, reports, and applications. Do you need to track the names of your customers’ children? Add a new field in CounterPoint. Do you need to track customer-specific part numbers? Add a new screen—you can even print the part numbers on invoices so customers can identify their merchandise.

The customization capabilities are unmatched—and practically unlimited.

With the Express edition, most customizations require the services of a CounterPoint Business Partner. With the Enterprise edition, any authorized user can customize CounterPoint using the built-in tools.

Just dream up what you want CounterPoint to do. Chances are CounterPoint can do it.

**Ready To Use**
Yes, you can tailor CounterPoint just about any way you want. But you don’t have to! CounterPoint is ready to use right away and gives you all the tools you need to run your business.

**What Are You Waiting For?**
Call (800) 852-5852 today. We’ll put you in touch with a CounterPoint Business Partner right away.
COUNTERPOINT BASE SYSTEM

The CounterPoint Base System contains countless front-office and back-office tools to help your business run efficiently and profitably.

POINT OF SALE

Overview

Point of Sale provides fully integrated cash register functions on a computer workstation. It also gives you a full complement of management controls and reports to help you operate your business profitably and securely. Point of Sale works well in a variety of retail, wholesale, mail-order, and ecommerce environments.

You can mix sales, returns, orders, and layaways on the same ticket. With the Enterprise edition, you can also mix special orders and backorders.

Associate image, audio, or video files with each item and/or customer, and CounterPoint can automatically display the image.

You can choose either Regular or Touchscreen Ticket Entry.

Regular Ticket Entry

The heart of Point of Sale is Ticket Entry. Because the screen is designed to look like a sales ticket, training your clerks is quick and easy.

To further customize Touchscreen Ticket Entry, you can define RunPage actions. RunPage is a powerful and easy method to perform multiple actions from a single button.

For example, you could simplify the steps a clerk must perform when entering a Point of Sale order by defining a RunPage button called “New Customer Order.” When New Customer Order is pressed, the following actions would be automatically executed: Start Order, Enter Customer, Enter Sales Rep, Enter PO Number, and Enter Shipping Information.

You can also define “custom” actions to display forms, run scripts, or print reports.
Passwords
Optionally password-protect ticket entry to ensure that access is restricted to authorized users. Through passwords, you may authorize a user for specific functions such as price overrides or the ability to void a ticket. You may also restrict a user to a specific store.

An authorized user can override another user’s security settings and allow that user to void a ticket, change the tax on a ticket, reprint a ticket, etc.

Clock-in/Clock-out
Employees can clock in and out from ticket entry. You can automatically prompt users to clock in, and you can restrict them from accessing any CounterPoint functions if they are not clocked in.

Customers
Customers can be selected by entering the customer’s number, scanning a customer ID card or loyalty card, or by searching for keywords that match any portion of the customer’s name, telephone number, or any other field designated as a keyword search field. New customers can be added on-the-fly.

For an A/R charge sale, CounterPoint checks the customer’s credit limit, and only an authorized user may override credit limits.

Zoom in on the customer’s account to see balance owed, credit limit, last payment date, up-to-date account aging, images, detailed sales history, open customer orders, and more.

Enter unlimited pages of notes for each customer— customer notes allow you to store additional information. You can automatically display a specific note for a particular customer: “Your special order is scheduled to ship next week.”

Notes can be automatically displayed based on the individual customer or on the customer category.

Inventory
Items can be identified by typing the item number, scanning a barcode, or by searching for keywords that match any portion of the item number, description, vendor number, category, or any other field designated as a keyword search field.

Item Zooms display quantities for each location, recent sales, open purchase orders, monthly sales history, substitute items, images, and more.

Enter unlimited pages of notes for each item. Notes allow you to provide additional information about your products. Automatically display item notes to encourage clerks to power-sell related items: “Would you like some tennis balls with that racquet?” Notes can be automatically displayed based on the individual item or the category or subcategory.

Pricing
Merchandise is priced accurately and automatically, based on list price, quantity breaks, customer discounts, a markup on cost, or a desired margin. Use mix-and-match pricing to group items together—by item number, category, sub-category, or vendor—to grant discounts based on quantity, etc.

Promotional prices can be date- and time-activated for limited-time sales. With the Enterprise edition, you can also use Contract and Special prices. Contract
prices are valid for certain customers for a group of items during a specific time period. Special prices indicate general pricing policies or for particular groups of customers and typically don’t have starting or ending dates.

Promotional, Contract, and Special prices can be based on a discount, markup, fixed price, or desired profit margin. Alternatively, you can simply pick the price. Prices can be based on relevant item, customer, or ticket information.

Items can be priced and sold by the stocking unit or up to five alternate selling units. For example, you may stock golf balls by the EACH, and sell them at one price by the DOZEN and at another price by the SLEEVE.

**Holds and Quotes**
A ticket or order can be placed on hold indefinitely and then later recalled for editing or completion. Customer quotes can be printed and retained indefinitely and can be reviewed, edited, and copied prior to completing the sale. Holds and quotes do not commit inventory.

**Orders, Backorders, and Special Orders**
In ticket entry, you can mix sales, returns, orders, backorders, special orders, and layaways on the same ticket. Backorders and special orders are only available in the Enterprise edition.

An order can be quoted, held, and recalled—just like a sales ticket. Plus, you can edit the order, accept a deposit, release the entire order or just specific lines, print a picking ticket, cancel an order, and reinstate a cancelled order. With the Enterprise edition, you can view an order’s history, including the original order, each time it was edited, each partial release, and the completed order.

CounterPoint’s order processing works for pure retail as well as for retail-delivery, retail-assembly-delivery, retail-special order, retail-wholesale, wholesale, and wholesale-manufacturing operations.

**Layaways**
A complete layaway processing system allows you to add new layaways, record deposits, view the status and history, and release completed layaways. Layaway processing is similar to order processing.

**Order and Layaway Deposits**
You can define minimum deposit amounts based on a dollar amount or a percentage of the order, backorder, special order, or layaway. For example, the minimum deposit amount can be $5 for an order, 20% for a backorder, 50% for a special order, and $10 for a layaway.

Multiple payment types can be accepted for each deposit. For example, you can accept a $30 deposit with $10 cash and $20 credit card charge.

**Customer-Specific Purchases (ENTERPRISE ONLY)**
CounterPoint makes it easy for you to take a customer’s order from the point-of-sale, place a purchase order with a vendor, track and receive the PO, and fulfill the customer’s order.

**Store Credits, Gift Certificates, and Shopping Cards**
Store credits and gift certificates can be issued, printed, partially redeemed, reissued, and voided. Rechargeable gift cards and shopping cards with magnetic stripes are also supported.
Certificates and cards may be redeemed at any store or restricted to the issuing store.

Taxes
Taxes are calculated automatically based on the taxable status of the merchandise and the customer. Tax calculations can be overridden by authorized users on a per-ticket basis, or individual line items can be set to “no-tax.” An entire ticket can be non-taxable by entering a tax registration (tax exempt) number. Tax can be a percentage of the sale amount, an amount per piece, or a combination.

An item’s tax can be different for each location. Tax figures are printed on end-of-day reports and are retained for historical purposes.

Surtaxes (taxes on the tax) and Canadian PST/GST calculations are also supported.

Payment Types
An unlimited number of payment types (e.g., cash, check, A/R charge, or credit card) may be defined.

Each payment type may be defined to open the cash drawer, allow change to be given, and to require validation (such as a credit card or driver’s license number). An unlimited number of payment types can be accepted on a ticket, including multiples of a single payment type (such as two different Visa cards).

You can also specify restrictions on each payment type. For example, you can require a $10 minimum on all Visa cards, or set a $5 maximum cash back amount for gift certificates.

End-of-day reports provide reconciliation information for each type of payment. Historical data is retained and reported for each payment type.

Multi-Currency
Multi-currency allows you to define foreign currencies with associated exchange rates. You can accept multiple foreign currencies on a ticket, and you can issue change using the home currency or foreign currency.

Commissions (Enterprise Only)
Optionally calculate sales commissions for each item on the sales ticket based on either the sale amount or the gross profit. Commissions are tracked by ticket and are reported in detail or in summary on the Commissions Due report.

Ticket Numbering
Ticket numbers are normally assigned sequentially by CounterPoint. Alternatively, user-assigned ticket numbers may be entered. Each station can have an independent series of ticket numbers, or all stations can issue tickets from a single series of numbers for the store. Order, layaway, hold, and quote numbers offer similar capabilities.

Drawer Readings
Drawer readings display an instantaneous summary of store-level or drawer-level activity and show the exact amounts of cash, checks, and other tender expected to be found in each cash drawer.

Daily Reports
Multiple daily reports (including X-tape and Z-tape) can be generated for each drawer and run at any time. Each report’s parameters are user-specified and provide end-of-day balancing, summary sales reporting, and sales and profitability analysis by department, user, and salesperson. Additional
analysis is available by tax code, sales rep, store, station, user, and payment type.

Sophisticated exception reporting allows a manager to monitor danger zones without having to pore through voluminous reports. Exception reports are available for critical areas such as tax overrides, voids, merchandise returns, and others. The Price Exceptions report allows you to review price overrides on unposted tickets before you post them.

Payment overages and shortages are reported in daily reports, and you can optionally create accounting distributions. The Ticket History report offers a view of sales across multiple stores and days.

**End-of-Day Processing**
The end-of-day process (counting drawers, posting tickets, settling credit card transactions, etc.) can be run for any station while other clerks continue to ring up customers. Drawers can be counted by currency unit (e.g., 4 fives, 7 ones, 2 quarters, etc.).

With the Enterprise edition, managers can reconcile drawers during the end-of-day process to verify the closing amounts and correct any mistakes made when the drawer was counted. Drawers can optionally be auto-reconciled.

End-of-day processing updates inventory, customer history, and financial records. End-of-day reports may be run automatically during the end-of-day process or at any time in the future.

**History**
CounterPoint retains complete history for management reporting in detailed (line-by-line) format.

Detailed history by customer and item can be retained indefinitely and is limited only by disk space. A complete history of a customer’s sales activity can be printed or viewed, showing every item purchased, transaction dates, and prices paid. Similarly, you can review an item’s detailed history.

In addition to detailed history, summarized history can be printed for item categories, users, salespersons, stations, etc. Historical reports can provide valuable information such as a comparison of sales for Easter week this year with Easter week last year.

More information regarding history is provided under Sales History (page 23).

**Retail Kits**
You can use Touchscreen Ticket Entry’s RunPage capabilities to press a single button that processes a retail kit. Retail kits are useful when the sale of an item causes multiple component parts to be deducted from inventory. A kit is made from a set of components (which may be substituted at the time of sale).

The sample kit below illustrates some of these features:

**Deluxe Stereo Package**
Acme stereo.......................................1 Each
Grade B speakers..............................2 Each
Installation ........................................3 Hours
Extended warranty ..........................3 Years
Speaker wire......................................20 Feet

Warning: Loud music causes hearing loss

In our sample kit, the clerk is required to enter a serial number for the stereo. The shopper may choose from three speaker grades: A, B, or C.

The stereo package also includes 20 feet of speaker wire, a 3-year extended warranty, and three hours for the installation. All quantities can be altered, and the price is adjusted accordingly. When sold, the speaker wire is deducted from inventory, but not printed on the receipt (using conditional printing). Other components, including the environmental impact warning, are printed on the customer’s receipt.
Form Printing
Multiple printers can be defined for each station, including 40-column receipt printers, full-width invoice printers, warehouse picking printers, check validation printers, admission ticket printers, etc. An unlimited number of forms may be printed for each sale, quote, hold, or order. Forms may include tickets, sales drafts, invoices, or even special forms such as Material Safety Data Sheets.

CounterPoint includes pre-defined forms for receipts, picking tickets, and invoices. You may define new forms or customize existing forms. Individual form layouts may be Crystal .rpt files, OPOS .xml files, or static documents such as Word or PDF files. Graphics, such as your company logo, may be printed on receipts or invoices.

Multiple forms can be grouped together, and the group becomes “active” under certain, user-defined conditions. For example, when a ticket is completed, the pre-defined group “TICKETS” will print a receipt and a credit card sales draft, and, if appropriate, a gift certificate.

You can also:
- Automatically print forms at ticket completion
- Use a single button to print one or more forms
- Let the clerk choose which form(s) to print from multiple buttons
- Require certain forms to be printed and/or limit reprints
- Print all forms to a single printer, or print different forms to different printers
- Define which printer the forms will print to, or let the clerk select the printer in Ticket Entry
- Automatically display messages, for example, “Print the Material Safety Data Sheet?”

Peripheral Devices
Each Point of Sale checkout station can support optional peripheral devices such as:
- Receipt printers
- Invoice printers
- Combination invoice/receipt printers
- Electronic cash drawers

- Barcode readers and scanners
- Magstripe readers (for credit cards, loyalty cards, or ID cards)
- PIN pads (for debit cards)
- Signature capture (Enterprise only)
- Check (MICR) readers
- Customer pole displays
- Multiple monitors (for displaying a separate screen image to your customers during checkout; you can display advertisements, change due, item images, change due, customer details, etc.)
- Programmable keyboards
- Touchscreen monitors
- Weight scales
- Handheld data-collection terminals (can also be used for physical count)

To simplify setup for commonly-used devices, a series of pre-defined Express Certified device definitions are installed with CounterPoint. The Express edition works with any of the Express Certified devices as well as other OPOS devices.

The Enterprise edition works with any of the Express Certified devices as well as other OPOS devices.

Special Functions
In addition to sales, returns, orders, layaways, quotes, and holds, Ticket Entry also handles:
- Adding and changing inventory and customer information on-the-fly
- Age-restricted items (for alcohol, etc.)
- Automatic station locking
- “Discount” items (to track coupons, trade-ins, or other sale reductions)
- Fractional prices (e.g., $1.3755 per LB)
- Fractional quantities (e.g., 1.6255 feet)
- Free-form comments
- Item and serial number prompts for requesting additional info (such as a monogram or permit #)
- Maximums for change, refunds, and overtenders
- Minimum price restrictions based on the item’s price level (“don’t allow a price below Price-2”) or a profit percent (“don’t allow a price with less
than 20% gross profit based on Average-cost”) with optional security overrides

- Miscellaneous charges (amount or percent)
- No-sales (authorized users can open cash drawers)
- Pay-ins and pay-outs to add or remove money from a drawer
- Payments on customer accounts
- Predefined ship-to addresses (addresses can also be entered at the time of sale)
- Price, tax, and quantity overrides
- Random weight barcodes
- Reason codes for returns, overrides, and voids
- Ticket profile tracking fields for collecting additional information
- Ticket reprints
- Ticket voids for authorized users
- Weighed items (with scale support) and tare weights (container weights)

**Built-In Credit Card Processing**
Credit card processing under the CounterPoint Merchant Program (CMP) is included in Express and Enterprise and is more fully described under **Credit Cards** (page 26). For Express, processing through Paymentech is also included in the Base System.

Other processors compatible with Express and Enterprise are described in **Credit Cards Option** (page 34).

Credit card processing allows you to swipe a credit card through a magnetic stripe reader, automatically authorize a credit card sale, verify an address, and settle funds to your bank. With the Enterprise edition, you can also electronically capture the customer’s signature.

CounterPoint can optionally retain a customer’s credit card number for future purchases. For receipts and invoices, you may print just the last four digits of the card number.

Multiple stations share a phone line and process credit card transactions more quickly by maintaining an active phone connection to the processor.

An optional CPGateway service is available for fast (2-second) Internet credit card authorizations.

**Built-In Debit Card Processing**
Complete debit card processing is provided (with DUKPT support) and requires the use of PIN pads and magnetic stripe card readers.

**Built-In EBT Food Stamp Processing**
EBT food stamp processing is available with CMP, First Data North, or Vital. EBT requires the use of PIN pads and magnetic stripe card readers.

**Built-In Check Authorization**
CounterPoint includes check authorization capabilities compatible with TeleCheck and Certegy.

**Benefits**
**Point of Sale** provides valuable benefits to any business that desires to:

- Simplify and accelerate checkout
- Reduce costly checkout errors and shrinkage
- Provide clerks with up-to-date inventory quantities and customer information
- Keep track of what’s selling and what’s not
- Update customer balances automatically
- Improve audit controls and accounting efficiency
- Improve accuracy of sales analysis reports
- Electronically process credit cards, debit cards, EBT, and checks

**INVENTORY**

**Overview**
**Inventory** is the backbone of CounterPoint. It is the means by which all items are identified, priced, and tracked. **Inventory** is designed to help you maintain optimum inventory levels, control inventory costs, and track merchandise movement. It provides the tools you need to minimize inventory levels and out-of-stock conditions, and maximize valuable management information and profitability.

Setting up inventory items is quick and easy. Item numbers and barcodes may be manually entered or assigned automatically. When a new item is added, much of the basic information may be copied from
another item to help reduce errors and speed up the entry process, or a template item may be defined.

The Enterprise edition supports multiple stocking locations. Locations may be reported separately, together, or in location groups. An unlimited number of locations and location groups may be defined, and each group may have an unlimited number of locations. Location groups can be used for reporting and merchandise allocation.

Each item number identifies a unique inventory item with an associated description, category, price, barcode, and other information.

CounterPoint supports normal inventory items, as well as gridded (apparel color/size) items.

An item may be defined as an Inventory, Non-Inventory, Service, or Discount item. CounterPoint tracks on-hand quantities for Inventory-type items.

You can easily remove inactive items. Inactive items are those that have no quantity on-hand, no quantity committed, and no sales activity after the specified cutoff date. CounterPoint retains sales history for items that were removed.

**Item Information**

Categories, subcategories, and up to six user-defined classification methods may be established for grouping items. These classifications are validated to ensure correct setup of information.

An item may also have:

- Unlimited barcodes, a stocking unit, and five alternate selling units (e.g., EACH, BOX, CASE)
- Up to 20 user-defined profile fields for collecting and displaying additional item information
- Images, sounds, or video clips that can be displayed in Zooms and Ticket Entry
- A weight assigned
- Unlimited substitute items
- A primary vendor and an unlimited number of alternate vendors. For each vendor/item combination, CounterPoint tracks the cost, the vendor’s item number, and other information.

**LookUps**

Easily select an item by entering the item number, scanning a barcode, or by using LookUps. With LookUps, you can find the item using a keyword search by entering any portion of the item number, description, category, subcategory, or any other field designated as a keyword search field.

For example, you could define a Filter that displays only those items that have the word “Wood” in the description, a primary vendor of “Adams,” and that are in the “Golf” category. You can save named LookUps for future use. Custom Filters are automatically saved with your LookUp.
Zooms
You can easily view details of an item whenever you look up or view an item. Item Zooms display information about the item (price, category, extended description, etc.), the inventory (location, cost, quantity available, etc.), recent sales history, vendors for the item, open purchase orders, monthly history, substitute items, images, item notes, and more.

Barcodes
An item may have an unlimited number of barcodes. Barcodes may be associated with a specific selling unit—for example, one barcode may indicate BOX, while another barcode indicates EACH.

Barcodes may be manually entered or automatically generated by CounterPoint. Both manufacturer and in-house barcodes are supported. Barcodes may be printed on labels and scanned during checkout, when taking a physical count, and in other functions. A unique barcode is supported for each individual color/size combination for a gridded (apparel) item.

Random-weight barcodes allow for variable weight items, such as meat or produce. Ticket Entry recognizes random-weight barcodes and automatically calculates the correct quantity (weight) and price. Weight scales and tare weights (container weights) are also supported.

Notes
An item may have unlimited pages of notes. These notes may be viewed, printed on forms, and even be set to automatically display when the clerk sells the item (valuable for power-selling related items).

Easily find your notes simply by entering a key word or phrase. For example, enter “patented technology” in the keyword search field to find all item notes that contain that text.

Pricing and Units
Item prices can be set up by simply assigning a selling price to each item. Or you can take advantage of CounterPoint’s flexible pricing rules.

An item may be priced by its stocking unit or by alternate units (up to five alternate units per item). For example, you may stock golf balls by the EACH, and sell them at one price by the BOX and at another price by the SLEEVE. Alternate units are supported throughout CounterPoint, including ticket entry,
inventory, purchasing, receiving, adjustments, physical count, transfers, etc.

Each item may have up to three price levels for the stocking unit and for each of its five alternate units.

With the Enterprise edition’s **Advanced Pricing Option**, you can have up to six price levels. **Advanced Pricing** also supports price-by-cell and location-specific pricing and is more fully described on page 36.

**Pricing Rules**

Pricing rules determine the basic pricing structure of an item—whether the item’s price is selected from one of the price levels or whether it is based on the quantity purchased, item or customer information, or a combination of those factors.

The calculated price can be based on a price level, a discount percentage/amount off of a price level, a markup percentage/amount from cost, a desired profit margin, or a fixed price determined by user-defined pricing rules.

Pricing rules provide flexible pricing options, including Promotional, Contract, and Special pricing:

- **Promotional**—Sale prices typically have starting and ending dates (and times). Discounts may be defined for specific items or entire categories or subcategories. Multiple sales may be defined in advance using Planned Promotions.

- **Contract**—Customer-specific prices may be defined for specific items or entire categories/subcategories of merchandise and have optional starting and ending dates (and times). (Contract pricing is only available in Enterprise.)

- **Special**—Special prices may be defined for general pricing policies or for particular groups of customers and typically don’t have starting or ending dates. (Special pricing is only available in Enterprise.)

With the Enterprise edition, you can also customize price calculations using SQL stored procedures.

**Valuation Methods**

Inventory valuation is provided by stocking location using the Average Cost method.

With the Enterprise edition, you can use the Retail Valuation method to track your inventory based on its presumed selling price. For example, if you receive two shirts priced at $10 each, you have increased your inventory value by $20. If you later mark down those shirts, you have reduced your inventory value, even though you have not received or sold any merchandise.

**Reports**

CounterPoint includes an extensive library of inventory reports to meet your reporting and analysis needs:

- **Inventory Status report** and **Stock Status report** provide valuable and concise views of your inventory levels.

- **Valuation report** shows your current inventory position from different points of view.

- **Inventory Analysis report** includes Top X and Bottom X reporting based on quantity on-hand, profit value, sales, quantity sold, etc.

- **Inventory History report** provides a detailed transaction log of historical inventory activity.
Inventory Snapshot report provides a simple view of your inventory status and sales history.

Six Week Item History report evaluates item performance and helps you spot trends.

Twelve-month Item History report evaluates item performance and helps you spot trends.

Committed Inventory report provides details of quantities committed, on order, on backorder, on layaway, and in transit.

Price reports list the current selling prices, including Price-1 values, sale prices, etc.

Transfer Advice report suggests transfer amounts and can create transfers (Enterprise only).

Transfer Status report provides details of all inventory transfers (Enterprise only).

Merchandise Analysis (Enterprise Only)
Merchandise Analysis is a powerful tool for analyzing inventory. You can classify and rank merchandise using criteria you choose, including units sold, sales dollars, profitability, quantity-on-hand, turn-rate, GMROI (Gross Margin Return on Investment), weeks-on-hand, discounts, etc.—there are over 180 different measurements to choose from.

Analyze merchandise at the item level, or get the bigger picture by grouping inventory by vendor, category, subcategory, etc.

With hot/cold reporting, you can show, for example, the “hottest 40 items based on quantity sold” or “the coldest 20 items based on turn rate.”

Merchandise Analysis includes pre-defined reports:

Sales is a high-level view of your performance.

Inventory Performance measures the performance of a particular item, category, or subcategory.

Sales/Returns evaluates returns in relation to sales.

Vendor Comparison compares each vendor’s sales performance against your investment in that vendor’s merchandise.

Retail Value History provides an in-depth or summarized analysis of inventory changes at the retail value within a selected period.

Sales Analysis shows the retail and off-retail values so you can compare discounts and profits.

Alternatively, you can create your own merchandising reports by selecting the columns, grouping, and ranking method you want to use.

Commissions (Enterprise Only)
Each sales rep can be assigned a commission code, and commissions can be based on the selling price or gross profit. Different commission rates may be used for different sales reps. Commissions are described more fully under Sales History (page 23).

Markdown Tracking (Enterprise Only)
Whenever Price-1 is changed, CounterPoint automatically tracks that change as a markdown. For example, if you reduce a shirt’s price from $10 to $9 and you have two shirts on hand, the change is recorded as a $2 markdown. CounterPoint retains a detailed history of all markdowns.

Transfers (Enterprise Only)
A transaction processing system is provided for initiating and tracking inventory transfer activity and in-transit quantities. A transfer-out may be entered manually and reviewed prior to posting, and may be accompanied by a printed transfer form. The completion of the transfer is accomplished by a transfer-in transaction.

For businesses with more than one store, transfer documents can be completed at the main office or at the other stores.

The Transfer Advice report provides a list of suggested transfers using the maximum-quantity calculation method. Transfer Advice can automatically create transfer transactions which may be reviewed and edited prior to finalizing the
transfer-out. Miscellaneous charges, such as freight, can optionally be added during the transfer.

You can also use “Quick Transfers” to transfer inventory in a single step.

**CUSTOMERS**

**Overview**
Customer tracking is an integral part of CounterPoint. CounterPoint retains complete details of every customer, including detailed sales history.

The **Receivables Option** adds charge sales, receivables tracking, account aging, cash receipts processing, and statement printing to CounterPoint. The Express edition includes all receivables functions in the Base System. For the Enterprise edition, you must have the **Receivables Option** in order to process receivables. Receivables processing is more fully described under **Receivables Option** (page 34).

**Customer Information**
A customer may be set up using the standard maintenance function, or on-the-fly in **Point of Sale**. Basic customer information includes name, address, email, two contact names, fax numbers, and phone numbers. A customer may be assigned to a specific user-defined category to group similar customers for reporting and analysis.

Customer numbers may be manually entered or automatically assigned. When a new customer is added, much of the basic information may be copied from another customer to help reduce errors and speed up the entry process, or a template customer may be defined.

Customers can be selected by entering the customer’s number, scanning a customer ID card or loyalty card, or by searching for keywords that match any portion of the customer’s name, telephone number, etc.

For a charge sale, CounterPoint checks the customer’s credit limit, and only an authorized user may override credit limits.

Easily remove inactive customers from CounterPoint. Inactive customers are those that have no open orders or layaways, no open balances, no unposted balances, and no sales activity after the specified cutoff date.

**Loyalty Programs (Enterprise Only)**
CounterPoint allows you to reward loyal customers with points that can be redeemed for future purchases or special incentives.

Customers can earn points for all items they purchase or just for certain items. The number of points can vary based on the item number, category, vendor, etc. as well as the sales information (date, store, day of the week, time of day, etc.).

You can enter loyalty point adjustments to grant or reduce points, and you can print reports and mailing labels based on point accumulation.

**Customer Profiles**
Customer profiles allow you to build a valuable database of information to assist in analyzing and marketing to your customers. Up to 20 user-defined profile fields may be tracked for each customer, such as birthday, preferences, membership status, etc.
Each user-defined profile field is set up to only allow certain types of information.

For example, “birthday” would only allow valid date entries, “shoe size” would only allow numeric entries between a specified range of values, etc. In addition, you may set up user-defined profile codes to ensure that (for example) “membership status” is selected from a list of valid user-defined values (e.g., Gold, Silver, or Bronze).

**Account Management (ENTERPRISE ONLY)**

CounterPoint’s Account Management allows you to manage credit and serve your customers by presenting all of the relevant information about a customer account in a single, unified form.

**LookUps**

Easily select a customer by entering the customer number, scanning a membership ID card or loyalty card, or by using LookUps. With LookUps, you can find the customer using a keyword search by entering any portion of the customer name or number, or by any field designated as a keyword search field.

Customize LookUps by setting the order in which the records display or by specifying which fields display (category, sales rep, email address, etc.). You can filter LookUps so that only customers that match specific criteria will display. For example, you could define a Filter that displays only your A/R customers that live in New York that are in the “Preferred” category. You can save LookUps and Filters by name for future use.

**Zooms**

You can easily view detailed customer information whenever you look up or view a customer.

Zooms provide information about the customer including current balance, last payment date, recent sales, open orders, ship-to addresses, layaways, customer-specific purchases, images, customer notes, and detailed ticket history. You can customize the format and the fields that display in the Zoom.

**Shipping Information**

Each customer may have an unlimited number of shipping addresses, and the default ship-to address can be different from the primary address. Each shipping address may have its own tax code, preferred shipping method, and specific ship-to notes that can be printed on invoices.
**Taxes**
For basic retail sales, a tax code is assigned to the store. Customers may have multi-level tax codes assigned that indicate special tax rates or taxing authorities. If applicable, a customer may be non-taxable, and the customer’s tax exemption number is entered and retained in CounterPoint.

You can optionally specify a tax code for each customer’s ship-to address. If a ship-to tax code is specified, tax calculations are based on that code instead of the customer’s tax code.

**Credit Limits and Controls**
Credit limits ensure that customers do not exceed management’s guidelines for open credit. In addition, individual customers may be prevented from paying by check, making charge sales, making any kind of sale, or even from placing orders.

For charge sales, the customer’s credit limit is checked and only authorized users may override credit limits.

Credit card information may be retained for each customer and may be retrieved automatically when paying for a purchase. Credit card numbers are masked for security purposes.

**Sales Reps**
Each customer must have a sales rep assigned. Point of Sale may be configured to allow a different sales rep (other than the one specified in the customer’s record) to receive credit for a particular sale.

**Labels**
Labels may be printed for any range or grouping of customers. Customer labels can be printed from ticket history based on merchandise purchased during a specific time period. For example, you can print mailing labels ordered by zip code for customers in the “Gold Member” loyalty program who purchased at least $100 worth of merchandise last year.

**Notes**
Customer notes may be viewed, printed on forms and labels, and even be set to automatically display when the clerk selects the customer.

Easily find your notes simply by entering a key word or phrase. For example, enter “special order” in the keyword search field to find all item notes that contain that text.

**History**
A multi-year monthly summary view is available for each customer showing sales, cost, profitability (dollars and percent), number of sales, and average sale amounts. Complete, detailed history shows every item sold on every ticket, or summarizes individual categories of merchandise.

Historical reports are available in Sales History (more fully described on page 23).

**Reports**
Customer listings (brief and full) are available, organized by type of customer, customer number, zip code, name, etc., to show basic customer information, credit rating, and payment information. Customers may be included in reports based on their category, loyalty point balance, profile information, or any other criteria.

**PURCHASING**
**Overview**
Purchasing is designed to help businesses control purchases and receipts.
New purchase requests (unapproved PO’s) are entered with system-assigned or user-entered document numbers. Optionally print PO forms when you post.

CounterPoint automatically updates on-order quantities for items. New vendors and items may be added on-the-fly. Vendor item records can be automatically created and updated.

During receiving, PO’s may be retrieved by PO number, vendor, or other keyword fields. A PO may be received in full, or only selected lines may be received. Unreceived goods can be backordered or cancelled. You can add additional lines or change, reissue, or reprint the PO. Merchandise that arrives without a PO may be entered on-the-fly during receiving.

To simplify reorders, historical PO’s may be copied into new purchase orders.

An item may have unlimited vendors, each with its own cost and purchasing unit. Costs and quantities may be entered on a PO and printed on forms. Vendor items are automatically defined as part of normal Inventory and Purchasing usage.

Full support is provided for gridded (color/size) items when entering PO’s, entering receivings, and printing reports. With the Enterprise edition’s Serial Numbers Option, you can enter serial numbers during receiving.

With the Enterprise edition, you can also use “Quick Receivings” to enter and receive inventory in a single step.

**Automatic Purchasing**

Purchasing Advice automatically calculates restocking orders. With the Enterprise edition, you can also automatically create the purchase request.

Purchasing Advice calculates the quantities to reorder based on current inventory levels, commitments, backorders, in-transit merchandise, open PO’s, desired stocking levels, vendor multiples, and/or vendor minimum order requirements.

Reorder quantities may be calculated using one of two methods:

- **Min/max**—Orders an item up to its desired maximum stocking level when it falls to or below its minimum (reorder) level.

- **Replenishment**—With the Enterprise edition, CounterPoint can order enough of an item to replace what was sold during a specified time period. You can even enter a history factor to order, for example, 20% more or 5% less.
**Miscellaneous Charges**
Extra charges (for freight, etc.) may be entered during receivings and optionally included in the landed cost. You can enter up to five separate miscellaneous charges which can be allocated based on the weight, quantity, cost, or cube (cubic volume) of the items received. You can also use negative miscellaneous charges to record discounts and credits from your vendors.

**Electronic Orders**
You may print paper PO’s for your vendors or output text files suitable for use in electronic ordering. You may save PO’s as PDF files to fax or email to vendors. Full EDI (Electronic Data Interchange) typically requires use of third-party translator and communications software.

**Accounts Payable Interface**
Received PO’s may be vouched directly into a third-party Accounts Payable system. Invoices may be vouched to the vendor and a report of unvouched receivings is provided. Interfaces to more than a dozen A/P packages are provided.

**Views and Reporting**
A detailed history of PO receivings and cancellations is retained for viewing and reporting. Open PO’s may be viewed or printed showing quantity ordered, received, and expected. The Open PO Report shows outstanding PO’s and can be printed by PO number, vendor, delivery date, etc.

**Customer-Specific Purchases (Enterprise Only)**
CounterPoint makes it easy to take a customer’s order from the point-of-sale, place a purchase order with a vendor, track and receive the PO, and fulfill the customer’s order.

You can review open customer orders and generate multiple purchase requests automatically from those orders.

**Multi-Location Purchasing (Enterprise Only)**
Full support is provided for purchasing and receiving across multiple stores. PO’s may originate at the main office and may be received at the other stores.

**Allocated PO’s (Enterprise Only)**
For multi-location purchasing, Purchasing Advice can generate allocated PO’s. Using location groups, you can order and receive merchandise for a group of stores in a single, combined PO.

CounterPoint supports allocated/merged PO’s as well as allocated/separate PO’s.

- **Allocated/merged** PO’s remain a single document throughout the ordering/receiving process. When the PO’s are received, transfers are automatically created to distribute the merchandise to the appropriate locations.

- **Allocated/separate** PO’s are split into one PO per location when issued.

**Purchasing Adjustments (Enterprise Only)**
After your receivings have been posted, you can correct receivings costs and miscellaneous charges to adjust inventory and/or cost of goods sold.

**Returns to Vendors (Enterprise Only)**
Returns to Vendors (RTVs) may be entered, reviewed, and posted to record the return of merchandise to a vendor. RTVs reduce on-hand inventory. RTVs may also be vouched into Accounts Payable to record credits with a vendor.

**LABELS**
CounterPoint allows you to print labels for merchandise and customers and supports barcode printing.

CounterPoint includes “out of the box” labels which may be printed directly from CounterPoint to any Windows printer, including dedicated thermal label printers and most laser and inkjet printers. No third-party label printing software is required.

With CounterPoint, you can:

- Print item labels—including barcodes—directly from CounterPoint
- Print item labels immediately after posting a purchase request, receiving, or transfer
Generate and print a variety of labels—including customer labels, shipping labels, file folder labels, and more.

Inventory labels may be printed for on-hand items, or a specific quantity of labels can be printed for each item. Inventory and customer labels may be printed based on category or profile fields (or from any other information for the item or customer).

Customer labels can also be printed from history based on merchandise purchased during a specific time period.

Predefined labels are included with CounterPoint, or you may design new labels using NiceLabel Pro software from NiceWare (purchased separately).

**Predefined Labels**

CounterPoint includes a number of predefined “label jobs,” which define the layout and content of particular types of labels. These label jobs allow you to print, for example, labels for items that are on file, labels for items on unposted receivings, labels for customers who are on file, and labels for customers based on ticket history.

CounterPoint’s predefined label layouts are compatible with industry-standard labels. Layouts are supported for pressure-sensitive labels, split (two-up) pressure-sensitive labels, butterfly labels, and perforated hangtags.

Specific support is provided for high-speed printing of multiple copies of a single label.

Predefined layouts and compatible labels simplify setup for several popular Cognitive Solutions and Eltron printers. You can also use a laser printer and standard Avery labels.

**WYSIWYG Designer**

You can modify the predefined label formats or create your own label formats using NiceLabel Pro label design software (purchased separately).

NiceLabel Pro is a “what you see is what you get” (WYSIWYG) label designer that allows you to easily create labels that can retrieve data from any CounterPoint field or table—including custom fields and tables—and format them for a variety of printers.

**Coded Costs and Dates**

Coded cost and date information can be printed on labels using NiceLabel Pro (purchased separately). User-defined encryption ensures that the information is readable by you but not by your customers.

**Barcodes**

Supported barcode symbologies include UPC-A, UPC-E, EAN/JAN-13, Code 39, Interleaved 2 of 5, Codabar, and many others. You can control the barcode height, width, and text under bar printing.

**Membership ID Cards**

Labels with optional barcoded identification may be printed for customers or employees to serve as loyalty card, membership card, or ID cards.

**Notes**

Item and customer notes can also be printed on labels so you can print the text associated with specific items and customers, categories and subcategories, or notes. For example, you could print a plant’s care instructions on the label.

**Item and Customer Profile Fields**

In addition to notes, you can print profile information such as the customer’s birthday or the item’s recommended age group.

**Targeted Mailings**

Mailing labels may be generated for customers who meet certain historical sales criteria, such as all customers in the “Gold Member” loyalty program who bought more than $100 worth of merchandise at Store 1 from categories D or F, between June 1st and July 15th last year, printed in zip code order.
Summary
CounterPoint offers an integrated, trouble-free approach to printing labels as part of daily operations. When used with NiceLabel Pro (purchased separately), CounterPoint gives you the flexibility to customize the labels the way you want.

GRIDS AND APPAREL

Apparel
Apparel capabilities are woven throughout CounterPoint. CounterPoint offers the ease of use, integrated features, and merchandising information essential for profitable soft goods retailing.

In soft goods, a single inventory item (a “style”) can be stocked in multiple colors and sizes (or lengths, widths, patterns, etc.).

Grids
Apparel grids can be one-, two-, or three-dimensional, with an unlimited number of colors and sizes (or lengths, widths, heights, etc.). An item can have thousands of unique color/size combinations, each of which is called a cell.

Items can be viewed, processed, and printed in grid format throughout CounterPoint, including adjustments, receiving, purchasing, transfers, physical counts, and ticket entry.

When a new item is set up, its grid layout is also established. New grids may be copied from an existing item to reduce errors and speed up the entry process.

You can track information for each cell, including quantity-on-hand, quantity-committed, quantity-backordered, quantity-on-PO’s, min/max quantities, and more. You can also specify which cells are stocked (or not-stocked) for each location.

Oversize Pricing (Enterprise Only)
With the Advanced Pricing Option, you can charge more or less for specific cells (colors or sizes). For example, you could charge $3 more for Extra Tall or 15% less for Plaid.

Barcodes
Each cell of a gridded item can have a unique barcode with multiple barcodes per cell, if needed. This feature allows goods to be scanned throughout CounterPoint, reducing entry time and errors. Cell-specific barcodes may be manually entered or automatically assigned.

With the Enterprise edition, you can import barcodes from the vendor using CounterPoint’s Database Import utility.

Purchasing
In Purchasing, gridded items can be quickly placed on order and easily tracked. Reorders may be entered manually or calculated automatically to meet model-stock levels. PO forms can print color/size information in a list or grid format. Receiving are quick—only the exceptions are entered.
Merchandising Reports
CounterPoint includes valuable reports for comparing, summarizing, and analyzing merchandise so you can make decisions on whether to reorder specific merchandise.

- **Inventory Status**—Shows you the “whens” and “wheres” of your inventory (including quantity on hand for one or more locations).

- **Stock Status**—A true “exception report” that prints just the items stocked above the maximum, below the minimum, out of stock, etc.

- **Management History - Item Category**—A high level comparison of your gross profits during different time periods that clearly separates your profitable categories from the unprofitable ones.

- **Six Week Item History**—Helps you spot sales trends in your recent sales.

- **Inventory Analysis**—See how well your inventory is performing (analyze gross profits or see which items will sell out in the next two weeks).

- **Merchandise Analysis** (Enterprise only)—Classify and rank merchandise using criteria you choose. Analyze merchandise at the item level, or get the bigger picture by grouping inventory by vendor, category, subcategory, etc.

- **Sales Analysis by Group** (Enterprise only)—A flexible and powerful reporting tool that analyzes your “hot and cold sellers” based on your performance indicators (quantity sold, quantity returned, average selling price, profit dollars/percent, and more).

SALES HISTORY
Overview
Sales History retains and manages historical sales data, and allows you to view and report those sales in summary or detailed format.

Ticket History View
CounterPoint retains detailed history of every sale and return ticket, including ship-to and bill-to addresses, line item detail, payment detail, sold gift certificates, and sales tax amounts.

Look up tickets by ticket number, customer number, store number, station number, or ticket date.

You can see as much detail as you want—totals, payments, or individual line items.

Individual tickets may also be retrieved by searching for keywords that match any portion of any field designated as a keyword search field.

Filter may also be defined to show the detailed information for specific tickets. For example, you could define a filter to display only the tickets for customer # 100 between May 1 and June 30, 2005.

Ticket History Report
A complete audit-level report of ticket history may be printed in order by store, station, or date, and can optionally include payment detail, line item detail, serial number detail, and cost.

The summarized report allows you to view sales across multiple stores.
Flash Sales
The Flash Sales Report provides a brief one-page synopsis (with optional pie chart) of sales activity at one or more stores for a specified period of time.

Flash Sales shows the total sales, number of tickets, average sales dollars per ticket, cost of sales, and gross profit for each store during the reported period. You can include up to five of over 20 columns on the report.

Flash Sales is a very powerful reporting and analysis tool that lets you define and present your own analysis of store operations.

Management History
Summarized and detailed historical reporting is provided for item categories, payment methods, sales reps, stations, stores, tax codes, and users.

History can be retained indefinitely and management history reports can provide valuable information such as a comparison of sales for Easter week this year with Easter week last year.

By Item by Customer & By Customer by Item History
Two reports, Sales History by Item by Customer and Sales History by Customer by Item, analyze what merchandise is being sold and who is purchasing that merchandise. These reports may be run for a selected range of items, customers, stores, dates, categories, or any other reportable criteria, and allow you to “drill down” to additional levels of detail.

Sales History by Item by Customer shows selected items and lists the customers who made purchases, along with the applicable sales, quantities, profitability, and percent-of-totals figures.

Sales History by Customer by Item shows selected customers and lists the items that were purchased, along with the applicable sales, quantities, profitability, and percent-of-totals figures.

Tax History
The Tax History Report provides detailed or summarized information for sales, taxable amounts, and tax amounts. You can choose how much detail to include on this report—from a summary by tax authority to a detailed report of the tax on each ticket.

Exception Reports
Sophisticated exception reporting allows a manager to monitor danger zones without having to pore through voluminous reports. Exception reports are available for critical areas such as price overrides, tax overrides, voids, merchandise returns, and others.

Commissions Due (Enterprise Only)
Each sales rep may be assigned a commission code with a commission percentage based on the sales amount or the profit amount.

The commissions to be paid are reported in detail or summary on the Commissions Due report.

Sales Analysis by Group (Enterprise Only)
Sales Analysis by Group is a powerful reporting and analysis tool that lets you define and present dozens of different analyses of historical ticket sales—with optional pie charts.

Choose from more than 120 different groupings, including item number, item category, customer zip code, customer category, customer profile fields, user, store, vendor, hour of the day, week, and many more.
For gridded items, you can group sales for colors and sizes within each category and subcategory.

For example, you can group reported information by item category to analyze the sales activity at the category level.

Each group can display up to three reporting periods. You can print all members of a group or just, for example, the top 10 members.

Store-level groupings summarize a store’s activity including ticket lines, sale amounts, and profitability. Reports may be run for one or more days, for one or more stores, and for a multitude of other criteria.

You can even view “theoretical” sales—as if all goods had been sold at the retail price.

Use Filters to limit the report to particular tickets (stores, customers, stations, etc.) and/or particular line items (items, categories, vendors, etc.). You can also use Filters to limit the group members (e.g., “only item categories A, B, and C”). Groups with no history can optionally be included so you can show, for example, all your sales reps whether or not they had sales activity during the period.

You can voucher received PO’s into Accounts Payable (A/P) and interface distributions to General Ledger (G/L).

In addition, utilities are provided to voucher receivings and export distributions for use by other third-party Accounts Payable and General Ledger products, such as Solomon IV, MIP, ACCPAC, and The Financial Edge.

**General Ledger**

CounterPoint account numbers are mapped to corresponding G/L account numbers. Mapping rules can be set up that pertain to all accounts, or on a one-to-one basis. G/L account numbers may be up to 50 characters and may be segmented.

The Distribution Report may be printed in order by account number or by posting source (distribution type or module). A summary version is available, or the detailed version may be printed in order to provide a complete audit trail back to the individual posting journals and document numbers that originally created the distribution.

Distribution activity can be transferred automatically into G/L in summary or detail format, providing a complete audit trail from G/L.

**Accounts Payable**

CounterPoint **Inventory** and **Purchasing** track vendor information. An Accounts Payable package is used to track payables and issue checks outside of CounterPoint. CounterPoint vendors may be set up automatically from existing A/P vendors or created manually in CounterPoint.

After a CounterPoint PO has been received, that receiver may be vouchered into A/P as an invoice (a payable). A/P invoice vouchers may be entered, and accounting distributions are automatically passed into A/P along with the invoice vouchers. With the Enterprise edition, Return to Vendor (RTV) transactions may also be vouchered into A/P and appear as vendor credits.

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**ACCOUNTING INTERFACE**

**Overview**

CounterPoint integrates seamlessly with a variety of accounting packages, including QuickBooks, BusinessWorks Gold, and Small Business Financials. With the Enterprise edition, CounterPoint also integrates with MAS 90/200 and Great Plains.
Importing and Exporting Data
(ENTERPRISE ONLY)
Easily import G/L account numbers into CounterPoint and add or update vendors from A/P to CounterPoint or from CounterPoint to A/P.

CREDIT CARDS
Overview
Credit Cards provides electronic draft capture (EDC) capabilities by allowing you to swipe a credit card through a magnetic stripe reader, automatically authorize a credit card sale, verify an address, and settle funds to your bank. With the Enterprise edition, you can also electronically capture the customer’s signature.

Electronic check authorization, EBT, and debit card processing are also provided.

Full support is provided for multiple industry classifications including Retail, Mail-order/Telephone-order (MOTO), and Ecommerce. CounterPoint also supports AVS, CVV2/CVC2, and purchase cards.

Transactions may be authorized using a standard dial-up telephone line. Two-second Internet authorizations are available using the optional CPGateway service (more fully described on page 41).

CounterPoint’s Base System includes credit card processing with the CounterPoint Merchant Program (CMP). With the Express edition, CounterPoint also includes processing with Paymentech.

Additional processors are available with the Credit Cards Option (page 34) and ensure that CounterPoint is compatible with the vast majority of U.S. banks.

Benefits
The benefits of integrated credit card processing include:

- Visa CISP Compliance
- Reduced cost of accepting credit cards
- No hand-recording of card information
- No paper slips to deposit at the bank
- No rekeying of card information
- No separate credit card terminal

Visa CISP Compliance
CounterPoint SQL is approved by Visa as a CISP-Validated Payment Application.

Visa enforces strict guidelines for the Cardholder Information Security Program (CISP) for any system that accepts credit cards. CISP ensures that cardholder information is secure and protected against theft.

Check Authorizations
CounterPoint includes electronic check authorization compatible with TeleCheck and Certegy. MICR check readers are optional, but are quicker and more accurate than manual data entry.

Debit Card Processing
Complete debit card processing with DUKPT support is built into CounterPoint. Debit card processing requires PIN pads and magnetic stripe card readers.

EBT Food Stamp Processing
EBT food stamp processing is available with CMP, First Data North, or Vital. EBT requires the use of PIN pads and magnetic stripe card readers.

Address Verification
Address Verification Service (AVS) reduces credit card fraud by confirming the customer’s address. AVS is primarily used in mail-order or ecommerce applications where the physical card is not present.

AVS processing does not affect whether or not the charge is approved. Instead, it informs the user whether or not the address provided by the customer matches the address information on file with the credit card company so the merchant can decide whether or not to process the ticket.

Optional CVV2/CVC2 supplements AVS information by sending the extra three or four digits printed on the back of the card to the processor.
Purchase Cards
CounterPoint supports Level II Purchase cards, Corporate cards, Business cards, and Commercial cards.

Purchase cards are Visa and MasterCard cards that look like normal credit cards, but are processed in a special way so the cardholder (typically a large business or government agency) will receive additional information on the monthly statement regarding the type of goods or services purchased.

Hardware Requirements
Requirements for credit card processing are a modem and phone line or an Internet connection, and typically a magnetic stripe card reader. The card processor determines the modem speed and the card reader requirements.

CounterPoint is compatible with any Windows-compatible modem and either Track 1 or Track 2 card readers. Card processors typically require a 1200 baud modem (minimum) and a Track 2 card reader.

One modem and phone line is typically shared by multiple workstations. You can use a dial-up server as your primary processing method or as a backup for CPGateway. CPGateway is an optional service that authorizes credit cards over the Internet in less than two seconds.

Functional Description
During Ticket Entry, the credit card is swiped through the magnetic stripe card reader. Card information is read and the amount is authorized over a dial-up or Internet connection. The processor returns an authorization number or a decline. Capabilities are provided for call retry and for a backup phone number. Any number of credit cards can be used on one ticket, and multiple cards of the same type are also allowed.

Authorizations only commit the cardholder’s credit line. Funds are not actually transferred until the transactions are settled, typically at the end of the day.

Invoices and receipts print the credit card information required by the processor (typically just the last four digits of the card number). Receipts can support one- or two-part paper with a signature line, as well as an abbreviated sales draft (that doesn’t list the merchandise sold).

The Pre-Settlement List allows you to review the day’s activities prior to settling the transactions.

Funds may be settled (electronically transferred) with the credit card processor daily. For most card types, settled funds are transferred via ACH to your local bank within two business days.

Other Costs
Typically, the costs associated with credit card processing include a telephone line and monthly usage, modems, magnetic stripe card readers, and cabling.

CPGateway requires Internet access and has startup and monthly transactional fees. You can try CPGateway for free for a limited time with your new CounterPoint system.

ECOMMERCE
Overview
Opening an online store is easier than you think.

Ecommerce capabilities are built into CounterPoint and are compatible with CPOnline, a Web-hosting and ecommerce service designed especially for CounterPoint merchants.

Because CPOnline is fully integrated with CounterPoint, you can maintain your brick-and-mortar store and your online store at the same time. There’s no costly double entry.
CPOnline is suitable for merchants of all sizes. With CPOnline, you can publish CounterPoint’s inventory and customer information to your online store. Shoppers place orders online, and the orders are imported into CounterPoint for processing and fulfillment.

**Capabilities**

CPOnline capabilities include:

- A complete Web site and shopping cart
- Real-time credit card authorizations with CPGateway
- Special member pricing, member-only items, and customer-specific discounts
- Online account access where shoppers can view their order status (A/R charge customers can also view their available credit and account status)
- Automatic email notifications to shoppers when orders are shipped
- Package tracking
- Easy-to-use Store Management Web site where you can maintain and configure your online store
- **Automated Data Transfer** (Premium Feature) exchanges data in unattended mode
- **Tax Rate Lookup by ZIP Code** (Premium Feature) accurately calculates tax rates based on the ZIP code of the order

**Marketing Tools**

Get noticed—and stay noticed. CPOnline includes the marketing tools you need to make your online store a profitable endeavor.

- **eNewsletters** keep customers informed about upcoming sales, special offers, and new items, and include links to items in your storefront
- **Discounts and promo codes** drive traffic to your store with flexible discount options
- **Froogle** data transfers increase your Web presence and help shoppers locate items in your store
- **Featured items** encourage impulse buys
- **Tell-a-friend emails** let your shoppers email their friends about items on your storefront
- **Affiliate programs** reward Web sites that advertise your products or provide links to your storefront

**Security**

Security is provided through SSL, an industry standard that employs the latest 128-bit encryption technology to encrypt sensitive information—like your customers’ names and credit card numbers—for safe transfer over the Internet.

**Requirements**

Ecommerce and credit card functions are built into CounterPoint. The only requirements for CPOnline are a CounterPoint system, a Windows workstation with Internet access, and a Web browser.

**SYSTEM**

**Overview**

CounterPoint is ready to use right away and gives you all the tools you need to run your business efficiently, profitably, and securely.

For a truly tailored fit, CounterPoint can be customized to meet your unique business needs. You can easily customize LookUps, Filters, Zooms, menus, toolbars, fonts, color schemes, Touchscreen Ticket Entry, table views, and grid layouts.

Nearly every aspect—its appearance, content, and behavior—can be customized. With the Express edition, customizations must be performed by a
CounterPoint Business Partner. With the Enterprise edition, you can customize CounterPoint using the built-in tools.

For example, you can:

- Customize reports, field names, field sizes, warning messages, and more
- Skip unwanted/unused fields
- Add new, user-defined fields to the system
- Add new, user-defined screens or attach custom programs to the CounterPoint main menu
- Print a report that identifies any customized columns, tables, triggers, stored procedures, etc.

### Timecards
CounterPoint allows you to track the hours your employees work. In addition to automatically notifying users when they are not clocked in, CounterPoint allows you to void timecards, print reports, and export timecard records into a third-party payroll application.

### Online Help and Tutorials
CounterPoint includes Online Help and tutorials designed to increase your knowledge. The searchable Online Help includes context-sensitive help as well as general overview help topics. Tutorials are interactive, computer-based training courses that provide basic knowledge for you and your staff.

### Security
Detailed function-level security is provided for each user. Function-level security determines whether a user is authorized to view costs, void tickets, enter returns, override credit limits, enter transactions for previous years, and much more.

CounterPoint can be password protected. Passwords can be required and can have a minimum length and an expiration date. Users can be forced to change their password after logging in. You can also see who is logged into CounterPoint at any given time, and, in many cases, which part of the software they're using.

For additional security, you can assign users to limited menus with fewer selections.

### Menus and Toolbars
Multiple menu styles (buttons, single panel, dual panel, or dropdown list) are available to provide access to all system functions.

![CounterPoint Enterprise Main Menu](image)

Each authorized user may determine menu style preference and customized menu selections.

Multiple toolbar schemes are also available. An authorized user may select a toolbar scheme or design a custom toolbar. Toolbars can be the same or different for each screen.

![CounterPoint Toolbar Schemes](image)

An easy drag-and-drop design interface allows authorized users to change the appearance and behavior of toolbars and menus, including:

- Toolbar visibility
- Toolbar position
- Button/Menu images
- Button/Menu text
- Shortcut keys
- External programs

### Touchscreen Interface
CounterPoint includes a simplified “touchscreen” user interface based on large buttons suitable for touchscreen, mouse, keyboard, and scanner input. A touchscreen monitor is not required.

A pop-up keyboard is available in Touchscreen Ticket Entry as well as from all standard maintenance forms, report forms, and filters. With pop-up keyboards, users
can enter information using touchscreen workstations that aren’t equipped with keyboards.

**Zooms**

Zooms display additional details throughout CounterPoint. Zooms are available for items, customers, A/R documents, vendors, stores, users, gift certificates, store credits, locations, location groups, PO’s, receivings history, ticket history, serial numbers, transfers, and more from virtually anywhere.

For example, while entering a ticket, the Item Zoom displays information about the item, quantities available, recent sales, vendors, monthly history, substitute items, notes, etc. The Customer Zoom displays the customer’s contact information, current balance, recent sales, ticket history, etc.

With the Enterprise edition, you can use the Zoom Dictionary to create new Zooms and to control the appearance, content, and behavior of existing Zooms.

**LookUps**

LookUps let you view a list of valid records (e.g., items, customers, vendors, etc.). LookUps are available from any field in which information can be “looked up” from a list of valid choices.

For example, when an item LookUp is requested, the LookUp window displays the complete list of items. The items can be ordered by item number, barcode, category, vendor, description, etc.

With user-friendly keyword searching, CounterPoint matches keywords to any field designated as a keyword search field. Keyword searching finds, for example, an item based on a partial match of any keyword fields (category, description, vendor, etc.).

All LookUps are customizable. From within a LookUp, you can zoom in on detailed information or set Filters to display only the items you want. Authorized users can even “add on-the-fly” or make changes to existing records.

**Table View or Record View**

On each CounterPoint screen, you can choose which view to use when editing and maintaining your data. Use the standard Record View to work with a single item, customer, etc., at a time. Or switch to Table View to view and edit multiple records at a time.
Filters
You can use Filters to customize the information displayed in LookUps, maintenance screens, and reports. Filters are automatically saved with LookUps.

Filters allow you to set conditions that limit the records that display. For example, you could choose to display only the “items in category GOLF with a primary vendor of ADAMS.”

Indexes
Indexes increase the speed of LookUps and reports. Adding an index allows you to quickly sort and look up information in the order you prefer.

For example, if you have tens of thousands of items on file, and you frequently look up items by subcategory, you may want to define a subcategory index to speed up the Item LookUp.

Crystal Reports
CounterPoint includes the Crystal Reports Viewer, so you can view and print reports outside of CounterPoint and export reports to a variety of formats.

New forms and reports may be created, and standard forms and reports may be customized using Crystal Reports Designer (purchased separately). Custom reports may be used in place of any standard report, or they may be added to custom menus and used in addition to the standard reports.

Quick Reports
You can create a Quick Report from any LookUp window to preview, print, or save the information. Quick Reports can easily be added to a customized menu and function like standard reports. You can also export the information from the Quick Report to another application, such as Microsoft Excel.

Automatic Workstation Updates
To simplify the installation of periodic software updates, newer software need only be installed on the server. Each CounterPoint workstation automatically detects new software and updates itself.

Triggers
For advanced requirements, additional processing can be performed using SQL triggers. A “trigger” is a set of SQL commands that execute automatically when information is added, updated, or deleted. Triggers are a powerful way to update your business records when certain conditions are met.

For example, you could define a Warranty Repairs trigger for billing the manufacturer (not the customer) for repair work. When a customer brings in an item for repair, the clerk enters a normal point-of-sale ticket, and the warranty work is “paid for” with a special A/R pay code. The trigger automatically charges the manufacturer’s A/R account. At the end of the month, a statement of how much money the manufacturer owes you for the warranty work can be printed and mailed to the manufacturer.

Batches (Enterprise Only)
CounterPoint updates data in “batches” so that multiple users can operate independently without interfering with one another.

For example, two people at the same location can concurrently enter and post inventory adjustments or cash receipts. Posting one user’s batch of data will not affect the other user’s batch.
Workgroups (ENTERPRISE ONLY)
A workgroup is a group of users who share similar characteristics. Workgroups control the locations, stores, and features that a user can access, as well as the automatically-assigned “Next” numbers (e.g., next PO number, next item number, etc.).

Workgroups are also beneficial for grouping users in wide area networks and Multi-Site configurations.

Messages/Reminders (ENTERPRISE ONLY)
With the Message Center, you can send electronic messages to other users to inform them about system changes, daily specials, etc., or you can schedule repeating reminders. Messages automatically display when a user logs into CounterPoint.

Renumbering Utilities (ENTERPRISE ONLY)
Utilities are provided to renumber items, customers, and vendors.

Importing and Exporting Data (ENTERPRISE ONLY)
CounterPoint includes Database Import and Export utilities to create and update CounterPoint data (item numbers, descriptions, prices, etc.). CounterPoint is also capable of importing and processing transactions (transfers, receivings, and adjustments) from text files. Many third-party packages can create text files suitable for importing into CounterPoint.

Data can be exported using CounterPoint’s Database Export utility or other applications such as Excel, Crystal Reports, or Microsoft SQL.

Upgrade Utility (ENTERPRISE ONLY)
CounterPoint SQL includes an Upgrade Data utility which allows you to import CounterPoint V7 inventory, customer, and vendor records, as well as inventory history (including markdowns), open purchase orders, ecommerce information, and configuration information into CounterPoint SQL.

You can also convert data from third-party applications into the appropriate CSV format, and then use the Upgrade Data utility to convert that data for use with CounterPoint SQL.

Data Dictionary*
The Data Dictionary allows you to easily customize CounterPoint’s appearance and behavior. You can change your information in one place, and your change is reflected on every screen and report. For example, you can display “Client” instead of “Customer” or “Department” instead of “Category.”

You can also define “rules” to control screen behaviors, such as specifying minimum or maximum values for numeric fields.

Custom Fields*
Custom fields allow you to easily record, track, and view additional information on existing CounterPoint forms. Custom fields are automatically available in Zooms, LookUps, and Filters.

For example, if you wanted to track referral names and dates, you could define custom fields for “Referred by” and “Referral date” and add them automatically to the standard Customers screen.

Custom Screens*
Custom screens allow you to create new, user-defined screens within CounterPoint. Custom screens fully support LookUps and Filters.
For example, if you wanted to track customer-specific item numbers, you could create a custom screen that includes customer number, item number, the customer’s item number, and a description.

Custom screens can be attached seamlessly to the CounterPoint main menu, to a Touchscreen Ticket Entry button, or to any toolbar. You can even add a button to the toolbar on the Customer maintenance screen that when clicked, displays the customer’s unique item numbers.

**Custom Programs***

CounterPoint will create a user-friendly “front end” for your custom programs. Custom programs and applications can be created using any number of development tools and can be run from the CounterPoint main menu for a consistent interface.

For example, you could create a Visual Basic application named Batch Price Changes that changes the Price-1 values for a group of items up or down by a specific percentage.

Using a “standard looking” CounterPoint screen, you can specify the category, subcategory, or vendor to change, as well as the percentage by which Price-1 should change.

CounterPoint then passes these values to your Visual Basic application which changes the Price-1 values for the group of items.

* With the Express edition, most customizations require the services of a CounterPoint Business Partner. With the Enterprise edition, any authorized user can customize CounterPoint using the built-in tools.
COUNTERPOINT OPTIONS

CounterPoint Options give you access to additional features that enhance the Base System. Options may be purchased with the Base System, or later as your business needs change.

CREDIT CARDS OPTION

Overview
The Express and Enterprise editions include credit card processing with the CounterPoint Merchant Program (CMP). Express also includes processing with Paymentech (the Credit Cards Option is not required for processing with Paymentech in the Express edition).

With the Credit Cards Option, you can choose to process through a CounterPoint Preferred Processor.

Preferred Processors
CounterPoint supports credit card processing through any of the Preferred Processors:

- First Data North (FDMS North)
- First Data South (NaBANCO)
- Vital (VisaNet)
- Paymentech
- Any bank compatible with a Preferred Processor

Using a CounterPoint Preferred Processor ensures compliance with rapidly changing standards and access to the most favorable rates, as well as industry classifications (Retail, Mail-order/Telephone-order, and Ecommerce), AVS, CVV2/CVC2, dial-up processing, purchase/corporate cards, and CPGateway.

Visa CISP Compliance
CounterPoint is approved by Visa as a CISP-Validated Payment Application. Visa enforces strict guidelines for the Cardholder Information Security Program (CISP) for any system that accepts credit cards. CISP ensures that cardholder information is secure and protected against theft.

Capabilities
Capabilities of the Credit Cards Option are identical to those described under Credit Cards (page 26).

RECEIVABLES OPTION

Overview
Complete customer tracking is an integral part of CounterPoint. The Receivables Option adds charge sales, receivables tracking, cash receipts processing, finance charges, account aging, and statement printing.

The Express edition includes receivables functionality in the Base System. For the Enterprise edition, the Receivables Option is required in order to process receivables.

Customer Accounts
Charge customers are “open-item” type accounts. Customer terms and prompt payment discounts may be based on a number of days (“net 30” or “2% 10, net 30”), or proximo terms based on a specific day of the month (“2% 10th, net 30th”).

Credit Limits and Controls
Credit limits ensure that customers do not exceed management’s guidelines for open credit. For a charge sale, the customer’s credit limit is checked, and only authorized users may override the credit limit.

Statements
Statements are normally printed as part of a month-end process. Statements may be limited to customers...
within particular statement groups and/or to customers with particular minimum balances and past due statuses.

A standard statement form may be printed, or the statement format may be customized with Crystal Reports Designer (purchased separately). Customer information, ticket details, activity detail of invoices and payments, aging, and dunning notices can be printed on the standard statement form.

**Cash Receipts**
When entering cash receipts, a customer’s payment may be applied to an individual document, selected documents, or automatically applied to any unpaid documents (starting with the oldest documents). Open item detail may be viewed on screen.

You may revise prior cash receipts by reapplying A/R documents so you can, for example, change the amount previously applied to an invoice.

Valid discounts are calculated automatically, and writeoffs are allowed. Discounts and writeoffs can be charged to the default G/L account or to any valid G/L account.

Authorized users can accept cash, check, credit card, or debit card payments on a customer’s A/R account from ticket entry.

**Debit/Credit Memos**
Customer Adjustments allow simplified processing of back-office debit and credit memos that are not appropriate for Point of Sale processing. Adjustment documents may be self-applied, open, or may be applied to an existing document.

**Aging**
Up to five aging periods may be defined, along with a number of days (such as 30, 60, 90, etc.). Documents may be aged by invoice date or by due date. Statements and the Aging report allow aging by number of days, as well as for a specific range of dates, and provide separate totals for debit and credit amounts.

You can view a customer’s current aging or the aging that was printed on the last statement.

The Aging report provides an aging summary per customer, or the complete document detail, and allows selection of just those customers with high balances and/or past due accounts.

The Aging report may be printed in order by customer number, name, or sales rep.

**SERIAL NUMBERS OPTION (ENTERPRISE ONLY)**

**Overview**
Serial number tracking provides a detailed record of each piece of merchandise—when it was received, what it cost, which customer bought it, when it was bought, warranty expiration, etc. Serial number tracking is beneficial to any business that sells big-ticket items, tracks product warranties, or deals in regulated commodities.

Serial numbers can be entered in inventory adjustments, quick receivings, purchase order receivings, quick transfers, transfers, and ticket entry (including same-day sales and returns).
Detailed historical activity is retained for each serial number transaction (receiving, sale, etc.). Historical details are available on reports, views, and Zooms.

Serial Number Tracking
Items may be defined as “Always serialized” or “Sometimes serialized.”

“Always serialized” tracking allows you to exercise tight management control over the movement of quantities for the item. Serial numbers must be specified for every transaction (receiving, transfer, sale, etc.). You may only sell serial numbers that are actually in stock. Always serialized tracking ensures that there is a serial number associated with each item on hand.

“Sometimes serialized” tracking provides looser management controls. Recording of serial numbers during receiving (or other transactions) is optional. To ensure that you keep good records, you may specify for each item whether serial numbers are required when selling and returning. The sometimes serialized tracking method is useful for businesses that don’t track in-stock serial numbers, but may want to record serial number information at the time of sale.

Serial Prompts
Serial prompts allow you to collect additional information. For example, you could define a serial prompt code to be used in receivings that requests the “classification” and optionally requires the user to enter either “New” or “Used.”

You may use the same prompt codes for all serialized items, or you may associate different prompt codes with different items. Serial prompt information is retained with the transaction detail and is available for viewing and reporting.

Costing Method
For accounting purposes, you may use the serial cost to account for the specific cost of each individual serial number or the average cost. CounterPoint supports serial costing for Always serialized items.

Zooms
From Item Zooms, you can display a list of serial numbers and the current status of each serial number.

From the Serial Number Zoom, you can display basic information for the serial number as well as historical transaction detail.

Reports
The Serial Numbers report may be printed for sold, missing, or unsold items, and may be organized by vendor, item, or customer.

Individual serial numbers and the associated reference information may be printed on applicable inventory reports.

ADVANCED PRICING OPTION
(ENTERPRISE ONLY)

Overview
The Advanced Pricing Option offers advanced pricing capabilities including price-by-location, 6-
level prices, oversize pricing for apparel, and custom pricing for price calculations.

**Price-by-Location**

Price-by-location allows an item to have a different price at each selling location. For example, your downtown store can charge higher prices than your uptown store.

**6-Level Prices**

Tiered, multi-level pricing automatically selects a particular price level based on the specific customer making the purchase and the quantity being sold.

In the CounterPoint Base System, each inventory item may have up to three price levels for the item’s stocking unit and for each of its five alternate units. The Advanced Pricing Option expands the number of price levels for each unit from three to six.

**Oversize Pricing (Price-by-Cell)**

Oversize pricing for gridded (apparel) items allows you to charge a higher or lower price for each cell (color/size combination) of a gridded item.

Pricing rules (described in Inventory) are used to assign a surcharge (or discount) of a dollar amount, a percentage increase/decrease, or a fixed price for each cell. For example, you could define a rule that determines “all X-Large in the category SHIRT for vendor 123 are Price-1 plus $5” or “all BLUE colors of the item DRESS are Price-1 less 10%.”

**Custom Pricing**

Advanced users may use custom SQL stored procedures to further customize price calculations. Custom pricing using stored procedures is valuable if your pricing rules require formulas (e.g., 10% off Price-1 minus one dollar) that cannot be described using the standard calculation methods.

**MULTI-SITE/HUB OPTION (ENTERPRISE ONLY)**

**Overview**

Multi-Site is an integral part of any business that has more than one store. Multi-Site enables a CounterPoint Hub (the main office) and one or more Remotes (other stores) to operate independently during the day and periodically exchange information. Each site may “subscribe” to a user-defined set of data (a “work set”) so that it receives just the inventory, store, and customer information that it needs.

Information is exchanged (replicated) through a dial-up, WAN, or Internet connection. Replication can be scheduled to take place periodically during the day or as an overnight process.

**Multi-Site Benefits**

Multi-Site operation of multiple stores offers many benefits, including:

- Independent operations across multiple sites
- Automatic, unattended, remote-site updating
- Cost-effective exchange of information across multiple sites
- Multi-location data integrity
- Data remains synchronized across multiple sites

**Exchanging Information**

The CounterPoint Hub and each remote site operate independently and periodically exchange (or replicate) information using PDRE (PeerDirect Replication Engine) software included with Multi-Site.

The Hub contains a complete database (all data for all sites). Remotes can also contain complete databases, or they can contain site-specific work set databases.

During a replication session, PDRE gathers all changes made to a database since the last replication session and replicates those changes with the other site via TCP/IP. PDRE automatically initiates
contact to ensure that each site gets all the data it needs, based on the site’s subscribed work set.

Replication can be scheduled to take place periodically during the day or as an overnight process. Data is replicated bi-directionally in a single session.

Log files for each session can be viewed using any text editor, or you can set up a Windows task to automatically email logs at a certain time every day to report the status of the replication.

Managing Multiple Sites
Manage all servers and workstations at each site from a central location. CounterPoint includes Altiris software that enables a single computer (the Notification Server) to control the installation of software updates, database changes, and file distribution. The Notification Server “talks to” the other computers in the Multi-Site environment and automatically keeps them all up-to-date.

Work Sets
Multi-Site uses work sets to manage the CounterPoint database for each site. Each site may subscribe to a user-defined set of data so it receives just the inventory, store, and customer information it wants. Work sets are established for each location and for each store.

For example, the MAIN location work set contains just the data that pertains to the MAIN location (inventory, transaction history, etc.), and the EAST store work set contains just the data that pertains to the EAST store (customers, ticket history, etc.).

Work sets offer many benefits, including:

- **Speed**—Replication for each site is fast. Each site only replicates the data it needs
- **Size**—Site-specific databases are smaller, thereby increasing CounterPoint’s speed and reducing the server requirements
- **Convenience**—Forms, LookUps, reports, etc., only display the data relevant to that site
- **Security**—One site cannot alter another site’s data if it is not subscribed to the work set

To further reduce data transmission and data storage requirements, a site can subscribe to the “master” data and not subscribe to the “history” data. For example, EAST may wish to see WEST’s inventory, but not see (or update) WEST’s inventory history.

Options
Options that are purchased for a Hub are also purchased and available for each Remote.

Affected Applications
Virtually all areas of CounterPoint are involved in Multi-Site. When an item is added at one site, it is automatically added at all sites. When a customer’s address is changed, that change is reflected at all sites having that customer on file. All appropriate changes are updated throughout CounterPoint.

**OFFLINE TICKET ENTRY OPTION (ENTERPRISE ONLY)**

Overview
The Offline Ticket Entry Option provides lane redundancy and ensures fault tolerance so clerks can continue to ring up sales if the connection to the CounterPoint server is lost.

Offline Ticket Entry is useful during network outages, sidewalk sales, scheduled server maintenance, or for any situation in which the server is unavailable. Offline mode may be used as the normal mode of operation for “sometimes-connected” workstations such as portable workstations or kiosks.

Offline Mode
In offline mode, clerks ring up sales in the normal manner, but the tickets are saved to a local database instead of the main CounterPoint server’s database. When the server becomes available, the workstation database is synchronized with the server, and the offline tickets become part of the server’s database.

In offline mode, you can:

- Open and close cash drawers
- Enter sale and return tickets, orders, layaways, holds, quotes, pay-ins, pay-outs, and pay-on-accounts
- Authorize credit card (EDC) transactions
- Add new customers on-the-fly

Other CounterPoint functions are not available in offline mode.
ADDITIONAL TOPICS

*Radiant Systems offers additional products and services that complement those of our CounterPoint Business Partners.*

**BUSINESS PARTNERS**

CounterPoint SQL is available exclusively from CounterPoint Business Partners who provide complete business solutions that include software, equipment, services, training, and ongoing support.

**SYSTEM CONFIGURATION**

CounterPoint is available in single-user and multi-user versions, and operates in both single-site and multi-store environments. CounterPoint workstations can either be standalone or attached to a network.

With the Enterprise edition, you can have multiple stores and multiple companies all running the same CounterPoint software. Each company can have a unique name, account number structure, and various other system-wide attributes. WAN (Wide Area Network) support is provided for Citrix and Windows Terminal Server.

**MINIMUM REQUIREMENTS**

- Workstations can run on Windows XP Professional or 2000. The minimum memory for a workstation is 512MB.
- Servers can run on Windows XP Professional, 2000, or Windows Server 2003. A server can also function as a workstation. The minimum memory for a server is 512MB.
- Microsoft Desktop Engine 2000 (MSDE 2000) is included with CounterPoint for systems with up to five users and up to a 2GB database. Microsoft SQL Server 2000 (MSSQL) is required for more than five users, larger databases, and for Multi-Site Hubs. (MSSQL is purchased separately.)

**POINT-OF-SALE HARDWARE**

An open architecture ensures compatibility with hardware from Radiant Systems as well as from a variety of other manufacturers.

By choosing Radiant Systems as the single source for your integrated hardware and software solutions, you reduce your implementation risks and optimize the technology solution for your environment.

**Radiant Systems Hardware**

Radiant Systems offers a comprehensive line of hardware solutions designed especially with CounterPoint users in mind. Our hardware is built to last in the harshest retail and wholesale environments.

Our approach is simple: *reliable and compatible solutions with low total cost of ownership.* Cost-effective maintenance plans keep your hardware in first-rate condition while lowering your overall technology costs.

Radiant’s full line of hardware includes compact workstations with easy-to-use touchscreen interface,
powerful back-office servers, handheld wireless tablets, indoor and outdoor kiosks, and more.

CounterPoint-compatible workstations include:

- **P1550 Workstation (Premium Model):** The P1550 is Radiant’s most advanced all-in-one workstation. It features key innovations such as a high-bright 15” touchscreen, the latest Intel technology, passive cooling, and innovative cable management.

- **P1220 Workstation (Value Model):** The P1550 is Radiant’s affordably priced all-in-one workstation. It features a 12.1” high-bright touchscreen, the latest Intel technology, and a small footprint with flexible mounting options.

### Peripheral Devices

CounterPoint supports a wide range of peripheral devices.

- **Receipt and invoice printers**—Various types of printers are used to output receipts and invoices, validate checks, and print other types of documents.

- **Cash drawers**—Electronic cash drawers can be connected directly to the computer’s serial or parallel ports, or through a point-of-sale printer with cash-drawer kickout ports. The Enterprise edition also supports compulsory cash drawers.

- **Barcode readers and scanners**—Scanners allow high-speed, accurate input of inventory items, and can also be used to scan in other barcoded information such as gift cards, customer numbers, etc.

- **Customer pole (“line”) displays**—These devices display change due and can also display sale amounts, item descriptions, and prices.

- **Multiple monitors**—Take advantage of the multi-monitor support that’s built into Windows to display a separate screen image to your customers during checkout. Customer display monitors can display advertisements, ticket information, item images, change due, customer details, etc.

- **Magnetic stripe card readers**—Track 1 and Track 2 magnetic stripe readers are supported for credit card authorizations. Keyboard-transparent card readers may also be used for shopping cards and identifying employees or customers.

- **PIN pads**—PIN pads are required for debit cards and/or EBT food stamps.

- **Signature capture (Enterprise Only)**—Obtain customer signatures electronically when processing credit cards, A/R charges, etc.

- **Check readers**—Check readers may be used in conjunction with check processing to pass MICR information to the processor.

- **Programmable keyboards**—Specialized keyboards are useful for simplified data entry. They may be used in place of or in conjunction with standard alphanumeric keyboards.

- **Touchscreen monitors**—Any touchscreen monitor that’s compatible with Windows will work with CounterPoint.

- **Handheld data-collection terminals**—Data collected by portable data-collection terminals may be imported into CounterPoint for physical counts, etc.

- **Weight scales**—CounterPoint may request a weight from a serial scale, or transmission may be initiated manually.

### Express Certified Devices

To simplify setup for commonly-used devices, a series of pre-defined *Express Certified* device definitions are installed with CounterPoint. The Express edition works with any of the *Express Certified* devices.

The Enterprise edition works with any of the *Express Certified* devices as well as other devices.
CounterPoint communicates with peripheral devices using the manufacturer’s OPOS drivers or the Generic OPOS drivers included with CounterPoint. OPOS is the industry standard for communicating with point-of-sale hardware.

Visit [www.CounterPointPOS.com/expresscertified](http://www.CounterPointPOS.com/expresscertified) for an up-to-date list of certified devices.

**ADDITIONAL SERVICES**

Radiant Systems offers ecommerce, credit card processing enhancements, training, technical support, and an annual User Conference to help you get more out of your CounterPoint system.

**CPOnline**

CPOnline is an ecommerce and Web-hosting service designed especially for CounterPoint merchants.

You can use CounterPoint to publish inventory, customers, and pricing information to your CPOnline store with a minimum of effort and expense. Then, you can process and fulfill orders received online through your CounterPoint system. With CPOnline, your inventory, customers, and pricing are always in sync.

CPOnline combines the essential tools of ecommerce into one simple package, including member-specific items and pricing, eNewsletters, Froogle™ submissions, automatic email notifications, real-time credit card authorizations, package tracking, and a wide range of payment and shipping options.

Visit [www.CounterPointOnline.com](http://www.CounterPointOnline.com) for additional information.

**CPGateway**

CPGateway enhances credit card processing for CounterPoint merchants. With CPGateway, you can authorize credit cards, debit cards, EBT food stamps, stored value cards, and checks over the Internet in less than two seconds.

CPGateway allows you to obtain authorizations from your processor using the Internet instead of dialing out for each authorization. This method is faster and more reliable than dial-up communications.

CPGateway is suitable for businesses of all sizes. High-volume businesses will benefit from fast authorizations all year long. Lower-volume businesses can reduce monthly fees by using CPGateway only during their peak seasons.

CPGateway offers:

- 2-second authorizations for credit cards, debit cards, EBT food stamps, stored value cards, and checks
- Internet-based service
- Faster settlement times
- Compatibility with CPOnline (for real-time authorizations in your ecommerce store)
- CISP compliance
- Simple setup
- Economical fees
- Ease of use
- Reliability
- Security
- One Internet connection for multiple workstations
- Compatibility with the CounterPoint Merchant Program (CMP), First Data North, First Data South, Vital, and Paymentech
- Automatic fallback using CPDialup
- Direct American Express authorizations instead of routing through processors (reduces bank fees)

You can try CPGateway for free with your new CounterPoint system.

Visit [www.CPGateway.com](http://www.CPGateway.com) for more information.

**CounterPoint Subscription Service**

The CounterPoint Subscription Service (CSS) automatically keeps your CounterPoint system up-to-date. It is required during the first year, and is strongly recommended in future years to get the most out of your investment and minimize your maintenance costs.

With CSS, you receive all feature enhancements (updates and corrections) as they are added to CounterPoint, along with updated documentation. CSS also ensures that your CounterPoint system remains CISP-compliant. Plus, you can access the CounterPoint Users Forum and other user-only areas of our Web site.
CounterPoint Users Forum

The CounterPoint Users Forum is the official forum for you to share questions, suggestions, and information with other users at forum.synchronics.com.

HelpDesk

HelpDesk provides supplemental support to help ensure the successful operation of your CounterPoint system. An annual HelpDesk agreement provides access to telephone and email support whenever you need it—24 hours a day, 363 days a year!

Each plan includes a specific number of prepaid support hours. Ask your CounterPoint Business Partner about signing up for HelpDesk to supplement the primary support services you already receive from your Partner.

Training

Comprehensive training courses cover all aspects and features of CounterPoint and provide discussion for the best way to integrate features with your business.

Visit www.CounterPointPOS.com/training for up-to-date training schedules and course descriptions.

CounterPoint User Conference

Join us for our annual CounterPoint User Conference (typically held in February).

You can meet the people behind the software, learn new things that your system can do, and “talk shop” with hundreds of other CounterPoint users. The entire Conference is geared toward helping you get more out of your CounterPoint system.

Visit www.CounterPointPOS.com/conference for more information.

www.CounterPointPOS.com

Visit our Web site, www.CounterPointPOS.com, for additional information on CounterPoint.

You’ll find information about new features and software updates, as well as contact information, support resources, training schedules, the CounterPoint Users Forum, and much more.

Thank You

Thank you for your interest in CounterPoint from Radiant Systems! We look forward to providing you exceptional products and services.

Call us today at (800) 852-5852, and we’ll put you in touch with a CounterPoint Business Partner in your area. Your Partner will give you a free software demonstration and show you how CounterPoint SQL fits your business needs.
Radiant Systems, Inc. is a leader in providing innovative technology to the hospitality and retail industries. Offering unmatched reliability and ease of use, Radiant's hardware and software products have been deployed in over 60,000 sites across more than 100 countries. Radiant has approximately 900 employees worldwide, 325 certified sales and service partners and over 1800 field service representatives. Founded in 1985, the company is headquartered in Atlanta with regional offices throughout the United States as well as in Europe, Asia and Australia.