

COUNTERPOINT TIPS AND TRICKS

OCTOBER, 2019



Retail



SMB



Setting User Home Action

Start off in Counterpoint in the spot most productive

- Setup/System/User Preferences
 - Set Home Action
 - Click to Open Home Action when launching Counterpoint
- Scenario: Have your operations person open Work Center automatically to see all unposted items

Button to Exit

Easily touch or click the exit button to close out Counterpoint

- Put the file Send-Escape-Key.txt into the company \ Configuration \ Actions folder (email andee.williamson@ncr.com to get the file)
- Rename the file from Send-Escape-Key.txt to Send-Escape-Key.vbs
- Add a new menu selection called Exit-CP (setup/system/menu code)
- Define it as an External Program and type Send-Escape-Key.vbs as the Command
- Now you will have a button called Exit-CP to "press" escape

Profile Codes

Tracking unique data on items, customers, vendors, and More

- Setup/System/Quick Setup
- Set profiles for Items, Customers, Purchasing, and Point of Sale
- Example 1: Customer Call Back Date set as Customer Profile Code
- Example 2: Price Rule Connected to an Item Profile Code
- Example 3: Set Season by item & use price sheet to select that group
- Example 4: Set a Vendor as Inactive
- Customer profile can be selected to segment email marketing

Min/Max Report (8.5.2)

- Inventory/Reports/Min-Max Advice
- Calculate what Min and Max Levels Should Be Based on Days of Supply
- Write the Data directly to the Min/Max fields for every item at every location

Item Filtered Lookup with 1 Keystroke

Reduce the Number of Keystrokes at POS

- Setup/Point of Sale/Touchcodes
- Select the button to press at point of sale
- Make the “Action” External
- Command = C:\SendKeys.vbs (top-level)
- Arguments = {F9}%pF
- Toplevel/System/Actions/SendKeys right-click and edit

Data Interchange

You can use a SQL Query in Data Interchange to pull specific data in to a CSV file.

- Example: File to handoff to a marketing firm with all customers who have spent over a certain dollar amount. Pull out Name, Address lines, and all the relevant data.

**** You need someone who understands SQL to write the SQL Query. CCS can help you with this**

Pie Chart Metric

Showing a Pie Chart on a Report Gives You Another Metric to Compare and Contrast

- When a report allows a Pie Chart to be added, you can change the metric we pie chart on by changing the Top Visible Column on the Add Columns Tab

New User Interface (8.5.3)

New Look and Feel to Counterpoint Plus New Features

- Easy to navigate Main Menu
 - Favorites
 - Recently Used
- Global Search on Main Menu
- In Point of Sale: Click in to Customers and Sales Reps
- New Splash Screens
- Add Your Logo to the Login Screen

Upselling

Use Tag-Along Kits to Upsell

- Inventory/Sales Kits
 - Tag-Along the Upsell
 - Use Fields in Component Prompts too add Price and Qty Available for items being upsold

Group Tag-Along Kits

The Parent and Components are Locked

- Inventory/Sales Kits
 - Group Tag-Along
 - Use to attach multiple items together. They remain separate items with separate prices, but they are locked together.
 - Example: Selling a Bottle Deposit with a bottle
 - Not able to Remove the Deposit without removing bottle

Menu Code - Changing Title Bar

Use Menu Codes to Change What Shows Up on the CP Menu

- Setup/System/Menu Code
 - Change the Form Caption for each menu option
 - Also Change the Menu and Button Caption

Play Sound - Item Not On File

Change the Sound In Windows When an Item Is Not On File

- Counterpoint plays the Windows Critical Stop Sound for “Item not on File” message
- Through Windows Control Panel, find Sound and Windows Critical Stop Sound and choose to play a custom sound
- This helps when the clerk notice that something isn’t right when scanning an item number
- Scenario: Item Not on File – Change Sound

Keyboard Equivalents

Find Your Way Around Counterpoint Faster

Keyboard Equivalents

- Use “T” in a date field to automatically fill in today’s date
- Search Online documentation to find other date shortcuts
- Use Tab or Enter to move from field to field
- Use Control-Tab to move from tab to tab

Touchscreen

- Setup/Point of Sale/Touchcodes/Button Tab
- Select a keyboard shortcut for that button action
- While in ticket entry, press the chosen key combination to launch that button action.

Resources

Help, Recordings, Knowledge Base and Other Counterpoint Resources

- <https://www.ncr.com/retail/counterpoint-pos>
- User Portal
 - <https://userportal.counterpointpos.com/news/training-manuals.htm>
 - Knowledge base
- www.ncrcounterpointhelp.com
 - Keyword search
- andee.Williamson@ncr.com

Search Item Notes by Keyword

Keep notes on items and search for which notes have particular data

- Inventory/Utilities/Item Notes
- Use the Lookup at Item Number and then use Keywords to find all notes that contain a certain word
- Great for customers tracking nutritional information and then needed to see which items contain a certain ingredient

Table View Mode

Change How You View Various Data In Counterpoint

- See multiple records on one screen instead of viewing each individual record.
- You can edit in Table View mode.
- You will see the Table View icon in the forms where it's available.

See Which Counterpoint User is Performing Events

See who is posting price sheets and other transaction types

- System/View/Events
- Lookup at Event Number and use filter to limit
- Use Options/Preview to print as a report
- This will show you which users posted which events

Margin Driven Pricing

Set Target and Minimum Margins in Setup/Inventory/Categories or Sub-Categories

- See with visual indicators if you are at, above, or below your target margin
- Inventory/Items Tableview Mode show all items and the indicators
- See the indicators in Receiving
- Use Price Sheet to find all items at, above, or below Target Margin and make price changes

Pop Up Notes in Purchasing

Great for reminding buyers about things like ordering “testers”.

- Setup/Purchasing Control set the note id for a note to show during purchasing
- Inventory items set the note id for purchasing to match what is defined in the Purchasing Control File
- During enter a new purchase request, when adding an item with a matching purchasing note id, the note pops up

Everything You Need to Know about Counterpoint

- System/View/Environment
 - Learn where the Top-Level is located
 - What your Counterpoint serial number is

Scrap Reason Codes

Return Reason Codes can be set to scrap inventory so when the return is done and the scrap reason code is used, it does not put the item back in Inventory

- Setup /Point of Sale/Reason Codes
- For Return Reason Codes, checkmark as Scrap
- When that Reason Code is used, we adjust the quantity received out of inventory automatically

Price Sheet

Global Price Changes

- Inventory/Prices/Price Sheet
- Print New Item Labels
- Change Prices for a Group of Items
 - Change by Dollar Amount
 - Change by Percentage
 - Change by Margin

Discount Codes

Apply/Scan Discounts at Point of Sale

- Apply a \$ or % discount to a point of sale ticket
- Ticket minimums
- Setup/Point of Sale Discount Codes
- Add the discount code as a barcode in Customer Connect email

Unposted Sales Analysis Report

SA By Group for Unposted Tickets

- Point of Sale/Reports/Unposted Sales Analysis
- See what's sold during the day before posting

Blind Copy Emailing Receipts & Reports

Have a copy of what you've emailed

- Start/All Programs/NCR Counterpoint/Utilities/Management Console
- Mail Tab
 - Blind Carbon Copy email address

Message Center

Stay in Touch with Employees

- Use the built in Message Center to stay in touch with employees
 - Information on how to sell new lines of merchandise
 - Daily reminders of sales and SPIFF's
- Send instant messages
 - Inform that suspicious people are in the store
 - Disaster recovery plan
 - Attractions: Child has wandered away

Validate Return & Sale on Same Ticket

Be More Efficient with Few Transactions

- Use the Configuration Setting in
 - Setup/Point of Sale Stores on Ticket Tab-1 to allow combined validated returns

Add Items in Purchasing

Use the built in work sheet to help decide what to reorder

- Purchase/Requests/Enter on the Lines Tab
- Select to Add Items
- Choose suggested reorder method
- For replenishment or days of supply, choose a date range and factor
- Use the column designer to see more helpful data



Thank You For Your Time