25 Things You Didn't Know NCR Counterpoint Could Do!
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1. **<u>Upsell Ticket Specific</u> –** Use this feature to prompt once per sale for a specific upsell. Maybe you're taking donations for a local charity, or selling a museum guide, etc. Setup/Point of Sale/Touch codes, use a Run Page Action and define the Pay or Total button to call a tag-along kit for upselling. Also define the tag-along kit in Inventory/Sales Kits. I'm using non-inventory item *Prompt as the tag-along kit parent. I selected to not include the parent in my example. The component is the item or service you want to prompt to upsell with the comment allowing you to set the exact phrase that will display (i.e. Would you like a Museum Guide for $5).

2. **<u>Home Action</u>** – In Setup/System/User Preferences, you can set a user's "Home Action" in the software. When that user is logged in and presses the Home Button (or hits the Home button on the Keyboard when using the Button Menu), it launches the user's Home Action in the software.

3. **<u>Changing Fonts/Colors</u>** – In Setup/System/User Preferences, you can set a user's preferences on font size and the color of the text on our menu.

4. **<u>Filtering Store Credits to the Customer on the Ticket</u>** – You can set the filter to Customer # is exactly %[CUST_NO]%. That tells Counterpoint to filter and show only store credits that match the customer entered on the ticket.

5. **<u>Date Shortcut Keys</u>** – Press the letter "T" in a date field to fill in today's date. In fact, search "shortcut in the online help for others.

6. **<u>Touchscreen Shortcut Keys</u>** – In Setup/Point of Sale/Touch Codes, on the button Tab, you can select a keyboard shortcut for that button action. While in ticket entry, press that key combination to launch that button action.

7. **<u>SA by Group (Time of Day Analysis)</u> –** Under Sales History/Reports, the Sales Analysis by Group is a robust report that gives you many options on viewing sales data. One of my favorites is the Time of Day Analysis. On the Parameters tab, group by (Ticket History) Hour of Day and set the rest of the fields to show the data you want to see. This will show you sales by Hour of the Day. Save the Parameters under the Options button to run the report again.

8. **Warning users of cost discrepancies (V8.4.5) –** In Setup/Purchasing/Control, on the PO's tab, you can set Counterpoint to warn you if the cost is outside the threshold you set. Define the threshold percent, and when entering a PO or Receiving, if the cost falls outside the threshold you set (compared to Last Cost), you are warned and able to correct the cost before finalizing the document.

9. **Sales Analysis for Unposted Tickets (8.4.6)** – Under Point of Sale/Reports/Unposted Sales Analysis, you can now see a variety of sales data for the current day's unposted sales tickets.

10. **Alternate Units** – Under Inventory/Items, on the Units Tab, you can select to stock an item in up to 6 units of measure total (a stocking unit and up to 5 alternates). You can assign a price to an alternate unit, or if the price is blank, Counterpoint will charge Price 1 times the stocking unit number you define on the Units Tab. You can even make the unit price zero for an alternate unit so that you can easily add that item at no charge or a discounted rate.

11. **BOGO and Kits for Upselling (8.3.9)** – Use a tag-along kit to help upsell in a BOGO scenario. If the item is buy 2 get 1 free, and the customer purchases 1, you display a prompt "Buy 2 more and get 1 Free". Say "Yes" and we will add the other 3 and price it as a BOGO. (item 7000 Elvis Bottle Opener)

12. **See Total Extended Retail Value for Open PO's –** Under Purchasing/Reports/PO's you can run a report of open Purchase Orders and in the totals, you get not only the total cost of outstanding PO's, but also the Extended Retail Total dollars.

13. **Display Customer's Email Address in Touchscreen Ticket Entry** – By changing the totals area and adding the customer's email address, you can display whether or not a customer has an email address on file. Go to Setup/Point of Sale/ Touch Codes , bring up the button editor and go to the Totals tab. Choose the regular standard layout and click to the left of number of lines. Go to Value to Display and select BILL_EMAIL_ADRS_1. Save the touchcode. You can also add the email to the customer lookup.

14. **Sales Rep Productivity Report (Version 8.3.5)** – In Sales History/Reports/Sales Rep Productivity you can see sales by hour and quantity sold by hour for Sales Reps. This report uses hours from Timecard.

15. **View Customer and Item Data on an iPad (8.4.4)** – You can use your iPhone, iPad, or iPod touch to do customer and item lookup AT NO CHARGE! CPMobile can also be used for remote and in-store sales, as well as Physical Count. These features are fee based.

16. **<u>Message Center (8.3.9)</u>** – This feature is a closed email system that allows you to communicate with employees in one store, or across multiple stores. Access by going to System/Message Center, or put on a button at Touchscreen.

17. **<u>Discount Codes (8.3.9)</u>** – You can create line level or ticket level discounts codes to apply at point of sale. Using Customer Connect, the codes can be printed as a barcode in an email campaign and scanned as a coupon. Ticket Level Discounts apply the discount proportionally across all the items on the ticket it applies to. Go to Setup/Point of Sale/Discount Codes to define.

18. **<u>Search Item Notes by Keyword (Version 8.2.9)</u>** – When you have multiple note ids on file, you can press the lookup icon and search through notes by keyword for an item. Under Inventory/Utilities/Item Notes, you can search through notes by Keyword across all items.

19. **<u>Find out what Version of CP you're running & MORE</u>** – Go to System/View/Environment to find out what version of CounterPoint you're running and a whole lot more.

20. **<u>Automatically determining pay codes from card numbers (Version 8.4.6)</u>** – Use this new feature to have one "Pay with CC" button to press, swipe the customer's credit card and let Counterpoint select whether it's a Visa, Mastercard, AmEx, etc. Under Setup/System/Paycodes, on the Credit Card Tab, set the prefixes. Also, for touchscreen users go to Setup/Point of Sale/Touch Codes and define a single "Pay with CC" button with an action of Card Payment.

21. **<u>Merge Items (Version 8.4.3)</u>** – In Inventory/Utilities you can now select to merge items which allows you to consolidate multiple item records that may have been inadvertently created for an item into a single record.

22. **<u>User ID Cards (Version 8.4.6)</u>** – Specially-encoded magnetic stripe cards that allow users to log in to **Ticket Entry**, **Touchscreen Ticket Entry**, and various drawer-related functions, as well as to record timecard events and to perform security overrides, without entering a user ID and password. User ID cards cannot be used to log in to Counterpoint itself or to **Order Management**

23. **<u>Filtered Lookups on Buttons in Touchscreen</u>** – Go to Setup/Point of Sale/Touch Codes and select the button action "Item from Lookup or Customer from Lookup". Select Edit filter to choose how to filter what displays when that button is selected during Touchscreen ticket entry.

24. **<u>Minimum Pay Code (Credit Card) Amount</u>** – In Setup/System/Pay Codes, on the Tender tab you're able to set the minimum tender for a pay code. This means, for example, that you can set the minimum sale amount for a credit card sale.

25. **<u>Automatically Prompt for Surcharge on Credit Card Sales</u>** – Earlier this year the law changed in regard to charging a surcharge on Visa and MasterCard sales (http://usa.visa.com/personal/using_visa/checkout_fees/index.html). The law varies state to state, but if you are in a state that allows it, and you want Counterpoint to assist in the process, you can set up a run page so that when a credit card tender type is selected, it first prompts for a miscellaneous charge.