



## NCR Counterpoint Functions & Features

 **NCR** Experience a new world of interaction

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## About NCR

NCR Corporation (NYSE: NCR) is a global technology company leading how the world connects, interacts and transacts with business. NCR's assisted- and self-service solutions and comprehensive support services address the needs of retail, financial, travel, hospitality, entertainment, gaming, public sector, telecom carrier and equipment organizations in more than 100 countries. NCR ([www.ncr.com](http://www.ncr.com)) is headquartered in Duluth, Georgia.

The following pages include information about many of NCR Counterpoint's vital features and functions and will help you discover why NCR Counterpoint is the solution you need to manage every facet of your business.

Along the way, you'll also discover why you can always count on NCR Counterpoint.



[www.CounterPointPOS.com](http://www.CounterPointPOS.com) · [www.ncr.com](http://www.ncr.com)

# Introducing NCR Counterpoint

NCR Counterpoint is a complete retail management solution that gives you the power to control every aspect of your business, including point of sale, inventory, customer records, purchasing, sales history, and more.

The NCR Counterpoint base system offers countless front-counter and back-office features to help your business run efficiently and profitably. Base system functionality includes fast and intuitive ticket entry, comprehensive inventory and customer management, integrated purchasing and receiving, flexible reporting, and detailed tracking of sales history. NCR CounterPoint also features robust credit card processing, ecommerce support through CPOne, and interfaces to many popular accounting systems.

NCR also offers a number of options that enhance the base system by activating additional functionality. You can purchase and register Options with the base system or add them later to meet your changing business needs.

This booklet introduces you to NCR Counterpoint starting with its fundamental features and followed by a closer look at each functional area, along with the other advantages that NCR Counterpoint has to offer.

## Fundamental Features at a Glance...

- *Microsoft SQL Server® database*
- *Multiple menu styles*
- *Configurable toolbars*
- *Keyword LookUps*
- *User-definable filters*
- *“Zoom” windows for more details*
- *Spreadsheet-style data views*
- *Integrated message center for internal e-mail*
- *Extensive report library*
- *Timecards with automated clock-in/clock-out*
- *Multiple layers of security*
- *Extensive configuration and customization tools*
- *Multiple companies, stores, and workgroups*
- *Wide Area Network (WAN) support*
- *Unlimited database size*



## SQL Server Database

NCR Counterpoint is based on Microsoft SQL Server®, the industry-standard database platform that's affordable and easy to use. SQL Server provides reliable data storage and excellent performance. Plus, it is highly scalable, accommodating small, single-user systems and enterprises with hundreds of users equally well.

All of your business records—including items, customers, vendors, sales history, and so forth—are securely stored in the Counterpoint SQL database. Because SQL Server operations take place at the server, reporting and analysis is quick and efficient, even with years' worth of data.

Counterpoint takes full advantage of SQL Server transactions to protect your data. If something goes wrong during posting—even a power outage—SQL Server automatically “rolls back” the transaction in progress, ensuring that you don't lose any data and allowing you to post the remaining transactions later.

And each time you post transactions, Counterpoint records *what* was updated, *when* it was updated, and *who* updated it, providing reliable audit trails.

Together, SQL Server and Counterpoint provide a rock-solid foundation for your business.

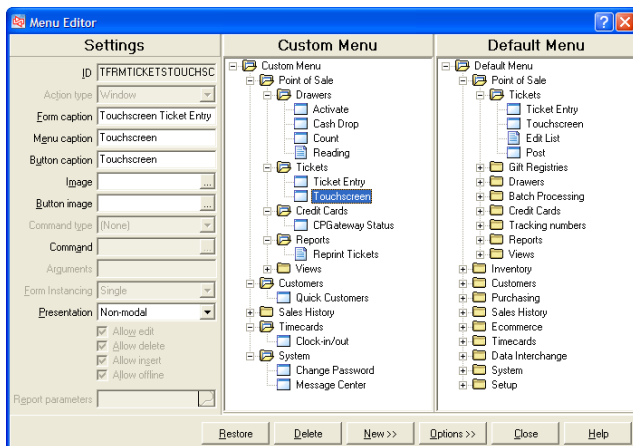
## Menus

Like most Windows® software, NCR Counterpoint features a system of menus that allow users to navigate through its various modules and functions. Unlike most software, however, Counterpoint's menus are truly *a la carte*.



With four different menu styles—including traditional pull-down menus, a dual-panel “Explorer” view, a collapsible folder tree, and a button menu designed for use with touchscreens—each user can choose the look and feel that's most comfortable for him or her.

Plus, Counterpoint's drag-and-drop menu editor allows you to easily configure each user's menu to include only the functions that user needs. Restrict your clerks to the appropriate Point of Sale or back-office functions while granting your managers and IT staff access to all of Counterpoint's reports, analysis tools, system utilities, and configuration options.



You can create each user's menu from scratch or simply modify the pre-defined, role-based menus for sales clerks, back-office employees, managers, and administrators. Either way, Counterpoint makes it easy to give each user an interface that's just right.

## Toolbars


NCR Counterpoint also includes three toolbar styles: one for Point of Sale users, one for back-office users and managers, and one for users who are making the transition from CounterPoint V7.

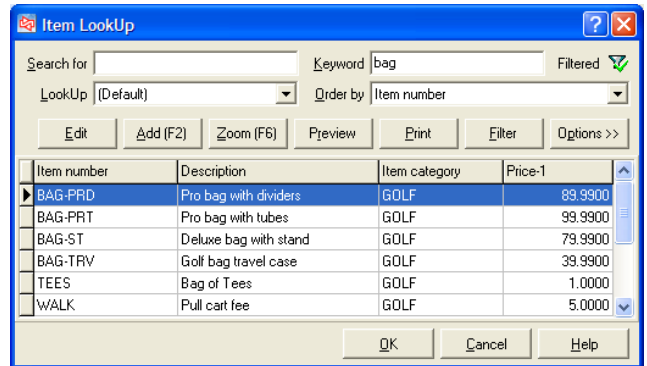


And Counterpoint's toolbars are just as flexible as its menus. Use the built-in toolbar editor to add, remove, or rearrange buttons on any toolbar. You can even modify each button's image, label, and shortcut key, further customizing the Counterpoint interface to match your company's needs.

## LookUps

When you want to find an item, a customer, a vendor, a purchase order, or just about anything else in your NCR Counterpoint database, just look it up!

LookUps are available wherever you see the  button, allowing you to find exactly what you're looking for, quickly and easily. All you have to do is start typing a keyword and Counterpoint does the rest.



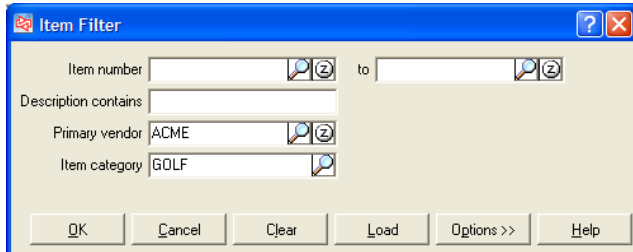
For example, you can use LookUps to find items with the word “blue” in the description, products in the “golf” category, or customers whose phone numbers start with a particular area code. With keywords, how you look things up is up to you!

Each LookUp includes a number of sorting options, allowing you to see your records in just about any order, and you can easily customize a LookUp window to display only the columns that are important to you. You can even save your favorite layouts for future use.

And, with the right authorization, if you can't find the item, vendor, or whatever it is you're looking for, you can add it “on the fly” right from the LookUp window.

## Filters

Another of NCR Counterpoint's fundamental features is the ability to limit, or *filter*, records in the database using specific conditions or criteria. For example, you can define a filter to display only GOLF items that you usually purchase from ACME Sporting Goods.

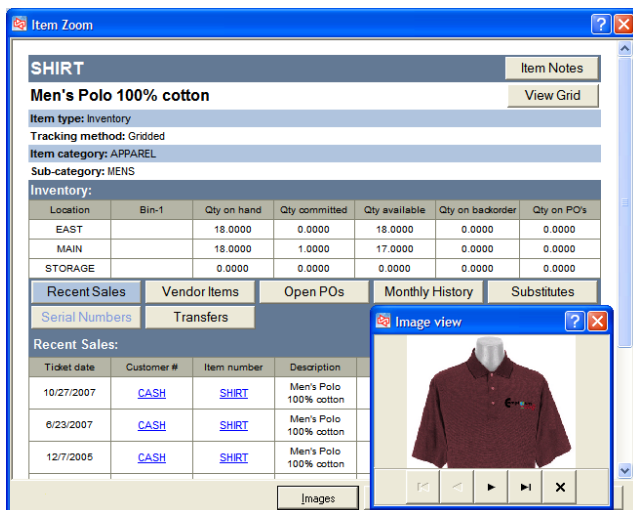


You can use filters anywhere you can view or modify records. Combine filters with LookUps to narrow down your search results even further. Apply a filter to a report to focus on a specific department or vendor. Or simply reduce the number of records you're working with to a more manageable level.

## Zooms

If you need more information about a record, you can "zoom in" for a closer look! Zooms combine a variety of important data into a single window, so you never have to look very far to get the detail you need.

Each Zoom window displays essential information about a particular type of record—including items, customers, vendors, purchase orders, receivers, transfers, and so forth—and allows you to access a wealth of additional detail with the click of a button.



For example, the **Item Zoom** displays an item's vital information—including its description, category, sub-category, and the available quantity and quantity on order for each of your locations—and lets you view recent sales and monthly history for the item, purchase orders and transfers that include the item, valid substitute items, relevant notes, and much more.

Each Zoom also includes hyperlinks that allow you to access other records directly from the Zoom window. For example, while you are viewing recent sales for an item on the **Item Zoom**, you can click a customer number to review the corresponding customer record.

Just like LookUps, you can customize the layout, content, and behavior of each Zoom window, adding or removing the fields and columns you want to see. You can even add buttons to existing Zooms or create brand new Zooms, allowing you to gather together all of the data that's important to you.

And you can access Zooms from every area of Counterpoint—even while you're entering a ticket—so you can zoom through your data in no time, anytime!

## Table View

On each maintenance window in NCR Counterpoint, you can choose whether you want to work with your data in the standard record view—that is, one record at time—or in **table view**, a spreadsheet-style format that allows you to review, compare, and modify multiple records simultaneously.

Item number	Description	Price-1	Barcode	Item category	Sub-category	Primary vendor
18HOLES	Green fee - 18 holes	36.00	18	GOLF	FEES	
2PERSON	2 Person	75.00		GOLF	ACCES	
9HOLES	Greens fees - 9 holes	18.00	9	GOLF	FEES	
ADM-SCD	Adams SC Driver, RH	399.99	1	GOLF	CLUBS	ADAMS
ADM-TL2	Adams Tight Lies 2'Wood	349.99	2	GOLF	CLUBS	ADAMS
ADM-TL3	Adams Tight Lies 3'Wood	349.99	3	GOLF	CLUBS	ADAMS
ADM-TL5	Adams Tight Lies 5'Wood	349.99	4	GOLF	CLUBS	ADAMS
ADM-TL7	Adams Tight Lies 7'Wood	349.99	5	GOLF	CLUBS	ADAMS
ADM-TL9	Adams Tight Lies 9'Wood	349.99	6	GOLF	CLUBS	ADAMS
ADM-VMI	Adams VMI Irons, Set	699.99	7	GOLF	CLUBS	ADAMS
ADM-VMI-P	Adams VMI Putter	99.99	8	GOLF	CLUBS	ADAMS
APL-UMB	Golf umbrella	14.99	U	GOLF	ACCES	
BAG-PRD	Pro bag with dividers	89.99	BAG	GOLF	ACCES	
BAG-PRT	Pro bag with tubes	99.99		GOLF	ACCES	
BAG-ST	Deluxe bag with stand	79.99	D	GOLF	ACCES	
BAG-TRV	Golf bag travel case	39.99		GOLF	ACCES	
BALL-RET	Ball Return - Battery powered	29.99		GOLF	MISC	DUNLOP
BALL-RET-PRO	Ball Return - PRO	69.99		GOLF	MISC	DUNLOP

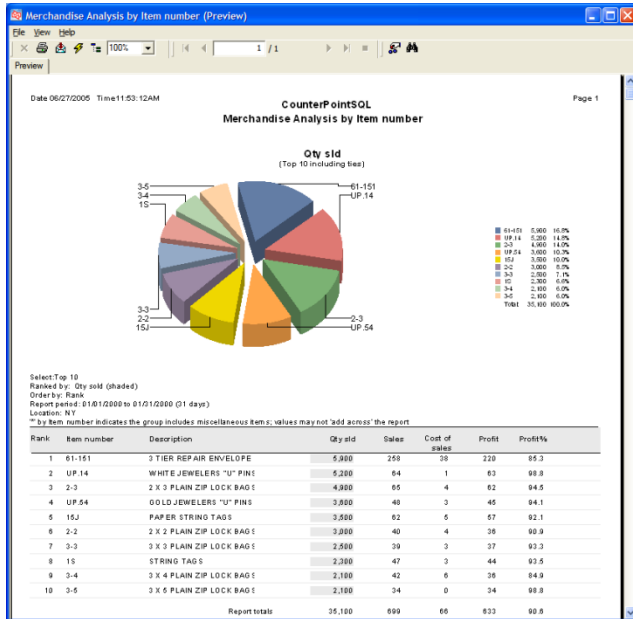
Each row in table view represents a single item, customer, vendor, or whatever type of record you're working with, making it easy to filter, select, and update multiple records without requiring you to visit each one individually.



## Reports

NCR Counterpoint includes an extensive library of reports, each of which is designed to give you the kind of mission-critical information you need to manage your day-to-day operations, analyze your sales history, and plan for your business's future.

Counterpoint reports are based on the industry-standard Crystal Reports®, providing fast and flexible reporting of any value in the CounterPoint database.



When you create a report, you can select a format and sort order, specify floating date ranges and other parameters to control the content and layout of the report, and apply filtering criteria to limit the records that appear on the report.

You can preview each report in the integrated Crystal Reports Viewer, which allows you to print the report or export it to a variety of formats, including Adobe PDF, HTML, CSV, Microsoft Excel, Microsoft Word, and many others. You can also send reports via e-mail to users, customers, or vendors, allowing you to reduce your consumption of physical supplies.

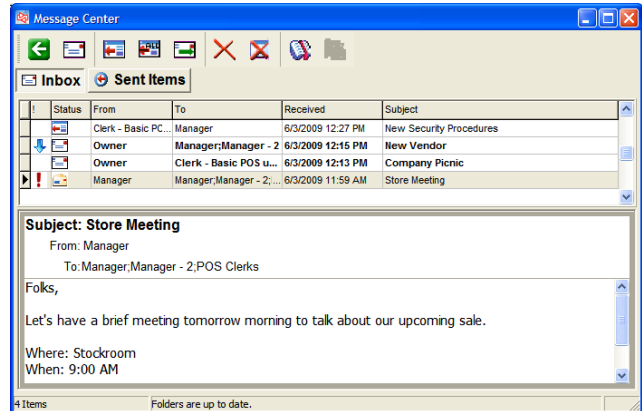
You can even create a "quick report" on the fly from any LookUp window to print, e-mail, or export the results of the LookUp. Add your favorite quick reports to your menu and they'll always be at your fingertips.

And if you have the Crystal Reports Designer (available separately), you can modify the pre-defined reports or create brand new ones. Replace standard reports with your own, or add a custom report to your menu to use alongside existing ones.

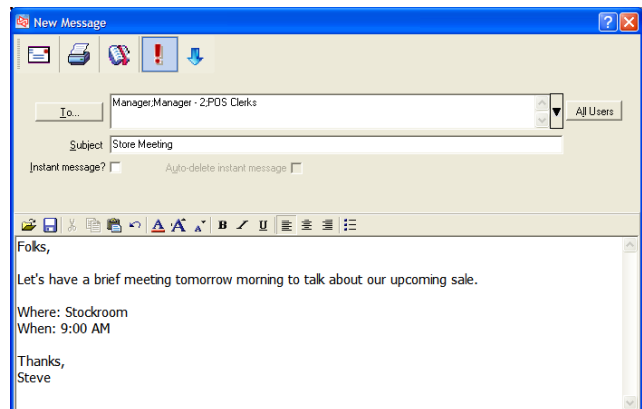
## Message Center

NCR Counterpoint's internal Message Center allows you and your employees to communicate quickly and efficiently, without requiring you to install or maintain third-party e-mail or messaging software.

Just like a traditional e-mail client, the Message Center displays your **Inbox** and your **Sent Items**, along with a message reading pane, so you can send, receive, and read messages using a familiar interface.



You can choose message recipients individually or in user-defined groups, assign messages a priority, and designate "instant messages," which will pop up on each recipient's desktop when he or she logs in.

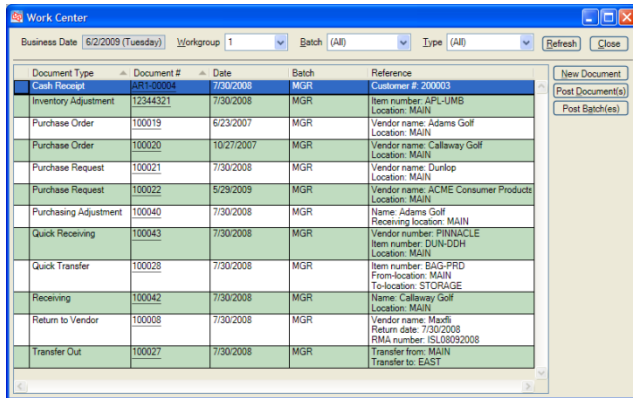


When you receive a message, an icon appears in your Windows system tray (accompanied by an optional alert sound). Simply double-click the icon to display the Message Center to read the message and reply.

Use the Message Center to remind users of company promotions, daily specials, or pending system changes. Encourage your managers to share merchandising and display ideas between stores. Whatever you need to communicate, Counterpoint makes it easy to make sure your users get the message.

## Work Center

NCR Counterpoint also includes the Work Center, which displays unposted inventory, purchasing, and A/R documents in a spreadsheet-style format. Authorized users can view and edit existing documents, create new documents, and post open documents—singly or in batches—directly from the Work Center window.



The Work Center simplifies the management of your workload, providing a snapshot of open documents and allowing you to complete the enter/edit/post process from a single, centralized interface.

## Touchscreen Interface

For touchscreen users, NCR Counterpoint offers a simplified interface that features larger buttons and text, “touchscreen-friendly” LookUp windows, and a pop-up keyboard/numeric keypad that allows users to easily enter values without a keyboard.



These are just a few of the additional touches that make using Counterpoint easy for everyone.

## Timecards

With NCR Counterpoint’s built-in timecards, you can easily track the hours your employees work.

Employees can clock in and out from any workstation at any time from the main menu or from within the

Ticket Entry interface. Each time a user clocks in or out, it is recorded as an entry on the user’s timecard.

You can require specific users to complete timecards and alert those users when they aren’t clocked in. You can even configure Counterpoint to automatically clock in those users when they log in to the software and remind them to clock out when they log out.

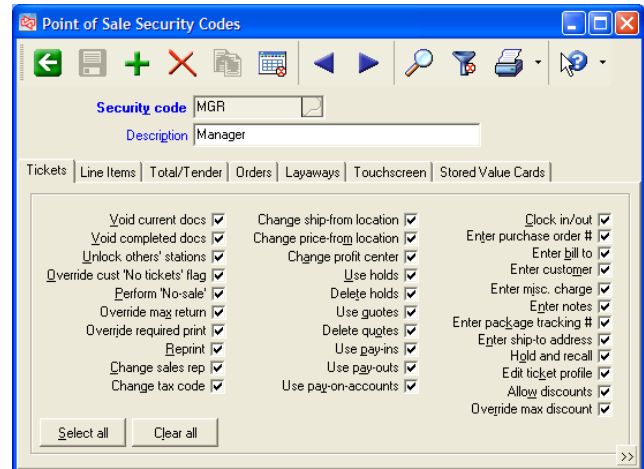
Timecard management features allow you to quickly review, modify, print, or void timecards, and to export timecard records into comma-separated value (.CSV) files that you can import into Microsoft Excel® or a third-party payroll package.

## Security

NCR Counterpoint includes multiple levels of security to protect your data and provide you with peace of mind. Password protect your Counterpoint system, requiring users to supply a password whenever they start the software, access ticket or drawer functions, clock in or out, or perform a security override.

Enable Windows authentication—allowing users to log in to Counterpoint with their Windows passwords—or define your own password settings to require each user to have a unique, Counterpoint-specific password. You can even make your password policy PCI-DSS compliant with a single click!

Counterpoint’s security features go beyond password protection, however. Detailed, function-level security settings allow you to determine whether each user is authorized to view costs, void tickets, enter returns, change prices, override customer credit limits, edit orders, or perform dozens of other sensitive functions.





And user-defined menus provide an extra layer of security, allowing you to restrict users to only the areas they are authorized to access in the first place.

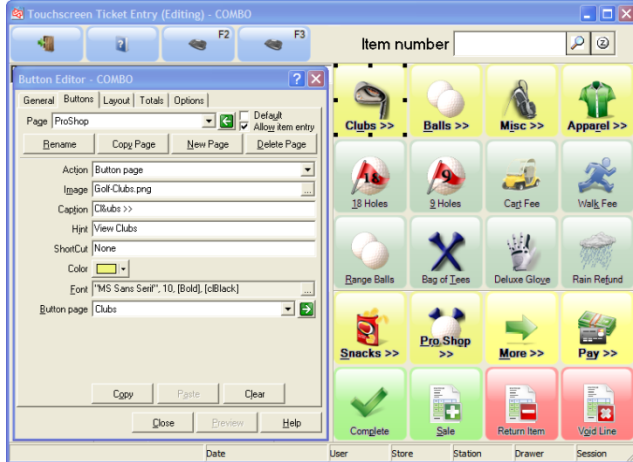
## Made to Order

Imagine, for a moment, a retail management system designed especially for you. Imagine an interface that speaks your language and reflects your style. Imagine software that works exactly the way you want it to.

Now, stop imagining...

At NCR, we know that retailers in different markets have very different needs, which is why we designed NCR Counterpoint to be the most flexible, configurable, and customizable system available. Counterpoint adapts to the way you do business, instead of forcing you to adapt to your software, allowing you to maximize best practices and instantly respond to changes in your particular market.

You can configure nearly every aspect of the Counterpoint system, from the appearance of the interface to the labels that appear on windows and reports to the very fields you use to track information.



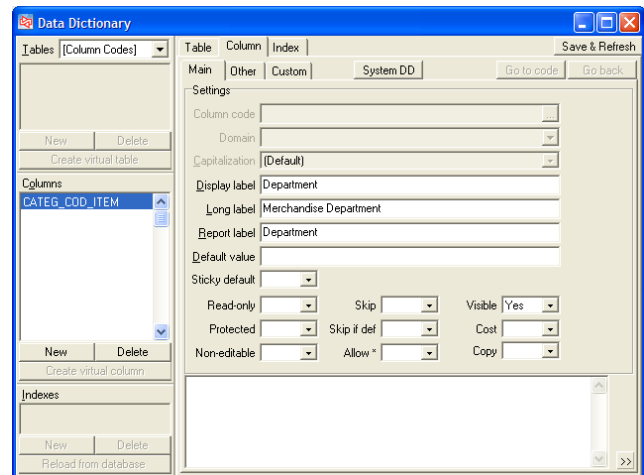
Create buttons that pop with custom graphics tailored to your store or industry. Replace default field labels with your own terminology—like “department” instead of “category,” or “member” instead of “customer”—throughout the system. Easily create custom profile fields that let you maintain and report additional information that’s important to you.

To complete that custom fit, you can add your logo, messages, or additional fields to any of the Counterpoint standard forms—including receipts, sales drafts, invoices, and so forth—using the built-in form editor.

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. Change default error messages and warnings to reflect your procedures (e.g., “Selected item is not valid. See Rebecca in Operations for a valid item number”). Create button “flowcharts” to lead clerks step-by-step through the selling process.

And if you really need to get your hands on the fabric of your system, you can tap into the full potential of the Counterpoint database using the Data Dictionary. Modify existing fields, database tables, and windows—or create your own from scratch—for the ultimate in flexibility and control.



Do you need to track the names and birthdays of your customer’s children? Simply add some new fields to the customer maintenance window. Do you want to track customer-specific part numbers for your items? Create a custom table and maintenance window—complete with LookUps, filters, and all the capabilities of Counterpoint’s standard windows. You can even add your fields to reports and forms—so you can print a child’s name on a receipt (“Happy Birthday Keisha!”) or a customer’s part number on an invoice.

The Counterpoint open architecture allows you to control every aspect of your system, down to the last stitch. The possibilities are practically unlimited. If you can imagine it, chances are you can do it with NCR Counterpoint.

## Ready to Wear

With NCR Counterpoint, you can tailor your system to fit your business perfectly, but you don’t have to. Out

of the box, Counterpoint is ready to use with all of the tools any merchant needs to run a retail business.

Just turn the page for a closer look...



# Point of Sale

Sales are the lifeblood of your company. You need them to flow quickly and easily. NCR Counterpoint includes powerful and intuitive Point of Sale features that allow your clerks to focus on ringing up sales and helping your customers.

The NCR Counterpoint Point of Sale module is much more than a simple electronic cash register. Counterpoint includes an arsenal of Point of Sale automation features, management tools, and reports to help you run your retail, wholesale, mail-order, or ecommerce business more efficiently and profitably.

NCR Counterpoint's Point of Sale module:

- Simplifies and accelerates the checkout process
- Minimizes training time for clerks
- Improves the overall customer experience
- Reduces costly errors and shrinkage
- Provides your clerks with up-to-date inventory quantities and customer information
- Updates A/R customer balances automatically
- Improves audit controls and accounting efficiency
- Securely processes credit and debit cards, stored value cards, EBT food stamps, and checks

## Ticket Entry

NCR Counterpoint features two different, fully-featured Point of Sale interfaces, allowing you to choose the interface that works best for each of your clerks.

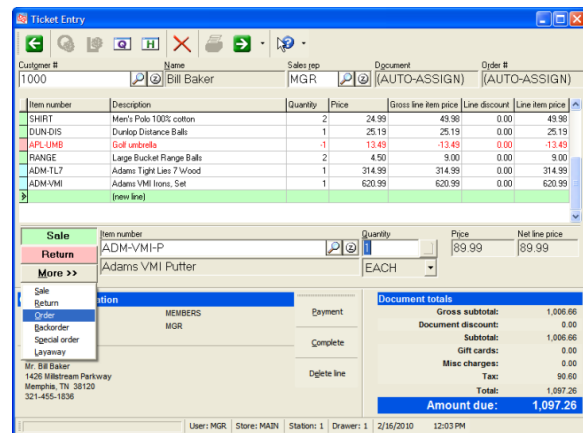
Counterpoint includes an easy-to-use, button-driven Touchscreen Ticket Entry interface that was designed with touchscreen users in mind—although mouse and keyboard users will love it as well!



Touchscreen Ticket Entry is completely configurable, allowing you to control button position, behavior, color, text, and even the image that appears on each button. You can use a single Touchscreen Ticket Entry layout for all of your Point of Sale workstations or create a unique layout for each one.

Touchscreen Ticket Entry buttons can also be configured to perform multiple actions in succession, allowing your clerks to complete complex procedures with a single touch.

Counterpoint also includes a more traditional Ticket Entry interface allows you to access all of Counterpoint's Point of Sale functions through a combination of menus and buttons. This interface is ideal for use with workstations that are equipped with a mouse and keyboard.



Whichever interface you choose, Counterpoint allows your clerks to process sales, returns, orders, and layaways quickly and easily. Because each interface is designed to look like a ticket, training your clerks is a snap. They can start ringing up sales after learning just a few essential buttons or keystrokes!

Also, each interface encourages your clerks to follow a standard ticket entry workflow, walking them step by step through the sale process from start to finish. From selecting a customer and sales rep, to adding items to the ticket, to tendering payment, issuing change, and printing the receipt, every phase of the process flows naturally from one to the next.

## Point of Sale at a Glance...

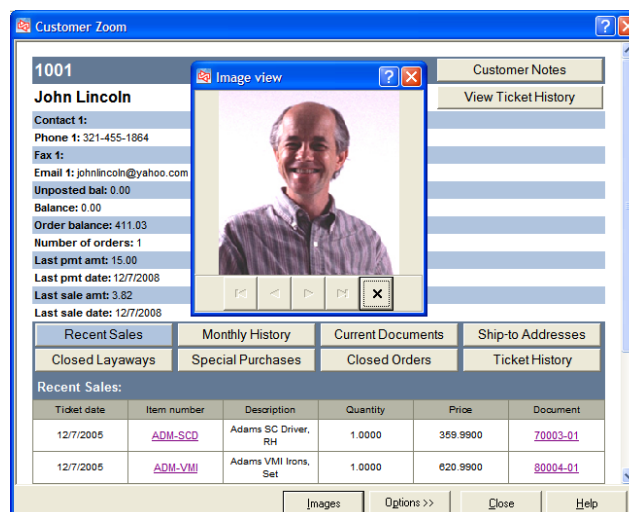
- *Regular or Touchscreen Ticket Entry*
- *Sales, returns, orders, and layaways*
- *Order Management functionality for high-volume order processing*
- *Drop-ship orders*
- *Holds and quotes*
- *Ticket history*
- *Gift cards and store credits*
- *Multiple currencies*
- *Manager security overrides*
- *Crystal Reports format receipts*
- *OPOS receipts*
- *Send receipts via e-mail*
- *Special orders and backorders*
- *Signature capture*
- *Drawer reconciliation*
- *Compulsory cash door close*
- *Commissions*
- *Discounts*
- *Scrapping items during returns*
- *Point of Sale Exceptions report*
- *Validated returns*
- *Drawer management*
- *Cash drops and cash loans*
- *Ticket number barcodes on receipts*
- *Selling items by vendor item number*
- *Scheduled ticket posting and card settlement*
- *Gift receipts*
- *Admission tickets*
- *Finding lines by item number*
- *Finding items by keyword*
- *Sort lines by any column*
- *Point of Sale security*
- *Batch order processing*
- *Passwords for Ticket Entry*
- *Clock-in/clock-out from Ticket Entry*
- *On-the-fly customer and item entry*
- *Customer-specific purchases*

## Selecting Customers

You can select a customer for a ticket by entering a customer number, scanning a customer ID or loyalty card, or by looking up any portion of the customer's name, telephone number, or other keyword. And if the customer isn't on file, authorized users can add a new customer record "on the fly."

When you select a customer, CounterPoint lets you know if the customer has open orders or layaways. CounterPoint also displays any notes that are configured to automatically appear for the customer, like "Don't forget the members-only discount" or "John's special order is scheduled to ship next week."

Finally, if the customer has an A/R account,<sup>1</sup> Counterpoint checks the customer's credit limit and alerts you if the customer is over the limit (only authorized users can override credit limits).



You can even zoom in on a customer record directly from a ticket to see recent sales, monthly history, open and closed orders and layaways, and other details. For A/R customers, you can also see the customer's balance, credit limit, and last payment date.

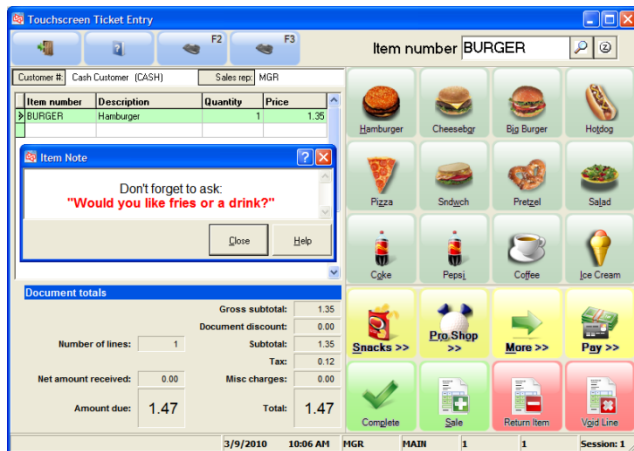
## Adding Items

You can add an item to a ticket by typing the item number, scanning a barcode, touching a button assigned to the item, or by looking up part of the item number, description, category, or any other keyword. If you can't find the item you're looking for, you can add it "on the fly."

<sup>1</sup> Requires the Receivables Option.



As with customers, Counterpoint can automatically display related item notes when an item is added to a ticket, providing additional information about the item or encouraging clerks to upsell related items—“Would you like some tennis balls with that racquet?” Counterpoint also prompts the user to enter validation information for age-restricted items and serial numbers for serialized items.<sup>2</sup>

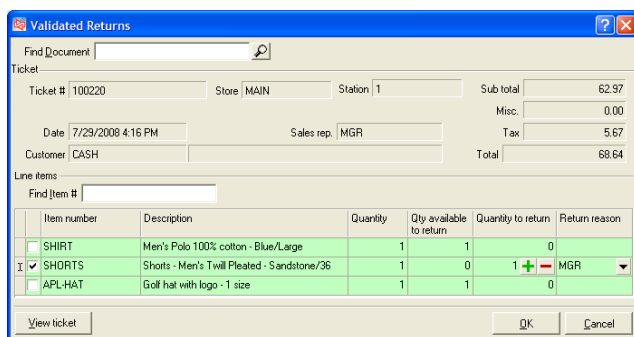


Zoom in on an item record to take a closer look at quantities for each location, recent sales, open purchase orders, substitute items, images, and more—without interrupting the ticket or closing Ticket Entry!

## Validated Returns

Whenever a customer returns an item to your store, you want to make sure that you actually sold the item, that the item hasn't been returned before, and that you don't refund more money than the customer actually paid.

With validated returns, you can look up the original ticket—or scan the ticket number barcode on the receipt—and select the item the customer is returning from a list of items that were sold on the ticket.



## Point of Sale at a Glance...

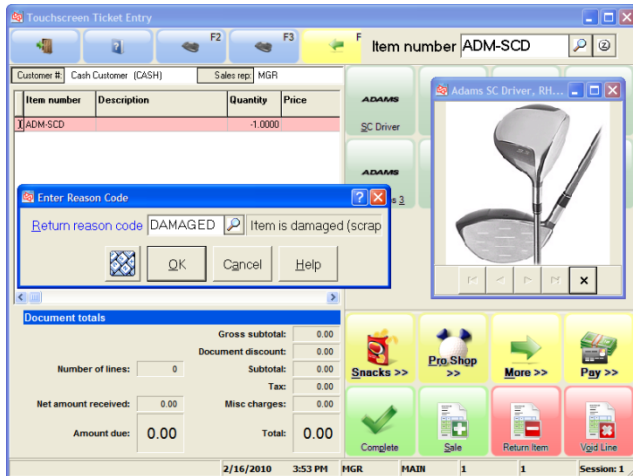
- Taxes based on item, customer, and/or location
- Unlimited payments/payment types
- Manually- or auto-assigned ticket numbers
- Drawer readings
- Daily reports
- End-of-day processing
- Support for Point of Sale peripherals
- Age-restricted items
- Automatic station locking
- Fractional prices (e.g., \$1.3755 per LB)
- Fractional quantities
- Free-form comments
- Item and serial number prompts to request additional information
- Maximums for change, refunds, and over tender
- Minimum price restrictions based on each item's price level or profit %
- Miscellaneous charges
- No-sales
- Pay-ins and pay-outs
- Pay-on-account transactions for A/R customers
- Predefined ship-to addresses
- Price, tax, and quantity overrides
- Random-weight barcodes
- Reason codes for returns, overrides, voids, and scrap inventory
- User-defined ticket profile fields to collect additional information
- Ticket reprints
- Ticket voids for authorized users
- Weighed items with tare weights
- EBT food stamps
- Stored value cards

CounterPoint tracks each validated return against the original ticket, preventing customers from returning items more than once, reducing your chances of accepting returns for merchandise you didn't sell, and ensuring that each item is returned for the price at which it was originally sold.

<sup>2</sup> Requires the Serial Numbers Option.

## Scraping Items at the Point of Sale

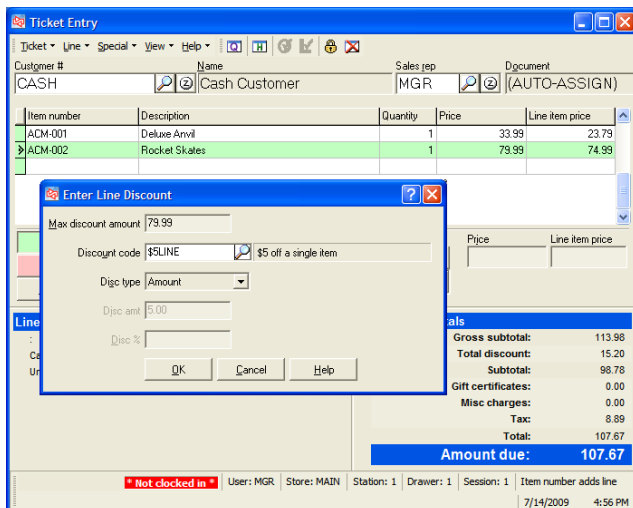
When a customer returns an item that is broken, defective, or otherwise cannot be resold, authorized users can “scrap” the item as they are processing the return by selecting the appropriate reason code.



When you post a ticket that includes a “scrap” reason code, Counterpoint automatically creates and posts the necessary inventory adjustment transaction to remove the scrapped item from your inventory and make the appropriate accounting distributions.

## Discounts

Authorized users can apply discounts to individual, eligible line items or to entire tickets—or both—at the Point of Sale. You can designate which items are discountable and which are not eligible for discounts. Each discount can be a pre-defined amount or percentage or specified by the user at the time of sale.



Ticket and line-item discounts “stack,” allowing both types of discount to apply to a single line. For example, if you apply a \$5 discount to a \$100 item, and then apply a 10% discount to the ticket, the total discount for the line will be \$14.50  $((100-5) \times 10\%)$ .

User-entered ticket and line-item discounts are indicated on receipts, included on all relevant reports, and reflected in the accounting distributions for discounted tickets and items. In addition, a discount summary appears at the bottom of each receipt to indicate the total amount of all discounts on the ticket (i.e., “You saved \$14.50”).

## Dynamic Customer Displays

Most checkout displays show the item number and price of each item a customer is purchasing, followed by the amount due and a brief “thank you” message. But what if you could use the time the customer is standing at the counter to encourage add-ons, promote your current specials or an upcoming sale, or even run advertisements for other companies?

With the Counterpoint Customer Display Designer, you can create dynamic, customer-facing media and display it on any secondary monitor, such as the NCR Graphical Customer Display. Capture your customers’ attention with slideshows, animation, video clips, or any other media, which you can present alongside essential ticket and payment information.



Modify one of more than a dozen pre-defined customer display layouts or design your own from scratch. Tailor your customer displays by department or use the same media throughout your store. Sell ad space in your checkout lanes for additional revenue.

It’s just another way Counterpoint helps you capitalize on the brief time your customers spend at the register.

## Gift Registries

With NCR Counterpoint's Gift Registry Option, you can create and manage gift registries and wish lists, allowing your customers to request and purchase gifts for special occasions like weddings, baby showers, and so forth. The Gift Registry Option lets you offer a valuable service while driving traffic to your store.

Authorized users can create gift registries, each of which must be associated with at least one customer and a specific, user-defined occasion. Each gift registry includes the date of the occasion, the city and state in which the occasion will take place, and the appropriate shipping address. You can even create gift registries for events that have already taken place!

Item number	Description	Unit	Qty requested	Qty filled	Unit price
ADM-SCD	Adams SC Driver, RH	EACH	2	0	
ADM-VMI	Adams VMI Irons, Set	EACH	2	0	
ADM-VMI-P	Adams VMI Putter	EACH	2	0	
ACM-002	Rocket Skates - Small	EACH	1	0	
ACM-002	Rocket Skates - Large	EACH	1	0	
	(new line)				

You can add items to a gift registry by entering them manually or by importing them from a handheld scanner, allowing customers to browse through your store and scan the items they are requesting. When the gift registry is complete, you can print a copy for the registrant(s) to take home.

You can also print gift registries—to a page printer or a receipt printer—for customers to reference while shopping. The shopper's copy indicates how many of each item the registrant(s) requested, how many have been purchased so far, and each item's price.

A customer can purchase items from different gift registries on the same ticket, along with items that are not from a gift registry. And if an item the customer is purchasing isn't on the registry, you can even add it to the registry as a "surprise" gift.

When you complete a ticket that includes gift registry items, the registry is updated automatically to reflect the purchase, so your registries are always current.

## Payments

How often does this happen in your store? A customer wants to pay for part of a purchase with a gift card, part with some birthday cash, part with a store credit she hasn't used up yet, and the rest with a check. It's an all-too-common scenario.

Fortunately, NCR Counterpoint makes short work of this kind of situation by allowing you to accept an unlimited number of payments for a single ticket.

Line payment type	Pay code	Description	Amount
Tender	GC	Gift Certificate Redemption	25.00
Tender	SC	Store Credit	10.89
Tender	CASH	Cash	10.00

Tender: CHECK Amount: 5.11  
 Change: Personal Check

Payment validation information: Driver's lic #, Div lic state, Check #

Document totals: Total: 51.00, Net amount received: 45.89, Amount due: 5.11

You can configure each payment type you accept to open the cash drawer, allow change to be issued, or to require additional validation information (such as a driver's license number or birthdate). You can also specify restrictions for each payment type, such as a \$10 minimum for credit cards or a maximum of \$5 cash back for redeemed store credits.

And with built-in support for multiple currencies, checks, credit and debit cards, store credits, gift cards, stored value cards, EBT food stamps, and A/R charge accounts,<sup>3</sup> you can offer your customers virtually unlimited payment options.

## Multiple Currencies

As you expand into international markets—or tap into local markets of international customers—you may find yourself handling foreign currency. Fortunately, NCR Counterpoint supports multiple currencies with ease, allowing you to accept payments in multiple foreign currencies (even on a single ticket!) and issue change or refunds in any form of currency that you accept.

<sup>3</sup> Requires the Receivables Option.

Whenever a customer tenders a foreign currency, Counterpoint automatically converts the amount due from your home currency into the foreign currency, based on the exchange rate you have defined, and displays the converted amount due. You can maintain exchange rates with remarkable precision, reducing overages or shortages due to conversion errors.

You can also define cash units (i.e., denominations) for each type of foreign currency you accept, allowing you to count your cash drawers by units and have Counterpoint automatically calculate how much of each currency is in the drawer, so you don't have to.

### Point of Sale Forms and Receipts

NCR Counterpoint includes a variety of common Point of Sale forms in OPOS and Crystal Reports format, including receipts, gift receipts, picking tickets, invoices, and even admission tickets!

Related Point of Sale forms can be grouped together and printed when the appropriate transaction is completed. For example, when a clerk completes a ticket, Counterpoint prints each form in the TICKET form group, including a credit card sales draft, a receipt, and a gift receipt, if necessary.

You can configure Counterpoint to print each Point of Sale form automatically or prompt the clerk to print each form in a group. You can also require certain forms to be printed under specific conditions and restrict reprinting. And since you can assign multiple printers to each workstation—including 40-column receipt printers, full-page printers, check validation printers, admission ticket printers, and so forth—you can print each form to a different printer.

Receipts can also be sent to customers via e-mail, eliminating the inconvenience of printed receipts and reducing your paper consumption. And if you don't have a customer's e-mail address, you can capture it "on the fly" during ticket completion.

You can customize existing Point of Sale forms or create your own, using the Counterpoint built-in receipt editor or the Crystal Reports Designer (purchased separately). Easily add fields, messages, your company logo, or other graphics to your receipts, sales drafts, and invoices. Create special-purpose documents—such as Material Safety Data Sheets or Assembly Instructions—that print automatically whenever you sell the appropriate items.

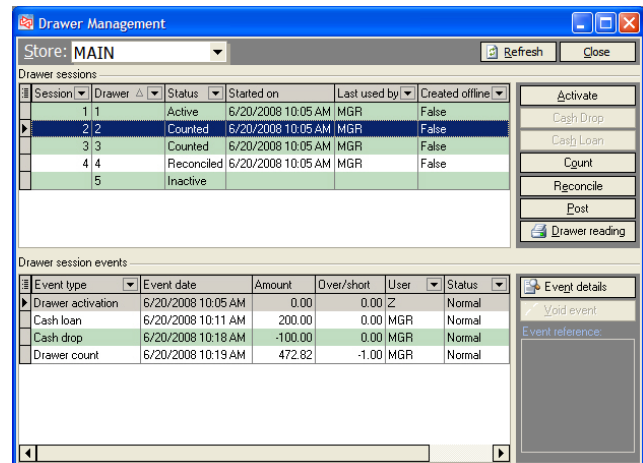
### Drawer Management

NCR Counterpoint organizes drawer-related activity into *drawer sessions*, which represent the period of time between the activation and reconciliation of individual drawers. Each drawer session can cover a single day or a single work shift, grouping together all tickets and drawer events recorded during that period for the purpose of cash accountability.

Because multiple drawer sessions can exist for each drawer, you can reuse a drawer during the day—to represent a shift change, for example—without requiring you to post the drawer. Drawer sessions also ensure that tickets from multiple days are kept separate and cannot be posted together.

Users can activate, count, reconcile, and post individual drawer sessions for drawers they are authorized to use. Authorized users also perform cash drops and cash loans. Each of these drawer events is recorded and tracked by date, time, and user.

Counterpoint also includes the Drawer Management window, which combines all drawer-related functions into a single interface, allowing you to easily review and manage all drawer sessions and events.



From the Drawer Management window, you can activate, count, or reconcile a drawer session, perform a cash drop or a cash loan, post tickets for a drawer, or run a Drawer Reading report. You can also review the details of each drawer event by payment type.

To simplify the counting process when you activate, count, or reconcile a drawer session, you can count currency by cash units (i.e., denominations) and have Counterpoint automatically calculate the total amount of cash in the drawer.



## Order Processing

Order entry and fulfillment features are integrated into Ticket Entry and Touchscreen Ticket Entry.

You can enter new order lines just like sale lines, specifying the items and quantities the customer wants to order. You can even combine order lines—including special order and backorder lines—with sale, return, and layaway lines on a single ticket!

When you complete a ticket that includes order lines, you can take an initial deposit and print a copy of the order for the customer. The open order is then stored in your database for future processing.

Counterpoint allows you to complete a variety of tasks for open orders, including taking additional deposits, printing picking tickets, editing order lines, cancelling an order, or reinstating a cancelled order.

When you are ready to deliver some or all of the items on an order, you can release the appropriate order lines to a ticket, which you can then edit, complete, and post just like an ordinary sale ticket.

Counterpoint tracks the complete audit history of each order, including the creation of the order, each change made to the order, each deposit or payment, each partial release, and the completion of the order.

You can also print, pick, and release orders in groups, or *batches*, based on filtering criteria you define. For example, you can print picking tickets for all orders that were entered for a particular customer, or release all orders that have been picked.

During the batch release process, you can generate the Release Orders Review report, which indicates the successful and failed releases for each batch of orders, along with the payment types that were used to generate final payments for orders with balances.

And the Fill Backorders report lets you quickly identify backorder lines that can be filled from on-hand inventory, saving considerable time during the order fulfillment process.

## Drop-ship Orders

NCR Counterpoint also allows you to create and process drop-ship orders, which means you don't need to stock or ship certain items. Instead, you can send the customer's shipping information to your vendors, who ship ordered item(s) directly to the customer, reducing your inventory and labor costs significantly.

When a customer orders one or more drop-ship items, you can enter drop-ship order lines in Ticket Entry or Touchscreen Ticket Entry. Counterpoint automatically creates a purchase request for each drop-ship item's primary vendor.

You can review and edit a drop-ship purchase request before posting it, which creates a purchase order for the vendor. When the vendor receives the drop-ship purchase order, the vendor ships the item to the customer and notifies you that it has been shipped.

When the item ships, you can create and post a receiver for the drop-ship purchase order, completing the drop-ship process.

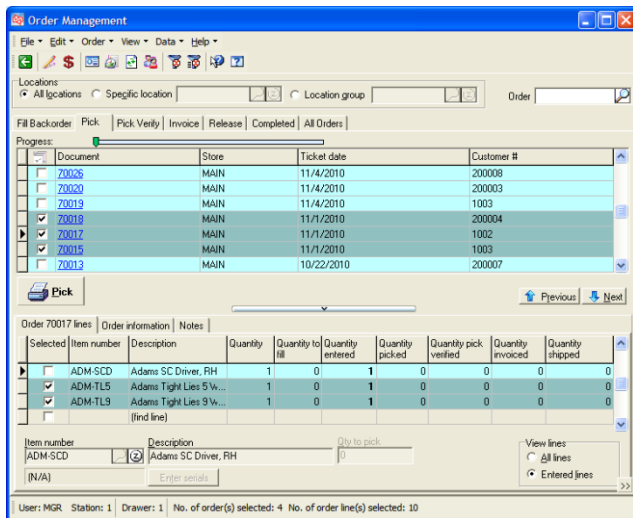
Quantities for drop-ship items are tracked separately from items you keep in stock, ensuring that they don't affect your inventory.



## Order Management

NCR Counterpoint also includes comprehensive Order Management functionality that allows merchants to process many orders simultaneously—instead of one at a time—using a single, centralized interface.

Order Management provides an efficient, task-oriented workflow that is designed to streamline order processing for structured, high-volume order-processing environments, including mail-order, telephone-order, and ecommerce merchants.



The Order Management window includes a separate tab for each stage that an order typically goes through (i.e., Pick, Pick Verify, Invoice, Release, and Completed), as well as a tab that allows you to fill backorder lines. These tabs display orders that include lines in the corresponding stage, filtered by location, customer, date, and other user-defined criteria.

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

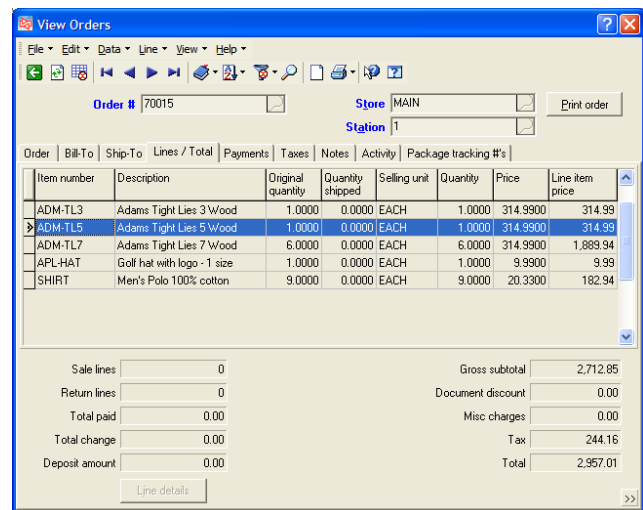
- Fill backorder lines
- Print picking tickets
- Verify picked quantities
- Generate invoices
- Release invoiced lines

Completing a task moves the selected orders into the next stage of the process. For example, the Pick tab allows you to print picking tickets for selected orders, moving them to the Pick Verify stage, while the Release tab allows you to move invoiced order lines to release tickets, marking them as released.

Because Order Management allows you to work with orders at the line level, individual orders can appear on multiple tabs, making it easy to see which lines on each order have been backordered, entered, picked, verified, invoiced, and released.

For convenience, the Order Management window also includes the All Orders tab, which lists all orders that match your filter criteria and indicates which stage(s) each order is in.

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



Whether you're a pure retail, retail-delivery, retail-assembly-delivery, retail-special order, or ecommerce operation—and regardless of your order volume—Counterpoint can handle your order processing and fulfillment needs.

## Layaway Processing

NCR Counterpoint handles layaways exactly like orders, allowing you to add layaway lines to a ticket, accept deposits and payments, view and edit open layaways, and pick and release completed layaways.

## Order and Layaway Deposits

You can configure NCR Counterpoint to require minimum deposits for orders and layaways, either a flat amount or a percentage of the total amount due. Minimum deposit requirements can vary based on line type. For example, you can require a \$5 minimum deposit for an order, 20% for a backorder, 50% for a special order, and \$10 for a layaway.

And you can tender multiple payment types for each deposit, allowing a customer to pay a part of a deposit in cash and put the remainder on a credit card.

## Tracking Numbers and Freight

NCR Counterpoint allows you to enter tracking numbers issued by UPS, FedEx, and other carriers, or to import them from a file generated by your shipping software (e.g., Worldship).

Tracking numbers assigned to an order or layaway are automatically copied to the corresponding invoice and/or release ticket, allowing customers to easily check the progress of their shipments.

In addition, when you import tracking numbers from an external file, you can specify which field represents the freight amount for each order number in the file, allowing you to import freight charges directly into the corresponding orders.

## Holds and Quotes

Any Point of Sale document that includes sale lines, order lines, or layaway lines can be converted into a quote or put on hold indefinitely.

You can print, view, modify, and copy holds and quotes at any time. Holds and quotes don't affect inventory, so your quantities aren't affected until you complete the sale.

And when your customer is ready to commit, you can convert a quote or a hold into a sale ticket with a single click.

## Reports

NCR Counterpoint includes a variety of Point of Sale reports and journals that provide end-of-day balancing, summary information, and profitability analysis by department, user, and salesperson. Each report includes user-defined parameters that allow you to perform additional analysis by tax code, store, station, user, and payment type. Counterpoint's reports help you get a handle on your daily sales.

For example, the Drawer Reading report provides an instant snapshot of store- and drawer-level activity, along with the amount of cash, checks, and other tender in each drawer, while the X-tape and Z-tape reports provide traditional end-of-day summaries before and after you post tickets.

Store		Drawer		Drawer status	
MAIN		1		Active	
Print store totals					
Merchandise	Amount	Type	Amount	Description	Tender
Type				Begin amt	Trx amt
Sales	1,779.87	Gift cert	20.00	A/R Charge	0.00
Returns	-29.99	Misc charges	15.00	American Express	0.00
		Tax	157.47	Cash	455.94
		Ord dep reovrd	250.00	Personal Check	270.00
		Ord dep refund	0.00	Discover	0.00
		Ord dep applied	0.00	Gift Certificate Redemp	0.00
		Pay-Ins	0.00	MasterCard	0.00
		Pay-Outs	-15.00	Store Credit Redemptic	10.89
		Pay-On-Account	250.00	Visa	1,690.32
Net Sales	1,749.88	Total	677.47		2,427.15

Sophisticated exception reports allow your managers to identify potential training or security concerns before they become a problem. The Point of Sale Exceptions report tracks the number of exceptions—including price and tax overrides, voided tickets, cash drops, cash loans, manual credit authorizations, and so forth—that each user performed or requested over a specified period, along with other user statistics. The Price Exceptions report allows you to review price overrides on unposted tickets before you post them.

Here are just a few of the many Point of Sale reports that Counterpoint offers:

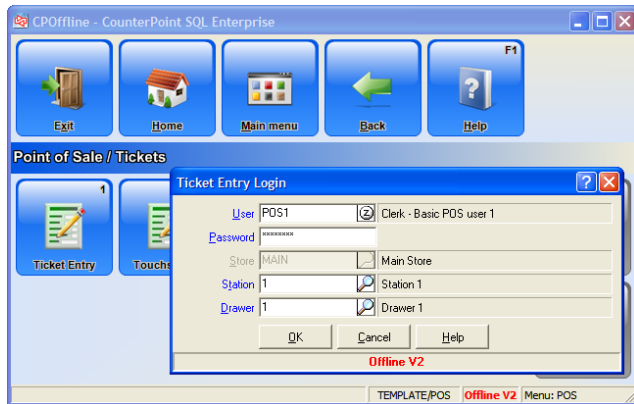
- Ticket Edit List
- Drawer Reading
- Pre-settlement List
- X-tape
- Price Exceptions
- Point of Sale Exceptions
- Order Activity
- Layaway Activity
- Settlement History
- Ticket History
- Z-tape

## Offline Mode & Off-site Sales

You've got to be able to keep ringing up tickets, even when your network, WAN, or database server is unavailable. That's where offline mode comes in.

Offline mode lets you run NCR Counterpoint whenever your workstation cannot connect to your database server.<sup>4</sup> Using a local database, offline mode lets you continue ringing up tickets, entering orders, and processing other Point of Sale transactions. You can also perform drawer-related functions (including cash drops and cash loans), add customers "on the fly," and authorize EDC transactions in offline mode.

In other words, just about everything a clerk needs to do during a typical shift can be done in offline mode.



When your database server becomes available again, NCR Counterpoint Services automatically synchronizes each workstation's database with the server to ensure that all new tickets, customers, and other transactions entered in offline mode are uploaded to your central database—no user intervention is required! And since NCR Counterpoint Services is a fully-integrated component of Counterpoint, there's no third-party replication software to install or manage.

Offline mode is critical for any situation in which a workstation can't connect to your server, but it also allows you to process off-site sales at trade shows, sidewalk sales, remote kiosks, festivals, or other special events.

Offline mode provides lane redundancy and ensures fault tolerance for those inevitable outages. But most of all, it provides peace of mind.

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<sup>4</sup> Offline V2 Option required.

# Inventory Management

If sales are the lifeblood of your business, your inventory is its backbone. You need to be able to manage your inventory effectively in order to maintain optimum inventory levels, control your costs, minimize stockouts, and maximize your profitability.

Counterpoint lets you get a handle on your inventory, with comprehensive inventory management features and reports that are designed to help you:

- Track inventory quantities and transactions
- Allocate inventory across locations
- Price items appropriately
- Bundle items effectively
- Encourage upselling and add-ons
- Determine which items are “hot” or “cold”
- Increase your return on investment (ROI)
- Analyze seasonal trends
- Improve turn rates

## Item Records

Setting up items in Counterpoint is quick and easy. You can create item records using the standard Items maintenance window or the simplified Quick Items window. Authorized users can add items “on the fly” from Ticket Entry or other areas. You can even copy basic information from an existing item or template to streamline the process of defining similar items.

The screenshot shows the 'Items' maintenance window in Counterpoint. The 'Item number' is set to 'AUTO-ASSIGN' with an 'Auto-assign' button. The 'Copy from item number' is 'SHIRT' and the 'Description' is 'Men's Polo 100% cotton'. The 'Item type' is 'Inventory' and the 'Tracking method' is 'Gridded'. The 'Price-1' is 29.99, 'Regular price' is blank, and 'Last cost' is 15.0000. The 'Quantity on hand' and 'Quantity available' are blank. The 'Stocking unit' is 'EACH'. The 'Status' is 'Active'. The 'Category' is 'APPAREL' and the 'Sub-category' is 'MENS'. The 'Primary vendor' is 'ACME' and the 'Vendor's item #' is blank. The window has tabs for 'Inventory', 'Prices', and 'Vendor Items'.

Whichever method you choose, Counterpoint leads you through the process of creating an item record, prompting you to define prices, assign barcodes, specify the primary and any alternate vendors, create inventory records, establish min/max quantities at all of your stocking locations, and so forth.

## Inventory Management at a Glance...

- Multiple stocking locations
- Transfers between locations
- Alternate selling units
- Physical count
- Up to six price levels
- Markdowns
- Promotional pricing
- Contract and special pricing
- Mix-and-match pricing
- BOGO/twofer pricing
- Margin-driven pricing
- Miscellaneous kits
- Tag-along item kits
- Unlimited barcodes per item
- Labels from barcodes
- Bills of material
- Grids and apparel
- Three-dimensional grids (i.e., size/color/width)
- Unlimited categories and sub-categories
- User-defined item attributes
- User-defined profile fields for collecting additional item-related information
- Images, sounds, and video clips can be associated with each item
- Weighed items
- Substitute items
- Item notes
- Unit-specific pricing
- Cell-specific pricing for gridded items
- Average cost valuation method
- More than 40 inventory reports
- Merchandise Analysis

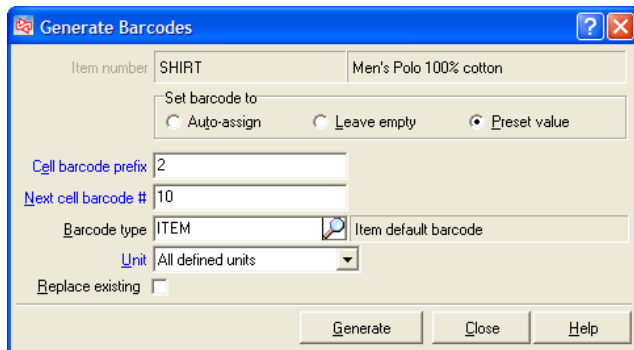




## Barcodes

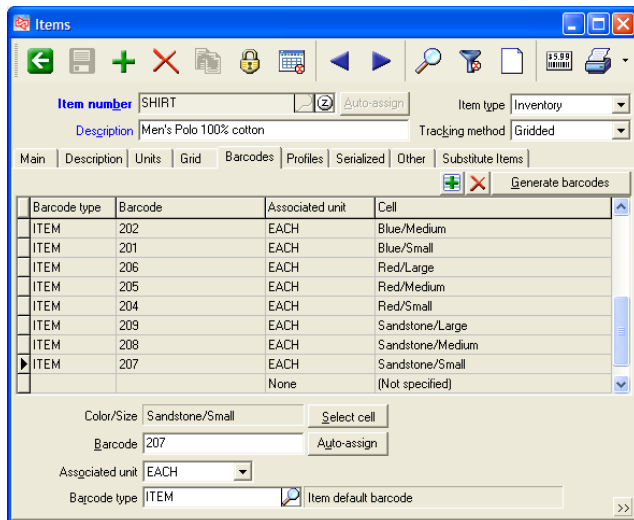
You can assign each item an unlimited number of barcodes, including in-house barcodes, manufacturer or vendor barcodes, customer-specific barcodes, or any other type of barcode you might need.

Barcodes can be entered manually or generated automatically by NCR Counterpoint, based on the prefix and number sequence you specify.



Barcodes are unit-specific, meaning that each barcode is associated with one of the defined units for an item, either the stocking unit (e.g., EACH) or one of up to five alternate units (e.g., BOX, CASE, and so forth).

You can also create a cell-specific barcode for each unique color/size combination that is defined for a gridded item.

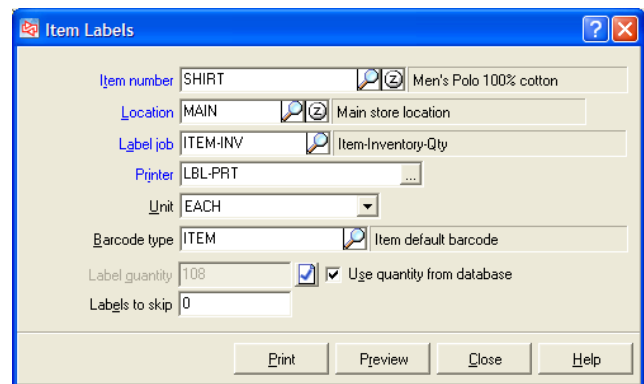


Counterpoint even supports random-weight barcodes that are generated by third-party scales, allowing you to scan a weighed item, such as meat or cheese, and have NCR Counterpoint automatically calculate the weight and extended price for the item, including any applicable tare (i.e., container) weight.

Once you've created your barcodes, you can print them on labels and scan them at the Point of Sale, during a physical count, while purchasing, receiving, or transferring items, or any other time you need to quickly find an item in your database.

## Item Labels

You can print item labels on demand or immediately after posting a purchase request, receiving, or transfer. Specify the number of labels to print or automatically print enough labels for your on-hand inventory or for incoming shipments. NCR Counterpoint's label jobs ensure that you print only as many labels as you need, eliminating wasted label stock.



You can print unit-specific labels for your stocking units and for each alternate unit, as well as cell-specific labels for each of a gridded item's unique color/size combinations.

Counterpoint includes a variety of pre-defined label formats—including one-up, two-up (split), butterfly, and hangtag labels—that are compatible with popular label printers from Cognitive Solutions, Eltron, and Datamax. Counterpoint also supports standard Avery® labels for use with any inkjet or laser printer.

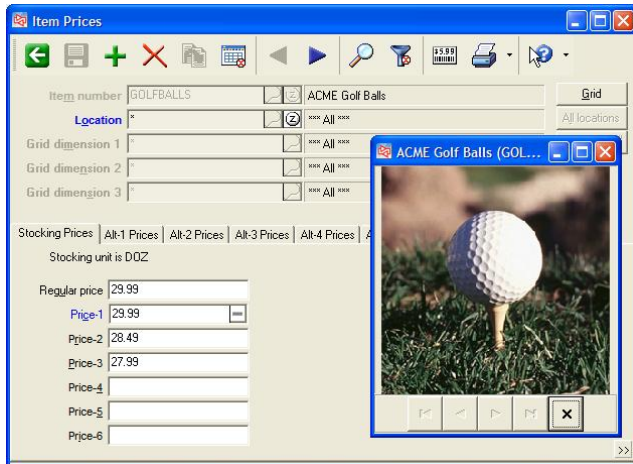


Supported barcode formats include UPC-A, UPC-E, EAN/JAN-13, Code 39, Interleaved 2 of 5, Codabar, and many others. You can control the barcode height and width and whether text appears under the barcode.

## Pricing

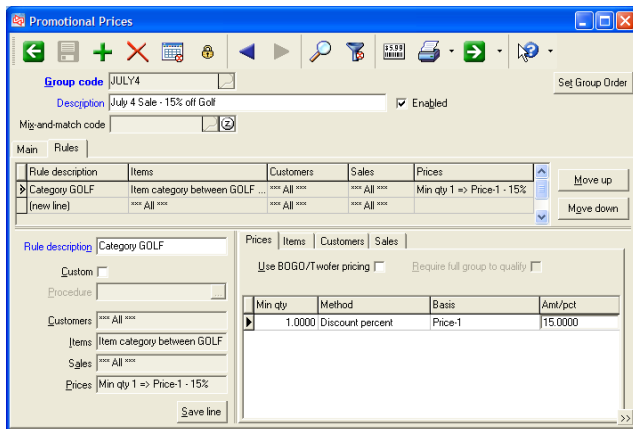
When it comes to prices, NCR Counterpoint offers you unparalleled flexibility, allowing you to create almost any pricing scenario you can imagine.

Out of the box, you can define three price levels for an item's stocking unit and for each of up to five alternate units. The Advanced Pricing Option gives you three more price levels, for a total of six prices per unit.



By default, each item's price at the Point of Sale is the **Price-1** value assigned to the unit sold. However, to truly unlock Counterpoint's pricing capabilities, you can define and implement your own price rules.

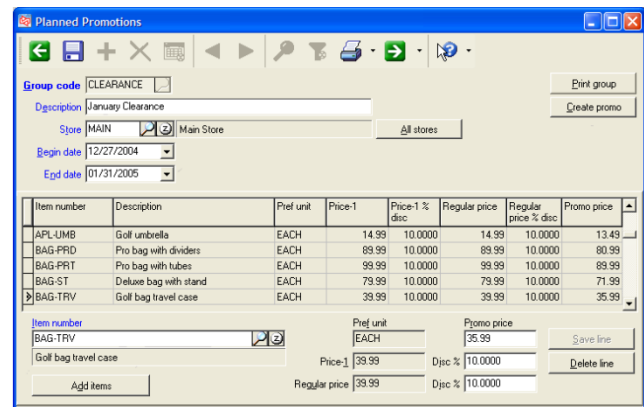
Price rules allow you to apply a specific price level (i.e., **Price-1** through **Price-6**), discount, markup, margin, or fixed price to individual items or to multiple items—based on categories, sub-categories, or any other criteria you define. Each discount or markup can be a flat amount or a percentage, based on any defined price level or on each item's cost.



Three different types of price rules accommodate different pricing needs:

- **Promotional** price rules allow you to enact sale prices that will be in effect for a limited time.
- **Contract** price rules apply to specific customers or groups of customers, according to the criteria you define, and can have starting and ending dates to cover the contract period.
- **Special** price rules allow you to define general pricing policies that don't have a time limit.

You can also create planned promotions to quickly define sale prices for any combination of items, and have Counterpoint create the necessary price rules and put them into effect automatically.



With the Advanced Pricing Option, you can use location-specific and cell-specific pricing, as well as custom SQL stored procedures for price calculations.

Location-specific pricing allows you to assign different price levels and price rules to each of your locations. For example, you could charge higher prices at your downtown store than you do at your other stores.

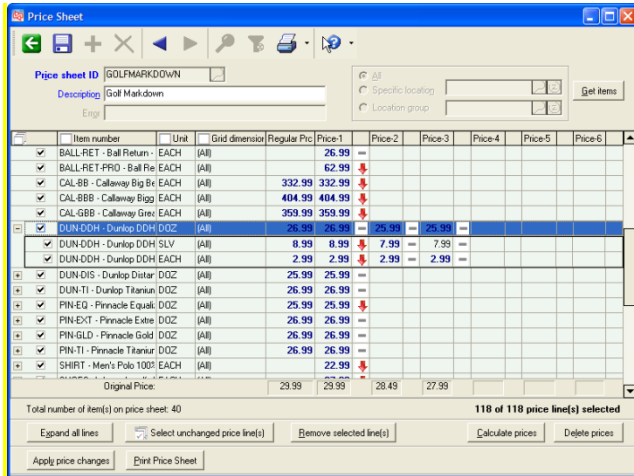
With cell-specific pricing, you can assign a different price to each color/size combination that is defined for each of your gridded items. You can also define price rules for specific grid dimensions, allowing you to apply surcharges (i.e., oversize pricing) or discounts based on color or size. For example, you could charge \$5 more for XXL shirts or 15% less for plaid golf wear.

And if you need to implement complex pricing formulas that cannot be defined using the standard calculation methods (e.g., 10% off **Price-1**, minus one dollar), the Advanced Pricing Option lets you include custom SQL stored procedures in your price rules.

## Price Sheets

NCR Counterpoint also includes price sheets, which allow you to select a group of items and apply price changes to all of them simultaneously.

Price sheets accommodate common price change scenarios, such as raising prices by 10% for all items from a particular vendor or setting the selling price to \$1.00 for items in a particular category that haven't sold in the last 90 days.



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

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

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

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

## Markdown Tracking

Whenever an item's **Price-1** value is modified for any reason, NCR Counterpoint automatically tracks the change as a markdown. For example, if you reduce a shirt's **Price-1** 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 markdowns.

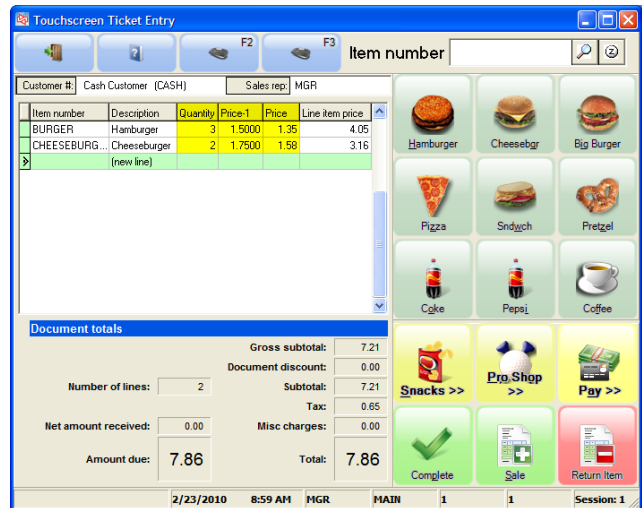
## Mix-and-match Pricing

Counterpoint also supports mix-and-match pricing, which lets you group items together by item number, category, sub-category, or vendor and grant discounts based on quantity sold, retail value, weight, or volume. Use mix-and-match pricing to encourage customers to purchase more items to qualify for a discount.



Define a mix-and-match group that allows customers to purchase any five items in a particular category (e.g., **BURGERS**) to get a 10% discount on each item. Or grant 5% off any combination of wine bottles that equals nine liters.

NCR Counterpoint applies mix-and-match pricing as soon as a customer buys enough qualifying items, even if the items are entered on separate ticket lines.



## BOGO/Twofer Pricing

But NCR Counterpoint's pricing flexibility doesn't end there. Counterpoint fully supports BOGO (e.g., "buy one, get one free" or "buy one, get one for 50% off") and twofer (e.g., "2 for \$1.00" or "3 for \$5.00") pricing, allowing you to offer your customers a broad range of common pricing scenarios.

You can apply BOGO/twofer pricing to individual items or to entire item categories or sub-categories. You can even combine BOGO/twofer pricing with mix-and-match groups to allow customers to mix and match BOGO/twofer items (e.g., "buy any three candy bars for \$1" versus "buy three Snickers® bars for \$1").

You can also use BOGO/twofer pricing to define "stepped" or "copy shop" pricing (e.g., buy the first 10 copies for \$.10, the next 10 for \$.09, and so forth), along with similar pricing schemes that allow items sold in specific quantities to have different per-unit prices.

Rule description	Items	Customers	Sales	Prices
Buy one, get one 50% off	Item number is in (SHIRT, VEST...	*** All ***	*** All ***	2 breaks
Buy 2 hats, get 1 free	Item number is (exactly) APL-HA...	*** All ***	*** All ***	2 breaks
3 burgers for \$2	Item number is (exactly) BURGE...	*** All ***	*** All ***	3 breaks
(new line)	*** All ***	*** All ***	*** All ***	

Qty	Method	Basis	Amnt/pct
1.0000	Fixed price	N/A	0.6700
2.0000	Fixed price	N/A	0.6700
3.0000	Fixed price	N/A	0.6600

When you set up BOGO/twofer prices, you can specify whether customers must purchase an entire group of items to qualify for the BOGO/twofer price, or whether any quantity will qualify. You can also control how Counterpoint will apportion each price across the items in the group (e.g., for a "3 for \$1" price rule, you can define a .34/.33/.33 split or a .49/.49/.02 split).

You can even specify when each BOGO/twofer price is in effect and whether the BOGO/twofer pricing only applies to particular stores, customers, and so forth.

## Margin-driven Pricing

To help you ensure that you are meeting your profit margin goals, NCR Counterpoint allows you to define minimum and target profit margin values for each item category and sub-category, and then set **Price-1** values for your items based on these margins.

Every **Price-1** field throughout Counterpoint includes an easy-to-read, visual indicator of whether an item's price is above, between, or below the minimum and target margin values for its category or sub-category.

Whether you're receiving inventory or editing item records, if an item's price is below margin, simply click the indicator icon to dynamically adjust the price to meet the defined minimum or target profit margin.

Only users who are authorized to view cost values are allowed to view margins and set margin-driven prices.

## Transfers

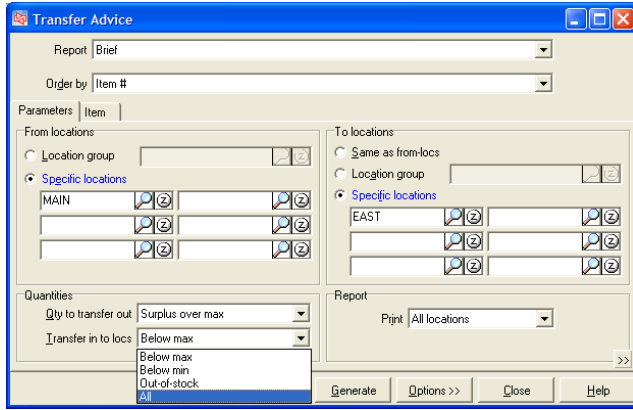
Merchants with multiple stocking locations can easily record and track the transfer of inventory from one location to another.

The transfer process begins with the creation of a transfer-out document, which identifies the sending and receiving locations, as well as the items and quantities to be transferred. Transfer-out transactions can be created manually or imported from a handheld data terminal or scanner.

When a transfer-out document is posted, a transfer form can be printed to accompany the items for verification at the receiving location. The transfer is completed and inventory quantities updated when the corresponding transfer-in document is posted.



Counterpoint also includes the Transfer Advice report, which can help you determine the most effective way to redistribute inventory across your organization. The Transfer Advice report suggests quantities to transfer to and from each location in order to ensure that each location has the appropriate stock levels.



When you are satisfied with the suggested transfer quantities, you can automatically create transfer-out transactions based on the report's recommendations.

You can also use the Transfer Advice report to transfer all inventory out of a location, allowing you to quickly transfer out all items from a category, sub-category, or vendor that aren't selling well at a particular location, or to clear everything out of a store in order to close it.

And if you're in a hurry, you can use Quick Transfers to transfer items between locations in a single step.

## Physical Counts

When you need to take stock of your inventory, you can count on Counterpoint physical count features.

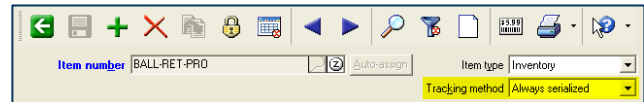
You can freeze inventory quantities for specific items, vendors, categories, a single stocking location, or all stocking locations. This flexibility allows you to count only part of your inventory, while normal operations continue in other departments or locations.

Enter counts manually—from quantities recorded on printed worksheets—or import them from handheld scanners to streamline the counting process. You can also record up to six count quantities for each item (e.g., from different areas of your store).

Posting physical count transactions automatically adjusts on-hand quantities for items for which the frozen quantity and the counted quantity varied. You can skip uncounted items, set their on-hand quantities to zero, or assume their frozen quantities are correct.

## Serial Numbers

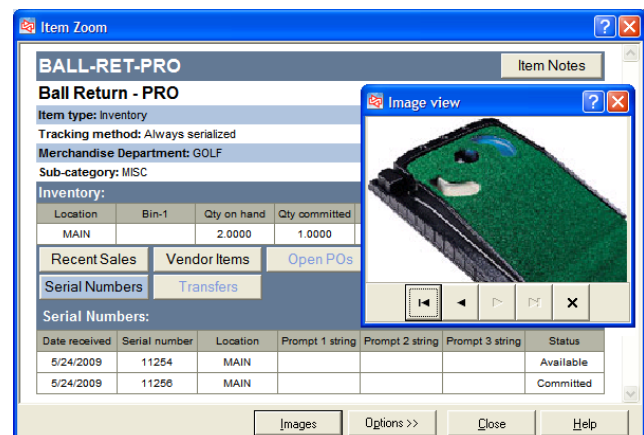
The Serial Numbers Option adds comprehensive serial-number tracking to NCR Counterpoint, allowing merchants who sell big-ticket items, maintain product warranties, or deal in regulated commodities to keep a detailed history of activity for each serialized item.



The “always serialized” tracking method allows you to tightly control the movement of your serialized items. Serial numbers must be specified in every transaction (e.g., sales, receivings, transfers, physical counts, etc.) that includes “always serialized” items—ensuring that a serial number is associated with each unit—and you can only sell serial numbers that are actually in stock.

The “sometimes serialized” tracking method provides for looser management of your serialized items. The entry of serial numbers during receiving, transfers, or other transactions is optional (although you may require a serial number when an item is sold or returned). This tracking method is useful for merchants who don't track in-stock serial numbers, but need to record serial numbers at the time of sale.

Whichever tracking method you use, Counterpoint retains detailed historical activity for each transaction that includes a serialized item, which you can review on the Item Zoom and on various reports.



You can also create serial prompts to collect additional information about serialized items. For example, you could define serial prompts that require users to specify whether a serialized item is new or used, along with the item's condition, whenever it is received, transferred, sold, or returned.



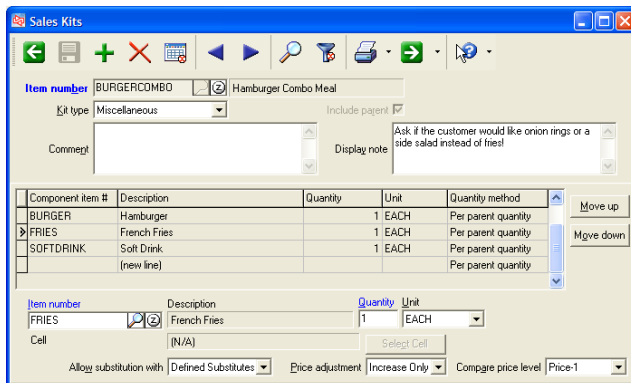
You can use the same prompts for all serialized items, or you can associate different prompts with different items. Responses to serial prompts are retained with the transaction detail for each serialized item and are available for viewing and reporting.



For accounting purposes, you have the option of using the serial cost method to track the specific cost of each “always serialized” item, versus the average cost method used for other items.

## Miscellaneous Kits

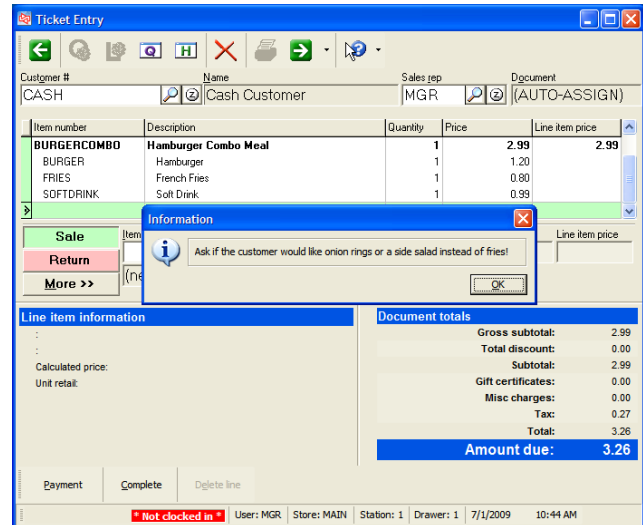
You can create miscellaneous kits, which allow you to associate any number of “component” items with a single, miscellaneous (i.e., non-inventory or service) “parent” item. You can determine the quantity of each component in a kit, as well as the dimensions (e.g., color/size/pattern) for each gridded component.



You can also specify whether users can substitute items for each component, which items are eligible substitutes, and whether the price of the kit will be adjusted to account for price differences between the original component and a substitute component.

You can even define a note for a miscellaneous kit that appears automatically when a user sells one. Use these notes to remind your users to offer common substitute items (e.g., “Ask if the customer would like a salad instead of fries”) or to upsell more expensive options.

When a user sells the parent item of a miscellaneous kit, the associated components are added to the ticket automatically. The total price of each miscellaneous kit is based on the parent item’s price, which is allocated among the component items proportionally.



The user can substitute a different item for a miscellaneous kit component by simply changing the component’s item number or by looking up an eligible substitute. Counterpoint automatically calculates any price adjustment for the substitution and indicates the increase or decrease on screen and on the receipt.

Sales of miscellaneous kits are reported by parent item and by component, allowing you track and analyze kit sales at either level, while accounting and cost distributions are generated for component items only.

## Tag-along Kits

NCR Counterpoint also allows you to create tag-along bundles, which associate one or more tag-along items—such as a bottle deposit or a service fee—with a single parent item. When a user sells the parent item, the associated items “tag along,” ensuring that the items are sold together.

If you wish, you can define a prompt message for a tag-along component (e.g., “Would you like to buy an extended warranty?”). The prompt message appears when a user sells the tag-along kit, allowing the user to decide at the time of the sale whether to include each tag-along component on the ticket.

Unlike miscellaneous kits, each component of a tag-along kit is recorded as a separate ticket line, allowing users to edit or remove tag-along items, as necessary.

## Bills of Material

NCR Counterpoint also allows merchants to create bills of material for manufactured goods. A bill of material lists the component items, or parts, that are required to assemble a single, finished item.

For example, you can define a bill of material for a chair that includes one seat, one back, four legs, one seat cushion, and enough fabric to cover the cushion.

Once you have defined a bill of material, create a quick assembly transaction to record the actual production of the finished good, specifying the quantity of each component used—including any overage to account for breakage or leftover material—and the specific dimensions (i.e., color/size/pattern) of each gridded component used in the assembly.

You can print a quick assembly form to use as a work order, and then post the quick assembly transaction once the parent item is assembled to increase the on-hand quantity of the finished item, decrease the on-hand quantity of the components, and make the appropriate cost distributions.

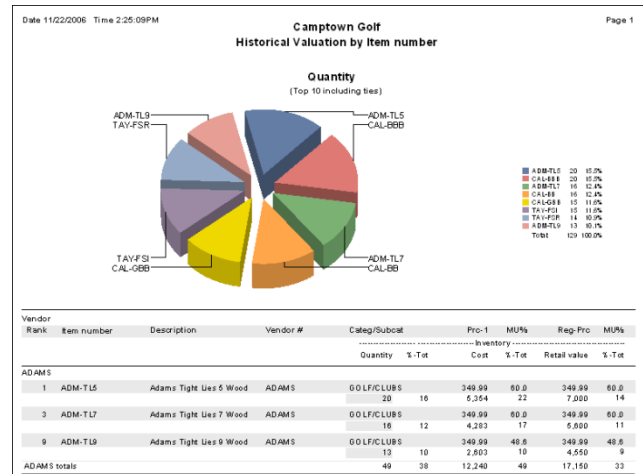
With the Kits/Bills of Material Option, you can change the quantity of a component or substitute components during assembly (e.g., replacing a fabric seat cover with leather). You can also change the stocking location for each component to reduce the on-hand quantities of those items at a different location, such as a parts warehouse.

Once a finished good is assembled, it can be sold, ordered, or returned in Ticket Entry or Touchscreen Ticket Entry, just like any other item.

## Reports

NCR Counterpoint includes more than 40 reports that are designed to help you take stock of your inventory, providing current and historical information to help you make pricing, merchandising, and purchasing decisions, increase your turn rate, and maximize your gross margin return on investment (GMROI).

For example, the Inventory Status and Stock Status reports provide concise views of your current stocking levels, while the Historical Valuation report indicates the value of your inventory as of a particular date.



Further examples include: the Inventory Snapshot report, which provides a quick overview of your quantities and current sales; the Inventory History report, which details the transaction-level history of inventory activity; and the Six Week and Twelve Month Item History reports, which help you evaluate item performance over time and spot sales trends.

Here's a small sample of the numerous inventory reports that are available in CounterPoint:

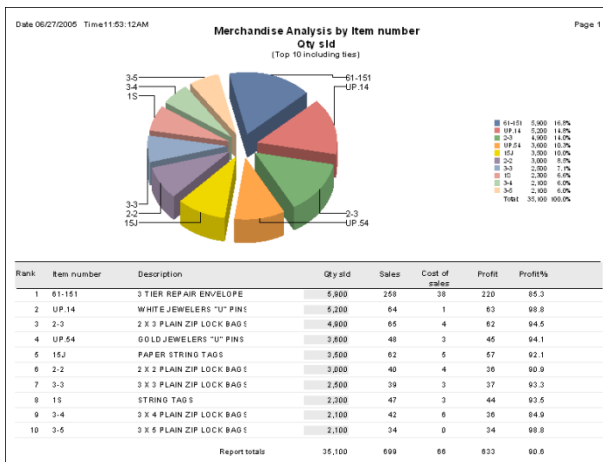
- Inventory Status and Stock Status
- Valuation and Historical Valuation
- Inventory Analysis
- Inventory History
- Inventory Snapshot
- Six Week and Twelve Month Item History
- Committed Inventory
- Consolidated Grid
- Transfer Advice
- Inventory Availability
- Inventory Aging
- Retail Inventory Value
- Sell-through Rate

## Merchandise Analysis

The Merchandise Analysis report is a powerful and flexible tool for analyzing your inventory. With the Merchandise Analysis report, you can classify and rank items using a wide variety of criteria, including units sold, sales dollars, profitability, on-hand quantity, turn rate, GMROI, weeks-on-hand, discounts, markdown, or any one of over 180 different measurements.

Analyze merchandise at the item level or get the bigger picture by grouping your inventory by vendor, category, sub-category, item attribute, and so forth.

Hot/cold analysis allows you to view, for example, the “hottest 40 items based on quantity sold” or “the coldest 20 items based on turn rate.” Location-specific reporting allows you to analyze merchandise at a single location or multiple locations.



Choose the columns you want to include on the Merchandise Analysis report or select one of these pre-defined report formats:

- **Sales** provides a high-level view of performance.
- **Inventory Performance** measures the performance of a particular items, categories, and subcategories.
- **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** indicates retail and off-retail sales, allowing you to can compare discounts and profits.

And because you can save and load report parameters, you don't have to set up your favorite Merchandise Analysis report every time you want to run it.

# Customer Management

Without customers, you wouldn't have any sales. You need to serve them well to keep them coming back to your store. And effective customer service begins with customer knowledge.

NCR Counterpoint lets you track detailed information for every customer—including contact information, sales history, important dates, sizes, and so forth—allowing you to offer the kind of personalized service and individual attention that creates customers for life. The Receivables Option adds complete support for A/R charge accounts to CounterPoint, providing another valuable service to your customers.

## Customer Records

Set up your customer records using the standard Customers maintenance window or the streamlined Quick Customers window. Just like items, authorized users can add customer records “on the fly” at the Point of Sale.

The screenshot shows the 'Customers' window with the following data:

Customer #	1001	Customer type	A/R	Name type	Business
Name	John Lincoln	Ship-To Addresses			
Salutation	Mr.	First name	John	Store	MAIN
Last name	Lincoln	Tag code	MEMTN	Tax exempt number	
Address 1	1325 Wondemist Dr.	Tax exempt date	7 / 7	Credit limit	Unlimited
Address 2		Terms code	NET30	Fig charge code	
Address 3		A/R account	1210	Accounts Receivable	
City	Memphis	Order balance	411.03	Layaway balance	774.00
State	TN	Unposted bal	0.00	Balance	2.00
Zip code	38120	County		Credit available	Unlimited
Phone 1	321-455-1864				
Phone 2					
Phone 3					
Flag 1					
Email 1	johnlincoln@yahoo.com				
Comment					
Category	MEMBERS				
Sales rep	MGR				

Each customer record includes basic demographics, including the customer's name, address, e-mail address, two contact names, fax numbers, and phone numbers. You can assign customers to user-defined customer categories for reporting, and analysis.

Like item numbers, customer numbers may be entered manually or assigned automatically. And as with item records, you can copy basic information for a new customer from an existing customer record or template to minimize errors.

You can select customers throughout Counterpoint by entering a customer number, scanning a customer ID or loyalty card, or by looking up keywords, such as the customer's name, phone number, or street address.

## Customer Management at a Glance...

- *Receivables*
- *Credit limits*
- *Finance charges*
- *Loyalty programs*
- *Customer labels*
- *User-defined customer profile fields for tracking birthdays, favorite colors, and so forth*
- *Account Management*
- *Unlimited shipping addresses per customer*
- *Customer-specific tax codes*
- *Customer-specific sales reps*
- *Customer notes*
- *Customer lists, aging reports, statements, and other useful customer reports*
- *Ecommerce customer tracking*

## Shipping Addresses

Each customer may have an unlimited number of shipping addresses, with the default ship-to address different from the primary address, if necessary. Each shipping address may have its own tax code, preferred shipping method, and specific ship-to notes that can be printed on invoices.

The screenshot shows the 'Ship-To Addresses' window with the following data:

Customer #	1001	Name	John Lincoln
Ship-to address	(DEFAULT)	Name type	Person
Name	John Lincoln		
Salutation	Mr.	First name	John
Last name	Lincoln		
Address 1	7129 Canterbury Cove		
Address 2			
Address 3			
City	Cordova	State	TN
Zip code	38016	County	
Comment			
Shipping zone	UPS ZONE 2		
Ship-via code	UPS GROUND		
Tax code	MEMTN		

## Taxes

For basic retail sales, taxes are calculated by the tax code assigned to the store. However, you can assign each customer a multi-level tax code that indicates special tax rates or taxing authorities. You can also designate a customer as non-taxable and retain the customer's tax exemption number.

You also have the option of specifying a tax code for each of a customer's ship-to addresses. If a tax code is specified for a ship-to address, tax calculations are based on that code instead of the customer's tax code.

## Sales Reps

Each customer must be assigned a default sales rep. Authorized users can change a customer's default sales rep at the Point of Sale to allow a different sales rep to receive credit for a particular sale.

## Payment Settings

You can establish limits for each customer for checks and credit card payments, or you can allow unlimited payments for each. Only authorized users may override a customer's check or credit card limit.

In addition, you can prevent individual customers from paying for merchandise with a check or credit card, from placing orders, or from completing a sale.

The screenshot shows the 'Customers' window for customer John Lincoln (ID 1001). The 'Payment' tab is selected, displaying the following settings:

- Checks:** Max check amt (empty),  Unlimited checks
- Credit:** Credit rating: AAA, Credit limit (empty),  Unlimited
- Credit Cards:** Credit card # (masked as 401010\*\*\*\*\*1010), Credit card exp date: 10/10, Cardholder's name: John Lincoln, Card pay code: VISA

Default credit card information can be retained for each customer and retrieved automatically at the Point of Sale. On-file credit card numbers are masked and cannot be viewed by unauthorized users, in accordance with current Payment Card Industry Data Security Standard (PCI-DSS) requirements.

## Customer Notes

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

The screenshot shows the 'Customer Notes' window for customer John Lincoln (ID 1001). A note is displayed with the text: "Remind John about his special order for bicycle parts. His order should be in sometime next week." The note ID is 2010/02/26 10:04:07, and the user is MGR.

Find your notes simply by entering a keyword or phrase. For example, enter "special order" in the keyword field to find all notes that contain that text.

## Customer Profiles

Customer profile fields allow you to build a valuable database of information to assist you in analyzing and marketing to your customers. You can define up to 20 profile fields for each customer to track additional information, such as the customer's birthday, sizes, preferences, membership status, and so forth.

The screenshot shows the 'Customers' window for customer John Lincoln (ID 1001). The 'Profiles' tab is selected, displaying the following information:

- Member Status: GOLD
- Lead Source: FRIEND
- Referred by: Mary Anderson
- Birthday: 10/26/1972
- First Purchase on: 07/05/2002
- Anniversary: 11/06/2002
- Shoe Size: 7.5000
- Dress/Pant Size: 8.0000
- Shirt Size: 8.0000

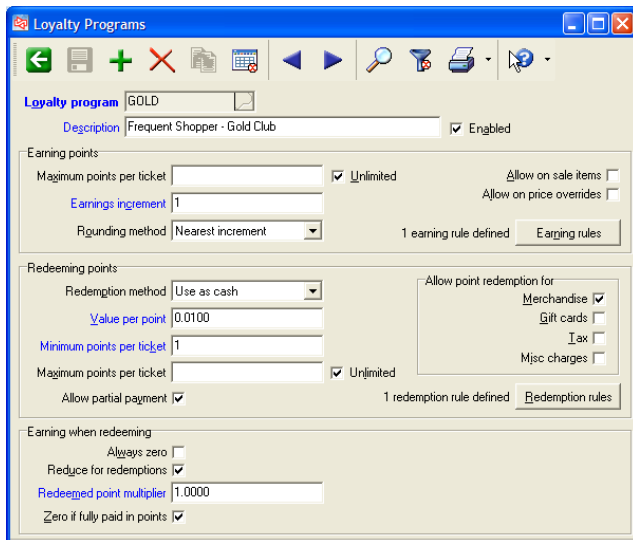
Each user-defined profile field only allows the entry of a specific type of information. For example, a "birthday" field would only allow valid date entries, while "shoe size" would only allow numeric entries between a specified range of values, and so forth.

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).

## Loyalty Programs

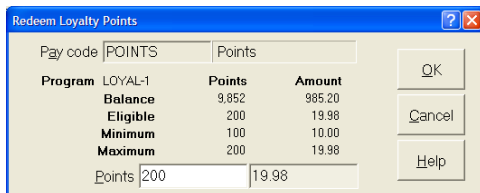
NCR Counterpoint includes support for customer loyalty (i.e., frequent shopper) programs, which allow you to reward loyal customers with points that can be redeemed for future purchases or special incentives.

You can create multiple loyalty programs, each of which can have different rules regarding how customers earn and redeem loyalty points. For example, you can specify whether each program grants points for items on sale, the dollar value of each point, and the maximum number of points that can be redeemed on a single ticket.



Each customer can be enrolled in a single loyalty program, earning points per dollar spent or per unit purchased. The number of points awarded can vary based on item characteristics—including the item number, category, vendor, and so forth—as well as the date, day of the week, store, or other sales conditions.

Customers can redeem loyalty points for items at the Point of Sale, just like any other form of payment. You can allow customers to redeem points for gift cards, taxes, and miscellaneous charges, if you wish.

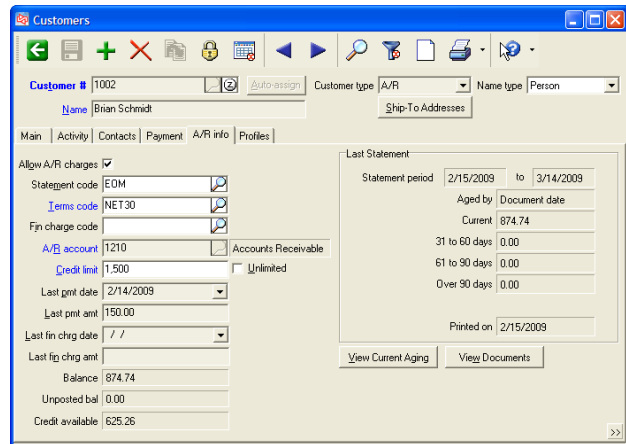


You can also record loyalty point adjustments to grant or reduce points, and you can print reports and customer mailing labels based on loyalty program membership or point balances.

## Receivables Option

The Receivables Option adds comprehensive A/R customer support to NCR Counterpoint, allowing you to process A/R charge sales, track receivables, record cash receipts, assess finance charges, age customer accounts, and print statements.

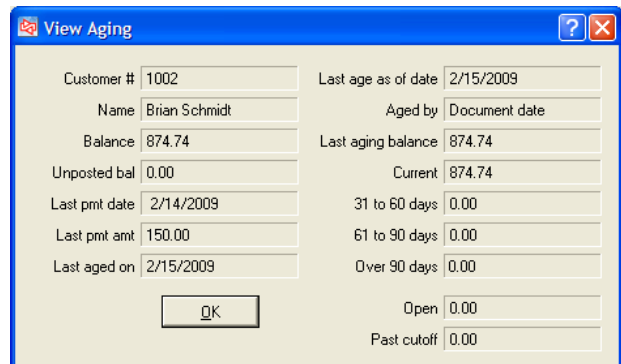
With the Receivables Option, you can offer customers “open-item” type A/R charge accounts. Customer terms and prompt payment discounts can be based on a number of days (e.g., “net 30” or “2% 10, net 30”) or on a specific proximo due date (e.g., “2% 10th, net 30th”).



For each A/R customer, you can define strict credit limits to ensure that your guidelines for open credit are not exceeded. The customer’s credit limit is verified at the Point of Sale for A/R charge payments. Only authorized users may override A/R credit limits.

You can define up to five aging periods, along with the number of days (e.g., 30, 60, 90, etc.) in each period. Documents can be aged by invoice date or due date. Statements and the Aging report allow aging by number of days or for a specific date range, 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 for each customer or complete document details. You can print the Aging report for only customers with high balances and/or past due accounts, and you may print the report in order by customer or sales rep.

Counterpoint can also automatically calculate and assess the appropriate finance charges for each A/R customer, based on finance charge settings you define and the customer's current past-due balance. You can modify calculated finance charges or enter and post finance charge transactions manually.

Counterpoint allows you to print statements as part of your month-end process or on demand. You can print statements for groups of customers (e.g., customers with the same terms code or due date) or for customers with high balances or past due accounts.

Statements can also be sent to customers via e-mail, eliminating the cost and inconvenience of mailing printed statements and reducing your consumption of physical supplies.

Counterpoint includes several pre-defined statement formats, which can incorporate customer information, ticket detail, invoice and payment activity, an aging summary, and dunning notices. If you prefer, you can modify an existing statement or create your own using the Crystal Reports Designer (purchased separately).

When you enter a cash receipt for an A/R customer, you can apply the payment to an individual document or selected documents, or automatically apply it to any unpaid documents (starting with the oldest). You can view open item detail while entering cash receipts.

Valid discounts are calculated automatically, and write-offs are allowed. Discounts and write-offs can be charged to your default G/L account or to any other valid G/L account.

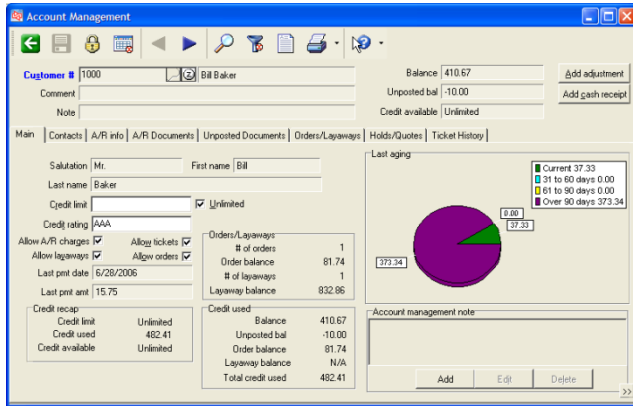
You can reverse previous cash receipts by reapplying A/R documents, allowing you, for example, to change the amount previously applied to an invoice.

Counterpoint also allows authorized users to process pay-on-account transactions in Ticket Entry or Touchscreen Ticket Entry, allowing customers to make cash, check, credit card, or debit card payments for their A/R accounts at the Point of Sale.

Finally, customer adjustments allow for simplified processing of back-office debit and credit memos that are not appropriate for Point of Sale entry. Customer adjustment documents may be self-applied, open, or applied to an existing A/R document.

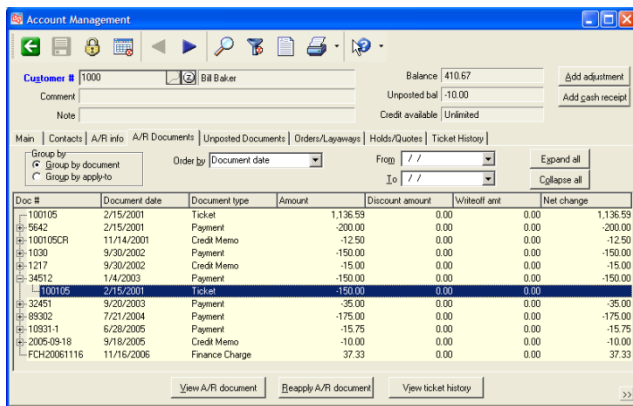
## Account Management

NCR Counterpoint's Account Management window lets you easily manage your customers by presenting all relevant information about each customer and allowing you to perform common, account-related activities from a single, unified interface.



You can review general customer information from the Account Management window, as well as orders, layaways, hold, quotes, and tickets for each customer. While you are viewing any of these documents, you can print, export, or send them via e-mail.

For A/R customers, the Account Management window allows you to view account information, modify credit limits and credit ratings, age customer accounts, view and print statements, review or reapply posted A/R documents, and edit unposted A/R documents.

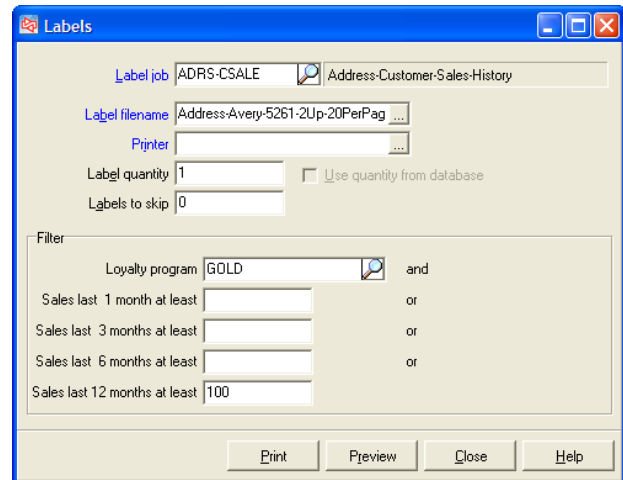


The Account Management window lets you serve your customers more effectively by putting all of Counterpoint's essential customer management views and A/R tools at your fingertips.

## Customer Labels

You can print customer labels on demand for all customer records on file or for any range or group of customers that meet the criteria you define, such as loyalty program enrollment or sales history.

For example, you can generate mailing labels, in ZIP Code order, for all customers in the GOLD loyalty program who purchased at least \$100 worth of merchandise last year.



You can even include barcodes on customer labels to serve as loyalty cards, membership cards, or ID cards.

## Reports

You can print detailed or summarized customer lists to review general customer information, credit ratings and credit limits, and A/R payments. NCR Counterpoint also includes a number of historical reports and journals that are specifically designed to help you track A/R transactions.

You can include customers in reports based on category, loyalty point balance, or any other criteria.

Counterpoint's customer-related reports include:

- Customer List
- Customer Loyalty Points
- Aging
- Statements
- Open and Unposted Documents
- Point History
- Point Redemption
- Customer Adjustments History/Journal
- Cash Receipt History/Journal
- Finance Charges History/Journal

# Purchasing

Purchasing and receiving go hand in hand with inventory management. To get the most out of your inventory investment, your purchases need to be timely, cost-effective, and designed to ensure that you have enough inventory to meet demand, while avoiding overstock or stockouts.

NCR Counterpoint includes numerous features that make purchasing and receiving as convenient and hassle-free as possible, from the ability to create and track basic purchase orders to advanced functionality like purchasing advice and forecast-driven replenishment that automate the purchasing process.

Counterpoint's Purchasing module allows you to:

- Manage your vendors and vendor items
- Identify the lowest-cost vendor for each item
- Purchase and receive merchandise on demand
- Allocate purchases across stocking locations
- Track sales trends and forecast seasonal demand
- Dynamically set min/max stocking levels
- Order the correct quantities to meet demand, replenish sold stock, or ensure a certain number of days of supply

## Vendor Management

Purchasing begins with vendor management and NCR Counterpoint allows you to maintain thorough records for the vendors you do business with.

The screenshot shows the 'Vendors' window in NCR Counterpoint. The 'Vendor number' is 'ACME' and the 'Name' is 'ACME Consumer Products'. The 'Name type' is 'Business'. The 'Main' tab is selected, showing fields for 'Salutation' (Mr.), 'First name' (Charles), 'Last name' (Jones), 'Contact 1', and 'Phone 1' (945-326-9683). The 'Category' is 'MERCH' (Merchandise Vendors), 'Terms code' is 'NET 30' (Net 30 days), and 'Ship-via code' is 'UPS GROUND' (UPS Ground). There are also fields for 'Sync with A/P', 'A/P vendor #', 'Vendor's ref #', and 'Voucher default' (Fully vouchered).

You can track address and contact information, category, terms and shipping codes, and vouchering details for each vendor. You can also define up to 20 profile fields, allowing you to record whatever additional vendor information you deem necessary.

## Purchasing at a Glance...

- Purchasing advice based on min/max levels
- Purchasing advice based on replenishment
- Purchasing advice based on days of supply
- Receiving (with or without a PO)
- Automatically generate POs
- Purchasing adjustments
- Returns to vendor
- Customer-specific purchasing
- Forecast-driven replenishment
- Margin-driven pricing
- Miscellaneous charges
- Export POs for transmission to vendors
- Interface to Accounts Payable software
- Multi-location purchasing
- Allocated purchase orders
- Primary vendor & unlimited alternate vendors

Vendor item records specify the cost, purchasing unit (which can be different from an item's stocking unit), minimum order quantity, order multiple, and lead time for each item from a particular vendor.

The screenshot shows the 'Vendor Items' window in NCR Counterpoint. The 'Vendor number' is 'ACME' and the 'Item number' is 'ACM-003'. The 'Purchasing unit' is 'DOZ'. The 'Stocking unit' is '1 DOZ = 12 EACH'. The 'Min order qty' is '1.0000 DOZ', 'Unit cost' is '120.0000 DOZ', 'Order multiple' is '1 DOZ', and 'Lead time' is '3 Auto-calculate'.

Vendor items are automatically created for each item's primary vendor. You can also create vendor items for any number of alternate vendors per item.

## Purchasing

The first step in purchasing merchandise is entering a new purchase request that details the items you want to order from a particular vendor. When you post a purchase request, it becomes a purchase order.

Item number	Description	Order qty	Unit name	Unit cost	Ext cost
ACM-001	Deluxe Anvil	3	EACH	50.0000	150.00
ACM-002	Rocket Skates	6	EACH	50.0000	300.00
ACM-003	Portable Hole	10	EACH	10.0000	100.00
ACM-004	Boulder Catapult	1	EACH	100.0000	100.00

Item number	Description	Qty	Unit	Unit cost	Ext cost
ACM-004	Boulder Catapult	1	EACH	100.0000	100.00

Subtotal	650.00
Total misc	0.00
Total	650.00
Total weight	0.0000
Total cube	0.0000

Like other document numbers in NCR Counterpoint, you can enter purchase request numbers manually or assign them automatically.

When you create a purchase request, you must specify the vendor you're ordering from (authorized users can create new vendors "on the fly") and the stocking location you want the merchandise shipped to. You can also record other details, such as the shipping method, free on board (FOB) destination, and so forth.

Next, you must add a line to the purchase request for each item you are ordering, including the item number, quantity, unit, and unit cost for each item. You can enter cell-specific (i.e., color/size) quantities for each gridded item on a purchase request. You can also use the purchasing worksheet to add multiple lines to the purchase request simultaneously.

Finally, you can include up to five miscellaneous charges—which can be included in the landed cost—to cover freight, handling, or other vendor fees. Each miscellaneous charge can be allocated based on the weight, quantity, cost, or volume of the ordered items.

When you post a purchase request, Counterpoint converts it into a purchase order—which you can print or send to the appropriate vendor via e-mail—and automatically updates on-order quantities.

To simplify reorders, you can copy historical purchase orders into new purchase orders.

## Receiving

For maximum flexibility, Counterpoint allows you to receive merchandise with or without a purchase order.

During receiving, you can retrieve purchase orders by PO number, vendor, or any other keyword. You can receive each PO in full or receive only selected lines, backordering or cancelling unreceived lines.

PO number	Item number	Entered description	Orig qty ordered	Order unit	Qty expected	Qty recvd	Qty to backorder	Last cost	Received unit cost
100021	ACM-001	Deluxe Anvil	3	EACH	3	3	0	50.0000	50.0000
100021	ACM-002	Rocket Skates	6	EACH	6	6	0	50.0000	50.0000
100021	ACM-003	Portable Hole	10	EACH	10	10	0	10.0000	10.0000
100021	ACM-004	Boulder Catapult	1	EACH	1	1	0	100.0000	100.0000

Item number	Description	Qty expected	Qty recvd	Qty to BO	Received cost
ACM-001	Deluxe Anvil	3	3	0	50.0000
Deluxe Anvil					150.00

Subtotal	650.00
Total misc	0.00
Total	650.00
Total weight	0.0000
Total cube	0.0000

You can even add new lines to a receiver—to account for additional merchandise that was shipped with an order—or modify, reissue, and reprint a purchase order.

If your vendors supply receivers in electronic format, you can import receivers from a file, with or without a purchase order. Or you can use Quick Receivings to receive inventory in a single step.

## Allocated Purchase Orders

You can enter a single purchase request for multiple stocking locations (in user-defined location groups), and then create a single, allocated/merged purchase order for all of the specified locations or split the purchase request into multiple, allocated/separate purchase orders—one for each location.

Vendor: ACME, Location: MAIN, Order date: 2/27/2010

Location: MAIN

Allocation options:  Allocated,  Separate,  Merged

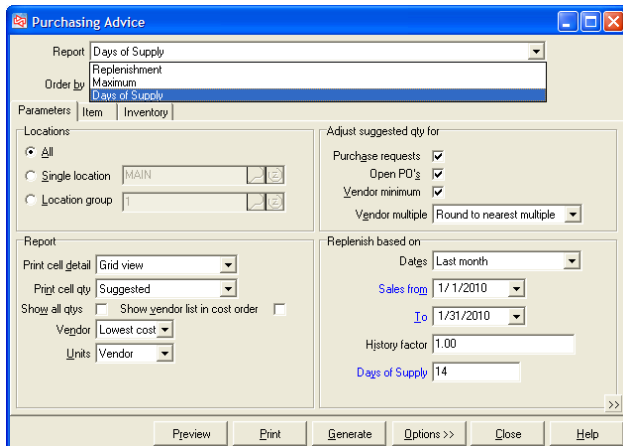
Location group: REGION1

When you receive an allocated/merged PO—at a central location, for example—NCR Counterpoint automatically creates the necessary transfer transactions to distribute the correct quantities of items to the other locations in the location group.

## Purchasing Advice

Purchasing Advice automates the purchasing process by calculating suggested reorder quantities and automatically generating the necessary purchase requests, based on one of three restocking methods:

- The **Replenishment** method suggests ordering enough of each item to replace the quantity that was sold during a specific time period. You can specify a “history factor” to adjust the calculated quantities (e.g., 20% more or 5% less).
- The **Maximum** method identifies items that have fallen below their minimum (i.e., reorder) quantities and suggests ordering enough of each item to bring stocking levels up to their defined maximum values.
- The **Days of Supply** method considers on-hand quantities and historical sales to suggest ordering enough of each item to last for the number of days you specify.



Purchasing Advice calculates suggested reorder quantities based on a variety of factors, including current inventory levels, committed quantities, backorders, and in-transit merchandise, unposted purchase requests, open purchase orders, vendor multiple, and vendor minimum order requirements.

You can generate the Purchasing Advice report for all of your stocking locations, a group of locations, or a single location. If you select multiple locations, the report can generate a single, allocated/merged purchase request for all of them.

You can also include cell-level detail on the Purchasing Advice report to calculate suggested reorder quantities for each of your gridded items' unique color/size combinations.

Finally, you can generate the Purchasing Advice report—and the resulting purchase requests—for primary vendors, for the lowest-cost vendor for each item, or for a specific, single vendor. If you purchase items in different units than you sell them, reorder quantities can be calculated in each item's stocking unit or in the purchasing (i.e., vendor) unit.

Date 7/21/2005 Time 8:44:22AM  
Purchasing Advice Report - Maximum

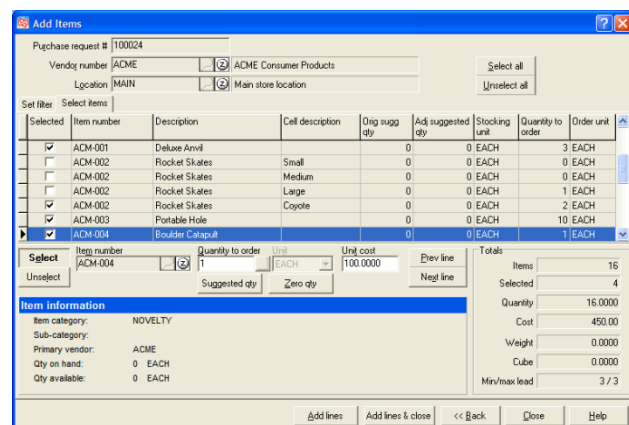
Location: MAIN  
Cell detail in Grid view - Suggested qty  
Suggested quantity = Max qty - Qty on hnd - Qty on PO - Qty on PR + Qty commit + Qty on BO.  
Suggested quantity is adjusted for vendor minimum and rounded to nearest vendor multiple. (Gridded items are not adjusted.)  
Record selection criteria: (Qty on hnd + Qty on PO + Qty on PR - Qty commit - Qty on BO) <= Min qty and Suggested qty > 0  
Order by: Item #, Location  
Item: Status is (exactly) Active

Item #	Description	Vendor #	Vendor's site
ADM-SCD	Adams S.C. Driver, RH	ADAMS	ADM-TLS
Location	Avg unit cost	Qty on PO	Min qty
	Last cost	Qty on PR's	Max qty
	Vendor unit cost	Qty on order	Qty on hand
MAIN	270.9960	0	3
	159.9980	0	12
		0	4
Adjusted quantity	Un	Quantity needed	
		9	EAC
		9	
Item #	Description	Vendor #	Vendor's site
ADM-TLS	Adams Tight Lies 9 Wood	ADAMS	ADM-TLS
Location	Avg unit cost	Qty on PO	Min qty
	Last cost	Qty on PR's	Max qty
	Vendor unit cost	Qty on order	Qty on hand
MAIN	212.8800	0	3
	180.0000	0	12
	180.0000	3	3
Adjusted quantity	Un	Quantity needed	
		10	EAC
		10	
Item #	Description	Vendor #	Vendor's site
APL-UMB	Golf umbrella	** None **	
Location	Avg unit cost	Qty on PO	Min qty
	Last cost	Qty on PR's	Max qty
	Vendor unit cost	Qty on order	Qty on hand
MAIN	7.8867	0	26
	5.9980	0	50
		0	3
Adjusted quantity	Un	Quantity needed	
		47	EAC
		47	

When you are satisfied with the results of the Purchasing Advice report, you can generate the necessary purchasing requests to order the suggested quantities with a single click. You can view, modify, and post purchase requests created by the Purchasing Advice report, just as if you'd entered them manually.

## Purchasing Worksheet

The purchasing worksheet allows you to add multiple items to a purchase request simultaneously—by selecting them from a filtered checklist—instead of creating each purchase request line individually, saving you valuable time and effort.





By default, the purchasing worksheet displays items that are available from the specified vendor, but you can include items from other vendors, if you wish.

To include an item on the purchase request, simply select its check box and enter the quantity you want to order. The purchasing worksheet can also suggest reorder quantities using the same calculation methods as the Purchasing Advice report, allowing you to order the suggested quantity for each item.

Once you have specified the items (and quantities) you want to purchase, you can add all of them to the purchase request with a single click.

### Customer-specific purchasing

Some merchants order merchandise to fulfill individual customer special orders, as opposed to generating purchase orders based on inventory levels or restocking plans. To accommodate this practice, Counterpoint allows you to review open customer orders that were entered at the Point of Sale, and then automatically generate purchase orders for exactly the items you need to fulfill those orders.

Use the Customer-specific purchases report to generate purchase orders for customer orders. You can create a single purchase order for each vendor—each of which may include items for multiple customer orders—or a separate purchase order for each customer.

Best of all, NCR Counterpoint stamps each customer order with the related purchase order information and when the purchase order is received, the customer's special order information is automatically printed on the receiver.

### Forecast-driven Replenishment

Maintaining appropriate inventory levels is critical to your long-term success. When you have too little inventory on hand, stockouts can occur, resulting in lost sales and reduced profits. Holding too much inventory can reduce profits as well, due to increased costs, such as higher insurance premiums and lost interest income. Unfortunately, determining the appropriate inventory levels is not an easy task.

Which is why Counterpoint includes forecast-driven replenishment functionality that allows you to more easily evaluate your inventory needs, dynamically adjust minimum and maximum quantities, and automatically replenish your stock to meet demand.

Forecast-driven replenishment combines the already useful Purchasing Advice report with a sophisticated forecasting module that is based on proven, industry-standard forecasting methods.

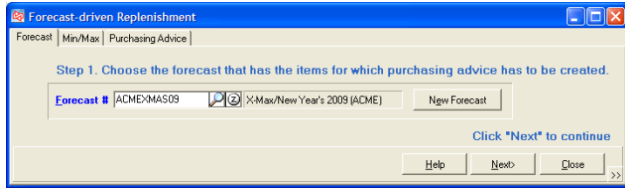
To use forecast-driven replenishment, you must create a seasonal forecast for a specific time period to estimate future demand for your items, based on historical sales. You can define the usual criteria (e.g., category, sub-category, vendor, and so forth) to filter the items you want to include in the forecast.

Item number	Description	Cell description	Year	Season	Forecasted qty
ACM-001	Deluxe Anvil	(N/A)	2009	Q4	2
ACM-001	Deluxe Anvil	(N/A)	2010	Q1	1
ACM-002	Rocket Skates	Coyote	2009	Q4	3
ACM-002	Rocket Skates	Coyote	2010	Q1	3

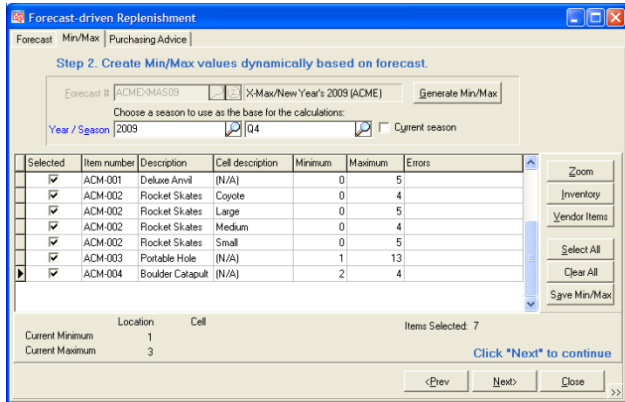
When you create a forecast, Counterpoint calculates the “forecasted quantity” for each item in the forecast. Once the forecast is created, you can view a graph of the forecasted quantity for each item.



You can use forecast data to update minimum and maximum quantities for your items and generate purchasing advice, based on the new min/max values, to ensure that you have the forecasted quantities on hand for each period or season.



Counterpoint calculates the ideal minimum and maximum quantities for the forecasted items, based on their safety stock, reorder point, and economic order quantity (EOQ) values—as determined by the annual holding cost, ordering cost, and lead time you specify for each item.



When the dynamic min/max quantity calculations are complete, you can select the items you want to update, save their new minimum and maximum quantities, and then generate the Purchasing Advice report and the corresponding purchase requests, to ensure that you can meet the forecasted demand.

## Purchasing Adjustments

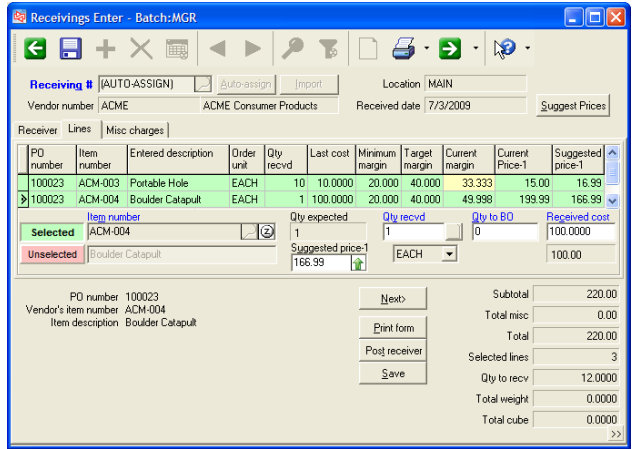
After you have posted receivings, you can create and post purchasing adjustment transactions to correct received cost and miscellaneous charge values for individual receivers, in order to update your inventory and/or cost of goods sold.

## Returns to Vendors

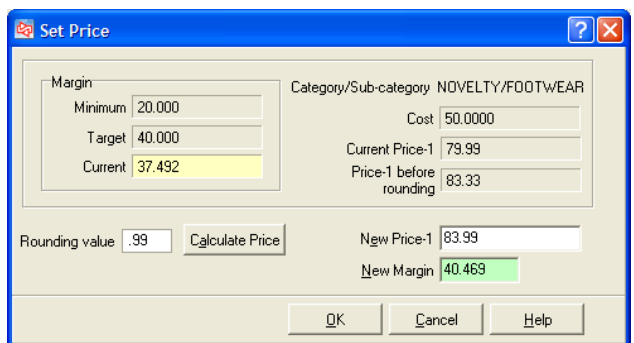
Return to vendor (RTV) transactions may be entered, reviewed, and posted to record the return of merchandise to a vendor. RTVs reduce on-hand inventory and may be vouchered into Accounts Payable to record credits with a vendor.

## Margin-driven Pricing

If you have defined minimum and target margins for your item categories and sub-categories, you can set **Price-1** values for your items, based on those margins, during receiving.



Authorized users can view cost values for each item on a receiver—along with the applicable minimum margin, target margin, and current margin values—and set a new **Price-1** value for each item by entering it directly or by using the **Set Price** dialog.



Authorized users can also have Counterpoint suggest new **Price-1** values for all items on a receiver, based on the corresponding target margins.

When you post a receiver, Counterpoint updates the **Price-1** value in each item record with the values specified on the receiver.

## Accounts Payable Interface

Received purchase orders may be vouchered directly into a third-party Accounts Payable system. Invoices may be vouchered to the vendor and a report of unvouchered receivings is provided. Interfaces to more than a dozen A/P accounting packages are provided, as detailed in the **Accounting** section on page 48 of this booklet.

# Sales History

Tracking and analyzing your sales history is a critical part of managing your business. You need to learn from the past in order to plan for the future. NCR Counterpoint includes powerful Sales History reports and tools that let you make sense of where you've been, so you can plan where you're going.

NCR Counterpoint allows you to retain, review, and report the entire history of your sales from the moment you begin using it. The only limitation is your disk space!

View and print all of your customers' sales, including the items purchased, how they paid for them, and the prices they paid. Or examine your sales from your items' perspective to determine which items were the consistent performers and which ones were duds.

Compare your sales year-to-year or during specific seasons, holidays, or annual promotions. Analyze sales by station to get an idea of how traffic patterns and your store's layout affect your bottom line. Find out which salespeople are worth their commissions and which ones are just getting by.

With a library of sophisticated reports, Counterpoint lets you major in history.

## Ticket History

You can view detailed history for every sale and return ticket, including bill-to and ship-to addresses, line-item detail, payment detail, sold gift cards and stored value cards, sales tax, notes, and so forth.

Item number	Description	Quantity	Selling unit	Item category	Price	Line discount amount	Line item price
TEES	Bag of Tees	1.0000	EACH	GOLF	1.0000	0.00	1.00
WALK	Pull cart fee	1.0000	EACH	GOLF	5.0000	0.00	5.00
HISHOLES	Green tee - 18 holes	1.0000	EACH	GOLF	36.0000	0.00	36.00
RANGE	Large Bucket Range Balls	1.0000	EACH	GOLF	5.0000	0.00	5.00

Number of lines: 4    Misc charge 1: 0.00    Gross subtotal: 47.00  
Return lines: 0    Document discount: 0.00  
Total amount received: 50.88    Gift cards: 0.00  
Total change: 0.00    Stored value cards:  
Deposit amount: 0.00    Misc charges: 0.00  
Tax: 3.88  
Total: 50.88

Look up tickets from history by ticket number, store number, or station number, or posting event, and then review as much detail as you like. You can even reprint a ticket directly from the ticket history view.

## Sales History at a Glance...

- *Ticket history view*
- *Ticket history report*
- *Dashboard*
- *MarketBasket*
- *Sales history by item, customer, and sales rep*
- *Sales analysis for user-defined groupings*
- *Sales History Profit report*
- *Flash Sales report*
- *Management history*
- *Sales History by Item by Customer*
- *Sales History by Customer by Item*
- *Tax History report*
- *Exceptions report*
- *Commissions Due report*
- *Sales Analysis by Group*

## Ticket History Report

The Ticket History report provides audit-level historical detail for all of your tickets or for a single ticket posting event, allowing you to review and analyze sales across multiple stores.

Parameters | Ticket History | Ticket History Line

Event number: 700193

Print line items

Cell detail: Grid view

Show payment detail

Print serial number detail

Show cost

Print pay code recap

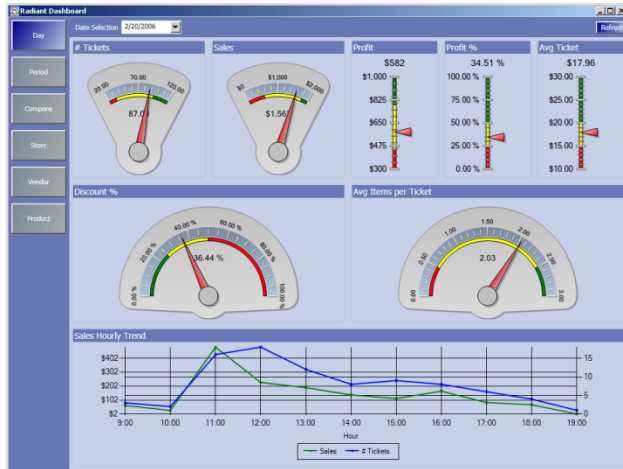
Buttons: Preview, Print, Options >>, Close, Help

You can configure the Ticket History report to include line-item detail—and cell-level detail for gridded items—for each item, payment detail, serial number detail, and cost values, as well as summary of the payment types that were used on all tickets.

## Dashboard

NCR Counterpoint's Dashboard provides a unified, graphical interface that allows you to monitor performance throughout your business.

The Dashboard presents a visual snapshot of various Key Performance Indicators (KPIs), giving you a "bird's eye view" of different areas of your business, allowing you quickly review current and past performance in order to better manage your business.



The Dashboard includes separate pages, or *views*, for a variety of performance areas, each of which displays the KPIs—also known as *metrics*—that are relevant to that particular area.

For example, the **Today** page provides a real-time snapshot of activity for the current day, while the **Day** page shows daily activity across your entire company for a specific date, including the number of tickets, sales dollars, gross profit, profit margin, and average ticket amount for that day.

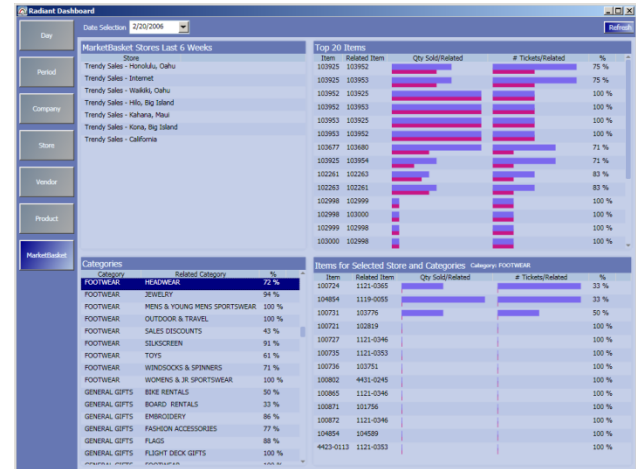
Similarly, the **Periods** page displays KPIs for a specified time period (e.g., week, month, season, or year), while the **Vendors** and **Products** pages allow you to review the performance of products from specific vendors or in particular categories.

Each page presents relevant KPIs as a series of gauges, meters, and graphs, using a familiar color-coded system. By establishing performance targets and thresholds, you can control when each performance indicator goes from green (good) to yellow (marginal) to red (problematic). By monitoring the various KPIs that are available, you can quickly see which areas of your business are doing well and which ones require your attention.

## MarketBasket

The Dashboard also includes the **MarketBasket** view, which displays related items sales (i.e., items that were sold together on the same ticket) for the last six weeks by store, by item, and by category.

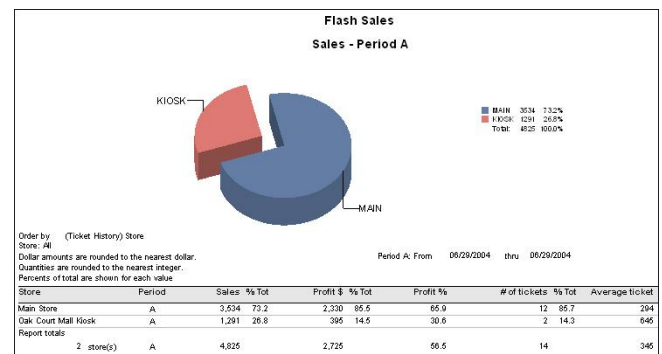
This view allows you to perform basic market basket analysis, which can help you identify cross-selling opportunities to drive merchandising, purchasing, and pricing decisions.



For example, if the **MarketBasket** view reveals a correlation between dolls and candy (i.e., those items are sold together on a high percentage of tickets), you might decide to place your candy bins near your doll display. Similarly, you might discount one item in a related pair of items to encourage customers to purchase the other, higher-priced item.

## Flash Sales

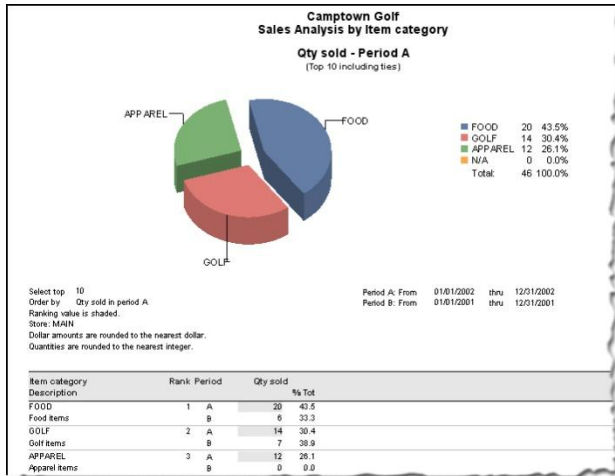
The Flash Sales report provides a brief, one-page synopsis (with an optional pie chart) of sales activity at one or more stores for a specified period of time.



The Flash Sales report details the total sales, number of tickets, average sales dollars per ticket, cost of sales, and gross profit for each store during the reported period.

## Sales Analysis by Group

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 (including optional pie charts).



Choose from more than 120 different groupings, including item number, item category, customer zip code, customer category, customer profile fields, discount code, user, store, vendor, and many more. For gridded items, you can group sales for colors and sizes within each category and sub-category.

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

**Sales Analysis by Item category (Item)**

Report: Traditional

Parameters: Select columns | Ticket History | Ticket History Line | Item Category

Group by: (Item) Item category  Include groups with no history

Print: Top 10  Show pie chart

Print in order by: Qty sold

Report periods:

Rank	Period	Dates	From	To
<input checked="" type="checkbox"/> A	Dates	Last year	1/1/2009	12/31/2009
<input checked="" type="checkbox"/> B	Dates	Custom	1/1/2008	12/31/2008
<input type="checkbox"/> C	Dates	Custom	/ /	/ /

Store: MAIN  Main Store  All stores

Buttons: Preview, Print, Options >>, Close, Help

Each group can display up to three reporting periods. You can print all members of a group or just selected members (e.g., the top 10 or bottom 20).

Store-level groupings summarize a store's activity including ticket lines, sale amounts, and profitability. You can generate reports 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 (e.g., stores, customers, and stations) and/or particular line items (e.g., items, categories, and vendors). You can also use filters to limit the group members (e.g., “only item categories A, B, and C”).

Groups with no history can also be included, allowing you to see, for example, all your sales reps, whether or not they had sales activity during the period.

## Sales History Reports

The Sales History by Item by Customer and Sales History by Customer by Item reports, analyze what merchandise is being sold and who is purchasing that merchandise. These reports may be created 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 indicates which customers purchased those items, along with the applicable sales, quantities, profitability, and percent-of-total figures.

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

## Reports

In addition to the Sales History reports detailed above, NCR Counterpoint includes the following reports:

- Commissions Due
- Management History
- Return Tickets
- Tax History
- Tax Exceptions
- Price Exceptions History
- Voided Tickets
- Sales History Profit
- Sale History by Sales Rep
- Sales Rep Productivity
- Price Reductions
- Miscellaneous Kit Sales



# Ecommerce

Opening an online store is easier than you think. Ecommerce capabilities are built into NCR Counterpoint and are compatible with NCR's Web-hosting and ecommerce service designed especially for Counterpoint merchants of all sizes.

NCR Retail Online combines the essentials of ecommerce into one simple package, including member-specific items and pricing, eNewsletters, Google Base™ submissions, automatic order notifications, real-time credit card authorizations, package tracking, and a wide range of payment and shipping options.

With easy set up, flexible configuration, and powerful retail functionality, NCR Retail Online can help you quickly extend your product offering to the web. Fully integrated with your Counterpoint system, it saves you time and money on administration and ensuring a seamless shopping experience for your customers.



## NCR Counterpoint Integration

Publish your inventory, customers, and pricing information directly from Counterpoint with a minimum of effort and expense. Then, process and fulfill your orders through your Counterpoint system. Your inventory, customers, and pricing are always in sync!

- Update inventory in Counterpoint and instantly publish changes to NCR Retail Online.
- Use Counterpoint's pricing, including sale prices, or publish different prices in your online store.
- Upload customer records from Counterpoint and invite existing customers into your online store
- Send customer orders from NCR Retail Online to Counterpoint for quick and easy fulfillment

## CPOnline at a Glance...

- *NCR Counterpoint integration*
- *Complete Web site and shopping cart*
- *E-mail forwarding*
- *Customizable, search engine-friendly templates with Cascading Style Sheet (CSS) support*
- *Store Management Web site for configuring every aspect of your online store*
- *Built-in Rich Formatting editor for adding images and formatting content without writing HTML*
- *Unlimited extra pages for additional information about your store, products, and services*
- *Real-time authorizations via CPGateway*
- *Card identification services (CVV2/CVC2/CID)*
- *PayPal, A/R charge, and foreign currency support*
- *Gridded items, alternate units, flexible pricing, and browse by vendor*
- *Special member pricing and member-only items*
- *Customer-specific discounts*
- *Online account access for shoppers*
- *Shipping calculation for FedEx, UPS, and USPS*
- *Integrated package tracking*
- *International shipping*
- *Automated shipping notification via e-mail*
- *Automated data transfer to & from CounterPoint*
- *Step-by-step documentation*
- *Online knowledge base and live technical support*
- *Multiple Boutique Stores with different products and branding tied to one Counterpoint system\**
- *Counterpoint Ticket History allows customers to view online and brick-and-mortar purchases\**
- *Restricted Store Access limits online shopping to existing customers only\**
- *Tax Rate Lookup by ZIP Code\**

\* Premium Features not included in monthly CPOne fees



## Sales & Marketing

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

- **Search engine-friendly URLs** are optimized for search engines and use common language that allows search engines to better understand your products and services.
- **Search Engine Marketing (SEM) Services** help generate higher revenue by attracting new customers to your online store.
- **Meta descriptions, meta tags, and page titles** help search engines better understand the content of each page on your storefront.
- **eNewsletters** keep customers informed about upcoming sales, special offers, and new items.
- **Discounts and promo codes** drive traffic to your store with flexible discount options.
- **Quantity discounts** allow you to offer online discounts for individual items, as well as for entire categories of items.
- **Abandoned cart e-mail** identifies shoppers who recently abandoned their carts and promptly sends them an e-mail notification.
- **Google Base and Google Sitemaps** increase your Web presence and help shoppers locate items in your store.
- **Google Analytics** helps you understand more about each shopper and the Web sites that drive traffic to your site.
- **Featured items** encourage impulse buys.
- **Tell-a-friend e-mail** lets your online shoppers alert their friends about items on your storefront
- **Affiliate programs** reward Web sites that advertise your products or provide links to your storefront

## Security

NCR Retail Online complies with PCI DSS requirements and is approved by Visa as CISP-Compliant Service Provider. It also supports CVV2/CVC2 card verification.

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.

## Professional Services

NCR Retail Online is designed to be your do-it-yourself solution to ecommerce success. Step-by-step instructions are available to walk you through setting up and maintaining your online store. If you want help from the experts, NCR offers a number of additional services to help you make the most of your experience:

**Search Engine Marketing (SEM)** – Target the shoppers actively searching for your product, drive more traffic to your site, and significantly increase your online sales. SEM delivers a powerful return on the investment of your marketing dollars.

**Design Services** – If none of the built-in templates meet your needs, NCR can work with you to create a truly unique look and feel for your online store.

**Custom Development** – Every online store has different needs. Chances are you'll think of something you'd like to see in your online store that we never anticipated. NCR can customize your online store to make it work the way you do.

**Personalized Training** – We provide live, dedicated, one-on-one guidance to help you open your online store quickly and efficiently. Our product experts will answer your questions and guide you through the configuration options that are most suitable for your particular business.

## Demo Store

Take a tour of a working storefront at [www.CPOStores.com/Demo](http://www.CPOStores.com/Demo) or check out our Design Gallery at [www.CounterPointPOS.com/Gallery](http://www.CounterPointPOS.com/Gallery).

The screenshot displays the CPO Demo Store website interface. At the top, there is a search bar and navigation links for 'SALE', 'TOP', 'my cart', and 'Log In'. The main content area features a large banner for 'Ahhh... relaxed fit jeans' with a 'save 10%' offer. Below the banner are several product categories: 'Shop for Women', 'Shop for Men', 'Shop for Home Decor', and 'Shop for Wine'. The footer contains site information, customer service links, company info, and account info.

# Accounting

Counterpoint integrates seamlessly with a variety of third-party accounting packages, allowing you to transfer information between Counterpoint and your General Ledger and Accounts Payable software.

You can interface distributions to your General Ledger (G/L) and voucher received purchase orders into Accounts Payable (A/P). Utilities also allow you to import accounts into NCR Counterpoint from your accounting software, and to share vendor information between Counterpoint and your A/P system.

Counterpoint includes direct accounting interfaces to a number of popular accounting packages, including QuickBooks, BusinessWorks, Great Plains, MAS 90/200, and Small Business Financials.

Counterpoint also includes pre-defined export interfaces to Sage ACCPAC, Solomon IV, Microsoft Dynamics SL, MIP Fund Accounting, The Financial Edge, Passport Business Solutions, and Peachtree.

## Import and Export Utilities

To ensure that your accounts in NCR Counterpoint match your General Ledger, you can import account numbers from your G/L and automatically designate them as valid main accounts and/or profit centers.

You can also create or update vendors in Counterpoint from the vendor records in your Accounts Payable module, or vice versa.

## General Ledger

NCR Counterpoint account numbers are mapped to the 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.

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

You can print a Distribution Report by account number or by posting source (i.e., distribution type or module). The summary version of the report lists distributions by event, date, and account, while the detailed version provides a complete audit trail back to the individual posting journals and document numbers that originally created the distributions.

## Direct Interfaces

- *QuickBooks US 2003-2011*
- *QuickBooks Canada 2005-2011*
- *Sage BusinessWorks 2009 through 2011*
- *BusinessWorks 5.0 through 8.0*
- *Great Plains 7.5 through 10.0*
- *MAS 90/200 v3.x and v4.x*
- *Small Business Financials 8.0 through 10.0*

## Export Interfaces

- *ACCPAC 5.1 through 6.0*
- *QuickBooks 2000-2011*
- *Microsoft Dynamics SL v6.5 and v7.0*
- *Solomon IV 5.0 and 5.5*
- *MIP Fund Accounting v5.1 or later*
- *The Financial Edge*
- *Passport Business Solutions v11*
- *Peachtree 2005 through 2012*

## Accounts Payable

If you are using an Accounts Payable package to track payables and issue checks outside of Counterpoint, when a purchase order has been received in Counterpoint, you can voucher the receiver into your A/P module as an invoice (i.e., a payable).

You can partially voucher a receiver multiple times, if necessary, until it is fully vouchered. You can also enter A/P invoice vouchers and transfer the corresponding accounting distributions into your A/P system along with the invoice vouchers.

Further, return to vendor (RTV) transactions can be vouchered into A/P as invoice credits.

The Unvouchered Receivings reports provide a list of received purchase orders that have not yet been vouchered, while the Vouchered Receivings report indicates which receivings have been vouchered, along with their voucher information.

# Payment Processing

Processing payment transactions is a critical part of your business. NCR Counterpoint's integrated payment authorization and settlement features make processing those transactions quick and secure, reducing your risk, along with your checkout times.

NCR Counterpoint includes electronic draft capture (EDC) capabilities that allow you to process credit cards, debit cards, and other EDC transactions through Radiant Payment Services.

Adding the Credit Cards Option allows you to process credit cards with additional processors, including First Data North, First Data South, Paymentech, RBS WorldPay, TSYS (formerly Vital), and Moneris Solutions.

Regardless of which processor you use, Counterpoint provides you with an integrated solution for processing credit cards, debit cards, and other EDC transactions that offers the following benefits:

- Rapid, automatic payment authorizations
- Faster checkout times
- Reduced customer frustration
- Fewer errors and fewer chargebacks

## PCI DSS Compliance

The Payment Card Industry (PCI) Data Security Standard (DSS) outlines a set of guidelines that merchants must follow in order to protect cardholder information and reduce the risk of credit card fraud.

Compliance with these guidelines ensures that sensitive cardholder information is secure and limits merchants' liability for the fraudulent use of cardholder data obtained from their systems.

Since these guidelines were established, NCR has taken a leadership role in PCI DSS compliance by ensuring that our applications meet all PCI DSS requirements and by helping merchants configure and maintain secure environments for processing sensitive cardholder data.

Counterpoint is recognized by Visa as a Validated Payment Application. This designation means that Counterpoint meets all Payment Application Best Practices (PABP) requirements for cardholder information security and provides the cornerstone of a fully PCI DSS-compliant system.

## Payment Processing at a Glance...

- *PCI DSS compliance*
- *Credit card authorization and settlement*
- *Check authorization (Certegy and TeleCheck)*
- *Debit card support*
- *Canadian debit card support (Moneris Solutions)*
- *Purchase card support (Level II)*
- *Electronic Benefit Transfer (EBT) food stamps*
- *Stored value cards (SVCs)*
- *Address verification services (AVS/AAV)*
- *Card identification services (CVV2/CVC2/CID)*
- *Retail, MOTO, and Ecommerce merchant support*
- *CPGateway support for 2-second credit card processing over the Internet*
- *American Express CAPN compliance*
- *Direct authorization of AmEx transactions*
- *Dial-up processing*
- *MSR and MICR support*
- *Electronic signature capture*

## Credit and Debit Cards

Counterpoint allows you to obtain authorizations for credit and debit card transactions at the Point of Sale, via a dial-up or Internet (i.e., CPGateway) connection.

Credit card numbers can be entered manually or obtained via a magnetic stripe reader (MSR), while debit card processing requires the use of MSRs and PIN entry devices. Counterpoint also supports electronic signature capture via payment terminals.

Printed invoices and receipts include masked card numbers, in compliance with PCI DSS requirements.

Credit and debit card transactions can be settled (i.e., electronically transferred) at the end of the day. You can also print the Pre-Settlement List to review the day's transactions prior to settlement.

## Address Verification and Card Identification

Address verification confirms the cardholder's address with the processor when the physical card is not swiped, reducing the risk of fraud and the potential for chargebacks against the merchant. Address verifications services (AVS) are primarily used in mail-order or ecommerce environments where physical cards are not typically present.

Counterpoint also supports card identification (CVV<sub>2</sub>/CVC<sub>2</sub>/CID) services, which provide additional verification for a transaction by sending the extra three or four security digits printed on the back of the card to the processor.

Address verification and card identification services do not affect whether a transaction is authorized. They are simply safeguards to help you avoid fraud. If the information the customer provides does not match the information the processor has on file, you can decide whether process the transaction.

## Purchase Cards

NCR Counterpoint supports Level II Purchase cards, Corporate cards, Business cards, and Commercial cards, all of which are referred to as "purchase 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 monthly statements regarding the type of goods or services purchased.

## Check Authorization

NCR Counterpoint supports check authorization through TeleCheck and Certegy with most processors. MICR check readers are optional, but are quicker and more accurate than manual data entry.

## CPGateway

CPGateway is a service provided by NCR that allows you to authorize and settle credit card, debit card, stored value card, EBT food stamp, and check transactions over the Internet. This method is much faster and more reliable than dial-up

communications, typically providing authorizations in 2 seconds or less.

CPGateway supports all of Counterpoint's EDC features and offers simple configuration, affordable fees, increased reliability, faster batch settlements, and automatic failover to a dial-up connection. CPGateway supports multiple workstations through a single Internet connection.

## Direct Authorization of AmEx Transactions

Typically, credit card transactions are authorized and settled through your processor and you are charged a separate fee for each authorization and settlement.

If you are using CPGateway, however, you can authorize AmEx transactions directly through American Express, instead of through your processor, allowing you to avoid the fees that are normally associated with authorizing AmEx transactions through your processor (settlement fees still apply).

## EBT Food Stamps

EBT food stamp processing is available through NCR Merchant Solutions, First Data North, and TSYS, allowing merchants using CPGateway to accept EBT food stamps and issue refunds to EBT accounts at the Point of Sale for eligible items.

To authorize an EBT transaction, you can swipe the customer's EBT card, using an MSR device, or enter the EBT card number manually. The customer then enters a PIN using a PIN pad and the transaction is authorized or denied. If the transaction is authorized, the customer's EBT balance is printed on the receipt.

## Stored Value Cards

Merchants using CPGateway can sell and redeem stored value cards (SVCs) at the Point of Sale, recharge an SVC, process a return to add value to an existing SVC, view the current balance of an SVC, and issue cash back to clear an SVC's remaining balance.

The value of each SVC is maintained by a third party, which means that accurate and up-to-date SVC information is always available from any merchant site, guaranteeing that an individual card cannot be redeemed multiple times at different stores.

Counterpoint is compatible with stored value cards from Comdata Stored Value Solutions, First Data, Paymentech, and RBS Lynk.



# Data Interchange

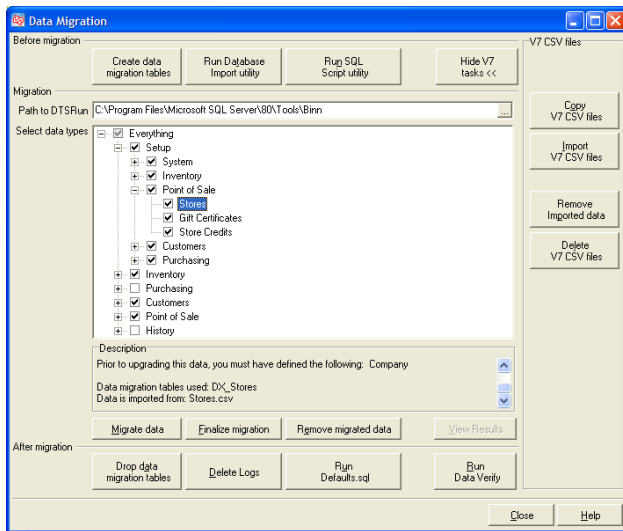
One of the advantages of the SQL Server database platform is that CounterPoint SQL data can be easily exported into other applications or imported from external sources.

NCR Counterpoint includes a set of advanced Data Interchange utilities that facilitate the transfer of data between CounterPoint and third-party applications.

## Data Migration Utility

The Data Migration utility allows you to convert data from virtually any source into NCR Counterpoint using a simple, unified interface. This utility simplifies the process of upgrading from Counterpoint v7 or a legacy POS system.

You can migrate data directly into a number of functional areas, including Setup, Inventory, Purchasing, Customers, Point of Sale, and History.



For each of these categories, there are specific data types you can migrate, each of which corresponds to a type of record in Counterpoint. For example, in the Purchasing category, you can migrate vendors, vendor items, and purchase orders.

The Data Migration utility guides you through each step of the data migration process, including creating temporary data migration tables, importing data from .CSV files into those tables, selecting the categories of data to migrate, and then moving the selected data into live NCR CounterPoint tables.

The Data Migration utility includes additional tasks that automate the process of copying and importing data from Counterpoint V7 into the data migration tables as part of the upgrade process.

You can also access the Database Import and SQL Script utilities directly from the Data Migration utility, allowing you to map fields from your source files into the data migration tables, and then run UPDATE, INSERT, and DELETE statements to pre-process the data migration tables for the migration.

## Database Import

Use the Database Import utility to import data from any .CSV file directly into a table in the Counterpoint database in order to create new records, update existing records, or both.

The Database Import utility allows you to map the fields in your source file to the corresponding fields in the destination table. You can map fields manually, using a drag-and-drop interface, or you can allow Counterpoint to map source fields to destination fields with names that match the values in the first row of the source file.

The Database Import utility includes a variety of parameters that allow you to control how the data in the source file is imported. You can save sets of import parameters, including field mappings, and then load them whenever you need to import data from a particular source.

## Database Export

Use the Database Export utility to export data from any NCR Counterpoint table to a .CSV file, for use in virtually any third-party application. You can specify the fields in the source table you want to export or create an SQL query to select the fields to export.

The Database Export utility also allows you to control the content and format of the export file to accommodate the requirements of the destination application (e.g., Microsoft Word® or Excel®).

# Multi-Site

You need a retail management solution that grows with your business. When you add stores and locations, the Multi-Site Option allows you to easily manage and synchronize data between them.

Multiple stores can run NCR Counterpoint in a Wide Area Network (WAN) environment, connecting to the central database via Windows Terminal Services® or Citrix Metaframe®. Alternatively, merchants who need to allow day-to-day operations to be carried out at each store without a constant connection to the central database, can use the Multi-Site Option.

The Multi-Site Option allows multiple Counterpoint sites to operate independently, using site-specific copies of the company database, and connect to the central server periodically to synchronize data using the DataXtend Replication Engine (DXRE).

The Multi-Site Option offers the following benefits:

- Independent operations at multiple sites
- Automatic, unattended, remote-site updating
- Multi-location data integrity

## Multi-Site Environment

A Multi-Site environment consists of a single Hub site, which is usually the main office or a central location, and one or more Remote sites, which represent additional stores or branch offices.

Each site includes a database server; the Hub—or First—site maintains the complete database, while each Remote site houses a partial database that contains only data that is relevant to that store.

## Work Sets

For Multi-Site purposes, tables in the Counterpoint database are divided into groups of related tables, called work sets. Each site may “subscribe” to specific work sets, ensuring that it receives only the data it needs. Work sets are automatically created for each store and stocking location.

For example, the MAIN work sets contain just the data that pertains to the MAIN store (e.g., tickets, customer records, ticket history, and so forth) and stocking location (e.g., inventory data and inventory transaction history).

Work sets offer a number of benefits, including:

- **Speed:** Replication for each site is fast, since each site only replicates the data it needs.
- **Size:** Remote databases are smaller, increasing speed and reducing server requirements.
- **Convenience:** LookUps, Zooms, reports, and so forth only display data that is relevant to each site.
- **Security:** One site cannot alter another site’s data if it is not subscribed to that site’s work sets.

To further reduce data transmission and data storage requirements, a site can subscribe to another site’s “data” work sets, but not its “history” work sets. For example, the EAST location may need the WEST location’s inventory, but not its inventory history.

## Replication

The Hub and each Remote site operate independently and periodically exchange—or replicate—information using the DataXtend Replication Engine (DXRE), which is included with the Multi-Site Option.

During each replication session, DXRE replicates the changes made to a database since the last session and with another site via TCP/IP. DXRE automatically initiates contact with the appropriate replication partner to ensure that each site gets all the data it needs, based on the site’s subscribed work sets.

Replication can be scheduled to take place throughout the day or overnight. Data is replicated bi-directionally in a single session. Log files for each session can be viewed using the Radiant Log Viewer, or you can set up a Windows task to automatically e-mail logs every day to report the status of each replication session.

## Management Console

The Management Console allows you to manage the servers in your Multi-Site environment from a central location. Use it to subscribe Remote servers to work sets, schedule replication for each server, and start replication sessions between your Remote servers and the First Site.

# Retail Applications

For all of its features, NCR Counterpoint is just one part of a total retail solution. NCR also provides a variety of Retail Applications that integrate with Counterpoint, extending its functionality and making it easier for you to run your business, connect with customers, and sell anywhere.

## Customer Connect

Fully integrated with NCR Counterpoint, NCR Customer Connect is the only e-mail marketing tool specifically designed for retailers. Customer Connect gives you everything you need to effectively connect with your customers, drive sales, and increase loyalty.

To make reaching your customers intuitive and simple, Customer Connect includes retail-specific e-mail marketing templates and recurring, targeted campaigns, allowing you to welcome new customers automatically or send a “we miss you” message to customers who haven’t shopped with you recently.

And to ensure your messages reach your customers, Customer Connect includes anti-spam checking, bounce management, and social network sharing.

As an extension of Counterpoint, Customer Connect allows for closed-loop reporting of sales lift and promotion redemption for each e-mail campaign, as well as analysis of delivery, open, and click rates.

## Smart Alerts

Smart Alerts is a real-time notification service that allows you to monitor your business from anywhere. SmartAlerts provides timely, actionable text and e-mail alerts that help you reduce fraud, improve operations, and provide better customer service.



Smart Alerts can instantly notify you of suspicious activity, including no sales for a specified amount of time, sales over a certain dollar amount, excessive returns or discounts, price overrides that exceed a specified percentage, and over a dozen other common retail inefficiencies.

## Counterpoint Mobile

Get out from behind the counter with Counterpoint Mobile, the mobile retail solution that integrates with NCR Counterpoint. It lets you look up items and customers, count your inventory, and ring up sales with your iPhone, iPod Touch, or iPad.



Counterpoint Mobile works over wireless and cellular networks, so it can go wherever you do. It allows you to take the transaction to the customer, redefining the “point” of sale.

With Counterpoint Mobile, completing a sale is as simple as scan, swipe, tap, done! Process payments securely through CPGateway and print receipts to a mobile Bluetooth or IP printer, or send them to customers via e-mail.

And since it shares your Counterpoint database, it updates your customer records, inventory quantities, and sales data instantly.

# Hardware & Other Services

NCR has been providing innovative, end-to-end solutions to the retail industry for more than a quarter of a century, offering unmatched reliability and ease of use. NCR's products are deployed in millions of sites. Why not yours?

NCR's approach is simple: *reliable and compatible solutions with low total cost of ownership*. Since we manufacture retail hardware and develop retail software, it's an approach that only NCR can take.

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

## Point-of-Sale Hardware

NCR offers a complete line of hardware designed especially with Counterpoint users in mind. Rugged, reliable, and feature rich, our hardware is built to last in the harshest retail environments.

And NCR stands behind its hardware by providing a comprehensive, no questions asked hardware replacement warranty with every unit.

NCR's full line of hardware includes compact workstations with easy-to-use touchscreen interfaces, powerful back-office servers, indoor and outdoor kiosks, and more.

NCR Counterpoint-compatible POS workstations include:

**P1560 & P1760 (Premium Models):** The P1560 and P1760 are our most advanced all-in-one workstations, featuring key innovations like a 15" or 17" high-bright touchscreen, a fast Intel® Core 2 Duo® or Celeron® processor, built-in 3-track MSR, passive cooling, and our exclusive CableLock™ cable management system.

**P1530 Workstation (Mainstream Model):** The P1530 is NCR's mid-range all-in-one workstation, featuring a 15" touchscreen, an Intel Pentium® or Celeron® processor, integrated MSR, passive cooling, and the CableLock cable management system.

**P1515 Workstation (Value Model):** The P1515 is an affordably-priced all-in-one workstation, featuring a 15" resistive touchscreen, a power-saving Intel Atom™ processor, built-in MSR, and a small footprint with flexible mounting options.



## Peripheral Devices

NCR also offers a wide range of peripherals that are certified for use with Counterpoint, including:

- Receipt printers
- Label/barcode printers
- Cash drawers
- Barcode readers
- Magnetic Stripe Readers (MSRs)
- 2x20 Customer Displays
- LCD Customer Displays
- PIN Pads
- Signature Capture Devices
- Biometric Devices/Fingerprint Readers

NCR Counterpoint is also certified for use with third-party peripherals from other providers, including:

- Magnetic Ink Character Recognition (MICR) check readers
- Electronic Scales
- Laser and inkjet printers



## NCR Merchant Solutions

NCR Merchant Solutions (NMS) is NCR's own payment processing platform, which provides integrated authorization and settlement of credit card, debit card, check, and EBT food stamp transactions. NCR Merchant Solutions' nationwide payment infrastructure is backed by fully-redundant data centers to ensure consistent availability and optimal routing times.

From the time a payment is made through the settlement of funds, NMS manage the entire transaction process. As a result, you have fewer points of contact, with fewer opportunities for error, and benefit from heightened security, competitive and transparent pricing, and an integrated solution that is easy to implement and manage.

## Search Engine Marketing

Recent studies suggest that as many as 68% of in-store purchases begin with online research.

Having an informational Web site is a requirement for doing business today. Selling merchandise online is a natural next step. But having great content without using Search Engine Marketing (SEM) is like putting a sign for your store in the desert—very few people are going to find out about your business!

NCR's SEM consulting service can help you increase your sales by driving more traffic to your Web site, online store, and brick-and-mortar stores. Contact us at [retailsales@radiantsystems.com](mailto:retailsales@radiantsystems.com) or (800) 852-5852 to schedule your free consultation.

## Counterpoint Subscription Service

The NCR Counterpoint Subscription Service (CSS) keeps your Counterpoint system up-to-date. 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 system remains PCI DSS compliant and allows you to access the Counterpoint Dashboard.

Plus, current CSS subscribers can access the Support area of our Web site, where you can find product downloads, software updates, the Counterpoint Knowledge Base, news about upcoming features, and the Counterpoint Users Forum.

## NCR Retail Partners

NCR Counterpoint is available exclusively through a network of NCR Retail Partners, who know as much about Counterpoint as we do. NCR Retail Partners provide complete business solutions for retail merchants, including pre-sale consulting, software, equipment, configuration services, training, and ongoing support.

## Training

Your Partner is your first source for NCR Counterpoint training, but NCR enhances your learning opportunities by offering comprehensive training courses—including instructor-led classes, webinars, and computer-based tutorials—that cover all aspects and features of Counterpoint.

Visit [www.CounterPointPOS.com/training](http://www.CounterPointPOS.com/training) for up-to-date training schedules and course descriptions.

## NCR Counterpoint Users Forum

The Counterpoint Users Forum is the official place for you to share questions, suggestions, and information with other Counterpoint users. You'll be amazed at what you can learn in the Counterpoint Users Forum!

## Retail User's Conference

Join us for the annual NCR Retail User Conference. You can meet the people behind the software, learn new things that your system can do, and "talk shop" with hundreds of other Counterpoint and NCR users.

Check out [www.CounterPointPOS.com/news/connect](http://www.CounterPointPOS.com/news/connect) for more information about how you can connect with NCR and other Counterpoint users.

## CounterPointPOS.com

Visit our Web site, [www.CounterPointPOS.com](http://www.CounterPointPOS.com), for more information about NCR Counterpoint, NCR hardware, and all of the valuable products and services NCR offers.

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 NCR Counterpoint! We look forward to providing you with exceptional solutions for the life of your business.

Call us today at (800) 852-5852.

We'll put you in touch with an NCR Retail Partner in your area who can give you a free software demonstration and show you how NCR Counterpoint fits your business needs.



[www.CounterPointPOS.com](http://www.CounterPointPOS.com)