



# Various Enhancements

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**Here is a small sample of the modifications we have created in the past.  
We couldn't include them all so if you don't see something you need ask about it.**

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### **Delinquent Customer Warning in Ticket Entry**

If the customer has an amount due beyond 60 days, a window displays a summary of the overdue invoices including the document-#, due-date, original-amount, balance-due and the age in days.

### **Customer Age Verification**

This enhancement to POS ticket entry allows swiping a mag-stripe driver's license (or entering the birthdate manually) to verify the customer's age.

### **Structured O/E Orders Processing**

This enhancement assigns a second order status to O/E orders and classifies the personnel accessing the order. Salesreps can enter/edit the order then release it to credit who releases it to a traffic manager. Once released to the next "level" of processing the person releasing the order cannot access the order.

### **Intelligent O/E Picking Tickets**

This version of the O/E picking tickets program allows printing the line items for each location in separate runs. It does not use the picking ticket date to block printing unprinted line items.

### **Insert Line Items in POS Ticket Entry**

We added the ability to insert line items in between existing line items.

### **ATF Processing**

Added the functionality required to meet the federal requirements to sell firearms and other controlled weapons.

### **Specify the Customer by Entering the Customer's Phone Number in POS Ticket Entry**

Enter the customer's phone number instead of the customer number and this enhancement will find the customer.

### **Unlimited Miscellaneous Charges When Receiving**

This enhancement allows entering an unlimited number of miscellaneous charges when receiving.

### **Unlimited Miscellaneous Charges for RTVs**

This enhancement provides the converse for the enhancement described above.

### **Add Bill-to Addresses for Customers**

We added the ability to create bill-to addresses for customers in the same manner as CounterPoint currently supports ship-to addresses (including F9-lookups and a listing report). The customer maintenance screen has the ability to maintain the customer's bill-to address. POS ticket entry has the ability to specify (or even edit) the customer's bill-to address.

### **Print Item-Related Word Documents From Within CounterPoint**

There are items that could use instructions or "Good-with" documents to accompany the sale. We modified POS ticket entry to print a Word document for each of the items. We also created a separate menu selection that will print the Word document for a single scanned item.

### **Modified Item Maintenance Screen**

We re-arranged the fields on the item maintenance screen in order to fit the description field for the category, subcategory and the 4 user-defined fields in. No essential fields were removed from the screen. The end result is more information in a better-looking screen.

### **Restrict O/E Lines to Contract Price Items**

Conditionally requires that a contract price exists for the customer/item before the item can be placed on an O/E order. We added a new field (Require contract price?) to the customer maintenance screen to control this feature.

### **Allow Importing Allocated POs Through DI**

We modified DI to allow the creation of allocated POs. If the import file has a value for the allocated location, the resulting PO will be an allocated PO. If the field is blank the resulting PO will be for a single location (the location specified in the existing location code field on the header record).

### **Add taxes to Customer Statement Forms**

We added a new field (182. Stmt tax amount) to the list of available customer statement footer fields. The amount reported is the accumulation of all tax amounts (as reported by the Sales history header file) for that customer for the reporting period of the statement.

### **Ability to Calculate Co-op Fees and Freight Charges**

The client charges a co-op fee and pays freight charge that is calculated on each line item. The freight charge can be calculated using a fixed amount times the units ordered or a percentage of the retail price of the item. The co-op fee is calculated by multiplying the fee percentage by the total of the extended costs of the PO's line. We created a new vendor freight maintenance program in which to define the vendor's per unit freight amount and freight percentage rates for the various sizes of items being ordered.

### **Add Item Profile Fields to Item Lookup Screens**

In the 'Item description' lookup view, we replaced the column 'Description-2' with item profile-1 field, moved the category field to the left slightly and inserted the item price-1 field on the right.

### **Modify Data Interchange for Updating Item File**

We modified Data Interchange to update grid color and size definitions for existing gridded items.

### **Markup Average Cost in Commissions Calculations**

The client pays commissions based on the item's margin. However, the client has additional overhead associated with many items depending on the type (category) of the item. To accomplish this we added a new field (the markup percentage) to the Inventory category record. This new field determines the amount to markup the item's cost when used in the calculation of the sales rep's commission.

### **RealWorld Style Comments to O/E Orders**

This enhancement allows entering the comments directly on the third order screen. These comment lines are then automatically saved as an order note using the note-id of "COMMENTS". The client then assigns "COMMENTS" to the field 'Order notes id' on the form definition they use for orders/invoices and add fields "312. Order notes 1" through "316. Order notes 5" in the footer section of the form.

### **Added Special Handling of the Standard and Average Costs for Select Customers**

The client sells items that require a duty tax. Some of their customers pay the duty tax themselves. The client pays the duty tax for the other customers. When the client pays the duty tax, he includes the duty tax in the price of the item. This results in erroneously high margins on those items. To correct this, we modified O/E to add the item's duty tax to the cost of the item for those customer's that do not pay their own duty tax. The standard cost field holds the item's duty tax amount. The software adds the item's standard cost field value (the duty tax) to the item's average cost and places that amount in the line item's cost field.

### **Create a Thinner Version of the Consolidated Grid Report**

We modified the Consolidated Grid report to lessen the amount of 'white space' and needless printing within the report. We removed the horizontal gridlines squashed the grid laterally and moved it to the left so that more of the grid could display in the first 80 columns of the report. Plus many more space-savers. This version uses MUCH less paper.

### **Display Picked Orders in Picking Order**

Added a function key to allow the O/E line items in the selection window in the same sequence as they are printed on the picking ticket. This makes updating the quantities to be shipped considerably easier.

### **Allow Voiding Orders**

In the O/E order maintenance program, we replaced 'F3 to delete' with 'F3 to void'. When the order is voided the operator enters the reason for the void. The user-id and the date & time is written to the voided order. If the operator has the ability to perform protected overrides, the program will allow deleting or voiding the order. Includes an edit list for voided orders.

### **Allow Tiered Loyalty Points Redemption in POS Ticket Entry**

Rather than allowing the customer to redeem any number of loyalty points for a fixed amount, this enhancement sets up a tiered approach that redeems the customer's loyalty points at a higher rate when he redeems a higher number of points. Thus the customer may get \$20 for 1,000 points, but \$200 for 5,000 points. Currently it works with tiers of 1,000 through 5,000 in 1,000 point increments.