

CPOne

CPOne is an ecommerce and web-hosting service from Synchronics. This document provides detailed instructions for setting up CounterPoint SQL to integrate with CPOne.

2/16/2004

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Introduction

CPOnline is an ecommerce and web-hosting service from Synchronics designed especially for CounterPoint SQL merchants. CPOne and CounterPoint SQL interact to provide a streamlined and cost-effective means for you to open an online store on the World Wide Web. You use your existing CounterPoint SQL inventory and customer information to connect your point-of-sale system with your online store.

Because you maintain only one set of data, your point-of-sale system and your online store will always be in sync. All your pricing, quantities, item descriptions, customers, etc. come directly from CounterPoint SQL.

If you already have a non-ecommerce Web site hosted elsewhere, you don't have to move it. Simply include a link from your existing Web site to your online store.

Once your online store is established, you can administer and maintain the store using your Web browser. The ecommerce functions built into CounterPoint SQL software allow you to publish CounterPoint SQL data to your online store. Orders are imported into your CounterPoint SQL system for processing and fulfillment.

For a further look at the features offered by CPOne, visit www.counterpointonline.com.

This document covers setting up CounterPoint SQL for CPOne.

Setup overview

You should create a thorough plan of your online store's organization **before** you begin setting up CounterPoint SQL.

We recommend that you begin setting up CounterPoint SQL **before** you sign up for CPOne. If you set up your ecommerce information before you sign up for CPOne, you won't have to pay the monthly hosting fees while you are still planning your store.

After signing up for CPOne, additional tasks must be performed using the CPOne Store Administration Web site accessed at www.cpostores.com/admin. You will be asked for the logon ID and password that Synchronics provided you when you signed up for CPOne.

CounterPoint SQL checklist

Use this checklist to set up CounterPoint SQL:

Setup steps:	What to use:
Update CounterPoint SQL software.	www.synchronics.com/support
Enable ecommerce in CounterPoint SQL.	Setup / Ecommerce / Control
Create ecommerce categories.	Setup / Ecommerce / Categories
Define publishing codes.	Setup / Ecommerce / Publishing Codes
Mark CounterPoint SQL items as ecommerce items.	Inventory / Items
Define ecommerce information for each eligible item, including a long description, and assign up to 25 online categories. You can also assign online categories to multiple items at the same time.	Inventory / Items Setup / Ecommerce / Categories
Create CPEExport.txt .	Ecommerce / Publish
Import CPEExport.txt into CPOne.	CPOne Store Administration

Once your store is up and running use the following steps to transfer CPOne order information to CounterPoint SQL:

Transfer steps:	What to use:
Export CPOne order information.	CPOne Store Administration
Import CPOne order information into CounterPoint SQL.	Ecommerce / Import

Setting up CounterPoint SQL

Updating CounterPoint SQL software

Installing the latest service pack

After you have installed CounterPoint SQL from the CD, visit the Synchronics Web site (www.synchronics.com/support) to download the CounterPoint SQL Service Pack (CPSQLSP.EXE). Download the file and run CPSQLSP.EXE to begin service pack installation. Follow the instructions that are provided on screen to complete the installation.

While visiting the Synchronics Web site, you can subscribe to the automatic email notification for future software and documentation upgrades. The service is free and ensures that you are notified of all future releases of software and documentation service packs.

Setting up ecommerce controls

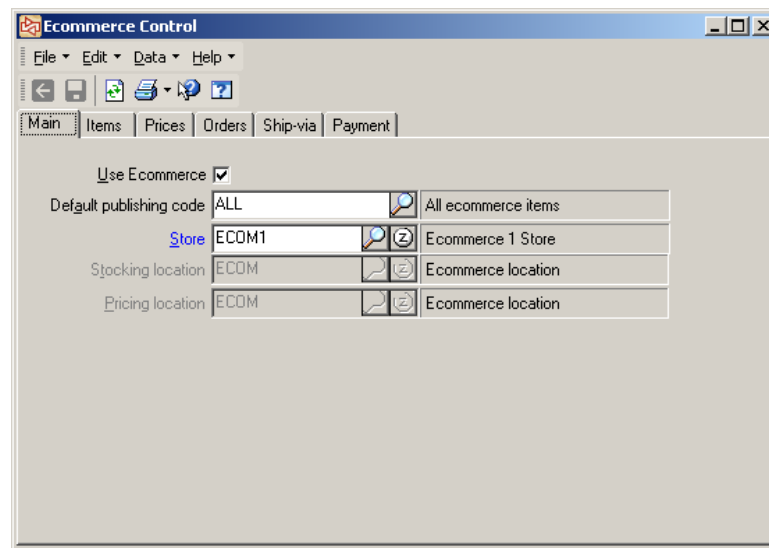
Setting up the ecommerce control file

To set up the ecommerce control file, choose **Setup / Ecommerce / Control** from the CounterPoint SQL menu.

NOTE: Prior to setting up the ecommerce control file, you should complete setup for Inventory and Point of Sale.

Main tab

The **Main tab** enables ecommerce and defines where ecommerce controls will be applied.



Use Ecommerce

Check the box labeled **Use Ecommerce**. If this box is unchecked, all of your ecommerce information is disabled. For example, if you have specified that an item is an ecommerce item and this box is left unchecked, the ecommerce tab no longer displays for the item (although information previously entered will be retained).

Default publishing code

Enter the default publishing code to use when publishing via **Ecommerce / Publish**. Initially, you may wish to leave this blank, and fill it in after you have defined at least one publishing code. See [Publishing codes](#) on page 15 for more information.

Store

Specify which store will correspond with your online store. This store will be used for all ecommerce processing. Only items stocked at the store entered here will be available to publish to your online store.

NOTE: In a Multi-Site installation of CounterPoint SQL, only one specific site should handle CPOne operations (this includes publishing data to CPOne and getting data from CPOne).

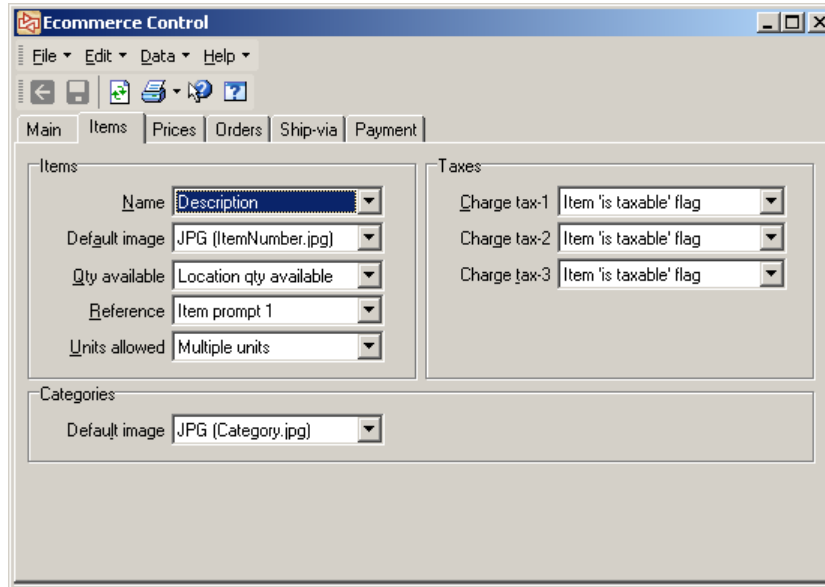
Stocking location and Pricing location

Stocking location and **Pricing location** display the defaults for the selected store and cannot be changed.

NOTE: Make sure that the store is set to use **Misc Chg 1** by checking **Use misc charge 1** on the **Misc charges** tab in **Setup / Point of Sale / Stores**. CPOne shipping charges are recorded as **Misc Chg 1**.

Items tab

The **Items tab** tells CounterPoint SQL how to publish item information to CPOne.



Items

Name

Specify which item description CPOne will use for the item name in your online store.

Select **Description**, **Short description**, **Long description**, or **Additional description 1, 2, or 3**.

Descriptions are pulled from the **Descriptions tab** under **Inventory / Items**.

Default image

Specify either **JPG** or **GIF** as the default image file type to use for items.

Qty available

Specify how to determine the available quantity for an item.

Select:

- Item qty available** To use the item's available quantity across all locations.
- Item qty on hand** To use the item's on-hand quantity across all locations.
- Location qty available** To use the item's available quantity at one specific location.
- Location qty on hand** To use the item's on-hand quantity at one specific location.

Reference

Define an item prompt to collect additional information (such as a monogram) from the customer when they purchase an item. **Item prompts 1, 2, and 3** are mapped to **Prompt codes 1, 2, and 3** under the **Other tab** in **Inventory / Items**.

Enter **Item prompt 1**, **Item prompt 2**, or **Item prompt 3**, or leave <blank> for **None**.

NOTE: You should only publish alpha type item prompt codes to CPOne. CPOne allows alpha entry at the item prompt, and you would encounter errors if you imported an order containing alpha characters for a numeric item prompt.

Units allowed

Specify the units of an item that online shoppers can purchase.

Select:

Stocking only To allow the purchase of stocking units only.

Preferred only To allow the purchase of preferred units only.

Multiple units To allow the purchase of all units.

NOTE: CPOne supports the first three alternate units for an item. If an item is gridded, alternate units are not used; all activity is in stocking units.

Taxes

Charge tax-1, 2, and 3

Specify how the item is taxed. (You set up the actual tax calculations in your online store.)

Select:

Item 'is taxable' flag To charge tax based on the Taxable flag under **Inventory / Items / Main**.

Yes (tax all items) To charge tax on all items

No (do not tax any items) To not charge tax on any items

Item 'ecommerce tax-1 flag' To charge tax based on the Ecommerce taxes flag set under **Inventory / Items / Ecommerce**.

Categories

Default image

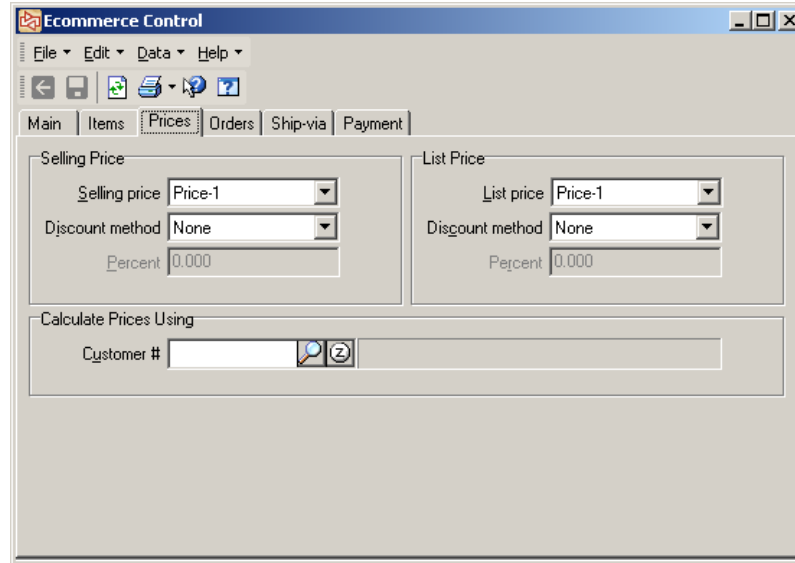
Specify **JPG** or **GIF** as the default image file type to use for the categories in your online store.

Select **None** if you are not using images.

Prices tab

The **Prices** tab allows you to configure the prices that are published to your CPOne store. You configure both the **Selling price** and the **List price**.

If you are using imported values for taxes and/or prices and using reason codes, then you should use **Setup / Point of Sale / Reason Codes** to set up a Point of Sale Reason Code of **CPOne** that is valid for tax overrides and/or price overrides. The reason code is used on imported orders for any price and tax overrides.



Selling Price

Selling price

Select **Calculated price**, **Price-1**, **2**, **3**, or **Regular price**.

Calculated prices are based on pricing defined in **Inventory / Items / Prices**.

NOTE: Calculated prices are always calculated based on the store, a quantity of one, and the date and time the item was published. If you specify calculated prices and there are no pricing rules defined for an item, then **Price-1** is used.

Discount method

Specify whether to discount or mark up items in your online store.

Select:

- None** To leave the Selling price as is.
- Discount** To apply a discount to the Selling price.
- Markup** To mark up the Selling price.

Percent

Displays when you specify a discount method of **Discount** or **Markup**.

Enter a percentage to discount or mark up the Selling price.

List Price

List price

Select **Calculated price**, **Price-1**, **2**, **3**, or **Regular price**.

Calculated prices are based on pricing defined in **Inventory / Items / Prices**.

Discount method

Specify whether to discount or mark up items in your online store.

Select:

None To leave the List price as is.

Discount To apply a discount to the List price.

Markup To mark up the List price.

Percent

Displays when you specify a discount method of **Discount** or **Markup**.

Enter a percentage to discount or mark up the List price.

Calculate Prices Using

Customer

Specify whether to calculate prices based on a specific customer. For example, you can add a customer named **CPONLINE** and define specific pricing rules for that customer. Those pricing rules could then be used for all of the items available in your CPOne store.

Orders tab

The **Orders tab** tells CounterPoint SQL how to import orders from CPOne.

The screenshot shows the 'Ecommerce Control' application window with the 'Orders' tab selected. The interface includes a menu bar (File, Edit, Data, Help) and a toolbar with icons for back, home, find, search, and next. The 'Orders' tab contains several configuration fields:

- Station:** 1 (Station 1 at Ecom)
- Drawer:** 1 (Drawer 1 at Ecom)
- Customer #:** CPONLINE (CPOne Customer)
- Tax method:** Imported
- Tax code method:** Customer
- Sales rep method:** Customer
- Price method:** Imported
- Notes item number:** CPNOTES (CPOne Notes Item)
- Discount item number:** CPDISCOUNT (CPOne discount item)
- Orders report:** Prompt user to preview

Station

Enter the station from which you will import orders. The station (or store, if order numbers are determined by the store) must be configured to auto-assign order numbers. Orders will be imported for the **Store** specified on the **Main** tab.

Drawer

Enter the drawer from which you will import orders.

Customer #

Enter the default customer for whom you will import orders. Imported orders will be assigned to this customer.

Tax method

Select:

Imported To accept the tax that is imported with the order.

Calculated To have CounterPoint SQL calculate tax during import.

NOTE: If you choose **Imported** for the tax method, any tax that is changed during the import will be marked as a tax override with a reason code of **CPONLINE**.

Tax code method

Specify how the tax code is derived when importing orders and customers from CPOnline.

Select:

Customer To use the tax code defined for the default ecommerce customer.

Customer + State To use the tax code defined for the default ecommerce customer plus the two letter state abbreviation.

NOTE: If you select **Customer tax code + state**, use **Setup / Customers / Tax codes** to define all possible tax codes. Errors are generated if the tax code does not exist when an attempt is made to download orders. CounterPoint SQL's **Customer tax code + state** method appends the bill-to state to the default customer's tax code. For example, if the default customer's tax code is **WEB**, and the order's bill-to state is **TN**, this method would use tax code **WEBTN**.

Sales rep method

Select:

Customer To use the existing sales rep for the default ecommerce customer on the imported order.

Affiliate To use the affiliate code imported from CPOnline as the sales rep.

Price method

Select:

Imported To use the price imported with the order.

Calculated To calculate the price during import.

NOTE: If you choose **Imported** for the price method, any price that is changed during the import will be marked as a price override with a reason code of **CPONLINE**.

Notes item number

Specify a **Notes item number**. The specified **Notes item number** should be defined as a non-inventory item and must be stocked at the location for the ecommerce **Store** defined on the **Main** tab. Any notes entered by a shopper in CPOne will be imported as one or more line items for the notes item in CounterPoint SQL.

Discount item number

Specify a **Discount item number**. The **Discount item number** must be defined as a discount type item and must be stocked at the location for the ecommerce **Store** defined on the **Main** tab. Any CPOne order discount will create a discount line on the imported order.

Orders report

Your **Orders report** selection controls reporting after importing orders.

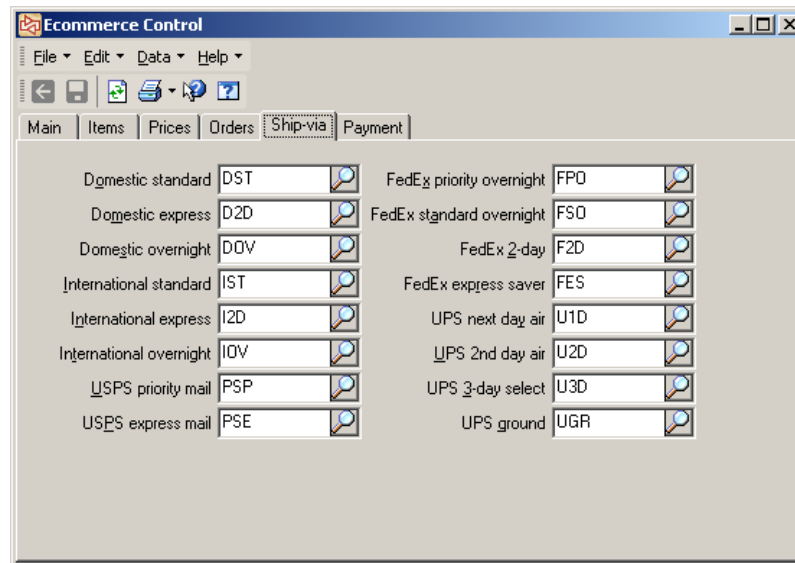
Select:

- Prompt user to preview** To prompt the user to preview the Orders report.
- Preview automatically** To automatically display the Orders report in the preview window.
- Prompt user to print** To prompt the user to print the Orders report.
- Print to default printer** To automatically print the Orders report to the default printer.
- Skip** To bypass printing or previewing the Orders report.

Ship-via tab

The **Ship-via** tab maps the ship-via codes in CounterPoint SQL to the different delivery methods available for CPOne orders.

NOTE: Ship-via codes must first be defined under **Setup / System / Ship-via Codes**.



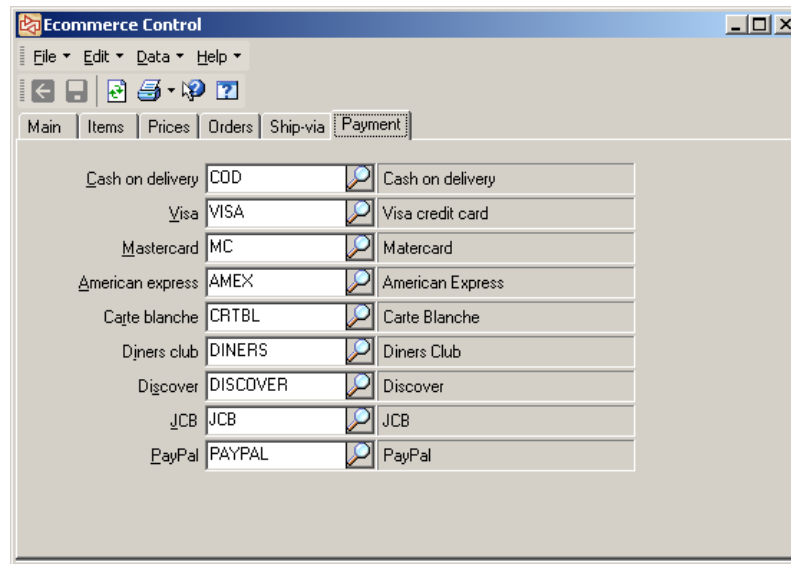
Enter the ship-via codes that correspond to the delivery methods available in CPOne.

NOTE: You only need to enter information for the shipping methods that will actually be used in your CPOne store.

Payment tab

The **Payment** tab lets you map the CounterPoint SQL pay codes to the pay codes available in CPOnline. You can use cash or credit card pay codes. Credit card transactions are not authorized until you release the order in CounterPoint SQL.

NOTE: Pay codes must first be defined under **Setup / System / Pay Codes**.

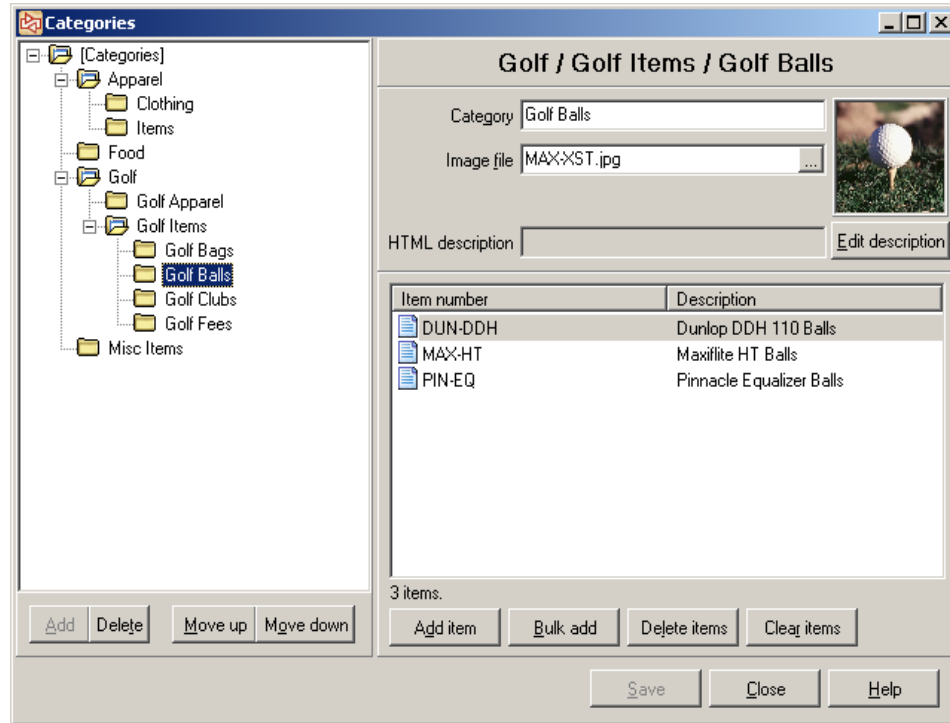


Enter the pay codes that correspond to the payment methods available in CPOnline.

NOTE: You only need to enter information for the pay codes that will actually be used in your CPOnline store.

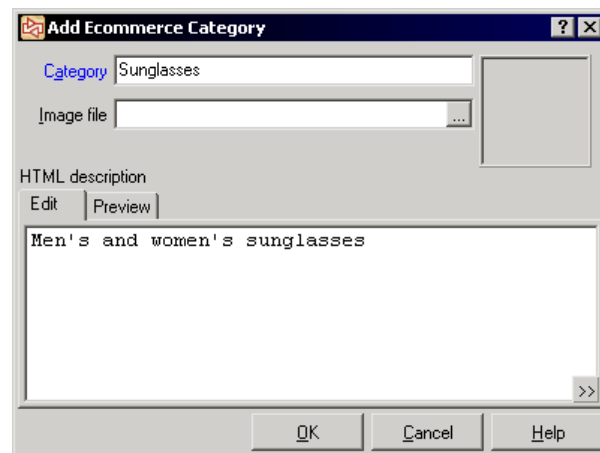
Defining CPOne categories

Select **Setup / Ecommerce / Categories** to configure the categories displayed in your CPOne store



The tree that displays on the left side of the screen is similar to the category organization that shoppers will see in the online store.

Under **Categories**, click **Add**. The **Add Ecommerce Category** window displays.



Category

Enter a new category.

If desired, enter an **Image file** and **HTML description** for the category.

You can display an item in up to 25 categories. Although you can move the categories up or down, this has no effect on the display order in CPOne (which is alphabetical by default, though you can modify the sort order in CPOne Store Administration).

NOTE: The ecommerce categories defined here are not directly related to your CounterPoint SQL item categories.

Defining CPOne sub-categories

To create a sub-category, follow the steps above to create a new category and then drag that category's folder into an existing category.

The category structure (i.e., category, sub-category, sub-sub-category, etc.) can be eight levels deep.

NOTE: You cannot add a sub-category to a category that contains items.

Associating items with categories

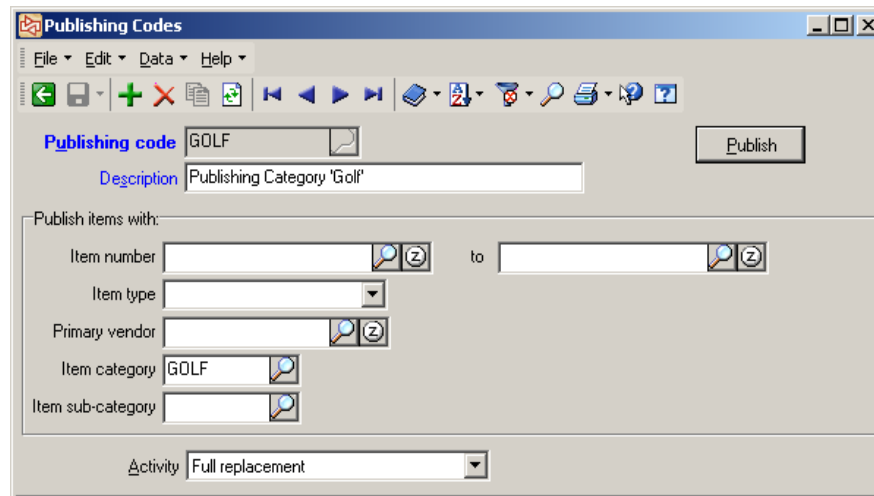
To define the items associated with categories and subcategories, select a category or sub-category. Click **Add item** to add a single inventory item to the category. Click **Bulk add** to add a multiple items to the category.

NOTE: You cannot add items to categories that contain sub-categories.

Publishing codes

Publishing codes allows you to define codes so that you can publish items to your CPOne store based on selected criteria. For example, you might choose to publish all of your ecommerce items to your online store, or you may choose to selectively publish only a specific category or range of item numbers.

Select **Setup / Ecommerce / Publishing Codes**.



Publishing code

Enter a publishing code or press **F9** to lookup existing publishing codes.

Description

Enter a description for the publishing code.

Publish items with

Item number

Enter a starting and ending item number.

Item type

Select **Inventory**, **Non-Inventory**, **Service**, or **Discount** as the item type, or leave **<blank>** for **All**.

Primary vendor

Enter the primary vendor for the item range you wish to publish, or leave **<blank>** for **All**.

Item category

Enter an item category, or leave **<blank>** for **All**.

Item sub-category

Enter an item sub-category, or leave **<blank>** for **All**.

Activity

Choose from the following activities:

- | | |
|---------------------------------|--|
| Full replacement | To mark all of the items in your CPOne store as inactive and perform a full replacement of the items included in this publishing code.
NOTE: This is the only way to remove items from the site. |
| Add/Replace items | To add new items and replace existing items based on this publishing code (without marking them as inactive first). |
| Update prices/quantities | To update prices and quantities for items included in this publishing code. |

WARNING: If you define a publishing code for selected criteria and choose **Full replacement** and then publish, all of your existing items are removed from your online store and only those items included in the publishing code are added to your store. For example, if your store includes categories **GOLF**, **APPAREL**, and **MISC** and you publish a full replacement code containing only the category **GOLF**, your store will then only contain the items from the **GOLF** category.

Defining ecommerce items

Once you have completed ecommerce setup, you need to identify items as ecommerce items. Select **Inventory / Items** from the CounterPoint SQL menu. Enter the **Item number**.

The screenshot shows the 'Items' window in CounterPoint SQL. The 'Ecommerce' tab is selected. The 'Ecommerce item' checkbox is checked. The 'URL' field contains 'http://www.adamgolf.com'. The 'Image file' field contains 'ADM-TL2.jpg'. The 'New' checkbox is checked. The 'On special' dropdown is set to 'Yes'. The 'Charge freight' checkbox is checked. The 'Freight amount' field is empty. The 'Ecommerce taxes' section has three checkboxes for 'Charge tax-1', 'Charge tax-2', and 'Charge tax-3', all of which are unchecked. The 'Last published' section shows a date of '9/20/2002 3:34 PM' and a status of 'Active'. The 'HTML description' field is empty. The 'Category' dropdown is set to 'Apparel/Clothing'. At the bottom, there are buttons for 'Barcodes', 'Inventory', 'Prices', 'Substitute Items', 'Vendor Items', and 'Grid'.

Ecommerce tab

For those items you want to include in your online store, click on the **Ecommerce** tab.

Ecommerce item

Check the **Ecommerce item** box to designate the item as an ecommerce item.

URL

Enter a URL to direct customers to another Web site with information about the item.

Image file

Specify the image file for the item.

New

Check the **New** box to designate the item as a **New** item. By checking the **New** box, a flag is set and the item shows up on the CPOOnline New Items page.

Until

Specify when the item should no longer be marked as a **New** item. (If you designated the item as **New**.)

On special

Specify whether the item is **On special** by selecting **Yes**, **No**, or **Check promos**.

If you select **Yes**, this item will appear on the CPOOnline Specials page until the date specified. If you select **Check promos**, this item will appear on the CPOOnline Specials page anytime it is on sale in CounterPoint SQL.

Until

Specify when the item should no longer be marked as **On special**. (If you designated the item as **On special**.)

Charge freight

Check the **Charge freight** box to indicate that freight should be charged for the item.

Freight amount

Indicate the amount of freight to be charged (provided you have configured your online store to charge freight by the item).

HTML description

Enter a description for the item that will display in your online store.

Category

Assign the item to one or more categories. (This can also be done using **Setup / Ecommerce / Categories**.) CPOne supports a maximum of 25 categories for a single item.

Ecommerce taxes

Select how this item is taxed in your online store.

Last published

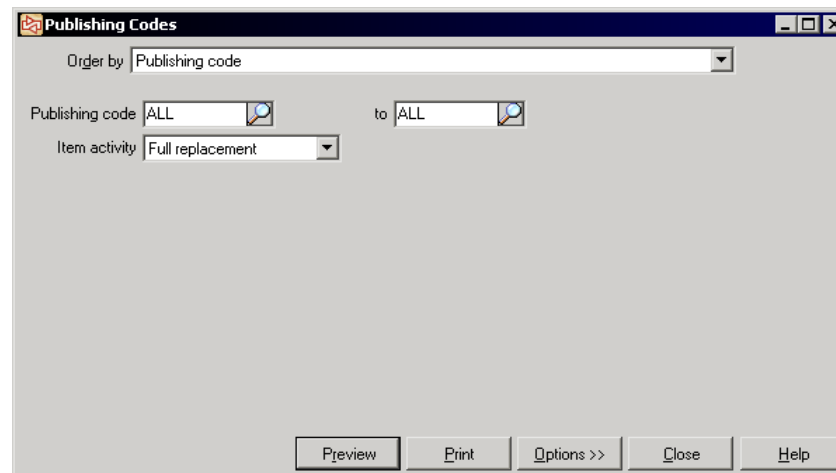
This field displays the date that ecommerce information for this item was last published to CPOne.

Printing ecommerce reports

Printing the Publishing Codes report

The Publishing Codes report allows you to see how your publishing codes are set up.

Select **Setup / Ecommerce / Reports / Publishing Codes**.



The screenshot shows a window titled "Publishing Codes" with the following controls:

- Order by: Publishing code
- Publishing code: ALL
- to: ALL
- Item activity: Full replacement
- Buttons: Preview, Print, Options >>, Close, Help

Order by

Specify whether to list the publishing codes in order by **Description (upper)** or **Publishing code**.

Publishing code

Specify the range of publishing codes to include on the report.

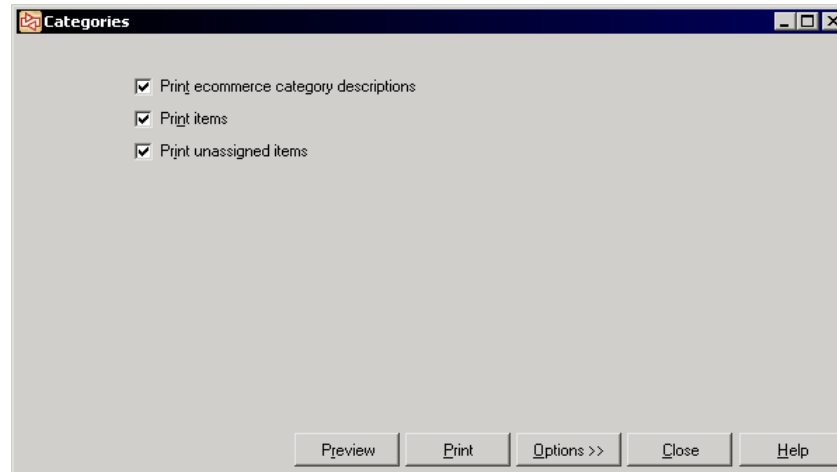
Item activity

Select:

- Full replacement** To see which publishing codes are assigned to make a **Full replacement**.
- Add/Replace items** To see which publishing codes are assigned to **Add/Replace items**.
- Update prices/quantities** To see which publishing codes are assigned to **Update prices/quantities**.

Printing the Categories report

The Categories report allows you to see how your CPOne categories are organized. Select **Setup / Ecommerce / Reports / Categories**.



Print ecommerce category descriptions

Select whether to report the HTML description for each category.

Print items

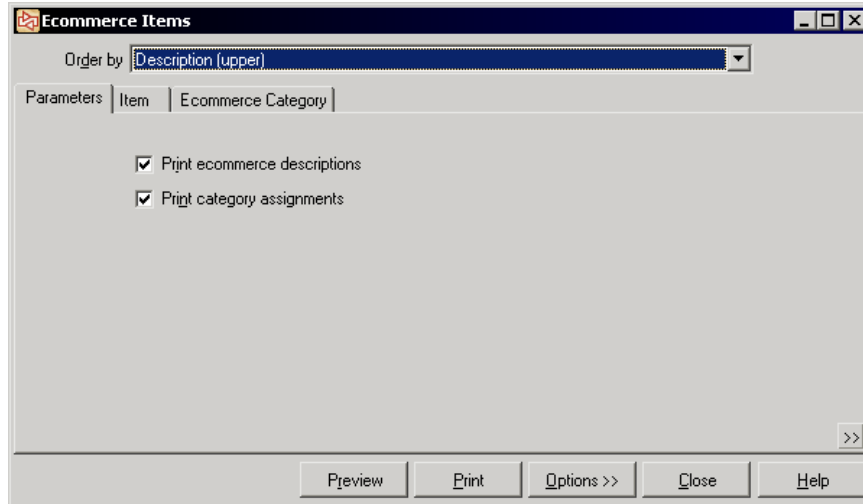
Specify whether to report which items are in which categories.

Print unassigned items

Specify whether to report items that have not been assigned to any ecommerce category.

Printing the Ecommerce Items report

The Ecommerce Items report allows you to see all items marked as ecommerce items. Select **Ecommerce / Reports / Ecommerce Items**.



Order by

Specify the order in which to list the ecommerce items. Select **Description (upper)**, **Category**, **Item type**, **Tracking method**, **Barcode**, **Long description (upper)**, **Primary vendor**, **Vendor's item number**, or **Item number**.

Parameters tab

Print ecommerce descriptions

Specify whether to report the HTML descriptions for ecommerce items.

Print category assignments

Specify whether to report the categories to which ecommerce items are assigned.

Item tab

Item number

Enter a beginning and ending item number for the ecommerce items you wish to report.

Ecommerce Category tab

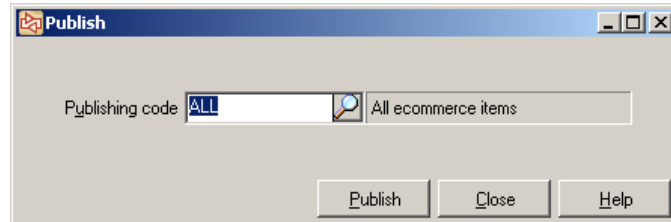
Category

Enter the range of categories whose ecommerce items you wish to report.

Using CounterPoint SQL and CPOne

Publishing items

Once ecommerce setup is complete, you can publish your items to your online store using **Ecommerce / Publish**.



You should use the Publish function periodically to update your online store with price and quantity information, or to add or update items in your online store. Publishing creates a file named **CPExport.txt** in the CPOne directory for your company located below the top-level CounterPoint SQL directory (e.g., **C:\CounterPoint\CompanyName\CPOne**). You can then upload this file to CPOne to update your online store. (You can also publish items by clicking the **Publish** button in **Setup / Ecommerce / Publishing Codes**.)

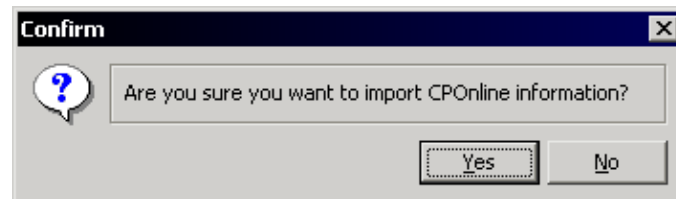
Importing Orders

Orders are imported with customer name and address information, but using a single customer number.

To import orders from CPOne, use CPOne Store Administration to export the orders from your online store and save them as a batch file called **CPImport.txt**, located in the CPOne directory for your company (e.g., **C:\CounterPoint\CompanyName\CPOne**).

NOTE: You will have to map a drive letter to your CounterPoint SQL top-level directory in order to use CPOne's browse function to import a file.

Choose **Ecommerce / Import** to import the orders.



Specify whether to import a batch of orders by selecting **Yes** or **No**.

The message **Loading - Please Wait...** displays while the orders are importing.

When the import is complete the Orders Report can be previewed and printed.



NOTE: For further instructions on downloading orders from your online store for export to CounterPoint SQL, see **Operations / Export / Instructions** in CPOne Store Administration.

CPOnline and CounterPoint SQL Notes

- Item numbers must be 15 characters or less.
- CPOne only handles integer quantities.
- CPOne only supports two dimensional item grids.
- If you publish cell-specific selling prices, you should set up your online store to show grid selections as combined, not separate.
- Do not rearrange the dimension order for a gridded item or the sequence of item alternate units with outstanding orders on file in CPOne. First import online orders, then change the grid, then publish item changes to CPOne.
- CPOne does not recognize enlarged data fields. For example, if you expand the item description beyond 80 characters, CPOne will not use the additional characters.

Signing up for CPOne

To ensure that you get the most out of your CPOne service, we recommend that you sign up for the CPOne service after you've completed setting up CounterPoint SQL. Once you've completed setup, be sure you have your images ready and sign up at www.counterpointonline.com.