



# CPOne

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CPOne is an ecommerce and web-hosting service from Synchronics. This document provides detailed instructions for setting up CounterPoint V7 to integrate with CPOne.

3/23/2004

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## Introduction

CPOne is an ecommerce and web-hosting service from Synchronics designed especially for CounterPoint merchants. CPOne and CounterPoint 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 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.

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 software allow you to publish CounterPoint data to your online store. Orders are imported into your CounterPoint system for processing and fulfillment.

Shoppers who visit your CPOne store can be imported into CounterPoint to create CounterPoint customers. If you prefer, you can keep your CPOne customers and your CounterPoint customers separate, and only retain CPOne customer information in Ticket (invoice) history.

You can publish some or all of your existing CounterPoint customers to your CPOne store and issue them initial passwords. You can then invite your existing customers to order from you online using their "already set up" online accounts.

For a further look at the features offered by CPOne, visit [www.counterpointonline.com](http://www.counterpointonline.com).

This document covers setting up CounterPoint V7 for CPOne.

# Setup overview

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

After signing up for CPOne, additional setup tasks must be performed using the CPOne Store Administration functions accessed at <http://admin.cpostores.com>. You will be asked for the logon ID and password that Synchronics provided you when you signed up for CPOne.

## CounterPoint V7 checklist

Use this checklist to set up CounterPoint V7:

Setup steps:	What to do:
Update CounterPoint software.	<a href="http://www.synchronics.com/support">www.synchronics.com/support</a>
Enable ecommerce in CounterPoint.	Setup / Ecommerce / Control
Create ecommerce categories.	Setup / Ecommerce / Categories
Mark CounterPoint items as ecommerce items.	Setup / Ecommerce / Set item ecommerce flags or Inventory / Items
Define ecommerce information for each ecommerce item, including a long description, and assign each item to up to 14 online categories. Import the long description from a text file (optional). Assign multiple items to online categories at the same time (optional).	Inventory / Items  Setup / Ecommerce / Import item long descriptions Setup / Ecommerce / Assign ecommerce categories
Define alternate names for displaying units in your online store (optional).	Setup / Ecommerce / Unit mapping
Define alternate names for displaying cell tags and names (e.g., colors, sizes, etc.) in your online store (optional).	Setup / Ecommerce / Cell tag mapping
Map CounterPoint fields to CPOne fields.	Setup / Ecommerce / Item mapping
Mark CounterPoint customers as ecommerce customers.	Setup / Ecommerce / Set customer ecommerce flags or Customers / Customers
Define ecommerce information for ecommerce customers.	Customers / Customers
Create the "CounterPoint Publication file."	Ecommerce / Publish
Import the "CounterPoint Publication file" into CPOne.	CPOne Store Administration



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

<b>Transfer steps:</b>	<b>What to do:</b>
Export CPOne order information.	CPOne Store Administration
Import CPOne order information into CounterPoint.	Ecommerce / Import

# Setting Up CounterPoint V7

## Updating CounterPoint software

After installing CounterPoint, prepare your CounterPoint system for ecommerce by:

1. Installing the latest service pack.
2. Running **Optional initialize**.

### Installing the latest service pack

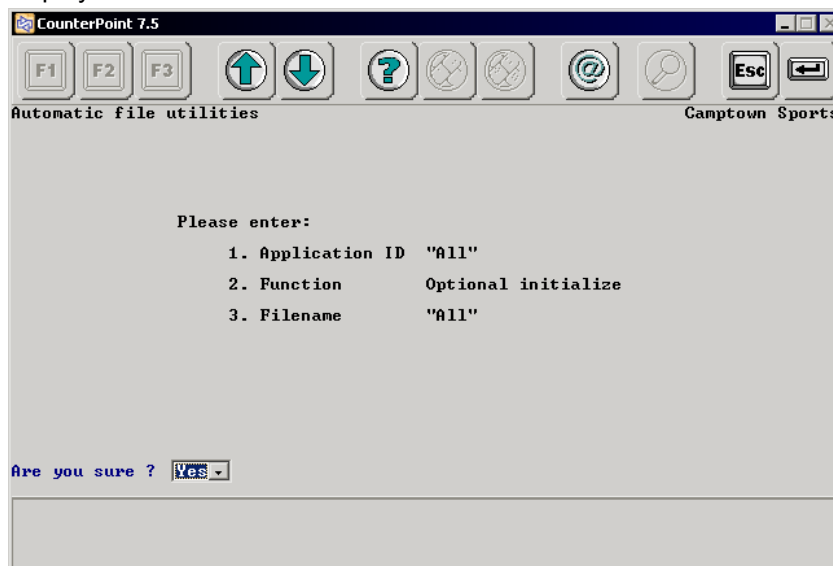
After you have installed CounterPoint V7 from the CD, visit the Synchronics Web site ([www.synchronics.com/support](http://www.synchronics.com/support)) to download the latest CounterPoint V7 Service Pack (CPSP.EXE). Download the file and run CPSP.EXE to begin service pack installation. Follow the instructions that are provided on the 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.

### Running Optional initialize

Run the **Optional initialize** utility after installing software updates. This utility only needs to be run one time for each company. This utility creates/updates the data files for your CounterPoint company to run ecommerce.

Start CounterPoint, and select **File Utilities / Automatic**. The **Automatic file utilities** screen displays:



1. **Application ID**  
Press F1 to select All.

## 2. Function

Select **Optional initialize** and press **Enter**.

## 3. Filename

All displays automatically to include all files.

Press **Enter** at **Field Number to change ?**, if all entries are correct. Select **Yes** at **Are you sure?**, then press **Enter** to start the initialization.

A status screen displays for the optional initialization. When the process is complete, the message **Processing complete – press ESC** displays.

# Setting up ecommerce controls

## Entering methods and rules for importing orders

Select **Setup / Ecommerce / Control** from the CounterPoint menu.

The screenshot shows the CounterPoint 7.5 Control screen. The window title is "CounterPoint 7.5". The menu bar includes F1, F2, F3, and navigation icons. The screen displays the following settings:

1. Use Ecommerce ?	Y
2. Order import method	Order Entry
3. Location	MAIN Central
4. Profit center	100
5. Tax code method	Customer tax code
6. Next publish file #	1

Field number to change ?

### 1. Use Ecommerce ?

Specify whether to enable ecommerce features on your CounterPoint system by selecting **Yes** or **No**.

### 2. Order import method

You can import CPOne orders into either **Order Entry** or **Point of Sale**.

If you select **Order Entry**, both the **Order Entry control record (Setup / Order Entry / Control)** and the **Order Entry store number** must already be on file in your CounterPoint system.

If you select **Point of Sale**, specify the **Drawer number** that you will use to receive the imported orders.

**NOTE:** When importing orders using **Order Entry**, shoppers are able to visit your online store and view the current status of their online orders. When using **Point of Sale**, information about order status is not sent back to CPOne, so online shoppers

will not be able to see order status information in your storefront. See the [Appendix](#) for more information on order processing with Order Entry and Point of Sale.

### 3. Location

Select the location to be assigned to any imported order (and all associated line items). Press F1 to select the location specified for the order import method you have already selected.

### 4. Profit center

Select the profit center you want assigned to imported orders.

Press F1 to select the profit center for the order import method you have already selected.

### 5. Tax code method

Select **Customer tax code** or **Customer tax code + state** to determine how the tax code is derived when importing orders and customers from CPOne.

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 import CPOne orders. CounterPoint'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**.

### 6. Next publish file #

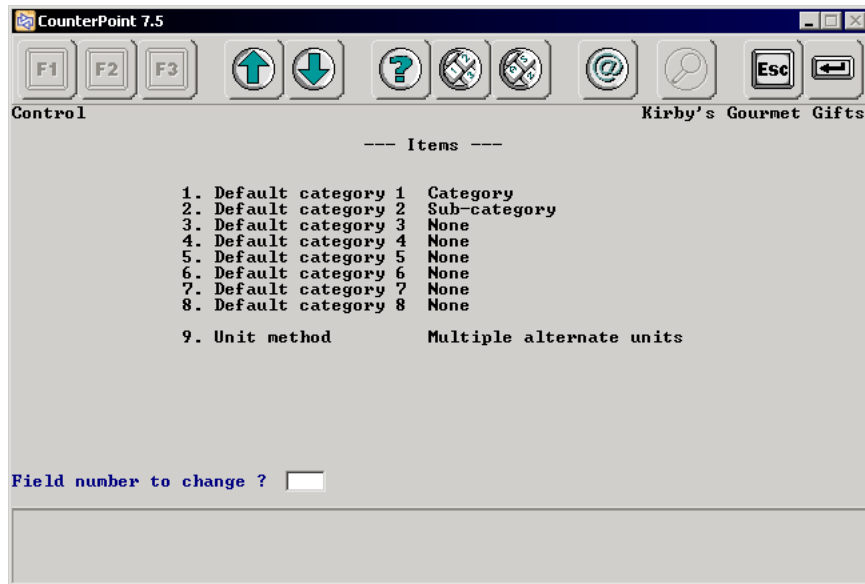
CounterPoint creates a new file with a sequentially assigned number every time the publish function is run. We recommend you initially set the file number to **1** in order to ensure room for subsequent file numbers.

## Entering item defaults

---

The **Items** information screen under **Setup / Ecommerce / Control** allows you to assign fields to category levels in order to assist in category assignment.

The assignment of default category fields is NOT required. If you do not specify default categories, you can still use **F9** in the **Ecommerce** popup window of the item record to lookup and assign categories to items.

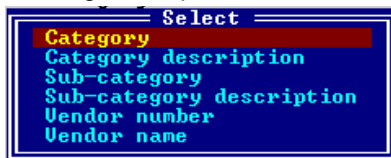


### Default category (1-8)

The fields selected for the **Default category** fields (1 thru 8) are used as values for looking up categories when assigning ecommerce categories in the **Ecommerce** popup window of the item record.

If you **do not** want to select fields for default categories, select a unit method, then press **Enter** at **Field number to change ?** to move to the **Customers** information screen.

If you **do** want to select fields for default categories, enter a field number at **Field number to change?** and press F2 to select from the fields available. The selection box displays:



Highlight a field and press **Enter** to select it as the default category lookup.

### 9. Unit method

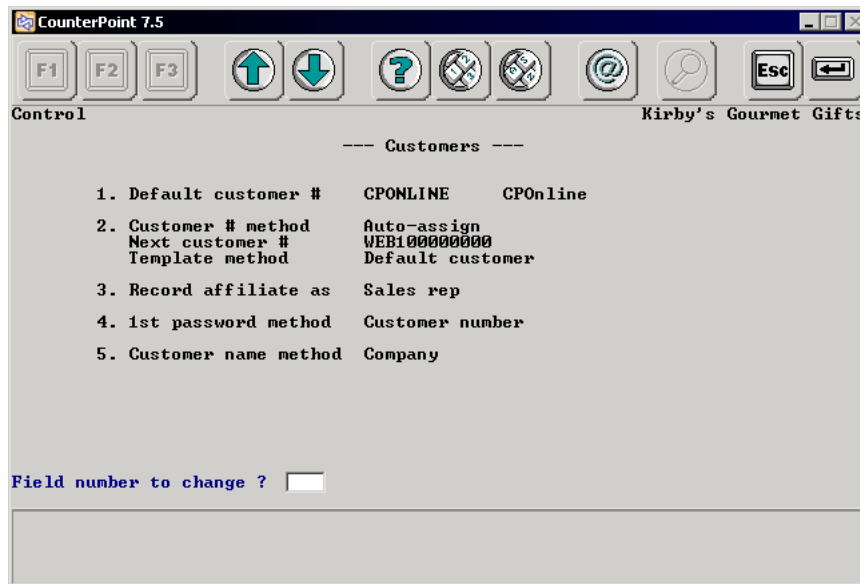
Select:

- Stocking unit** To publish item prices and quantities in terms of the item's **Stocking unit**.
- Preferred unit** To publish item prices and quantities in terms of the item's **Preferred unit**.
- Multiple alternate units** To allow shoppers to select which unit they wish to order.

When all desired default category fields are assigned and the unit method has been selected, press **Enter** at **Field number to change ?**. The **Customers** information screen displays.

## Entering ecommerce customer information

The information you provide on this screen determines how CounterPoint defines customer records for customers imported from CPOne and how passwords for customers exported from CounterPoint into CPOne are established.



### 1. Default customer #

Select the customer to use as the default customer to provide certain values such as terms code, parent customer, etc. for imported orders and customers.

### 2. Customer # method

Indicate how you want to assign customer numbers to new customers imported from CPOne.

Select:

- |                                     |  |
|-------------------------------------|--|
| <b>Default customer</b>             | To use one customer number for all online orders. <b>Default customer</b> does not provide tracking of information by individual customer.   |
| <b>Default customer + state</b>     | To use one customer number per bill-to state for online orders. <b>Default customer + state</b> will create those customers on-the-fly as new states join your clientele.              |
| <b>Auto-assign</b>                  | To create a new customer record in CounterPoint by assigning a unique customer number to each CPOne shopper.   |
| <b>Default customer + affiliate</b> | To use one customer number per affiliate Web site. <b>Default customer + affiliate</b> will create those customers on-the-fly as customers link to CPOne from new affiliate Web sites. |

### NOTES:

- Affiliate Web sites are sites that include a link to your online store and can be compensated for sending you traffic. You must enable the affiliate program in CPOne Store Administration if you wish to use affiliate codes in your customer numbers.

- If you select either **Default customer + state** or **Default customer + affiliate**, the **Default customer #** needs to be short enough to include the state or affiliate within the customer # field.
- If you select either **Default customer + state** or **Default customer + affiliate**, you are prompted for the **Not-on-file handling** method. The options for entry are: **Add customer**, **Use default customer**, and **Log error**. If you select **Add customer**, a new customer will be added if the customer record is not found. If you select **Use default customer**, the default customer will be used when a customer record is not found. If you select **Log error**, a customer record will not be created and an error (e.g., **Customer record not on file**) will be written to the ecommerce import log.
- If you select **Auto-assign**, you are prompted for the **Next customer #** and the **Template method**. Each time a new CPOne customer is added, the **Next customer #** will automatically be increased by 1. Be sure to set the **Next customer #** to a figure that will not overlap with the **Next customer #** in **Setup / Customers / Control**. For example you might set the **Next customer #** to WEB1000000. Choose a template method of **Default customer** to assign a default customer type or **Default customer + affiliate** to assign multiple customer types along with affiliated web sites.

### 3. Record affiliate as

(Not applicable) displays if you selected **Default customer** as the **Customer # method**.

The affiliate code identifies the Web site from which an ordering customer linked to your store (if you have enabled the affiliate program in CPOne Store Administration).

Press F2 to display a list of profile fields from which to select how the affiliate code is stored in CounterPoint. For example, if you choose to store the affiliate code as a Sales Rep, you can track the commissions due to the affiliate Web site associated with an order.

**NOTE:** The options available for entry in this field are defined in **Setup / Customers / Control**.

Leave <blank> for **None**. The imported affiliate for this customer record will not be retained.

### 4. 1st Password Method

Specify how you want to assign the customer's initial password for customers that you publish from CounterPoint.

Select:

**Customer number** To set the CPOne customer's password to the respective customer number.

**Generate random** To generate a random value for the CPOne customer's initial password.

**NOTE:** If you publish customers from CounterPoint and generate passwords for those customers, you will need to inform your customers of their initial password. Customers will be required to change passwords the first time they log in to your online store.

### 5. Customer name method

Indicate how CounterPoint will determine the customer name and contact for new customers imported from CPOnline.

Select:

- Company** To store what your customer enters in the CPOnline **Company** field as the **Customer name** in the customer record. The entry in the CPOnline **Name** field is stored in the **Contact** field of the customer record.
- Name** To store what your customer enters in the CPOnline **Name** field as the **Customer name** in the customer record. The entry in the CPOnline **Company** field is stored in the **Contact** field of the customer record.

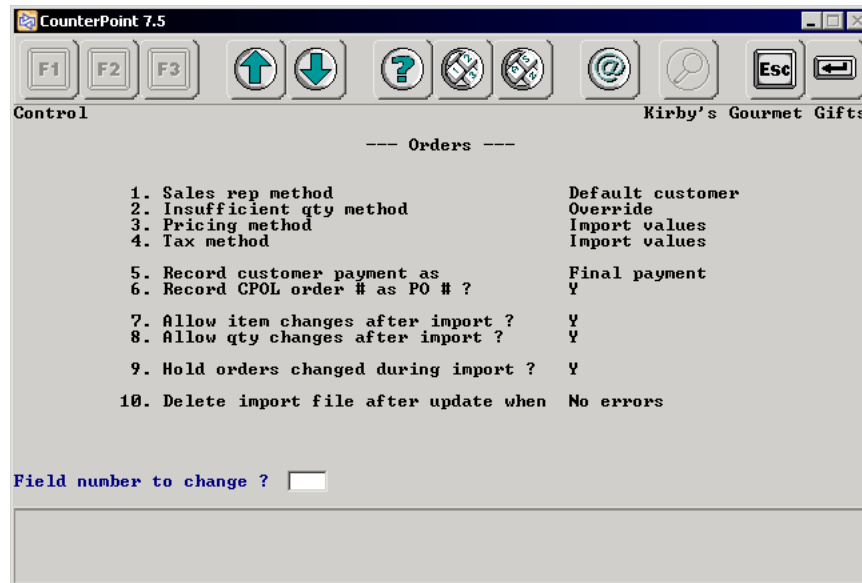
**NOTE:** If no **Company** is specified in CPOnline, the **Name** is used as the **Customer name** in CounterPoint.

**NOTE:** If you chose the **Separate First/Last** name format in CPOnline Store Administration, you must select **Name** as the Customer name method.

Press **Enter** at **Field number to change ?**. The **Orders** information screen displays.

## Entering ecommerce order information

The information you enter on the **Orders** screen specifies how online orders are processed by CounterPoint.



### 1. Sales rep method

Select:

- Customer** To use the existing sales rep for the customer on the imported order.
- Default customer** To use the sales rep from the default customer record. (New customers are automatically assigned this sales rep.)
- Affiliate** To use the affiliate code as the sales rep (i.e., to track the commissions due to a Web site that sent an ordering customer to your store).

## 2. Insufficient qty method

Indicate the method you want to use to handle insufficient quantities for imported orders.

Select:

- Override** To override the insufficient quantity.
- Backorder** To backorder the insufficient quantity.
- Ship-in-stock** To process the available quantity only.
- Cancel** To cancel the line.

## 3. Pricing method

Select:

- Import values** To accept the prices that are imported in the order.
- Calculated price** To have CounterPoint calculate prices during import.

**NOTE:** When customers place orders in your online store, they are provided with a total amount for the order. If you elect to calculate prices during import, the total order amount may change. This means that you may end up charging your customers more or less than they expect to pay for their order.

We strongly recommend that you set this field to **Import values** in most cases.

## 4. Tax method

Select:

- Import values** To accept the tax that is imported with the order.
- Calculated tax** To have CounterPoint calculate tax during import.

**NOTE:** When customers place orders in your online store, they are provided with a total amount for the order. If you elect to calculate taxes during import, the total order amount may change. This means that you may end up charging your customers more or less than they expect to pay for their order.

We strongly recommend that you set this field to **Import values** in most cases.

## 5. Record customer payment as

If you are using the Order Entry import method select:

- Deposit** To store online order payments as deposits in CounterPoint.
- Final payment** To store online order payments as final payments in CounterPoint.

If you are using the Point of Sale import method, **Final payment** is automatically selected.

## 6. Record CPOL order # as PO # ?

Select:

- Yes** To store the CPOne order number in the P.O.# field.  
This selection enables you to look up orders by the CPOne order #, which is a number that is given to your online customers with the confirmation of their orders.

- No** The CPOne order number must be looked up through Order Entry.  
**NOTE:** If you enter **No**, there will be no way to look up the order by CPOne order number once the order has been fully invoiced.

**7. Allow item changes after import ?**

Select:

**Yes** To allow you to change item numbers for individual order line items after they are imported into CounterPoint.

**No** To disallow changes to item numbers after import.

In Order Entry, you are allowed to make changes to orders imported from CPOne if:

- a. You select **Yes** to **Allow item changes after import?** , and
- b. The order has not been invoiced. Once an invoice has been created for an order (even a partial invoice), changes to the order are not allowed.

**8. Allow qty changes after import ?**

Select:

**Yes** To allow you to make changes to item quantities after orders are imported into CounterPoint.

**No** To disallow quantity changes after imports.

**9. Hold orders changed during import ?**

Select:

**Yes** To automatically place orders on hold that are changed during import.

**No** If orders changed during import should not be placed on hold.

**10. Delete import file after update ?**

Select:

**Always** To delete the import file after the import is complete.

**Never** To retain the import file after the import is complete.

**No errors** To delete the file only if no errors occurred during import.

See [Importing CPOne information into CounterPoint](#) on page 61 for more information on importing orders.

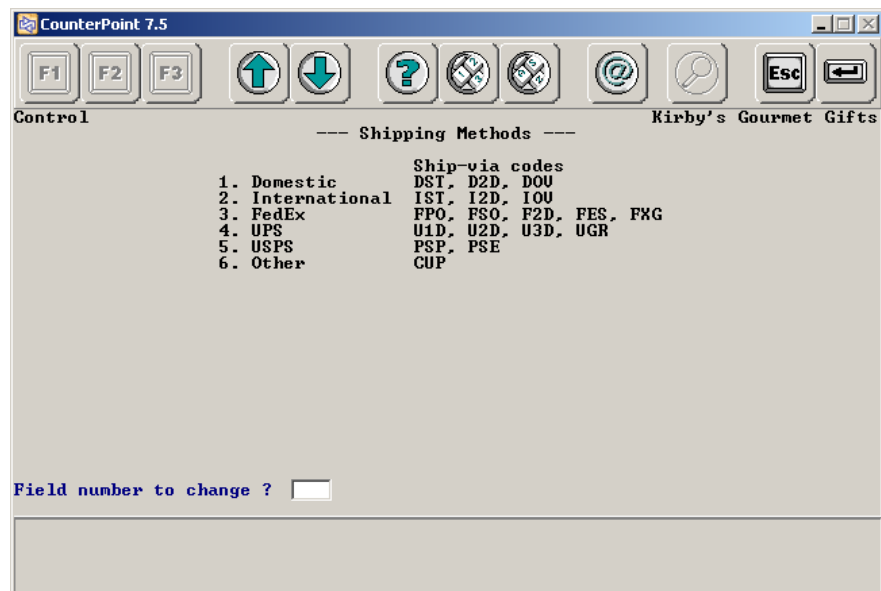
**NOTE:** Previously imported files can be downloaded again from CPOne Store Administration for viewing at a later date.

Press **Enter** at **Field number to change ?**. The **Shipping Methods** screen displays.

## Entering shipping methods for ecommerce

The **Shipping Methods** screen allows you to map ship-via codes from CounterPoint to CPOnline shipping methods. The CPOnline shipping methods are the numbered items listed on the left side of the screen.

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



Control --- Shipping Methods --- Kirby's Gourmet Gifts

	Ship-via codes
1. Domestic	DST, D2D, DOU
2. International	IST, I2D, IOU
3. FedEx	FPO, FSO, F2D, FES, FXG
4. UPS	UID, U2D, U3D, UGR
5. USPS	PSP, PSE
6. Other	CUP

Field number to change ?

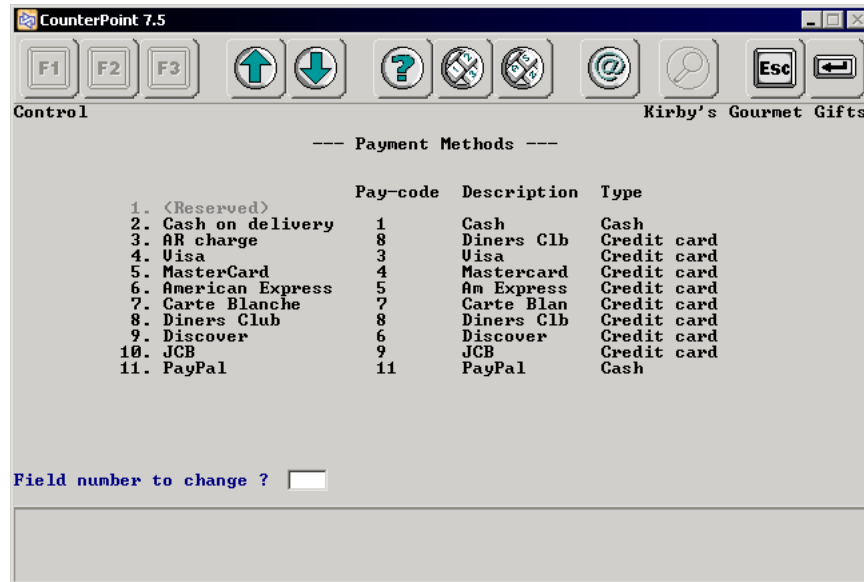
Enter the ship-via code that corresponds to each shipping method that you want to use for online orders.

**NOTE:** You don't need to enter a ship-via code for shipping methods that you will not use in your CPOnline store. Be sure that you are consistent in specifying shipping methods in CPOnline Store Administration. If an online order is created with a shipping method online that is not supported in CounterPoint, the order is flagged and not imported.

Press **Enter** at **Field number to change ?**. The **Payment Methods** screen displays.

## Entering payment methods for ecommerce

The **Payment Methods** screen allows you to map pay-codes from CounterPoint to CPOnline payment methods. The CPOnline payment methods are the numbered items listed on the left side of the screen.



Control Kirby's Gourmet Gifts

--- Payment Methods ---

	Pay-code	Description	Type
1. <Reserved>			
2. Cash on delivery	1	Cash	Cash
3. AR charge	8	Diners Clb	Credit card
4. Uisa	3	Uisa	Credit card
5. MasterCard	4	Mastercard	Credit card
6. American Express	5	Am Express	Credit card
7. Carte Blanche	7	Carte Blan	Credit card
8. Diners Club	8	Diners Clb	Credit card
9. Discover	6	Discover	Credit card
10. JCB	9	JCB	Credit card
11. PayPal	11	PayPal	Cash

Field number to change ?

Enter a pay-code for each payment method you want to use in your online store. Do not enter a pay-code for payment methods that you will not use for CPOnline orders.

The pay-codes available are those that you have already defined in CounterPoint. Enter the pay-code that corresponds to each payment method supported in your online store.

A/R pay-codes should only be mapped to the **AR charge** payment method in CPOnline. Only A/R charge customers published from CounterPoint will be able to successfully submit online orders with this payment type.

**NOTE:** To accept PayPal as a payment method in your CPOnline store, you must first establish a PayPal merchant account at [www.paypal.com](http://www.paypal.com). The pay-code type for PayPal should be mapped as **Cash**.

Press **Enter** at **Field number to change ?**. The **Registry** screen displays.

Gift registries will be supported in a future release. Leave the fields on this screen blank and press **Enter** to complete ecommerce control setup.

## Entering ecommerce categories

A CounterPoint item's ecommerce category determines where a shopper will see that item in your online store. You can assign each individual item to any ecommerce category, so you can control placement of items in your online store; and you can assign an item to up to 14 different ecommerce categories.

You can use **Setup / Ecommerce / Control** to establish a default rule to simplify category assignment when setting up a new item. You can also use **Setup / Ecommerce / Assign ecommerce categories** to assign categories to groups of items.

You will use **Setup / Ecommerce / Categories** to assign, change, and/or unassign:

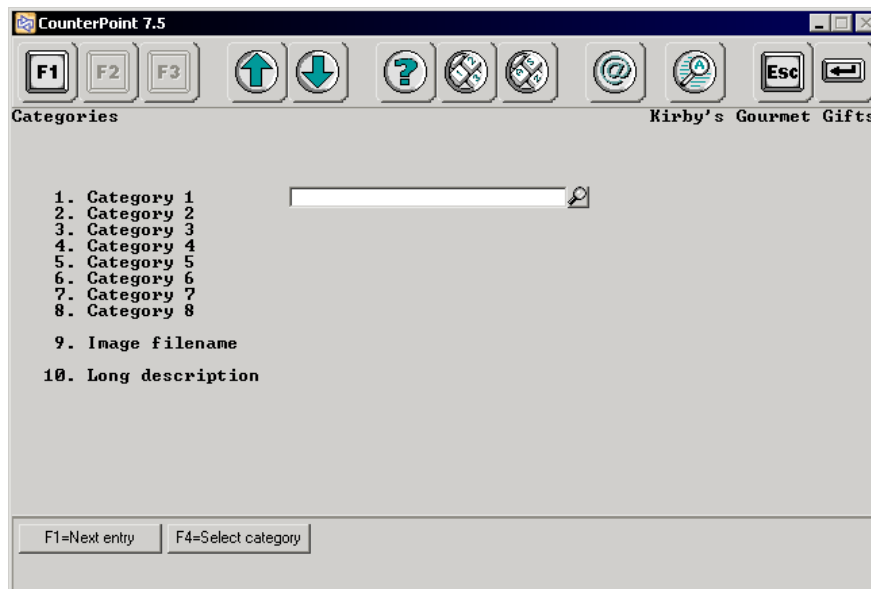
- CPOne category levels.
- Category level image filenames.
- Category level long descriptions.
- Items assigned to category levels (after items have been flagged for ecommerce).

Select **Setup / Ecommerce / Categories** to display the **Categories** window.

There are eight category levels available, with each successive category being a sub-category of the former (i.e., **Category 2** is a sub-category of **Category 1**, **Category 3** is a sub-category of **Category 2**, etc.). For your shoppers' browsing convenience, we recommend using no more than three to four levels in your online store. Many merchants find that two levels are sufficient.

## Adding new ecommerce categories

Select **Setup / Ecommerce / Categories** to enter new ecommerce categories and related information.



### 1. Category 1

Enter a category description and press **Enter**. The cursor moves to **Field number to change?**. Press **Enter**. The **Category 1** field is cleared and the new entry appears as an **F2** button on the bottom of the screen.

If you do not want to add any sub-categories or items to the category at this time, enter a new category description in the **Category 1** field or press **Esc** to exit category setup.

To add a sub-category or items to the category, press **F2**. The new entry displays in the **Category 1** field. Press **Enter** and the cursor moves to the **Category 2** field.

### 2. Category 2

Enter a sub-category description and press **Enter**. The cursor moves to **Field number to change?** Press **Enter**. The **Category 1** field is cleared and the **F2** button on the bottom of the screen defaults to that value. Press **F2**. The **F2** button on the bottom of the screen

defaults to the sub-category value. Press **Enter**. The cursor moves to the next category level.

Press **Enter** to leave a category level blank and indicate that no further sub-categories will be entered. The cursor moves to **Field number to change ?**

Press:

- F1** To display the next category or sub-category.
- F3** To delete the entry.
- F5** To edit items (assign or unassign items to the category).

### 3.-8. Category

Enter **Category 3 – Category 8** levels by following the same steps used for entering **Category 2**.

### 9. Image filename

Enter **9** at **Field number to change ?**. In the **Image filename** field enter a complete file name (per your category image file naming convention), including the **.jpg** or the **.gif** extension.

**NOTE:** Image file names can be entered for categories and sub-categories, and when entered apply to the lowest category level displayed.

### 10. Long description

Enter **10** at **Field number to change ?** The **Long Description** text box displays. Type the desired text and press **Esc** when finished.



Press **F5** to copy a long description from another category. (This function key is only available from the first line of the text box when the box is empty.) The **Lookup CPOL categories** window displays.

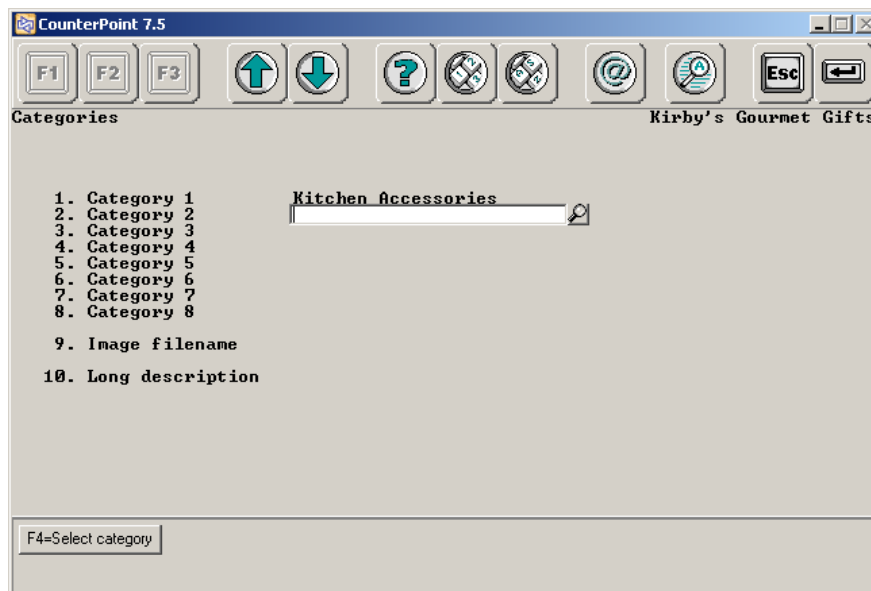
Select one of the displayed categories to display its long description. You are prompted to confirm or cancel at **Ok to copy long description ?**. If you respond with **Yes**, the long description is copied into the current long description text box. Press **Enter** when prompted. The cursor moves to the first position in the text box. You may edit the description. When you have completed any modifications, press **Esc** to save the long description and to return to the **Categories** window.

## Adding a new ecommerce sub-category

Select **Setup / Ecommerce / Categories**.

### 1. Category 1

Press **F4** to look up a category. Select a category and press **Enter**. The cursor moves to **Category 2**.



## 2. Category 2

Enter a sub-category description and press **Enter**. The cursor moves to **Field number to change ?** Press **Enter**. The **Category 1** field is cleared and the **F2** button on the bottom of the screen defaults to that value. Press **F2**. The **F2** button on the bottom of the screen defaults to the sub-category value. Press **Enter**. The cursor moves to the next category level.

## 3. Category 3.-8.

Enter **Category 3 – Category 8** levels by following the same steps used for entering **Category 2**.

Press **Enter** to leave a category level blank and indicate that no further sub-categories will be entered. The cursor moves to **Field number to change ?**

When you have finished entering category information, press:

- F1** To display the next category or sub-category.
- F3** To delete the entry.
- F5** To edit items (assign or unassign items to the category).

## 9. Image filename

Enter **9** at **Field number to change ?**. In the **Image filename** field enter a complete file name (per your category image file naming convention), including the **.jpg** or the **.gif** extension.

**NOTE:** Image file names can be entered for categories and sub-categories, and when entered apply to the lowest category level displayed.

## 10. Long description

Enter **10** at **Field number to change ?** The **Long Description** text box displays. Type the desired text and press **Esc** when finished.



Press **F5** to copy a long description from another category. (This function key is only available from the first line of the text box when the box is empty.) The **Lookup CPOL categories** window displays.

Select one of the displayed categories to display its long description. You are prompted to confirm or cancel at **Ok to copy long description ?**. If you respond with **Yes**, the long description is copied into the current long description text box. Press **Enter** when prompted. The cursor moves to the first position in the text box. You may edit the description. When you have completed any modifications, press **Esc** to save the long description and to return to the **Categories** window.

## Assigning items to ecommerce categories

Select **Setup / Ecommerce / Categories**.

### 1. Category 1

Press:

**F1** To display the next entry.

**F4** To look up a **Category**.

Select a category and press **Enter**. The cursor moves to **Category 2**.

**NOTE:** You cannot enter items for a category that contains sub-categories. Items can only be entered into the lowest category level.

### 2./8. Category 2 - 8

Press:

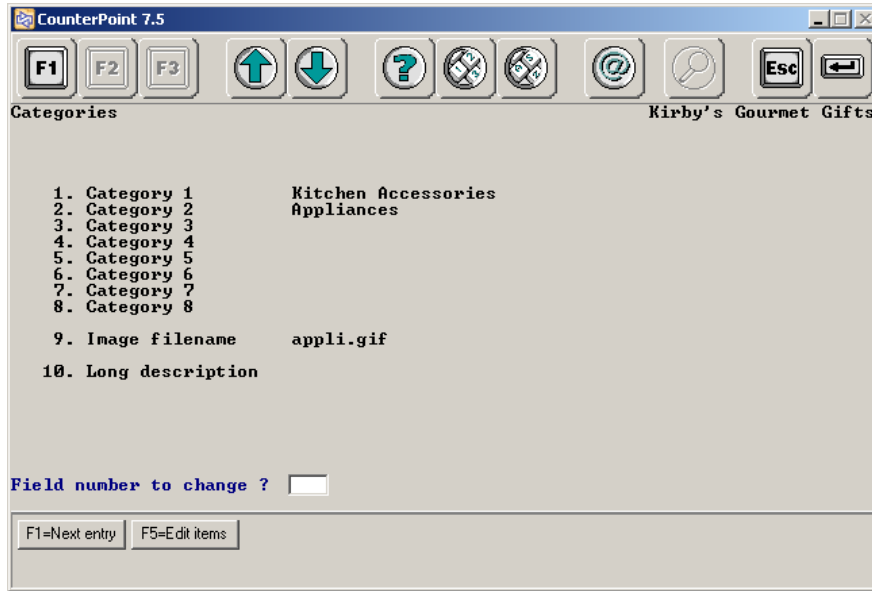
**F1** To display the next entry.

**F4** To look up a **Category**.

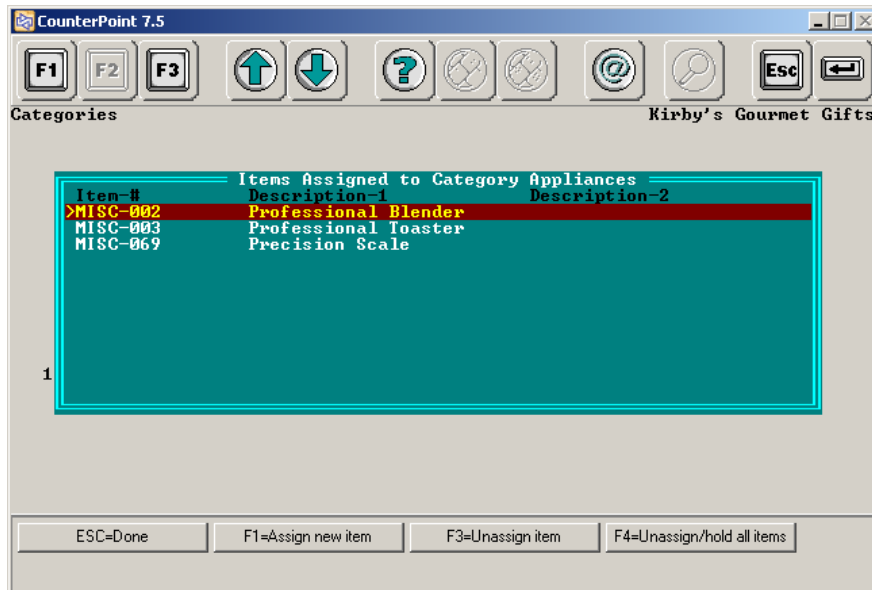
Select a category and press **Enter**.

If you select a category that does not contain items, the cursor moves into the next category field, giving you the opportunity to add additional sub-categories. If you press **F4**, the message **No categories on file at this level** displays. To assign items, press **Enter**. The cursor moves to **Field number to change**.

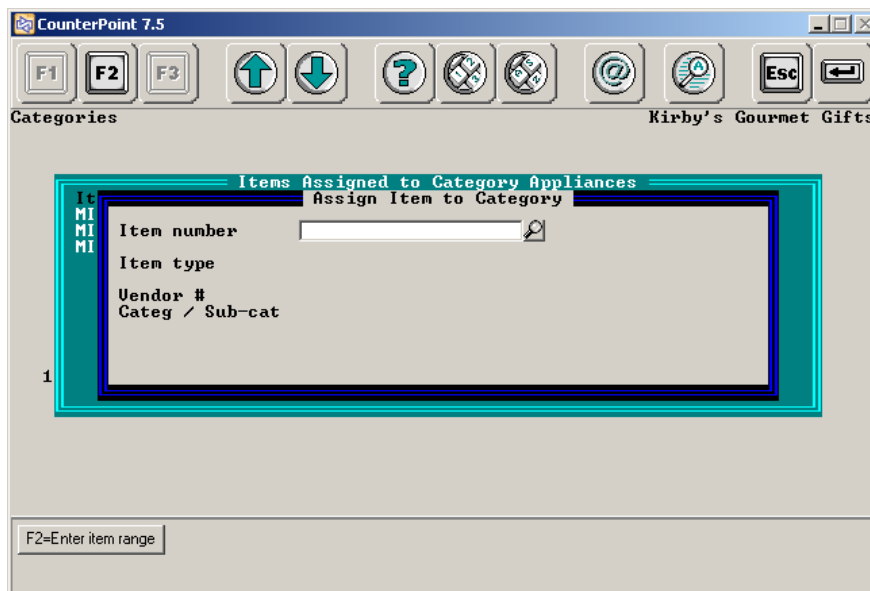
If you select a category that does contain items, or that does not have any sub-categories, the cursor moves to **Field number to change**.



Press F5 to open the Items Assigned to Category...popup window.



Items can be assigned singly or in batches. Press F1 to assign an item to the category.



Use F2 to toggle between the **Enter item range** and **Enter single item** buttons.

In single item mode, select an ecommerce item by item number. The remaining fields display the values on file for the item. Press **Enter**.

In item range mode, select the criteria for the range of ecommerce items to be added to the category. Press **Enter**. After the items have been processed, a message displays informing you how many items were added to the category. If items could not be added to the category, one of the following messages displays:

**Item already assigned to this category**

**Item already assigned to the maximum number of categories**

When item assignments are complete, press **Esc** to exit the **Items Assigned to Category...** window.

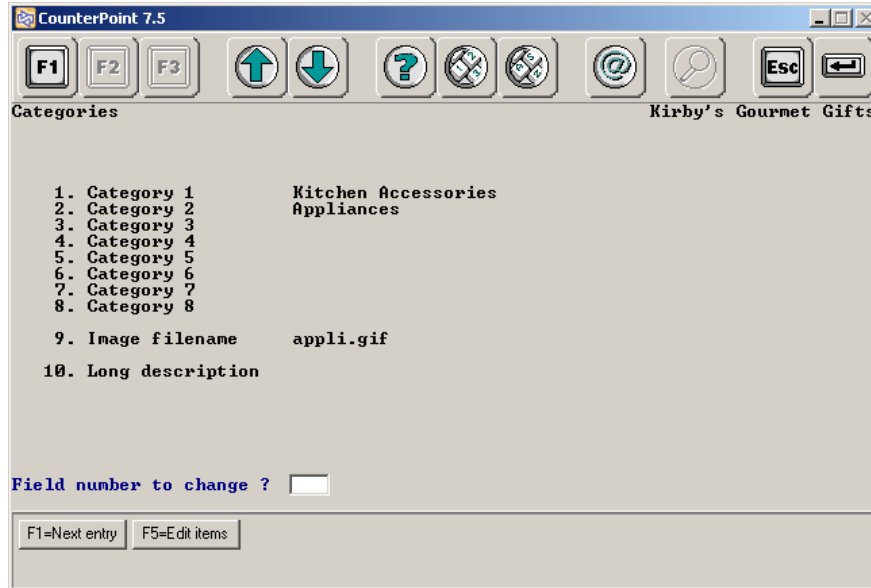
**NOTE:** Items can also be assigned to categories from the **Ecommerce** popup window of the item record.

## Unassigning items from ecommerce categories

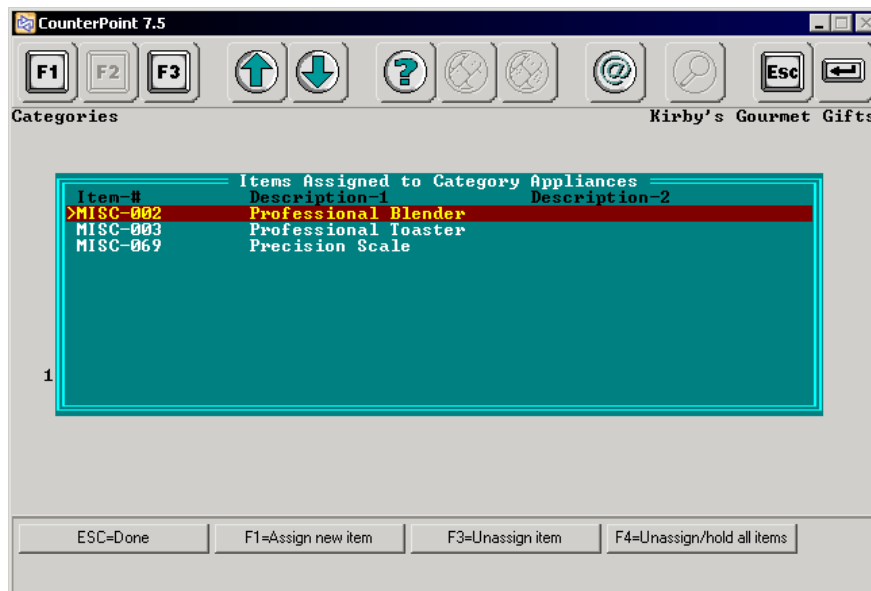
Select **Setup / Ecommerce / Categories**.

### 1./8. Category 1 - 8

Use **F4** to select the category or sub-category that contains the items to be unassigned. Press **Enter**. The cursor moves to **Field number to change**.



Press **F5** to open the **Items Assigned to Category...** popup window.



In the **Items Assigned to Category...** window, press **F3** to unassign an item from the category. The item will be permanently removed from the category. If you try to unassign an item that is not assigned to any other categories, the following message displays:

**This item is not assigned to any other category**

Are you sure you want to remove this last assignment ?

Select **Yes** or **No**.

For instructions on unassigning and holding items, see [Moving items from category to category](#), below.

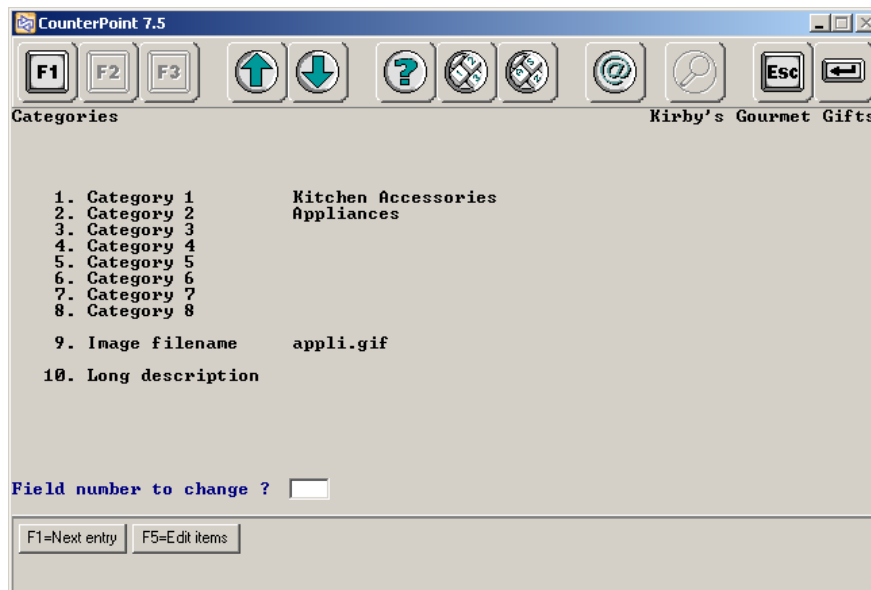
When item changes are complete, press **Esc** to exit the **Items Assigned to Category...** window.

## Moving items from one ecommerce category to another

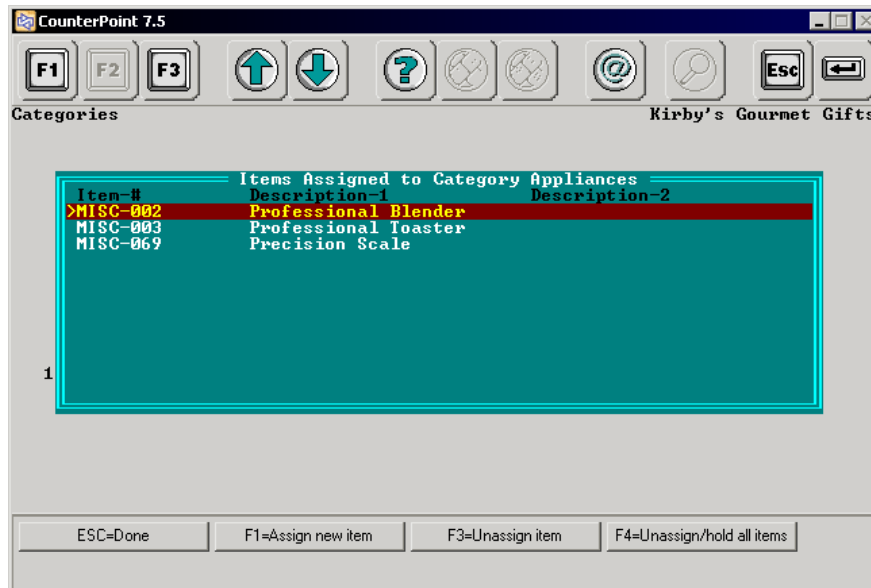
The unassign/hold feature allows you to remove items from one category and move them to another category.

### 1./8. Category 1 - 8

Use **F4** to select the category or sub-category that contains the items to be moved. Press **Enter**. The cursor moves to **Field number to change**.



Press **F5** to open the **Items Assigned to Category...** popup window.



In the **Items Assigned to Category...** window, press **F4** to unassign/hold items. All items will be removed from the category.

**NOTE:** If you decide not to move the items, prior to exiting the window press **F2** to re-assign them to the category.

Press **Esc** to exit the window. Press **Enter** at Field number to change. Use **F4** to select the destination category for the items and press **F5** to open the **Items assigned to Category...** window. Press **F2** to assign the held items.

**NOTE:** Only one group of items can be held at a time. If you unassign/hold items from another category, the list of previously held items will be overwritten. If you exit the program before assigning any held items, they will be permanently discarded. If you attempt to unassign/hold a group of items while items from another category are being held, the following message displays:

**Unassigned items being held will be lost if you continue.  
Do you wish to continue ?**

**NOTE:** Held items can only be assigned once.

When item changes are complete, press **Esc** to exit the **Items Assigned to Category...** window.

## Making changes to ecommerce categories

You can change any category at any level and CounterPoint will update all related category records accordingly.

For example, suppose you have the following categories on file.

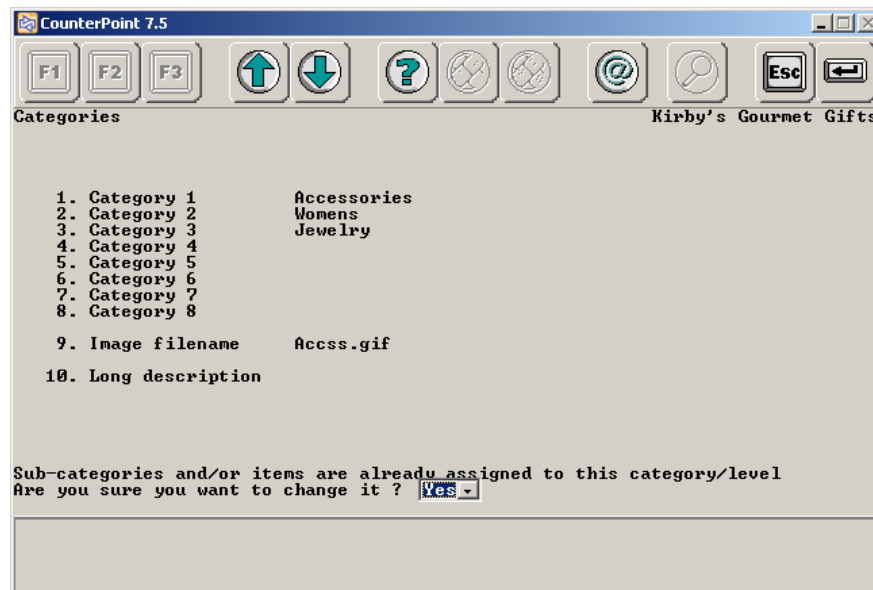
**Accessories**

**Accessories / Womens**

**Accessories / Womens / Jewelry**

If you decide to put an apostrophe in the word **Womens**, you can access any record containing **Accessories / Womens** and make the change. CounterPoint will make the change for all category records and will re-link items and long descriptions to the new category.

Select **Setup / Ecommerce / Categories** and select a record containing the category you wish to make a change to. At **Field number to change ?** enter the line number of the category to be changed.



The following warning message displays:

**Sub-categories and/or items are already assigned to this category/level**

**Are you sure you want to change it ?**

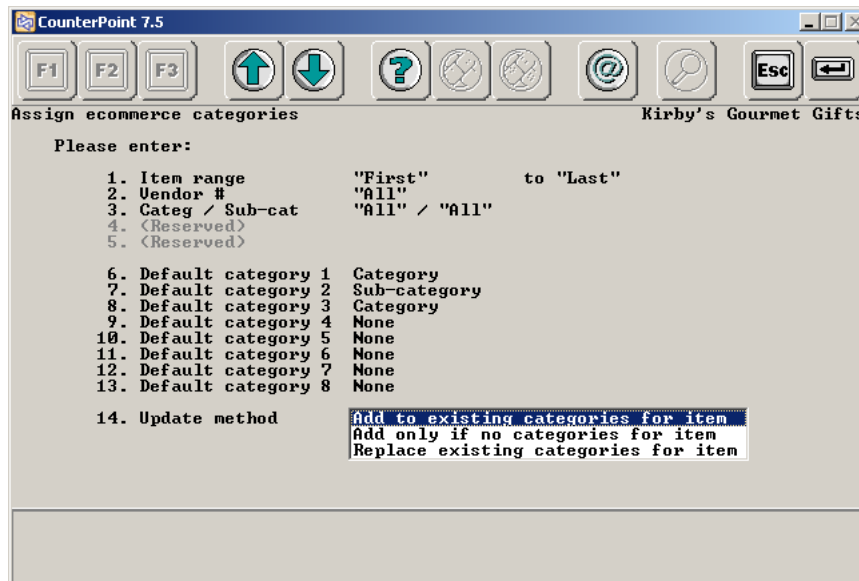
Select **Yes**.

Enter the new category name and press **Enter**. The message **Please wait ... Updating categories** displays. When the **Category updated** popup window displays, press **OK**. All category records are updated.

## Converting ecommerce categories

If your ecommerce categories will exactly match the inventory categories you have set up in CounterPoint, you can use **Setup / Ecommerce / Assign ecommerce categories** to convert your inventory items to ecommerce.

Select **Setup / Ecommerce / Assign ecommerce categories**.



### 1. Item range

Enter the range of item numbers affected by ecommerce categories.

Press F1 to enter **First** to **Last** as the range.

### 2. Vendor

Enter the vendor number for the items with category assignments.

Press F1 for **All** vendors.

This field refers to the item's primary vendor for selecting records.

### 3. Categ / Sub-cat

Enter the CounterPoint category and sub-category you want to publish.

Press F1 for **All**.

### 4./5. (Reserved)

If you use item attributes in your CounterPoint system, they may be used to select items to make category assignments, or you may use F1 in both fields to select **All**.

If your existing CPOnline categories were mapped to any of the default category fields prior to converting your CPOnline category file (**Category description, Sub-category, Sub-category description, Vendor number, Vendor name**), those fields automatically display in fields 6-13 as applicable to your updated category structure. The category conversion program adds the defaults. For this initial assignment, keep the default categories at the default settings, and select **Add to existing categories for item** in the **Update method** field.

If you have run the conversion and no default categories display for default categories in this window, then there is no need to run this assignment utility. Use **Setup / Ecommerce / Categories** to set up the category structure. See [Adding new ecommerce categories](#) on page 18 for details on entering ecommerce categories.

6. **Default category 1**
  7. **Default category 2**
  8. **Default category 3**
  9. **Default category 4**
  10. **Default category 5**
  11. **Default category 6**
  12. **Default category 7**
  13. **Default category 8**
- Enter a default category.

Press F2 to select from a list.

Leave <blank> for **None**.

#### 14. **Update method**

For the initial running of this program, select **Add to existing categories** for item.

The options available are:

- |   |  |
|---|--|
| <b>Add to existing categories for item</b>  | To assign the existing category to the item.   |
| <b>Add only if no categories for item</b>   | To assign a specified category only if no categories are already assigned to the item. |
| <b>Replace existing categories for item</b> | To replace all existing categories assigned to an item with the specified categories.  |

## Selecting items and defining ecommerce information

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In **Inventory / Items**, you identify the items that can be published to your online store by setting the **Ecommerce ?** field to **Yes**. You can also enter specific ecommerce information.

To mark items for ecommerce, you can use the following CounterPoint menu selections:

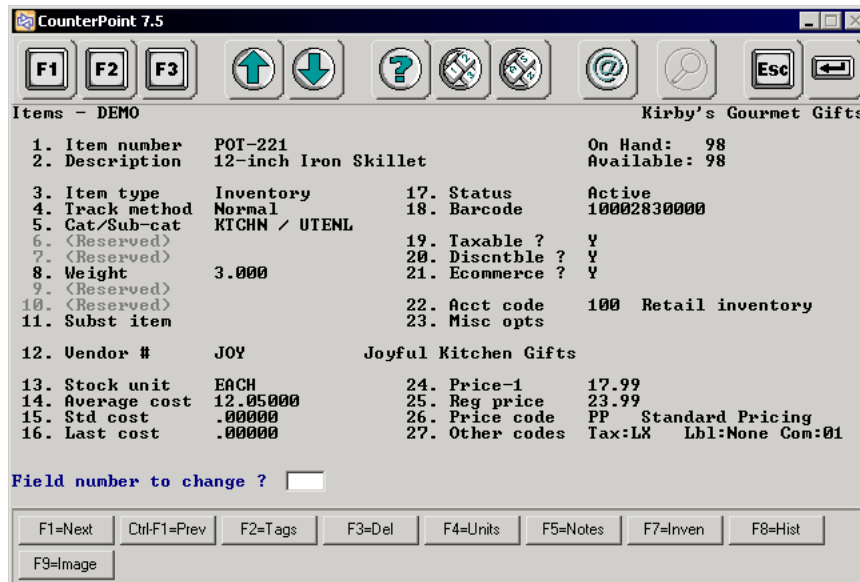
- **Inventory / Items** - to set the ecommerce flags for individual items. This method also allows you to enter all ecommerce information about the item, including assignment of up to 14 ecommerce categories. See [Marking individual items as ecommerce items](#) below for a more detailed description of this menu selection.
- **Setup / Ecommerce / Set item ecommerce flags** - to set the ecommerce flag for multiple items simultaneously. This method simply sets the ecommerce flags for items. It does not provide a means for entering any additional ecommerce information for each item. See [Marking multiple items as ecommerce items](#) on page 33 for a more detailed description of this menu selection.

### Marking individual items as ecommerce items

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Use this menu option to flag and update individual item records for ecommerce. The following instructions guide you through entry of all ecommerce-related fields in the item record.

Select **Inventory / Items** from the CounterPoint menu.



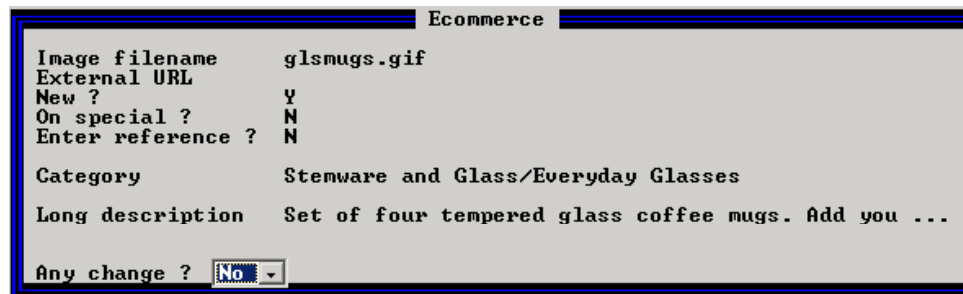
Select the item you want to include in your online store.

To include the item in your online store inventory, change the value for **Ecommerce ?** to **Yes**, and press **Enter**. To remove the item from your online store inventory, enter **No** for **Ecommerce ?**.

After you enter **Yes** for **Ecommerce ?** and press **Enter**, the **Ecommerce** window displays.

### Entering item ecommerce information

Use the **Ecommerce** window to enter item ecommerce information, set flags, assign categories, and/or to enter or maintain item long descriptions.



### Image filename

Enter the filename for the image of this item. The file extension on the image file should either be **.jpg** or **.gif**.

In order to save a significant amount of time, we recommend that you use the item number as the name of the corresponding image file so that you can easily identify your images later. See [4. Image filename](#) on page 38 for more information on the recommended method of naming files.

**NOTE:** Image filenames should not contain special characters such as asterisks (\*), or spaces, and item numbers should not contain spaces, as they are not supported by Web browsers. You can use underscores instead of spaces in filenames.

### External URL

If you want to include a link in your online store to a manufacturer's or other Web site for this item, enter the complete URL in this field (e.g., <http://www.synchronics.com>).

### New?

To include this item on your online store's **New Items** page, enter **Yes** in this field.

### On special?

To include this item on your online store's **Specials** page, enter **Yes** in this field.

**NOTE:** If you currently use sales prices in your CounterPoint inventory and plan to list the same sale items in your online store, then you can choose the **Special price flag** instead of the **On special flag** when mapping your ecommerce item info in **Setup / Ecommerce / Item mapping**. If you use the **Special price flag**, sales prices will automatically be posted to your online store and the **On special?** setting in the **Ecommerce** window will be ignored. If you prefer to set sales prices manually, choose the **On special flag**. See [Entering status, user-defined fields, and related items](#) on page 40 for more information.

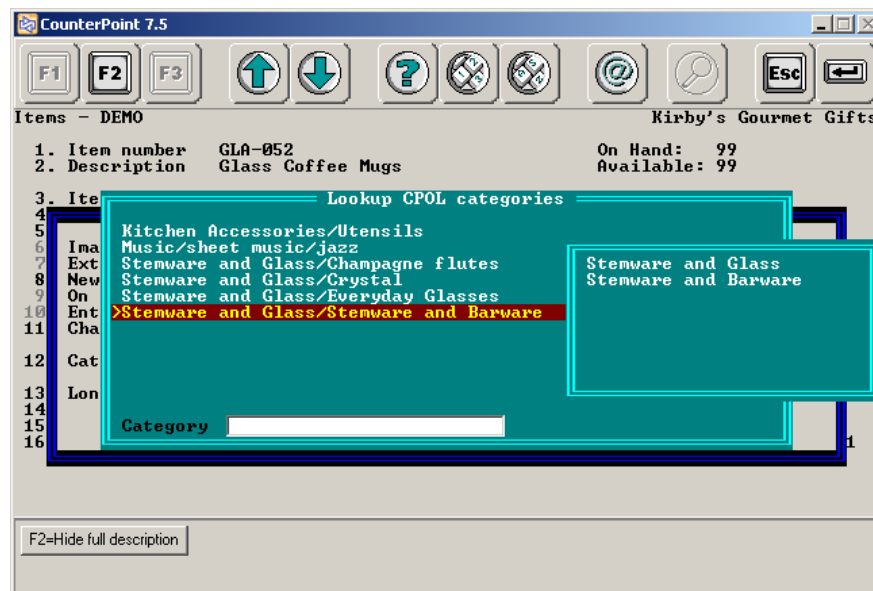
### Enter reference?

When your customer orders this item, do they need to provide you with any product specifications, such as monogramming? If so, enter **Yes** in this field. After you enter **Yes** in this field, a **Tag** field appears. Enter up to fifteen characters for the tag. This tag will display beside the reference field on the merchandise page. The tag should indicate to your customers what you want them to enter in the field (e.g., **Monogram**). If you do not enter a tag, the CPOne default tag **Comment** will appear for this item.

In CounterPoint, the information entered by the customer will appear in the **Reference** field of the line item window in Order Entry.

### Category

Press **F2** to assign the item to up to 14 category levels. Press **F9** to view a list of all possible category levels. From the **F9** list, you can press **F2** to show or hide the category structure for the highlighted category.



Use the arrow keys to move to the desired category level, and press **Enter** to select that category level.

### Long description

Press **F4** to enter the long description for the item. The description of the item displays on the merchandise page in your online store. You may enter up to 80 lines (with a width of 78 characters per line) of description. The text will wrap as you type, and you may use HTML tags (if you are familiar with HTML) to format the text.

**NOTE:** If you plan to enter HTML in your Long description, do not use quotation marks in the HTML code as this will have an undesired effect online. Do not paste in HTML generated from WYSIWYG editors such as FrontPage, Dreamweaver, or Microsoft Word. HTML generated in this way contains extraneous code that may cause your online store to appear improperly.

See [Importing item long descriptions](#) on page 47 for a simpler method of importing long descriptions.

After you have completed all of the entries in the **Ecommerce** window, select **No** at **Any change ?** and press **Enter** to return to the item record.

### Updating other item fields, as needed

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Depending on your plans for your online store, you may need to add or update other information in the CounterPoint item record.

### Identifying related items

If you plan to show related items in your online store, you can map two of the substitute items defined in **Inventory / Items** to the **Related item # 1** and **Related item # 2** fields in CPOne.

**NOTE:** If the substitute item fields in CounterPoint contain information that doesn't work well for CPOne, you can use Store Administration to record up to ten item numbers as **Related Items**.

For example, from the page for cooking sherry, a customer might see links to a related item such as Marsala cooking wine. Using this example, in the cooking sherry item record, you would enter the item number for the Marsala cooking wine in the **Subst item** field.

Some merchants also enter reciprocal links in the other item records. Using the same example, on Marsala cooking wine page, a customer would see the related item cooking sherry.

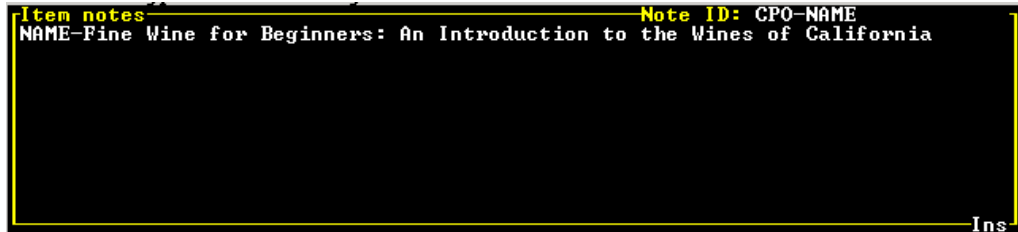
### Verify online item name

CounterPoint uses the item description defined in **Inventory / Items** as the item name in your online store.

Verify that the **Item name** field (**Description1**) contains the item name as you want it to appear in your online store.

If the content of the **Description1** field is not what you want for the item name in your online store, you have several options.

- You may change the field to contain what you want it to display.
- You may use another field to enter the item name as you want it displayed in your online store. **Item notes** are often the best place to record item names that are longer than 25 characters.



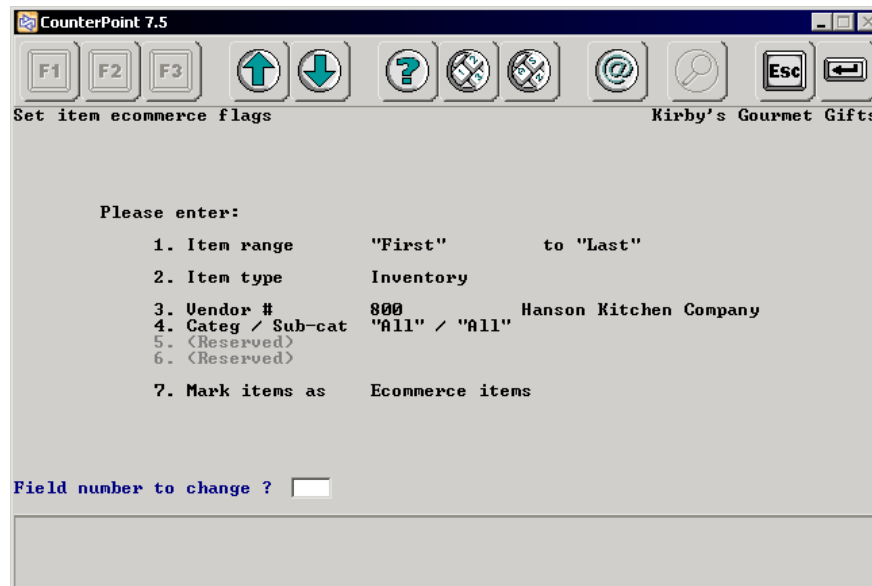
**NOTE:** You must record the CPOnline item name in the same field for every item that you intend to sell online. If you choose to use a field such as **Item notes** to record item names, make sure that the **Item name** field in **Setup / Ecommerce / Item mapping** is correctly mapped to the **Notes source 1**.

For more information and examples of using item notes, see [Using item notes for miscellaneous ecommerce info](#) on page 49 of this document.

## Marking multiple items as ecommerce items

Use the **Set item ecommerce flags** utility to flag items for ecommerce. This utility allows you to set ecommerce flags for multiple items simultaneously (i.e., mark which items are eligible for ecommerce). This utility only sets the ecommerce flags for items – it does not provide a means for entering other item ecommerce information. This utility can also be used to mark items that are no longer eligible for ecommerce. Fields 1 through 7 on this screen may be used independently or together to select the items.

Select **Setup / Ecommerce / Set item ecommerce flags** from the CounterPoint menu. The **Set item ecommerce flags** screen displays.



### 1. Item range

Enter the range of items you want to flag for ecommerce.

Press **F1** for the **First to Last** items on file.

### 2. Item type

Specify which types of items should be flagged for ecommerce.

Select:

**Inventory** To mark only inventory items for ecommerce.

**Non-inventory** To mark only non-inventory items for ecommerce.

**Service** To mark only service items for ecommerce.

**Consignment** To mark only consignment items for ecommerce.

Press **F1** for **All** items.

### 3. Vendor #

Specify the **Vendor #** for the primary vendor of the items you want to include in the selection.

Press **F1** for **All** vendors.

### 4. Categ / Sub-cat

Specify the category and/or sub-category that indicates which items to flag for ecommerce.

Press **F1** for **All** categories and sub-categories.

### 5./6. (Item attribute)

**(Reserved)** displays if you do not have any item attributes defined in **Setup / Inventory / Control**.

Specify which the **Item attribute** values to select and flag for ecommerce.

Press **F1** for **All** attributes.

### 7. Mark items as

For the items you have selected in fields 1-6 above, select:

**Ecommerce items** To flag the items for ecommerce.

**Non-ecommerce items** To remove the items from online inventory.

Press **Enter** at **Field name to change ?** when all fields are complete. After the ecommerce flags are set, a completion screen displays reporting the number of records that were read and the number of records that were updated.

## Entering item mapping information

Item mapping allows you to specify what information from CounterPoint is used in CPOne and where it is used online. The four screens in the item mapping utility cover:

- Calculated pricing parameters and notes.
- Item, pricing, and quantity information.
- Item status, user-defined fields, and related items.
- Shipping and tax information.

### General Entry Tips

Two function keys are available at most fields to assist you on each of the item mapping screens:

- F1** When available, supplies a default source field that may be appropriate for many merchants.
- F5** Provides a selection list of available fields that may be mapped to the current field.

For any field where a CounterPoint value is not used or needed online, you may leave that field blank by pressing **Enter**. The value **None** will display.

If you select a CounterPoint field using **F5**, the field is enclosed in brackets [e.g., **[Category]**]. If you want to remove any extra trailing spaces from a field, you can change the square brackets to braces (e.g., **{Category}**). If you fail to include brackets or braces, your entry is treated as a literal value.

Numeric CounterPoint fields can be combined with arithmetic operations to obtain the value for a CPOne field. For example, if you give 5% discount on every item purchased through your online store, you could enter **[Price(Calculated)]\*.95** as the **Selling Price**. The following operators may be used to perform calculations:

+ to add      \* to multiply      - to subtract      / to divide

You can also combine literal text with a CounterPoint source field. For example, if your item numbers don't contain any spaces or special characters, and they all use the same format (either **.gif** or **.jpg**), you can save a significant amount of time by naming your item image files the same as the item number (e.g., the image file for item **ABC** might be **ABC.jpg**). Then, instead of entering the image filename into each item record, you can simply enter **{Item number}.jpg** as the data to publish for the CPOne **Image filename**. (The braces around **Item number** mean that when you publish your item catalog, CounterPoint will trim any trailing spaces from the item number before appending it with **.jpg**.)

Use this method **only** if all of the following are true:

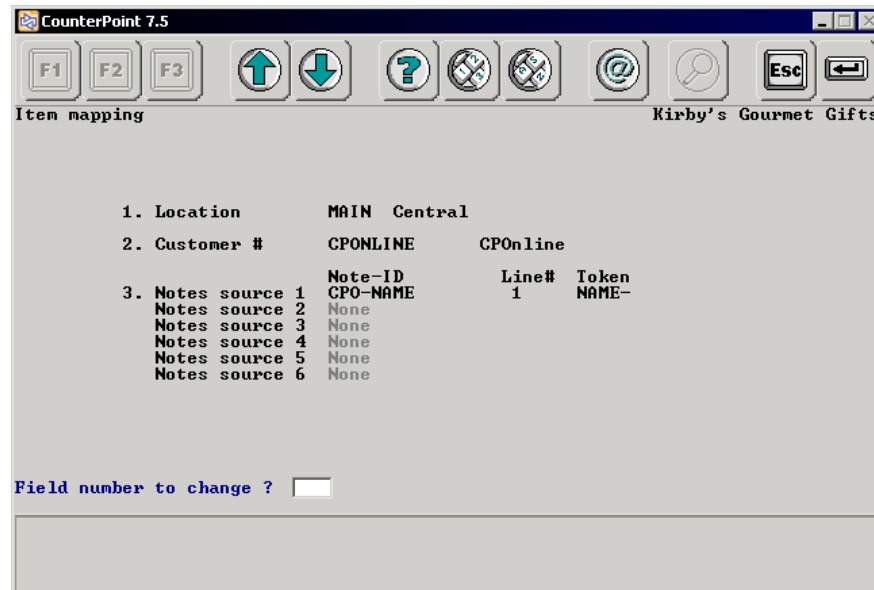
1. You will not be renumbering your CounterPoint items.
2. All of your image files have the same extension (**.gif** or **.jpg**).
3. There are no spaces or special characters in your item numbers.

**NOTE:** Image filenames should not contain special characters such as asterisks (\*), or spaces, and item numbers should not contain spaces, as they are not supported by Web browsers. You can use underscores instead of spaces in filenames.

## Enter calculated pricing parameters and notes

Select **Setup / Ecommerce / Item mapping**. The first item mapping window displays.

The first item mapping window allows you to enter calculated pricing parameters and to identify any CounterPoint notes fields that will be used to map information to CPOne.



### 1. Location

This field serves the following purposes:

- Supplies the default location for price calculations (if you choose calculated prices later in your item mapping and only if you are using the Price Pack Option).
- Provides quantities, if you choose **Qty Available (Location)** or **Qty on Hand (Location)** later in your item mapping.

Enter the location that is appropriate for your online store.

### 2. Customer #

Enter the customer number to use for calculating prices for your online merchandise.

If you choose to publish calculated prices (which take into account price codes, sale, and contract pricing), all item prices for CPOne will be calculated based on the customer number you enter here. You will specify whether to publish calculated prices to CPOne on the third screen in item mapping.

### 3. Notes source(s) 1-6

If you have created notes in CounterPoint to use in your online store (e.g., for item names), they must be identified in these fields. Only one line of a note can be used as a notes source. Later in the item mapping, you may use **Notes source 1** (for example) to map to a CPOne field.

For each note you intend to map to your online store, enter the **Note-ID** and **Line#**. We recommend that you use a descriptive **Note-ID**, such as **CPO-(purpose)** for a note you intend to use for CPOne.

If you do not intend to use the entire 25 character length of the item note for CPOnline, you may enter a **Token**. The token should be a word or character at the start of the text line. Only the part of the line following the specified token will be used.

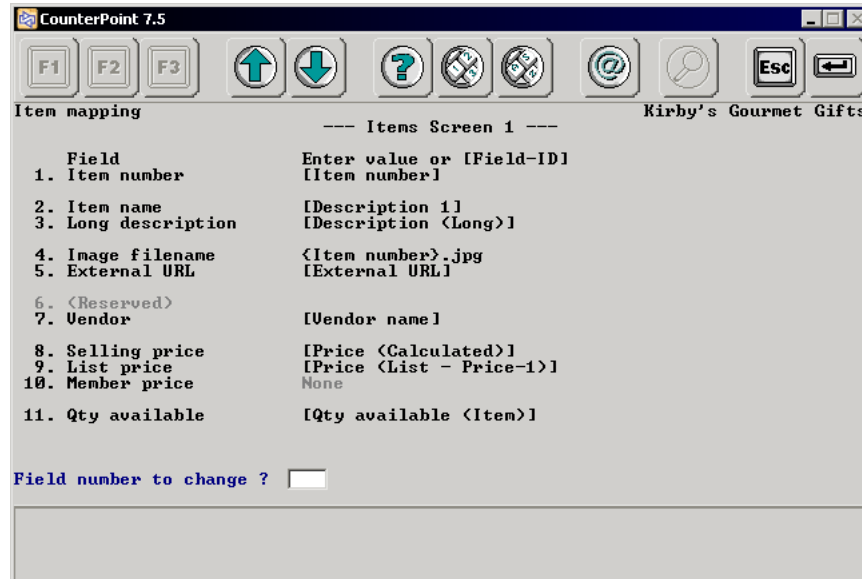
**NOTE:** If you enter **None** as the token, CounterPoint will look for a token called **None**. If you leave the **Token** field <blank>, the entire specified note line will be treated as the note source.

For more information and tips on using item notes, see [Using item notes for miscellaneous ecommerce info](#) on page 49 of this document.

Press **Enter** at **Field number to change ?** to move to the second item mapping window.

### Enter item, pricing, and quantity information

The second item mapping window, **Items Screen 1**, is where you map item, pricing, and quantity information to CPOnline.



#### 1. Item number

The CPOnline item number must correspond to the item number in CounterPoint. This field cannot be changed.

#### 2. Item name

This field displays in your online store as the CPOnline item name. The default mapping is to **Description 1** in the item record.

If the content of the **Description1** field is not what you want for the item name in your online store, you can map the field to a different source, such as a note source, where the item name is entered as an item note for display in your online store. **Item notes** are often the best place to record item names that are longer than 25 characters.



### 8. Selling price

The values in this field display as **Your Price** on the merchandise pages in your online store. The default mapping is to **Price (Calculated)**.

**NOTE:** If you want to use oversize pricing or alternate units in you online store, **Selling Price** must be mapped to **Price (Calculated)**, **Price (List – Price-1 – 6)**, or **Price (List – Regular)**.

### 9. List price

The values in this field display as **List Price** on the merchandise pages in your online store. The default mapping is to **Price (List – Price-1)**.

**NOTE:** If you want to use oversize pricing or alternate units in you online store, **List Price** must be mapped to **Price (Calculated)**, **Price (List – Price-1 – 6)**, or **Price (List – Regular)**.

### 10. Member price

The values in this field display as **Your price** on the merchandise pages in your online store. It displays only for customers whose categories qualify them for member status. The default mapping is to **Price (Regular)**.

**NOTE:** If you want to use oversize pricing or alternate units in you online store, **Member Price** must be mapped to **Price (Calculated)**, **Price (List – Price-1 – 6)**, or **Price (List – Regular)**.

See CPOne Store Administration for more information on setting up member pricing.

### 11. Qty available

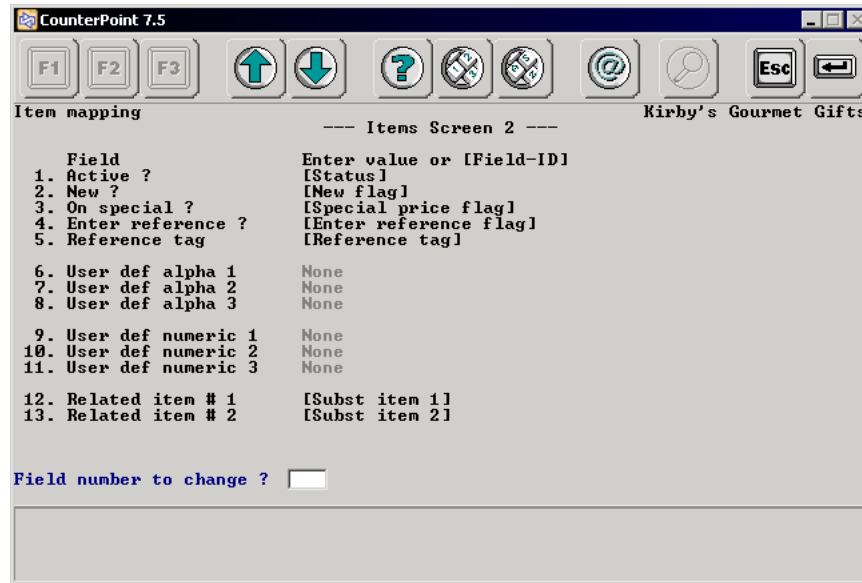
The value in this field indicates the quantity available for the items in your online store. The field corresponds to **Qty available(Item)**, which totals the quantity available for each item across all locations.

Each time an online order is placed, the quantity sold is subtracted from the **Qty available** field for the item. This is how **Out-of-stock** status is determined in CPOne. Customers do not see **Qty available** unless it has been enabled by the merchant in the online store administration.

Press **Enter** at **Field number to change ?** to move to the third item mapping window.

## Entering status, user-defined fields, and related items

The third item mapping window, **Items Screen 2**, allows you to map item status fields, user-defined alpha and numeric fields, and related items.



### 1. Active ?

This setting determines whether an item displays in your online store. This field corresponds to **Status** in the item record.

### 2. New ?

This setting determines whether an item appears on the **New Items** page in your online store. This field corresponds to **New ?** in the **Ecommerce** popup window of the item record.

### 3. On special ?

This setting determines whether an item displays on the **Specials** page in your online store.

Select:

**Special price flag** To post items with sale prices in CounterPoint to the CPOne **Specials** page.

**On special flag** To post items that contain **Yes** in the **On special ?** field of the **Ecommerce** popup window of the item record to the CPOne **Specials** page.

### 4. Enter reference ?

This setting determines whether a text entry field is available on the merchandise page for an item. This field corresponds to **Enter reference ?** in the **Ecommerce** popup window of the item record.

### 5. Reference tag

The value in this field displays as a label for any reference field on the merchandise page. The field corresponds to **Tag** (which displays when you answer **Yes** to **Enter reference?**) in the **Ecommerce** popup window of the item record.

**6.-8. User defined alpha 1-3**

**9.-11. User defined numeric 1-3**

These user-defined fields are not used online and should be left <blank> for None.

**12. Related item # 1**

The value in this field identifies a related item that is suggested to your online customers on the item's merchandise page. The default mapping is to **Subst item-1** field of the item record.

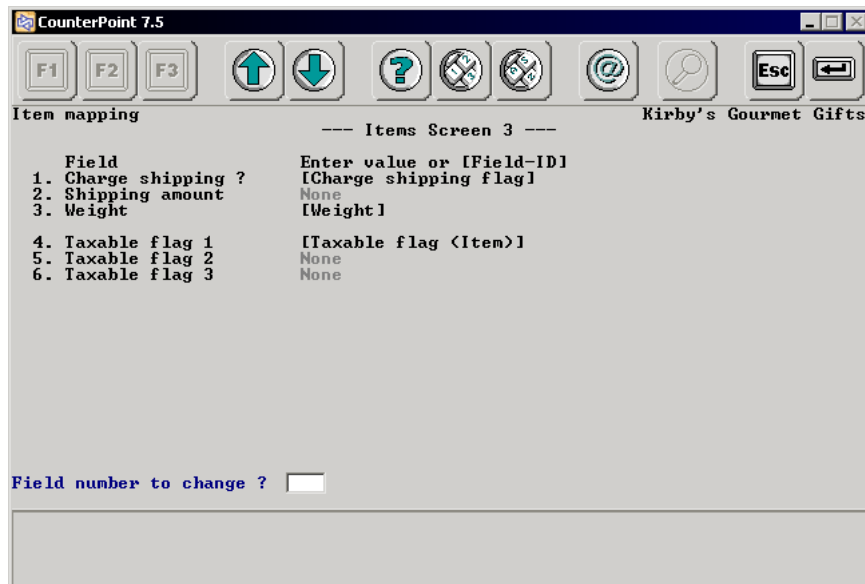
**13. Related item # 2**

The value in this field identifies a related item that is suggested to your online customers on the item's merchandise page. The default mapping is to **Subst item-2** field of the item record.

Press **Enter** at **Field number to change ?** to move to the fourth item mapping window.

**Entering shipping and tax information**

The fourth item mapping window, **Items Screen 3**, is where you map shipping and tax fields.



**1. Charge shipping?**

This field determines whether an item is subject to shipping charges in your online store.

Default mapping is to **Charge shipping flag** and corresponds to the **Charge shipping ?** field in the **Ecommerce** popup window of the item record.

**NOTE:** If you leave this field blank, it will default to **None** and shipping will not be charged for any items.

## 2. Shipping amount

The value in this field is used to determine the shipping cost for the item, if you select **By Item** as the shipping rate method in **Shopping / Shipping** in CPOne Store Administration.

Enter the amount you want to charge per item in this field, or select the field in the item record from which the shipping amount should be pulled.

If you choose a shipping method other than **By Item** in CPOne Store Administration, CPOne ignores this field.

## 3. Weight

The value in this field is used to calculate shipping charges, if the calculation method selected in **Shopping / Shipping** in CPOne Store Administration is **By Total Order Weight** or **Use 3rd Party Rates**.

**NOTE:** If you leave this field blank, it will default to **None** and no weights will be uploaded to the online store.

## 4. Taxable flag 1

The value in this field determines whether the item may be taxed in your online store. This field corresponds to **Taxable ?** in the item record.

## 5./6. Taxable flags 2 and 3

The values in these fields determine whether any other taxes defined in CPOne apply to the item. These fields correspond to an available field of your choosing.

Press **Enter** at **Field number to change ?** to save your entries.

## Mapping unit, cell tag, or color/size name changes

---

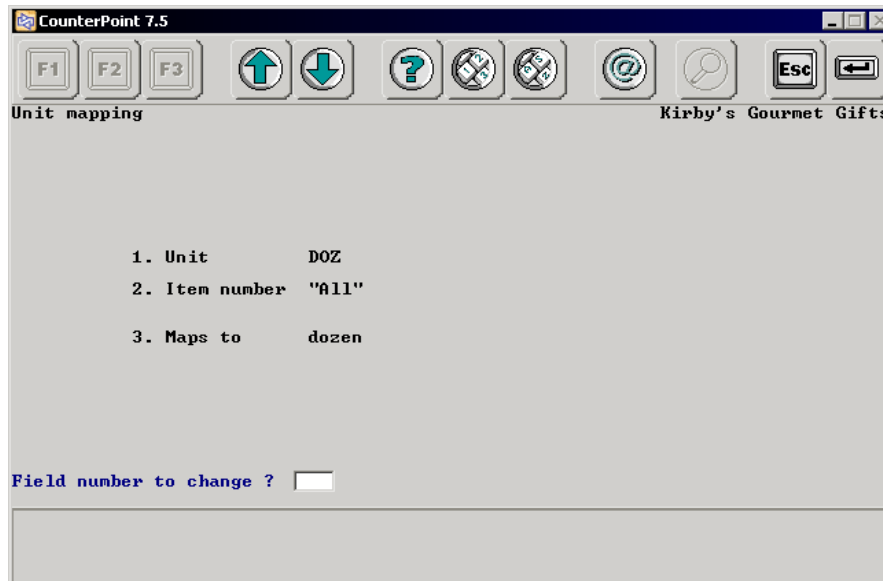
### Unit mapping

---

Unit mappings allow you to change (i.e., re-map) the units CounterPoint exports to your online store. For example, you may prefer to display the CounterPoint unit **DOZ** as **dozen** (all lower case) in your online store. In this case, you would define a unit mapping for the unit **DOZ**.

Complete unit mapping for every unit that you want to change for your online store.

Select **Setup / Ecommerce / Unit mapping** to map units for your online store or to delete any unit mappings. The **Unit mapping** window displays.



### 1. Unit

Enter the unit value as it is stored in CounterPoint (e.g., **DOZ**). If you have already mapped units, use **F1** to move through and select those mappings.

**NOTE:** Entries of these unit values are case-sensitive.

### 2. Item number

You may leave this field blank to cover all occurrences of the specified option in CounterPoint.

To apply the mapping to a specific item number only, enter the item number.

### 3. Maps to

Enter the unit value as you want it to display in your online store (e.g., **dozen**).

Press **Enter** at **Field number to change ?** to save your mapping.

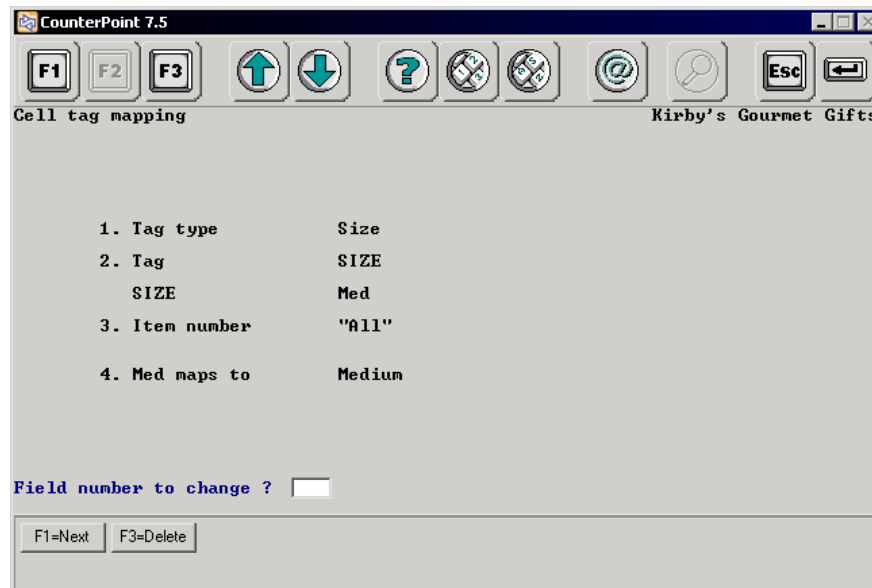
You may print the units that are mapped for your CPOnline store by selecting **Setup / Reports / Ecommerce / Unit mapping**. See [Printing the Unit Mapping List](#) on page 52 for more information.

## Cell tag mapping

Cell tag mappings allow you to change (i.e., re-map) the cell tags and color/size names that CounterPoint exports to your online store.

For example, you may want to change grid labels of **COLR** and **SIZE** to display as **Color** and **Size**. To do so, you would map the **COLR** tag to **Color**, and you would map the **SIZE** tag to **Size**. As another example, you might want a color choice to display as **Hunter Green** in your online store rather than **Green**. You would map the color **Green** to **Hunter Green** using the **Cell tag mapping** utility.

Select **Setup / Ecommerce / Cell tag mapping**. The **Cell tag mapping** window displays.



### 1. Tag type

Select:

- Color tag** To map a color tag (e.g., **COLR**).
- Color** To map a color name (e.g., **Green**).
- Size tag** To map a size tag (e.g., **SIZE**).
- Size** To map a size name (e.g., **Med**).

### 2. Tag

Enter the specific color or size tag that corresponds to the tag you want to re-map.

**NOTE:** If you are defining a color or size name mapping (as opposed to a color tag or size tag mapping), you must also enter the actual color or size name that you want to map (e.g., **Green**).

### 3. Item number

You may leave this field blank to cover all occurrences of the specified option in CounterPoint.

To apply the mapping to a specific item number only, enter the item number.

### 4. Maps to

Enter the value that you want to appear in your online store for this tag or name. With the **COLR** example, you would enter **Color**. With the **Green** example, you would enter **Hunter Green**.

Press **Enter** at **Field number to change ?** to save your mapping.

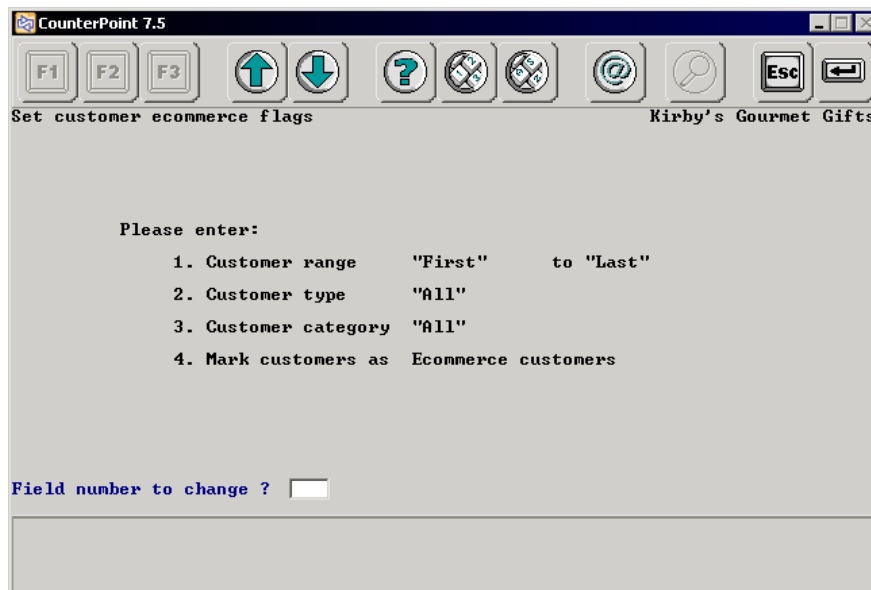
You may print the cell tag mappings for your CPOnline store by selecting **Setup / Reports / Ecommerce / Cell tag mapping**. See [Printing the Cell Tag Mapping List](#) on page 53 for more information.

## Marking multiple customers as ecommerce customers

### Setup / Ecommerce / Set customer ecommerce flags

Use this utility to flag multiple customer records simultaneously for **Ecommerce** or **Non-ecommerce**. In order to publish customer records and import them into CPOne, the ecommerce flag in the customer record must be set to **Yes**.

Select **Setup / Ecommerce / Set customer ecommerce flags** from the CounterPoint menu. The **Set customer ecommerce flags** window displays.



CounterPoint 7.5  
Kirby's Gourmet Gifts

Set customer ecommerce flags

Please enter:

1. Customer range "First" to "Last"
2. Customer type "All"
3. Customer category "All"
4. Mark customers as Ecommerce customers

Field number to change ?

#### 1. Customer range

Enter the range of customer numbers for which you want to set the ecommerce flag. Press F1 for the **First to Last** customers on file.

#### 2. Customer type

Select:

**A/R charge** To select A/R charge customers only.

**Cash** To select cash customers only.

**Miscellaneous cash** To select miscellaneous cash customers only.

Press F1 for **All** customer types.

#### 3. Customer category

Enter the customer category or press F9 to select the customer category to use for ecommerce.

Press F1 for **All** customer categories.

#### 4. Mark customers as

For the customer records you have selected in fields 1-3 above, select:

**Ecommerce customers** To flag the customers as ecommerce customers.

**Non-ecommerce customers** To flag the customers as non-ecommerce customers.

Press **Enter** at **Field name to change ?**. After the ecommerce flags are set, a completion screen displays reporting the number of records that were read and the number of records that were updated.

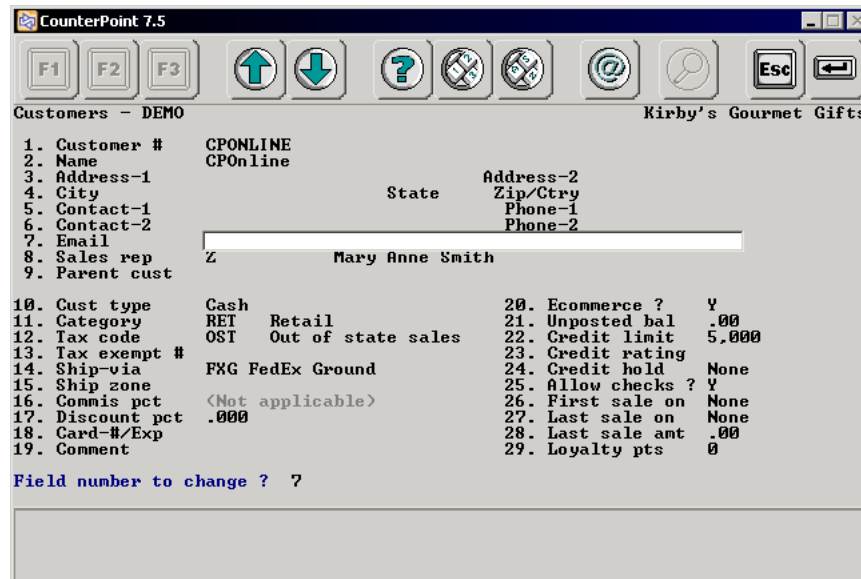
## Marking individual customers as ecommerce customers

Select **Customers / Customers** to:

- Flag individual customer records as **Ecommerce** or **Non-ecommerce**. In order to publish customer records and import them into CPOne, the ecommerce flag in the customer record has to be set to **Yes**.
- Add email addresses to customer records. Email addresses that are a part of the customer record in those marked for ecommerce will be sent to CPOne when the customers are published. If you send an email address from CounterPoint to CPOne, this address will become the ID for the customer's online account.

The first time customers imported from CounterPoint visit the online store and log in, they are required to change their password. If no email address is provided in CounterPoint, CPOne will use the CounterPoint customer number as the email address and the shopper will be required to provide a valid email address after they log in for the first time.

Select **Customers / Customers** from the CounterPoint menu. The **Customers** screen displays.



CounterPoint 7.5  
Customers - DEMO Kirby's Gourmet Gifts

1. Customer #	CPONLINE			
2. Name	CPOnline			
3. Address-1			Address-2	
4. City		State	Zip/Ctry	
5. Contact-1			Phone-1	
6. Contact-2			Phone-2	
7. Email				
8. Sales rep	Z	Mary Anne Smith		
9. Parent cust				
10. Cust type	Cash		20. Ecommerce ?	Y
11. Category	RET Retail		21. Unposted bal	.00
12. Tax code	OST Out of state sales		22. Credit limit	5,000
13. Tax exempt #			23. Credit rating	
14. Ship-via	FXG FedEx Ground		24. Credit hold	None
15. Ship zone	<Not applicable>		25. Allow checks ?	Y
16. Commis pct			26. First sale on	None
17. Discount pct	.000		27. Last sale on	None
18. Card-#/Exp			28. Last sale amt	.00
19. Comment			29. Loyalty pts	0

Field number to change ? ?

There are two ways that an email address may be entered into the customer record in CounterPoint. You can either enter the address in the **Email** field, or change the **Ecommerce ?** field to **Yes** and enter the address in the ecommerce popup window.

**NOTE:** There is no need to do both. A change to **Email** automatically changes the contents of the email field associated with **Ecommerce ?**, and vice versa.

### Ecommerce ?

Enter **Yes** and press **Enter**. The customer ecommerce window displays.

Ecommerce	
Email address	<input type="text" value="cponline@synchronics.com"/>
Affiliate	
Ecommerce active ?	Initial password CPONLINE

### Email address

Enter the email address for the customer, and press **Enter**.

If the customer record sent to CPOnline does not have an email address, the **Customer #** will be used for the initial ID, and the customer will be forced to enter a valid email address the first time they log in to your online store.

**NOTE:** If you change a customer's email address in CounterPoint after the customer record has been exported to CPOnline, the change to the email address will not be imported into CPOnline.

### Affiliate

Leave <blank> for **None**.

The **Affiliate** field will be populated by CPOnline (if you have enabled the affiliate program in CPOnline Store Administration).

### Ecommerce active ?

#### Initial password

Ecommerce will be activated the first time an order for the customer is imported into CounterPoint. The initial password defaults to either the customer number or a randomly generated password depending on your selection in **Setup / Ecommerce / Control**. Once the customer has placed an order (and changed his or her password), the initial password will be removed from this window.

At **Any change ?** select **No**. Press **Enter**. You are returned to the **Customers** window. Press **Enter** at **Field number to change ?** to save any changes.

## Importing item long descriptions

Long descriptions of items display on merchandise pages in your online store. You may enter up to 80 lines (with a width of 78 characters per line) of description. The text will wrap as you type, and you may use HTML tags (if you are familiar with HTML) to format the text.

**NOTE:** Do not use quotes as part of your HTML as this will have undesired results online.

You can use an application such as Microsoft Word or Microsoft Excel to enter all of the long descriptions for your ecommerce items into one file, save the file as a comma separated value (CSV) format file, then import the file into CounterPoint using **Setup / Ecommerce / Import item long descriptions**.

The file must be created in a specific format. There should be two records per row: a single item number (not a barcode) followed by a comma and then the entire long description. For example:

APP-1927, The long description for item #APP-1927.

APP-1928, The long description for item #App-1928.

Enter your information in the format shown above and save as a CSV file.

### To use Microsoft Word

A possible method of using Microsoft Word to create a file to import long descriptions is:

1. Open a new document and create a table with two columns.
2. Enter a row for each item with the **item number** in the first column and the **description** in second column. Do not enter a TAB character anywhere, and ensure that your item numbers do not have spaces after them.
3. Save the file as a Word document.
4. Choose **Table / Convert / Table to text** from the Word menu. When asked, select **Commas** as the character to separate text, and click **OK**.
5. Choose **File / Save As** from the Word menu and save the file in **Text only (\*.txt)** format. This file is now formatted properly for CounterPoint.

### To use Microsoft Excel

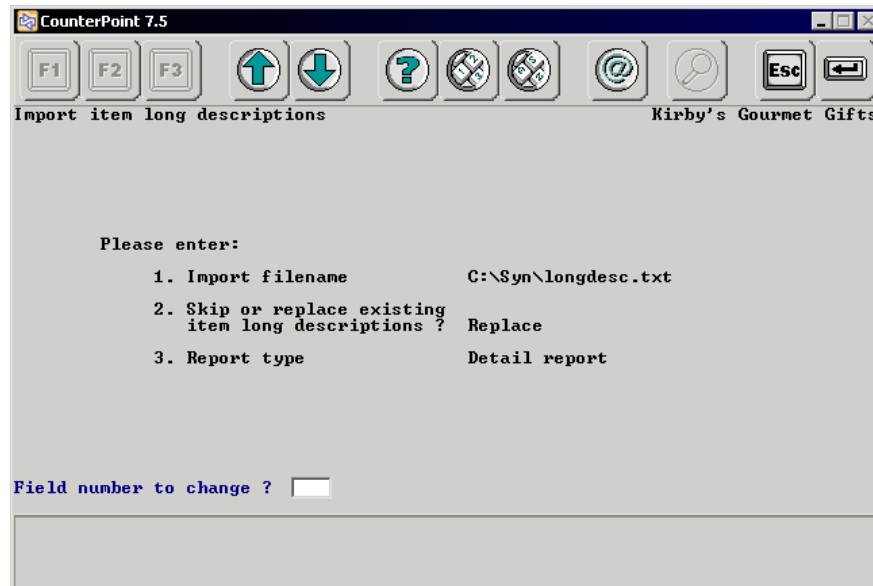
A possible method of using Microsoft Excel to create a file to import long descriptions is:

1. Open a new document and create a table with two columns.
2. Enter your items and descriptions by typing the **item number** in the first column and the **long description** in the second column. Be sure not to leave any blank lines in between your items.
3. When you have finished entering your item information, copy and paste the table into Microsoft Word.

**NOTE:** We recommend using Word for import due to the fact that when using Excel, if there are any commas in the long description, the entire long description will be enclosed in quotation marks.

4. Follow steps 3 through 5 of the Word instructions above to complete the import process.

From the CounterPoint menu, select **Setup / Ecommerce / Import item long descriptions**. The **Import item long descriptions** window displays.



### 1. Import filename

Enter the full path and file name of the text file (e.g., C:\SYN\LONGDESC.TXT).

### 2. Skip or replace existing item long descriptions?

Select **Skip** to skip items that already contain long descriptions, or select **Replace** to replace any existing long descriptions.

### 3. Report type

Select:

**Detail report** To print the details of every long description.

**Errors only** To only print any errors that occurred during import.

**None** To skip printing altogether.

Press **Enter** at **Field number to change ?**. If any errors are encountered in this import they are listed on the report.

## Using data interchange to import item data

---

If you have the CounterPoint Data Interchange Option, you can use this option to import ecommerce information for items. The following item fields can be imported:

**Ecommerce ?**, **Image filename**, **External URL**, **New ?**, **On special ?**, **Enter ref ?**, and **Reference tag**.

## Using item notes for miscellaneous ecommerce info

---

If there is specific item information that you want to publish to your online store, but that information doesn't fit anywhere in the current CounterPoint item fields, you can enter that information in an item note. You can then map the item note to a specific field in CPOne.

For example, your existing CounterPoint items may have descriptions that aren't suitable as CPOne item names (e.g., you have an item with a description of **Aluminum Scoop**, but you want your online store to list the name of this item as **Aluminum Ice Cream Scoop**). In this case, you could enter the desired item name in an item note.

You should change the **Note ID** to something that describes the content of the note (e.g., **CPO-NAME** for a note that contains the CPOne item name). You would then enter a similar note for each of your ecommerce items, ensuring that the **Note ID** is the same for each item.

If you use item notes to enter custom item information, you must ensure that the information entered doesn't exceed the maximum length of the intended destination field in CPOne. For example, item names in CPOne can contain up to 25 characters. If you intend to map a **Note source** to one of the CPOne categories, you must ensure that the category information in the note line doesn't exceed 25 characters.

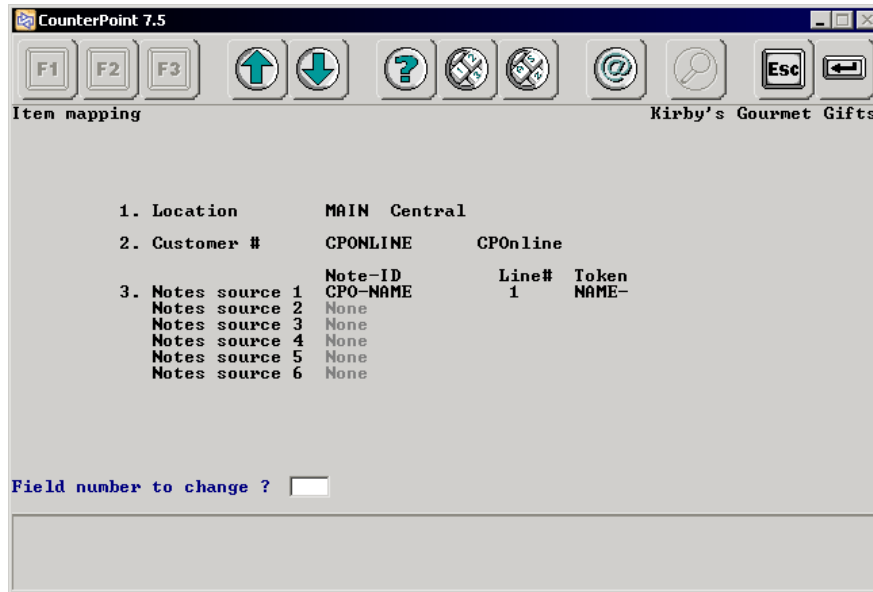
Only one line from an item note can be mapped to a **Note source** for CPOne. When you perform item mapping, you will enter a **Line#** to identify which line of the note is mapped.

### Using tokens in item notes

If you only want to map a part of a line, you may use a **token** in your notes. You can specify a **token** for each item note you map.

A token is an optional character string that appears at the beginning of the note line that you want to publish to your online store. The token is used in **Setup / Ecommerce / Item**

**mapping** to identify what text should be published. All text on the specified line after (but not including) the token will be used as the **Note source**.



For example, if you enter **NAME-** as the token, and the item note reads **NAME-Aluminum Ice Cream Scoop**, the **Note source** for this item will be **Aluminum Ice Cream Scoop**.



## Printing ecommerce reports

### Printing the Ecommerce Category List

The **Ecommerce Category List** allows you to see how your CPOne categories are organized, and even list which items are in which categories. You can also report those items that have not been assigned to ecommerce categories.

Select **Setup / Reports / Ecommerce / Categories**. The **Category list** window displays.

CounterPoint 7.5  
Category list  
Camptown Sports

Please enter:

1. Starting category	"First"
2. Print long descriptions ?	Y
3. Print item numbers ?	Y
4. Print unassigned items ?	Y

Field number to change ?

#### 1. Starting category ?

Enter the category to start the category list.

Press **F9** to look up a category. Press **F1** for the **First** category.

#### 2. Print long descriptions ?

Specify whether to print long descriptions by selecting **Yes** or **No**

#### 3. Print item numbers ?

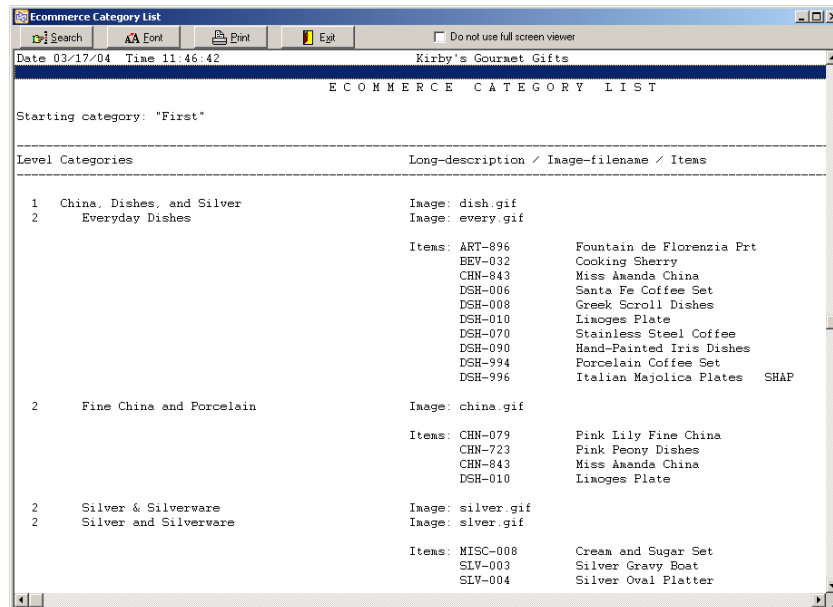
Specify whether to print item numbers by selecting **Yes** or **No**.

#### 4. Print unassigned items ?

Specify whether to print items that have not been assigned to any ecommerce category by selecting **Yes** or **No**.

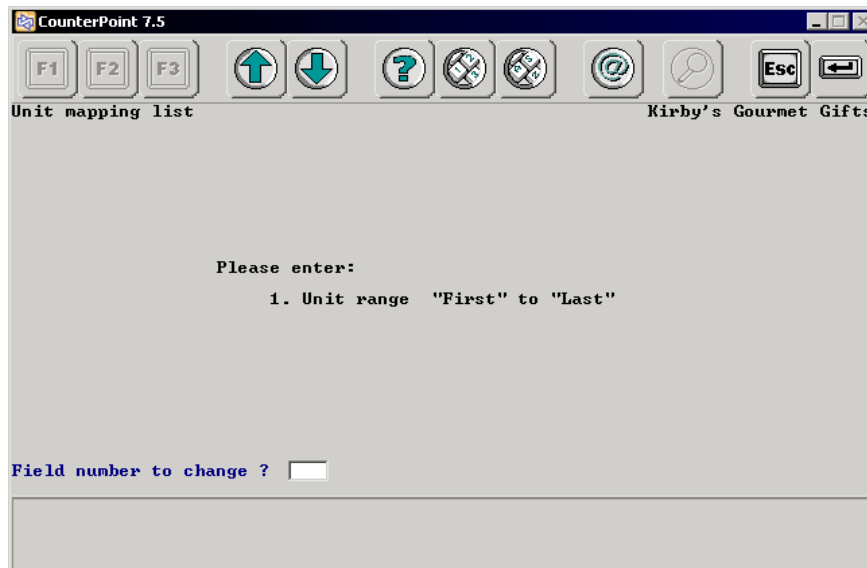
Press **Enter** at **Field number to change ?**. From the **Select printer** popup window, select where to print the **Ecommerce Category List**.

A sample **Ecommerce Category List** is illustrated below.



## Printing the Unit Mapping List

Select **Setup / Reports / Ecommerce / Unit mapping**. The **Unit mapping list** window displays.



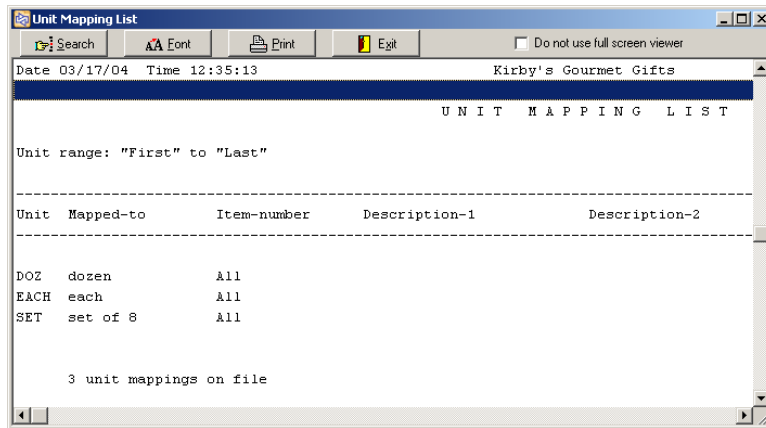
### 1. Unit range

Enter a starting and ending unit range.

Press **F1** for the **First to Last** units on file.

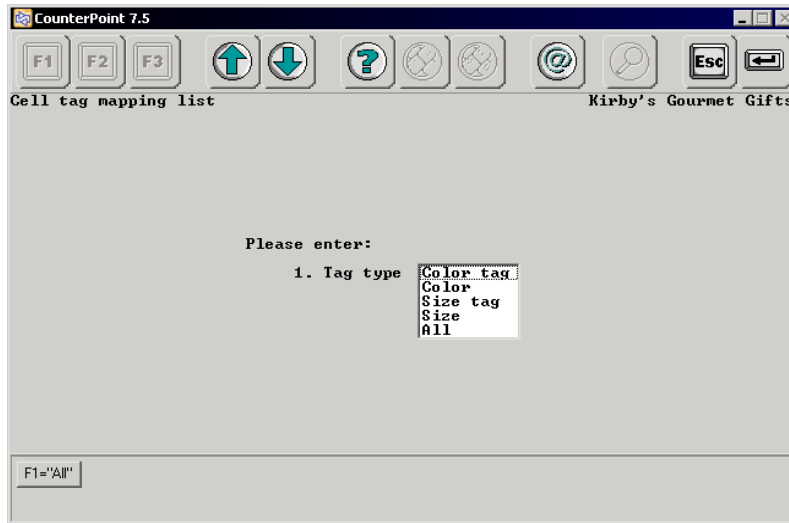
Press **Enter** at **Field number to change ?**. From the **Select printer** popup window, select where to print the Unit mapping list.

A sample **Unit Mapping List** is illustrated below.



## Printing the Cell Tag Mapping List

Select **Setup / Reports / Ecommerce / Cell tag mapping**. The **Cell tag mapping list** window displays.



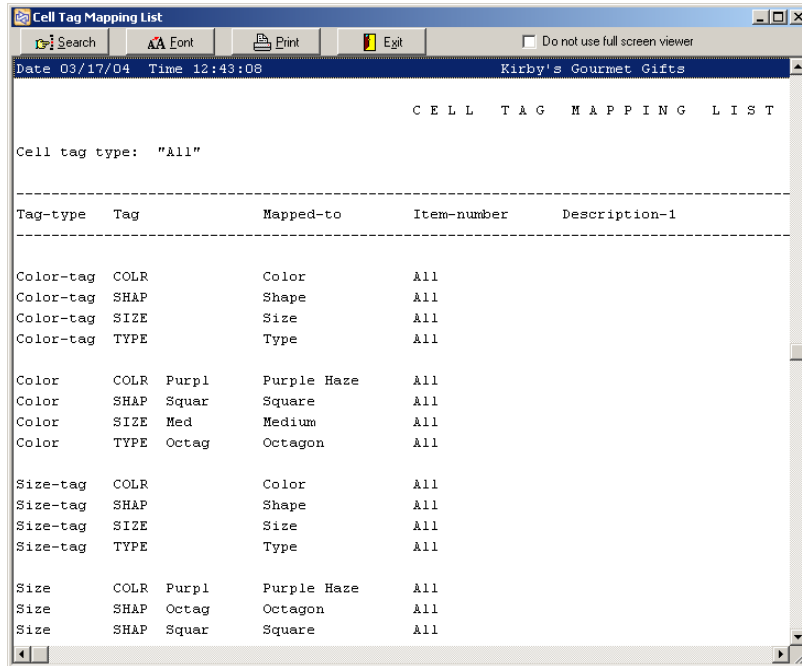
### 1. Tag type

Select a tag type of **Color tag**, **Color**, **Size tag**, or **Size**.

Press **F1** for **All** tag types.

Press **Enter** at **Field number to change ?**. From the **Select printer** popup window, select where to print the **Cell Tag Mapping List**.

A sample **Cell Tag Mapping List** is illustrated below.



The screenshot shows a window titled "Cell Tag Mapping List" with a menu bar containing Search, Font, Print, and Exit. The status bar shows the date 03/17/04, time 12:43:08, and the company name Kirby's Gourmet Gifts. The main content area displays the following table:

CELL TAG MAPPING LIST				
Cell tag type: "All"				
Tag-type	Tag	Mapped-to	Item-number	Description-1
Color-tag	COLR	Color	All	
Color-tag	SHAP	Shape	All	
Color-tag	SIZE	Size	All	
Color-tag	TYPE	Type	All	
Color	COLR	Purpl	Purple Haze	All
Color	SHAP	Squar	Square	All
Color	SIZE	Med	Medium	All
Color	TYPE	Octag	Octagon	All
Size-tag	COLR	Color	All	
Size-tag	SHAP	Shape	All	
Size-tag	SIZE	Size	All	
Size-tag	TYPE	Type	All	
Size	COLR	Purpl	Purple Haze	All
Size	SHAP	Octag	Octagon	All
Size	SHAP	Squar	Square	All

# Using CounterPoint and CPOne

## Publishing information to CPOne

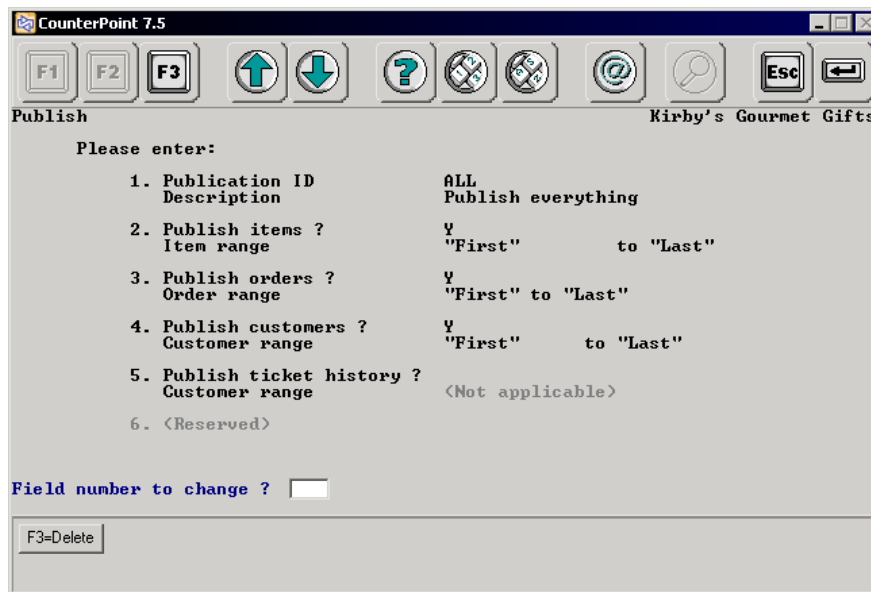
Select **Ecommerce / Publish** to publish items, orders, customers, and/or ticket history in any combination.

### Defining a Publication ID

You can save up to 12 publication ID's, so you don't have to enter parameters every time you publish.

For example, you might save a publication called **DLY** that you run on a daily basis to publish updated item prices and quantities as well as order status updates. You might define a second publication called **CUS** that you run less frequently to publish only your customers.

Select **Ecommerce / Publish**. The **Publish** window displays.



CounterPoint 7.5

Publish Kirby's Gourmet Gifts

Please enter:

1. Publication ID	ALL
Description	Publish everything
2. Publish items ?	Y
Item range	"First" to "Last"
3. Publish orders ?	Y
Order range	"First" to "Last"
4. Publish customers ?	Y
Customer range	"First" to "Last"
5. Publish ticket history ?	
Customer range	<Not applicable>
6. <Reserved>	

Field number to change ?

F3=Delete

### 1. Publication ID

Press **F2** to select from a list of existing publication ID's or enter a name for a new set of publication parameters.

### Description

Enter a description for the new publication ID.

Set parameters for the remaining 5 fields. These will be saved under the name of the new publication ID.

Leave **<blank>** for **None**. If you do not enter a name, the parameters you choose for this publication will not be saved for later use.

## Publishing items

When you publish your item catalog, CounterPoint ecommerce information is written to an ASCII text file named CPTOCPOL-nnnn.TXT. In this file, **nnnn** refers to the publish file number currently in use based on the initial setting in **Setup / Ecommerce / Control**. The CPTOCPOL-nnnn.TXT file is created from CounterPoint data based on the entries in item mapping and stored in the CPONLINE sub-directory below your CounterPoint company directory. CPTOCPOL-nnnn.TXT is the vehicle for getting information from your CounterPoint system to your online store.

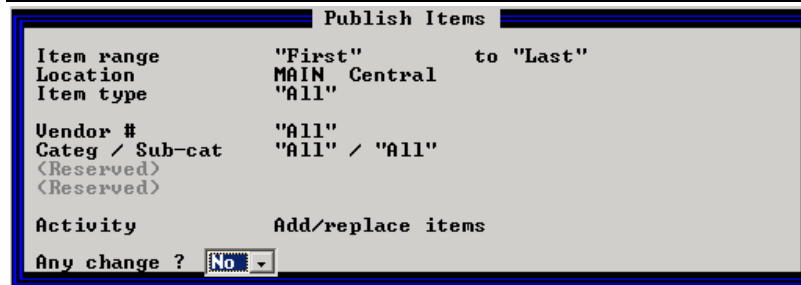
You will routinely publish your item catalog to:

- Assign, move, or unassign items in your online store.
- Add, change, or delete category levels in your online store.
- Change the items listed on your **Specials** page.
- Change the items listed on your **New Items** page.
- Update prices and quantities.

You should also publish an item catalog when you need to re-map any CounterPoint information to your online store.

You have many options for selecting which items to publish in your item catalog. To publish your CounterPoint data, select **Ecommerce / Publish**. Select **Yes** at **Publish items ?**. The **Publish Items** window displays.

### 2. Publish items



The screenshot shows a window titled "Publish Items" with the following fields and values:

Item range	"First" to "Last"
Location	MAIN Central
Item type	"All"
Vendor #	"All"
Categ / Sub-cat	"All" / "All"
<Reserved>	
<Reserved>	
Activity	Add/replace items
Any change ?	<input type="checkbox"/>

#### Item range

Enter the range of item numbers to publish.

Press F1 for the **First** to **Last** item number.

#### Location

The default value for this field is the location specified in item mapping.

**NOTE:** Location will be used for quantity tracking if you mapped **Qty available (Location)** or **Qty on hand (Location)** to CPOne's quantity field, and/or if you mapped **Price(Calculated)** to any CPOne pricing field.

#### Item type

Enter the type of item(s) to publish (e.g., **Inventory**, **Non-inventory**, etc.).

Press F1 for **All**.

**Vendor #**

Enter the vendor number of the items you want to publish.

Press F1 for **All**.

**NOTE:** This field refers to the item's primary vendor for selecting records.

**Categ / Sub-cat**

Enter the category and sub-category you want to publish.

Press use F1 for **All**.

**(Reserved)**

**(Reserved)**

If you use item attributes in your CounterPoint system, they may be used to select items to publish, or press F1 in both fields for **All**.

**Activity**

Indicate what type of item catalog you want to publish.

Select:

**Add/replace items** To add or replace item and category information without removing any existing items from your online store.

**Update prices/quantities** To update existing item prices and quantities only.

**Full replacement** To completely replace all items and categories in your online store with the information being published.

Any existing CPOne items or categories that aren't included in the export are marked as **Inactive** in your CPOne store when you import a Full Replacement catalog. Though not displayed to your online customers, these inactive items and categories aren't actually deleted from your online store, because the information for these items/categories might be needed to fulfill outstanding orders or to display past order history for your customers.

Press **Enter** at **Field number to change ?** to begin publication. A status screen displays as your items publish. When the publication is completed, the message **Process complete – press ESC** displays at the bottom of the screen.

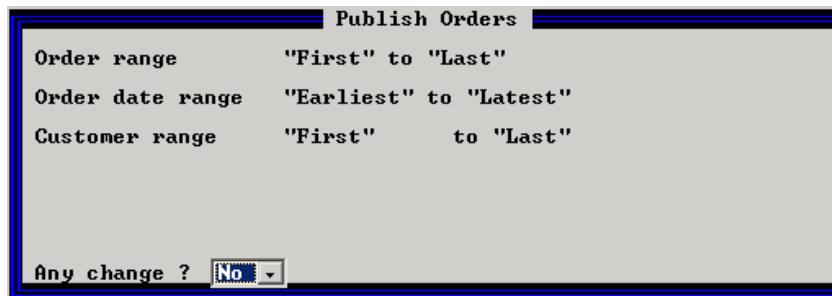
## Publishing orders

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You can publish CPOne order status information—including invoice history—from CounterPoint to CPOne. This allows customers to view the history of their online purchases that were processed through Order Entry.

Select **Ecommerce / Publish**. Select **Yes** at **Publish orders ?**. The **Publish Orders** window displays.

### 3. Publish orders



The screenshot shows a dialog box titled "Publish Orders". It contains three lines of text: "Order range" followed by "First" to "Last", "Order date range" followed by "Earliest" to "Latest", and "Customer range" followed by "First" to "Last". At the bottom left, there is a label "Any change ?" followed by a dropdown menu with "No" selected.

#### Order range

Enter the range of orders you wish to publish.

Press F1 for the **First** to **Last** order number.

#### Order date range

Enter a beginning and ending date for the orders you wish to publish.

Press F1 for the **Earliest** to **Latest** order date.

#### Customer range

Enter the range of customers you wish to publish.

Press F1 for the **First** to **Last** customer number.

### Publishing customers

As mentioned in the previous section, when you publish your item catalog, CounterPoint ecommerce information is written to an ASCII text file named CPTOCPOL-nnnn.TXT. When you publish your customers, the new customer records are written to the CPTOCPOL-nnnn.TXT file.

Publishing customers publishes current information about CounterPoint customers to CPOne. Only customers flagged for ecommerce are published. You will publish customers to send CounterPoint customer records to CPOne for the first time, and also to update existing CPOne customer records.

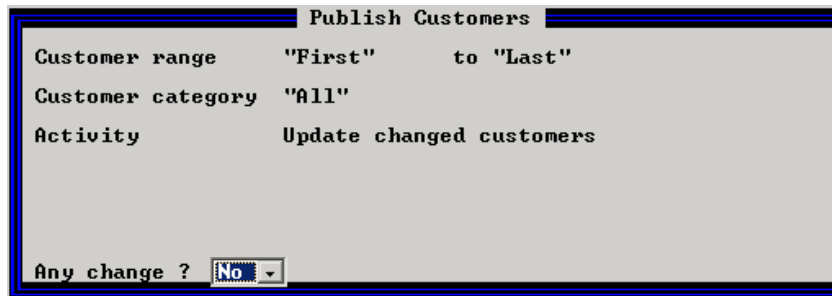
When a new customer submits an order in CPOne, a customer record is created in CounterPoint. A customer number is generated based on the specification you entered **Setup / Ecommerce / Control**.

You will routinely publish customers to CPOne to add and update customer information from CounterPoint to CPOne.

If you are using **On Account** as a payment method in CPOne, AR charge customers can charge to their accounts in your online store. Credit limits and available credit are sent from CounterPoint. If your store allows the **On Account** payment method, you will want to publish customers regularly to ensure accurate credit limit checks for online purchases.

Select **Ecommerce / Publish**. Select **Yes** at **Publish customers ?**. The **Publish Customers** window displays.

#### 4. Publish customers



**Publish Customers**

Customer range "First" to "Last"  
Customer category "All"  
Activity Update changed customers

Any change ?

##### Customer range

Enter the range of customers you wish to publish.

Press F1 for the **First** to **Last** customer number.

##### Customer category

Enter the customer category you wish to publish.

Press F1 for **All**.

##### Activity

Select:

**Add/replace customers** To add or replace customer information by republishing all customers. (This creates the largest file.)

**Update balances** To update existing A/R customer balances.

**Update changed customers** To update only those customers whose information has changed since the last publication and to add new customers.

Press **Enter** at **Field number to change ?** to begin publication. A status screen displays as your customer records publish. When the publication is completed, the message **Process complete - press ESC** displays at the bottom of the screen.

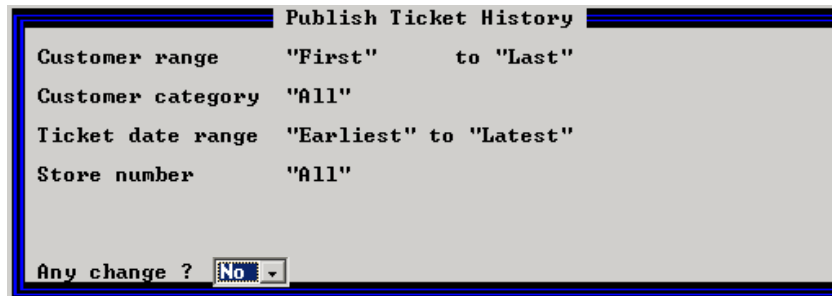
#### Publishing ticket history

You can publish CounterPoint ticket history—for purchases that did not originate online—to CPOne. This allows online shoppers to view the entire history of their purchases, including those made in your CPOne store and your brick-and-mortar store.

**NOTE:** You must sign up for the **CounterPoint Ticket History Premium Feature** from your CPOne Store Administration web site to allow online shoppers to view CounterPoint ticket history in CPOne.

Select **Ecommerce / Publish**. Select **Yes** at **Publish ticket history ?**. The **Publish Ticket History** window displays.

## 5. Publish ticket history ?



**Publish Ticket History**

Customer range	"First" to "Last"
Customer category	"All"
Ticket date range	"Earliest" to "Latest"
Store number	"All"

Any change ?

### Customer range

Enter the range of customers for which you want to publish ticket histories.

Press F1 for the **First** to **Last** customer number.

### Customer category

Enter the customer category for which you want to publish ticket histories.

Press F1 for **All**.

### Ticket date range

Press F2 to enter a specific date range.

Press F1 for the **Earliest** to **Latest** ticket date.

### Store number

Enter a store number.

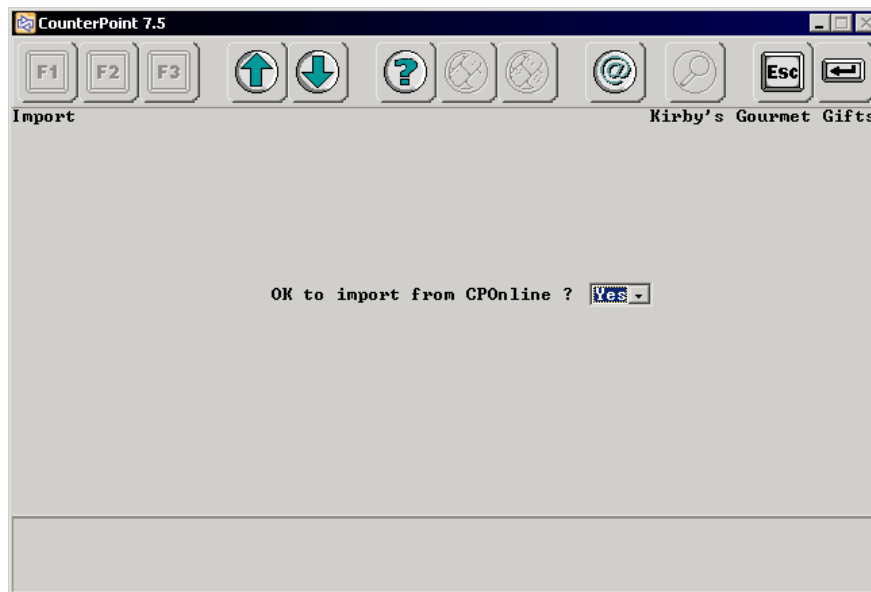
Press F1 for **All**.

## Importing CPOne information into CounterPoint

Use CPOne Store Administration to download and save your order information as a batch file called CPOLTOCP.TXT in your company's CPOne directory (e.g., C:\SYN\COMPANYNAME\CPOne).

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

In CounterPoint, select **Ecommerce / Import**.



### OK to import from CPOne ?

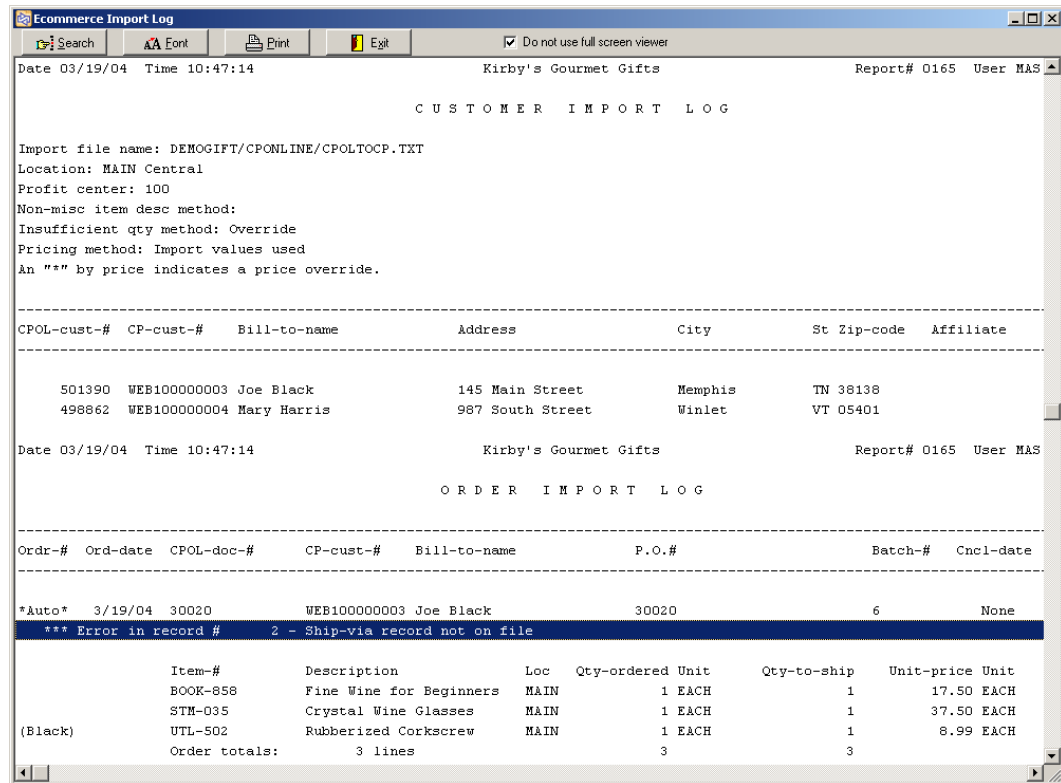
Specify whether to import a batch of orders by selecting **Yes** or **No**.

From the **Select printer** popup window, select where to print the import logs.

When the reports have completed printing the message **Import complete – press ESC** displays.

If errors occurred during import, the message **Errors have occurred – check import log for details** displays. Select **System / Spooled reports / Ecommerce Import Log** to view a summary of orders and customers imported into CounterPoint along with any accompanying error messages.

A sample of an **Order Import Log** containing errors is illustrated below.



Make any necessary changes in CounterPoint to correct the error. For example, in the report above, an error occurred because the correct ship-via code was not on file in CounterPoint. Adding the code in CounterPoint corrects the error.

Once the error or errors have been corrected, open your company's CPOnline directory (e.g., C:\SYN\COMPANYNAME\CPONLINE). Locate the error file CPOLTOCP.ERR. This file contains the erroneous data. Rename this file CPOLTOCP.TXT.

**NOTE:** If a file called CPOLTOCP.TXT already exists in your CPOnline directory, it must be deleted prior to renaming the CPOLTOCP.ERR file.

Re-run **Ecommerce / Import**. The file CPOLTOCP.TXT, which contains the newly corrected data, is imported into CounterPoint, creating an error-free import log.

## Signing up for CPOnline


We recommend that you sign up for the CPOnline service during CounterPoint setup in order to see what's available online while you set up your online store. To sign up, contact us at [www.counterpointonline.com](http://www.counterpointonline.com).

# Appendix


## Order Entry vs. Point of Sale

<b>Feature</b>	<b>If you process CPOne orders using Order Entry...</b>	<b>If you process CPOne orders using Point of Sale...</b>
<b>Order status information in CPOne</b>	You can publish order status information to CPOne so that shoppers can see specific status information about each of their online orders, including whether anything on the order has changed and whether any part of the order has shipped.	No order status information may be published to CPOne. When shoppers view order history online, all orders will always show a status of <b>New</b> .
<b>Invoice history information in CPOne order history</b>	You can publish complete invoice history for your ecommerce orders so that shoppers can see the CounterPoint invoice detail for each of their online orders.	No invoice history information may be published to CPOne.
<b>Email notification to shoppers of order status</b>	You can send automatic email messages whenever the status changes for a particular order, so shoppers are notified when their order ships, if something on the order changes, if the order is placed on hold or backorder, etc.	Email notifications of order status are not available.
<b>Tracking number support</b>	You can publish tracking numbers to CPOne so that shoppers can track their packages right from the Account area of your online store.	No tracking number support is provided for CPOne.
<b>Promotional code reporting</b>	You can use CounterPoint reporting (via the SQL Connection Option) to design whatever reports you need to track promotional code usage to aid in your marketing efforts. (This customizable reporting is available in addition to the pre-defined Promo Codes report in CPOne Store Administration.)	No reporting is available in CounterPoint for CPOne promotional code usage. The only promotional code reporting available is the pre-defined report in CPOne Store Administration.
<b>Possibility of importing duplicate orders</b>	Order Entry will not allow you to import an order if that order already exists in CounterPoint, preventing accidental duplication of orders if the same batch is imported more than once.	No order duplication checking is provided. If you import the same batch more than once, you will create duplicate orders.
<b>Order change restrictions</b>	You can control what changes can be made to ecommerce orders, such as preventing item substitutions or quantity changes.	No order change restrictions are provided. Ecommerce orders can be changed at will.








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Feature	If you process CPOne orders using Order Entry...	If you process CPOne orders using Point of Sale...
<b>CPGateway</b>	Order Entry fully supports online credit card authorization through CPGateway, and allows you to import authorization codes for CPOne orders that were authorized using CPGateway.	Point-of-Sale does not import authorization codes obtained from CPGateway for CPOne orders. Online real-time credit card authorization is not available for Point of Sale users.