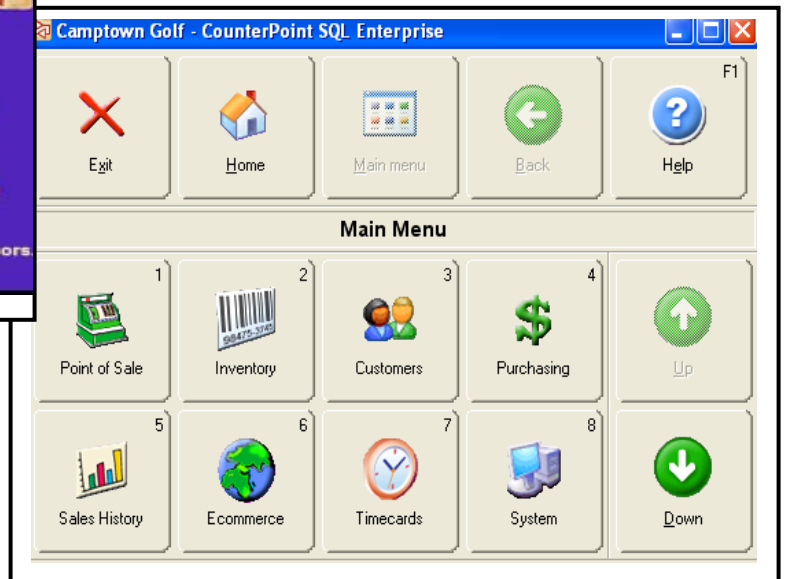
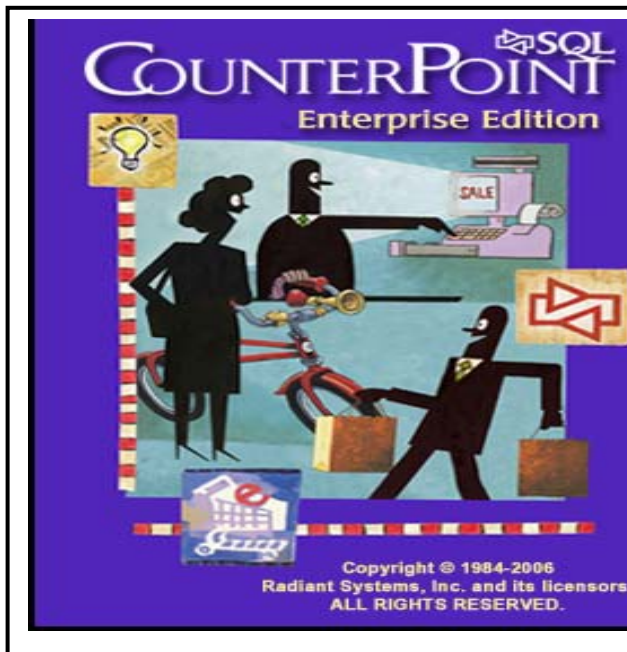




ADVANCED RETAIL MANAGEMENT SYSTEMS

Providing retailers with the technology to excel • Point-of-Sale and Inventory Control specialists

Training Catalog and Syllabus



CounterPoint SQL



Training and Support for CounterPoint SQL

Congratulations on your selection of CounterPoint SQL, the Inventory Control software for specialty retailers'.

CounterPoint SQL is a robust and flexible program. There are different ways to do the same things within CounterPoint SQL. Because the training time is limited, Advanced Retail Management Systems (ARMS) trainers show you the most common way to setup and start using your system, based on your pre-train interview. With the limited time allotted, the trainer does not go into all the different ways that you can do things with CounterPoint SQL.

Your initial trainings through POS training are designed to get you functional with CounterPoint SQL. Advanced trainings are done at a later date to assist you with the more complex parts of the system. You have at your disposal the e-manuals, which consists of electronic CounterPoint SQL manuals, and technical supplements. You also have help functions in CounterPoint SQL to assist you with questions and procedures during and after your trainings. Of course, you are always welcome to call us and schedule a training based on your needs.

In order for you to get the best experience out of the training that ARMS is providing, it is important that your training environment be conducive to learning CounterPoint SQL. The most important factor is to train in an area with the least amount of distractions. We commonly train you in your work environment, and we strongly suggest that if your shop is open during these trainings, you have adequate staff on hand to run your business during the time set aside for training.

Because of our trainer's schedules, we ask that you do your best to anticipate your training needs. The trainers are commonly booked 3 to 4 weeks in advance. We do have a trainer available through our support channels. If you do call in for training through support, the call will be billed against your Client Service minutes. If you do not have client service minutes, an invoice will be generated and sent to you for that billing cycle.

It is important to keep your training dates as you will be billed for missed appointments.

Who should be present at the trainings?

- The 1st training is a system overview, tour of CounterPointSQL, security and some inventory. This training normally should have the owners and upper management present.
- The 2nd training covers purchasing and receiving as well as new item entry. This is usually attended by owners, buyers and warehouse personnel.
- The Point of Sale trainings would include the sales people. You may opt for having duplicate trainings so you can split your staff so you have coverage for the stores while they are being trained. Another option for POS training would be to train the managers and have them train the sales people.

Support for CounterPoint SQL

Regular support hours are Monday through Friday 8am-5pm MST. Emergency technical services are 6am-8am and 5pm-9pm Monday through Friday and 6am-9pm Saturday, Sunday, and Holidays. The Technical Support number: 303-738-1800.

Off-hours Emergency Support should be reserved for the following situations:

1. You cannot use your point of sale.
2. You have data corruption
3. Your system is down

All other calls where assistance is needed should be made during regular business hours.

When calling in for support, it will greatly assist the technicians and you if you have the following information:

1. When did the problem 1st occur
2. What have you done to try to correct the problem
3. What Operating System is your computer running
4. Make and model of the device that is having the issue
5. What version of CounterPoint SQL
6. Location: Store, Station, WorkStation #

How ARMS determines the billing type of the call:

You have a sales agreement in which you have agreed to lease CounterPoint SQL from Radiant Systems. Radiant Systems does not have a direct sales force, nor do they have technical support available directly to end users.

Advanced Retail Management Systems is a Business Partner of Radiant Systems, and we fulfill the sales and support side of the business.

What you get from ARMS is certified technicians who have access to our growing knowledgebase and who have access to Radiant Systems support technicians and developers. Through this Business Partner channel, we do our best to keep businesses like yours operating as well as we can.

When you solicit assistance from ARMS, we log that time in accordance with the agreements you have with us. If an issue can be duplicated by ARMS techs and Radiant Systems, then it could be logged as a bug and corrected in a hot fix release. The software is leased as is; however, Radiant Systems is committed to fixing any issues that are found, and that Radiant Systems deems necessary.

ARMS policy is to track minutes when assistance is solicited for any issues with your software, whether they are perceived or real issues, and to bill for our assistance per your agreement with us. We also track time for training and other services.

Billing Inquiries

If you have billing questions, you need to fax a copy of your Service Detail Statement along with a note on your question about the statement. Send the fax to the attention of the Support Manager. Your inquiry will be researched and a written response will be sent to you, usually before the next billing cycle.

All inquiries must be submitted within 30 days of the invoice date.

Training Evaluation

At some point after your training, you will be sent a training evaluation form. We would appreciate you taking 5 minutes to fill this out and fax back to us. Advanced Retail Management Systems appreciates your effort and comments.

The ARMS team is pleased to have you as a customer, and we look forward to working with you.

Advanced Retail Management Systems

Advanced Retail Management Systems - Denver - Chicago - WWW.ARMSYS.COM

Advanced Retail Management Systems Training Syllabus and Outline

Training Catalog

- CPSQL 100-Initial Training (approx 4 to 6 hours)
 - Introduction
 - Navigation
 - Overview
- CPSQL 101-Inventory Entry (approx 4-6 hours)
 - Inventory
 - Adjustments
 - Reports
- CPSQL 102 Purchasing and Receiving (approx 4-6 hours)
 - Purchase Requests
 - Purchase Orders
 - Receiving
 - Quick Receiving
 - Return To Vendor
 - Adjustments
 - Reports
- CPSQL 103-Point of Sale (approx 4-6 hours)
 - Customers
 - Point of sale
 - Orders
 - Reports
 - Time cards
- CPSQL 104 Touch Screen Design (approx 2 hours)
 - Designing Touch Screens
 - Using Touch Screens
- CPSQL 105 Physical Counts (approx 1 hour)
 - Create/Enter Counts
 - Import Counts
- CPSQL 106 Transfers/Multi Site (approx 2 hours)
 - Transfer Out
 - Transfer In
 - Quick Transfers

Advanced Retail Management Systems

Training Syllabus and Outline

- CPSQL 107 Loyalty Program (approx 2 hours)
 - Configure Loyalty Program
 - Issue/Redeem Loyalty Points
 - Loyalty Adjustments
 - Reports
- CPSQL 200 Prices (approx 2 hours)
 - Special Prices
 - Promotional Prices
 - Contract Prices
 - Planned Promotions
- CPSQL 201 Receivables (A/R option purchased separately-approx 2 hours)
 - Cash Receipts
 - Customer Adjustments
 - Customer Statements

Advanced Retail Management Systems
Training Syllabus and Outline

CPSQL 100 – Initial Training

Client Name: _____

Date(s) of Training _____

A. Introduction

- ____ 1. Review training schedule
- ____ 2. Primary contact method during training process
- ____ 3. Review service plan
- ____ 4. ARM hours
- ____ 5. Off hours
- ____ 6. Windows desktop
- ____ 7. System clock
- ____ 8. Tutorials
- ____ 9. Help PDF
- ____ 10. Copy Fundamentals, Configuration, and Reports manuals to desktop
- ____ 11. Launching CounterPoint SQL
- ____ 12. F1 and Shift F1

B. Navigation

- ____ 1. Point of Sale
- ____ 2. Inventory
- ____ 3. Customers
- ____ 4. Purchasing
- ____ 5. Sales History
- ____ 6. Time cards

C. Overview (Section 1 of CounterPoint Fundamentals)

- ____ 1. CounterPoint menu styles
- ____ 2. CounterPoint toolbars
- ____ 3. Using lookups
- ____ 4. Saving lookups
- ____ 5. Using filters
- ____ 6. Customizing filters
- ____ 7. Saving filters
- ____ 8. Table view
- ____ 9. Customizing table view
- ____ 10. Using zooms
- ____ 11. Entering notes
- ____ 12. Generating reports

Client Signature

Date

CPSQL 101 – Inventory Entry

Client Name: _____ **Date(s) of Training** _____

A. Inventory (Section 2: Defining Items of CounterPoint Fundamentals)

- _____ 1. Defining items
- _____ 2. Defining items-quick items
- _____ 3. Defining items-on the fly
- _____ 4. Zooming on an item
- _____ 5. Defining item, category, and sub-category notes
- _____ 6. Printing item labels
- _____ 7. Other options for defining inventory
- _____ 8. Defining substitute items
- _____ 9. Defining vendor items

B. Adjustments (Section 4: Inventory Processing of CounterPoint Fundamentals)

- _____ 1. Entering inventory adjustments
- _____ 2. Printing an adjustment edit list
- _____ 3. Posting adjustment transactions

C. Inventory Reports (Section 2: Inventory Reports of Reports Handbook)

- _____ 1. Committed inventory
- _____ 2. Customer price list
- _____ 3. Inventory analysis
- _____ 4. Inventory history
- _____ 5. Inventory status
- _____ 6. Item price list
- _____ 7. Items
- _____ 8. Items on sale
- _____ 9. Merchandise analysis
- _____ 10. Purge inactive items
- _____ 11. Six week item history
- _____ 12. Stock status
- _____ 13. Valuation
- _____ 14. Journals/Inventory adjustments

_____ **Client Signature**

_____ **Date**

CPSQL 102 – Purchasing and Receiving

Client Name: _____ **Date(s) of Training** _____

A. Purchasing and Receiving (Section 5 of CounterPoint Fundamentals)

- ____1. Defining vendors
- ____2. Zooming on a vendor
- ____3. Defining vendor items

B. Purchase Requests

- ____1. Entering a purchase request
- ____2. Adding comments to a purchase request
- ____3. Printing a purchase request edit list
- ____4. Posting a purchase request

C. Purchase Orders

- ____1. Cancelling a purchase order
- ____2. Changing a purchase order
- ____3. Viewing open purchase orders
- ____4. Printing purchase order forms

D. Receiving

- ____1. Receiving with a purchase order
- ____2. Receiving without a purchase order
- ____3. Printing a receiving edit list
- ____4. Posting receiving

E. Quick Receiving

- ____1. Entering quick receiving
- ____2. Printing a quick receiving edit list
- ____3. Posting quick receiving

F. Return to Vendor

- ____1. Entering a return to vendor
- ____2. Printing a return to vendor edit list
- ____3. Posting returns to vendors
- ____4. Viewing RTV history

G. Adjustments

- ____1. Entering a purchasing adjustment
- ____2. Printing a purchase adjustment edit list
- ____3. Posting purchase adjustments

H. Purchasing Reports (Section 4: Purchasing Reports of the Reports Handbook)

- _____ 1. Customer specific purchases
- _____ 2. Purchase Orders
- _____ 3. Purchasing Advice
- _____ 4. Vendors
- _____ 5. Journals/Purchase requests
- _____ 6. Journals/Purchase adjustments
- _____ 7. Journals/Quick receiving
- _____ 8. Journals/Receiving
- _____ 9. Journals>Returns to vendors

_____ **Client Signature**

_____ **Date**

CPSQL 103 – Point of Sale

Client Name: _____ **Date(s) of Training** _____

A. Customers (Section 3: Defining Customers of CounterPoint Fundamentals)

- ____ 1. Defining customers
- ____ 2. Defining customers-quick customers
- ____ 3. Defining customers-customer on the fly
- ____ 4. Defining customer shipping addresses
- ____ 5. Zooming on a customer
- ____ 6. Viewing customers

B. Point of Sale (Section 6: Point of Sale Processing of CounterPoint Fundamentals)

- ____ 1. Sequence of Point of Sale
- ____ 2. Activating a drawer
- ____ 3. Entering tickets
- ____ 4. Selling gift certificates
- ____ 5. Editing gift certificates
- ____ 6. Entering miscellaneous charges
- ____ 7. Changing tax amounts
- ____ 8. Voiding a ticket
- ____ 9. Reprinting a ticket
- ____ 10. Tendering a sale
- ____ 11. Redeeming gift certificates
- ____ 12. Issuing store credits
- ____ 13. Redeeming store credits
- ____ 14. Reading a drawer
- ____ 15. Counting a drawer
- ____ 16. Reconciling a drawer
- ____ 17. Settling credit cards
- ____ 18. Posting tickets

C. Orders

- ____ 1. Entering an order
- ____ 2. Taking a deposit for an order
- ____ 3. Completing an order
- ____ 4. Processing an order
- ____ 5. Releasing an order

D. Reports (Section 1: Point of Sale Reports of the Reports Handbook)

- _____1. Drawer reading
- _____2. Gift certificate list
- _____3. Holds
- _____4. Open customer-specific purchases
- _____5. Order activity
- _____6. Orders
- _____7. Pre-Settlement list
- _____8. Price exceptions
- _____9. Purge settlement history
- _____10. Quotes
- _____11. Reprint tickets
- _____12. Store credit list
- _____13. X-tape
- _____14. Journals/Closed gift certificates
- _____15. Journals/Closed order journal
- _____16. Closed store credits
- _____17. Drawer summary
- _____18. Ticket journal
- _____19. Z-Tape

E. Sales History Reports (Section 5: Sales History Reports of the Reports Handbook)

- _____1. Commissions due
- _____2. Flash sales
- _____3. Management history
- _____4. Price exception history
- _____5. Return tickets
- _____6. Sales analysis by group
- _____7. Sales history by customer by item
- _____8. Sales history by item by customer
- _____9. Sales history by sales rep
- _____10. Tax history
- _____11. Tax exceptions
- _____12. Voided tickets

F. Time Cards

- _____1. Clock in/clock out
- _____2. Time cards report

_____ **Client Signature**

_____ **Date**

CPSQL 104 – Touch Screen Design

Client Name: _____ **Date(s) of Training** _____

A. Designing Touch Screens (Section 6: Setting Up Point of Sale Data of Configuring CounterPoint SQL)

- _____1. Planning touch screen configuration
- _____2. Setting up touch screen codes
- _____3. Touch Screen button action

B. Using Touch Screens (Section 6: Point of Sale Processing of CounterPoint Fundamentals)

- _____1. Touch screen ticket entry
- _____2. Exploring touch screen ticket entry
- _____3. Using touch screen ticket entry

Client Signature

Date

CPSQL 105 – Physical Counts

Client Name: _____

Date(s) of Training _____

A. Create/Enter Counts (Section 4: Inventory Processing of CounterPoint Fundamentals)

- ____ 1. Performing a physical count
- ____ 2. Creating a physical count transactions
- ____ 3. Printing the physical count worksheet
- ____ 4. Entering Physical count quantities
- ____ 5. Removing physical count transactions
- ____ 6. Posting physical count transactions

B. Import Counts

- ____ 1. Import counts

Client Signature

Date

CPSQL 106 – Transfers/Multi Site

Client Name: _____ **Date(s) of Training** _____

A. Transfer Out (Section 4: Inventory Processing in CounterPoint Fundamentals)

- _____1. Processing transfers
- _____2. Transfer advice report
- _____3. Transfer out
- _____4. Transfer out edit list
- _____5. Posting transfer outs

B. Transfer In

- _____1. Receiving a transfer
- _____2. Transfer in edit list
- _____3. Posting transfer ins

C. Quick Transfers

- _____1. Entering quick transfers
- _____2. Quick transfers edit list
- _____3. Quick transfer's summary
- _____4. Posting quick transfers

_____ **Client Signature**

_____ **Date**

CPSQL 107 – Loyalty Program

Client Name: _____ **Date(s) of Training** _____

A. Configure Loyalty Program (Page 48 of March 2006 8.3.4 release notes)

- ____ 1. Set-up/Customers to configure
- ____ 2. Earning rules
- ____ 3. Redemption rules
- ____ 4. Loyalty pay code
- ____ 5. Enrolling customers

B. Issue/Redeem

- ____ 1. Issue loyalty points
- ____ 2. Redeem loyalty points

C. Loyalty Adjustments

- ____ 1. Adjusting loyalty points
- ____ 2. Adjust points edit list
- ____ 3. Posting adjusted loyalty points

D. Reports

- ____ 1. Loyalty points
- ____ 2. Point history
- ____ 3. Point redemptions

Client Signature

Date

Advanced Retail Management Systems
Training Syllabus and Outline

CPSQL 200 – Prices

Client Name: _____ **Date(s) of Training** _____

A. Special Prices (Section 2: Defining Items of CounterPoint Fundamentals)

- ____1. Defining special prices
- ____2. Pricing calculation method and basis

B. Promotional Prices

- ____1. Defining promotional prices
- ____2. Pricing calculation method and basis

C. Contract Prices

- ____1. Defining contract prices
- ____2. Pricing calculation method and basis

D. Planned Promotions

- ____1. Defining planned promotions
- ____2. Pricing calculation method and basis

E. Reports

- ____1. Planned Promotions
- ____2. Markdowns

_____ **Client Signature**

_____ **Date**

Advanced Retail Management Systems
Training Syllabus and Outline

CPSQL 201 – Receivables

Client Name: _____

Date(s) of Training _____

A. Cash Receipts (Section 7: Receivables in CounterPoint Fundamentals)

- ____ 1. Entering cash receipts
- ____ 2. Cash receipt activity
- ____ 3. Applying open documents
- ____ 4. Cash receipts edit list

B. Customer Adjustments

- ____ 1. Entering customer adjustments
- ____ 2. Printing an adjustment edit list
- ____ 3. Posting customer adjustments

C. Customer Statements

- ____ 1. Printing customer statements
- ____ 2. Viewing A/R Documents

_____ **Client Signature**

_____ **Date**