

Release Notes v3.6.5

These release notes cover all the changes made since the release of version 3.6.4 on June 4th 2015. This includes information regarding changes that were already documented in the release notes for version 3.6.4A.

Important Notes

If upgrading from a version before 3.6.3, the CoPOS Item Template has changed. The new version is available at www.copos.com and is required for options that use this file. This new CoPOS Item Template says “Use with CoPOS v3.6.3 or Later” in the file header.

New and Changed Features:

Printing a Range of Pages

Tired of printing off 10 pages of items when you only need the information on pages 3 and 4? Well, no more of that for you! CoPOS has made it possible to print a specified page or a range of pages from within a list or report. This will save both paper and time. Look for this new option the next time you go to print a report or list. Please note that most reports have been given this new functionality, if you have a favorite report that did not get updated, let us know. Thanks!

CoPOS now has more ways for you to get help using F10.

Ever wonder what a certain option does? Now you can read a brief summary of any option in CoPOS. Simply type in the option number followed by the F10 key instead of the ENTER key. For example, ever wonder what option 6.2 “Specify Qty Low/High Levels” is all about? Now you can type “6.2” followed by the F10 key instead of the ENTER key to read all about that option.

CoPOS has expanded the usability of the help information from within CoPOS. The F10 key now works in an menu option of CoPOS. In addition to giving you help regarding the current option that you are in, F10 now gives you access to search all of the help text available in CoPOS. Simply type F10 and then chose the option [Search Help] from the Choice Bar. In addition to this feature, F10 help information is also continually being added and expanded throughout CoPOS. Remember F10 is your friend!

New Notation for Faster and More Accurate Editing of Multiple Items or Members.

When you have a list of items or members and you need to change a single attribute, CoPOS has long had the “*” asterisk notation which allowed you to specify the attribute to all items or members in the list. Now you can put the letter “U” or “D” to apply this attribute to this item and all the items above this item - “U” for UP or “D” for DOWN to apply this attribute to this member and all the members below this member in the list. For Example you can get a list of members sort it by their join dates and then give people who joined before Jan. 1 2015 an IOU Limit of \$50 which was grandfathered in but for new members, they get the IOU limit of \$30 that was recently passed by the Co-op board.

Quick Member Contact List

CoPOS has had some requests recently to be able to print out a quick member list with contact information to make calls to members for special events or for other reasons. Now you can do this. In many of the Membership options you can now choose to [Print List] and than [Quick Member Contact List] to accomplish this task. The membership options that have been updated with this functionality include, 7.6 Member Newsletter Status, 7.7 Member Voting Status, 7.8 Patronage Distribution Method, 7.11 Overdue Members, 7.12 Member Sales By Date, 7.14 Member Sales By Volume, 7.15 New Member Signups, 7.17 Member Discounts and 7.18 Member Payments.

External Files as the Source for Options that Manipulate Information in a Tabular Fashion

This is a powerful new feature which has permeated most option in CoPOS. You can now use either the CoPOS Item Template file or the CoPOS Membership Template file in conjunction with most options that manipulate data in a tabular fashion. Some examples of these options include doing a multi-edit in option 4.4 "Member Enter/Edit/List/Query" where you want to change a single attribute of many members at once. Now instead of getting your list of members from a query you can get it from an excel spreadsheet. Another quick way to use this feature is to scan a list of PLUs or UPC codes in excel and than use this list in option 8.1 to check to make sure those products are indeed on sale.

The files used for his new feature are available on the CoPOS website at www.copos.com/resources/templates/.

Item Queries Can Now Use the CoPOS Item Template file as the Source of the Query

The file CoPOS-Item-Template.xlsx is available on the CoPOS website at www.copos.com/resources/templates/. With this new feature you can query the information in this file just the same as you would query information in the item database. For example you can create a CoPOS Item Template file with all of the items from a particular vendor. The file could be populated by CoPOS or from a vendor catalog. You could do an Item Query in option 4.1 "Item Enter/Edit/List/Query" and query specific products from this vendor that are located in the file. In the past you could only query the item database in CoPOS.

Green Info on Shelf Tags

The Green Information for an item such as Local, Regional, Organic, Free Range, Fair Trade, P6 Standards, Independent and Non GMO can now be shown on the shelf tags. This Green Information is printed on the Shelf Tag in place of the Date Printed. Shelf Tags printed for Items lacking a Green Information show the Date Printed. Use System Constant 217 to enable this feature.

CoPOS Weigh and Label Kiosk

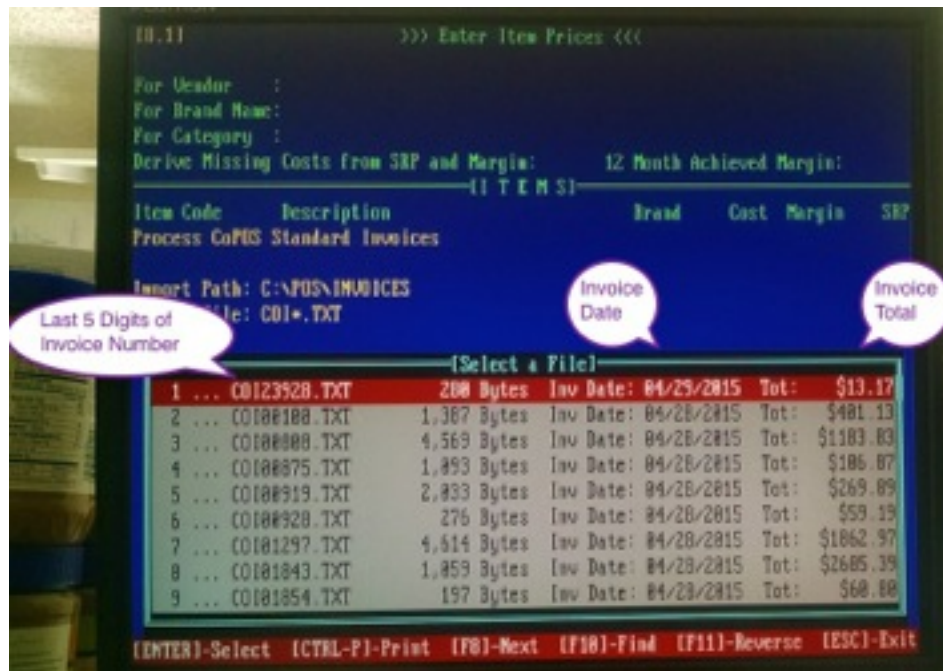
The Weigh and Label Kiosk now has the ability to allow customers to use their own containers. "*tare" will allow customers to override the default tare of the item. To enable this feature set System Constant #125 to Yes.

CoPOS Announces Direct Integration with the UNFI Website

CoPOS is excited to announce integration with the UNFI EDI (Electronic Data Interchange) server. You can now automatically download your UNFI Invoices straight from the UNFI

website into CoPOS and process them in options 8.1 Enter Item Prices or option 8.7 Process Electronic Invoices.

If you are interested in this new feature, you need to contact your UNFI representative and get the login credentials for the UNFI EDI server. This will be an FTP username and password for the server ftp1.unfi.com. You add these credentials to CoPOS and the Invoices are downloaded and converted automatically into files ready to be processed.



This photo shows a list of your UNFI invoices automatically downloaded and converted and ready to process in CoPOS.

CoPOS - New and Changed Features:

1.1 Record a Sale - Basic Member Discount

Members who have already taken their Basic Member Discount during the specified timeframe are now indicated as such in option 1.1 Record a Sale.

1.1 Record a Sale - Placing a Sale on Hold

It is now much easier to place a sale on Hold for a second time. This is useful when a sale is placed on Hold and then recalled and a few items are added and then the sale is placed on Hold again.

1.1 Record a Sale - IOUs

You can now print a summary of a person's IOU balance over time in option [1.1] "Record a Sale." The summary is printed as a chit through the receipt printer. When the cashier rings up a customer with an IOU Balance, CoPOS now gives the option to print a summary of the IOU balances as a small chit on receipt paper.

The summary includes:

Date and Time Printed

Current Member IOU Balance
Balance 1 to 30 Days Overdue
Balance 31 to 60 Days Overdue
Balance 61 to 90 Days Overdue
Balance 91 to 120 Days Overdue
Balance >120 Days Overdue

To see an example of this IOU Summary, go to option [1.1] "Record a Sale" and enter a Member with an IOU Balance in the F7 Member Field. At this point CoPOS shows the current balance and gives the following 6 options:

1. View Aged IOU Summary
2. Print IOU Summary
3. View Outstanding IOUs
4. Repay the Entire IOU
5. Repay Some of the IOU
6. Leave this IOU as is.

Select option 2. Print IOU Summary to see the report printed through the receipt printer.

1.1 Record a Sale - Receipts

Green Attributes for an Item are now displayed when the Item is Price Checked both in option 1.1 Record a Sale and from any menu prompt.

1.1 Record a Sale - Receipts

Sales Receipts show items on sale using the "!" character to the right of the item price. Receipts now have the following explanation of what the "!" is on the receipt. The receipts now say: " ! Items whose price is followed by a '!' are ON SALE."

1.1 Record a Sale - Searching for Items

You can now search Items using the Receipt Description. To do this, prefix your response with a "R/" or "r/". Example "R/PIZZA" returns all Items whose Receipt Description starts with "PIZZA". The same deeper searching syntax is available here as in other Item searches. Example "R/+PIZZA" gives you all the items whose Receipt Description contains the word PIZZA.

Note: This new search syntax is universal and works in other CoPOS options as well. The register is a particularly handy place to search by receipt description for those times when a customer asks a cashier to look up an item based on the receipt that they have in their hand.

1.1 Record a Sale - Searching for Items

You can now use numerical comparisons when looking up an Item in Enter a Sale. For example, consider a Pizza that you know sells for less than \$8.99, you can enter "PIZZA/<8.99".

1.1 Record a Sale - Special Order Deposits

Special Order Deposits taken at the Register and not attached to any particular Special Order can now be selectively applied to a Special Order when it is brought up at the Register or when it is entered in option 5.1 Enter (Place) a Special Order. You can use this feature when taking deposits well in advance for a particular Item. Thanksgiving turkeys come to mind.

1.4.5 Link/Unlink a Gift Card To/From a Member or Customer

Declining Balance Gift Cards (DBGC) can now be Unlinked From a Member or Customer. This allows a store to reuse a physical CoPOS gift card.

1.4.11 Create Preloaded Gift Cards

You can now easily pre-load and sell physical gift cards in CoPOS. Contact CoPOS for more information about how you can promote your co-op with physical gift cards to give away at events or sell at the registers. This can make a nice gift and can help co-op enthusiasts spread the word about your store. CoPOS keeps track of the balance and when the gift card balance is used up the card can be recharged or resold to another member.

1.8 Sales Query

You now have a choice of displaying Register Donations as a Right Hand Column choice in the Sales Query.

1.8 Sales Query

The Sales Query now allows for consolidation by Item, Department, Time slot, Cashier and Register#. All of these consolidations (except the Time slot) can be broken down by hourly Time slots.

1.12.13 Transaction Log

You can search the different transactions by time periods and a multitude of transaction types including most any transaction that involves money at the register including Sales, Voids, Returns, Declining Balance Gift Card (DBGC) Purchases, DBGC Refunds, Miscellaneous Cash Payouts, Miscellaneous R/A, IOU Payoff Via 2.7, Member Payments, Member Payments Reversal, Special Order Deposits, Special Order Deposit Refunds and Deleted Special Order Deposits.

1.29 Member Signup By Cashier

The individual who signed up a Member is now saved. This information is recorded in option 1.1 Record A Sale when signing up a member using the “*N” option from the member field. The person’s initials who signed up the new member can be now viewed in option 7.15 New Member Signup by selecting [Right Col] and than [Signed Up By]. There is also a handy new report summarizing the number of new members signed up by the cashier’s initials and date. This is option 1.29 Member Signup By Cashier. You can print this report by typing the Ctrl key and the letter P.

4.1 Item Enter/Edit/List/Query > Edit

When editing Items in option 4.1, you can now see the current Bottle Deposit when you go to edit the deposit.

4.1 Item Enter/Edit/List/Query > Query

Item Queries can now return results based on the number of characters in a field. For example you can search for all of your Item Codes that are less than 6 characters, in general this would be your PLUs. Please see the F10 help screen for details on how to use this new feature. The following fields can be queried using this new feature:

- 1) Item Code
- 2) Item Description
- 3) Pack Size
- 4) SKU

4.1 Item Enter/Edit/List/Query > Query

The Item Query now lets you query on Restock Dates when the criteria Out of Stock is selected.

4.1 Item Enter/Edit/List/Query > Query

You can now set the scope of the Item Query to be the Last Query run. This allows you to run a query on a query.

4.1 Item Enter/Edit/List/Query > Query

The ability to view "Sales Tax Status" and "Item Unit(s)" also known as "Units of Sale" has been added to the available choices to view in the Rightmost or 5th Column in the option 4.1 Item Query.

4.1 Item Enter/Edit/List/Query > Query

When using the criteria Future Sales or On Current Sale in an item query, you can now filtered the results by:

- 1) Member Only Sales
- 2) Excluding Member Only Sales
- 3) All Sales (Either #1 or #2)

4.1 Item Enter/Edit/List/Query > Query

Multiple codes can now be used in the Item Query for the following selection criteria:

- 1) Units of Sale
- 2) Item Category
- 3) Brand
- 4) Vendor
- 5) Item Code

Multiples are indicated by a comma and will be processed as logical "ORs". Example: An item query where selection criteria for an Item Category is "1001,1004" will result in all items that are in Categories 1001 or 1004 being presented.

4.4 Member Enter/Edit/List/Query > Query

You can perform Member Queries with no specified criteria. This provides a de facto way to quickly view all Members.

4.4 Member Enter/Edit/List/Query > Query

Member Queries can now return results based on the number of characters in a field. For example you can search for all of your Members who reside in a city with more than 10 characters in the name of the city. Please see the F10 help screen for details on how to use this new feature. The following fields can be queried using this new feature:

- 1) City of residence
- 2) State of residence

4.4 Member Enter/Edit/List/Query > Query

The Member Query has two more fields on which to query. These are:

- 1) Members Needing Contact Review
- 2) Members With IOU Credit Limits

4.4 Member Enter/Edit/List/Query > Edit > Multiple Members, Single Field

Member Contact Review status can now be changed en masse via option 4.4 using the edit multiple members, single field option.

4.4 Member Enter/Edit/List/Query > Edit > Single Member, Multiple Fields

Inactive Members are now indicated with an "*" before their name when listing members using F1 or ?L functions or when looking up members by name.

Note: This new notation works in other options as well where members are listed using the F1 or ?L functions.

4.7 Units of Sale Enter/Edit/List

Changing the Default Unit of Sale is much more intuitive. There is now a Field #5 that reads "Default Units of Sale For Either Sale By Unit or Random Weight? [Y/N]:"

6.11 Department Transfers Multiple Items

Items can now be transferred to another department en masse. This allows the Deli department to "go shopping" for ingredients and then transfer those items to the deli in one big basket.

6.24 Move Ingredient Text

Ingredients can now be copied en masse between the two label types, Standard and Expanded.

7.4 Enter/Edit Variable Member Days

You can now use a Member File (or any list of member numbers saved in Excel) to set the scoop of the members eligible for this discount.

7.15 New Member Signups

The individual who signed up a Member is now saved. This information is recorded in option 1.1 Record A Sale when signing up a member using the "*N" option from the member field. The person's initials who signed up the new member can be now viewed in option 7.15 New Member Signup by selecting [Right Col] and then [Signed Up By]. There is also a handy new report summarizing the number of new members signed up by the cashier's initials and date. This is option 1.29 Member Signup By Cashier. You can print this report typing the Ctrl key and the letter P.

7.25 Individual Member Sales By Month

Figures from option 7.25 can now be made to match the figures from option 1.8 Sales Query using a new feature of Option 7.25 that lets you selectively add in the sales tax, bottle deposits and coupons.

8.1 Enter Item Prices

Future Pricing changes can now be set up through Option 8.1. This allows for future pricing changes to be done en masse.

8.1 Enter Item Prices

SRP price changes exported from CoSAT option 2.3 "Send Item Pricing File" can now be processed using this option and the item selection method of "2 ... External File" and than the template type of "CoPOS Pricing." This is an easy and quick way to process price changes made on your CoSAT unit.

8.8.1 Process CAP Files

Items processed via the CAP flyer whose CAP sale price is in excess of an Item's base price are now flagged. The flagging works as follows, if the CAP/TPR sales starts today or before, any item whose CAP price is in excess of the Base SRP is flagged. Otherwise, the flagging is restricted to any Item whose CAP price is in excess of 10% of the item's base price. The 10% rule is designed to allow for future price changes that occur before the sale starts.

Individuals processing the CAP file can view, print or save this list of items for use elsewhere in CoPOS.

Note: The flagging happens before the sale prices are set, so if you are setting up a CAP sale for next week, you can still check if any sale prices are over your current base price by telling CoPOS to start the sale today, save the list of items and quit without saving.

8.8.8 Process CoPOS Sale Files

Items placed on sale via option 8.8.8 Process CoPOS Sale File can now be placed on a list.

8.8.9 Process Price Change Files

Items that change prices using the CoPOS Item File are now automatically saved to a list so that tags can be printed in option 8.20 Print Multiple Shelf tags. Tags can still be printed from option 8.8.9 but by using option 8.20 with a query and this list, the user has the ability to restrict which tags get printed based on such criteria such as department or date the item last sold.

8.21 Print Shelf Tag for ONE Item

Shelf Tags can now be printed that show the Single Item Price for items that are set up as being Break Pack items.

8.30 Pricing Change Log

This new option now lets you view, print and export the price changes that have occurred in your system. To enable CoPOS to keep track of these price and cost changes, set System Constant #185, Log the last 20 Item Cost or SRP Changes to Yes.

9.1 Enter/Edit Store Settings - Payroll Start Day

You can now control the day of the week that the payroll starts. This is done via Option

9.1. Steps to do this:

- 1) Go to Option 9.1. Save and Continue.
- 2) Choose the [MORE] selection.
- 3) Choose the [Day Employee Payroll Starts] selection.
- 4) Specify the Day of the week the Payroll is to start or Select [REMOVE] to clear the Payroll Start Day to the default.

9.1 Enter/Edit Store Settings > Smart Rounding

Smart Rounding has been changed to round down to 99 cents on the previous dollar on amounts over \$10 when the decimal value is between .00 and .09

10.5.5 Receive a Periodic Inventory Count FROM Tab Delineated File

This now functions more closely to 10.5.4. The following is now done by 10.5.5:

- 1) Automatically saves a list of the items that were imported for later use in CoPOS.
- 2) Lets the user REVERSE a Periodic Inventory Count.

10.5.7 Receive Items Marked Out of Stock BY CoSAT

Items can now be marked as out-of-stock in CoSAT and then sent to CoPOS.

In CoSAT use option 11 "Specify Out of Stock Items" and option 2.7 "Send Items Marked as Out of Stock By this CoSAT Unit" to mark items as out of stock and send these items to CoPOS. In CoPOS use option 10.5.7 "Receive Items Marked Out of Stock BY CoSAT" to import the Out of Stock status of these items.

CoPOS - Bug Fixes:

1.1 Record A Sale

Contract Review now works correctly at the register if your intention is to continue flagging a Member already flagged for Contract Review.

1.1 Record A Sale

Corrected the problem of the discounts doubling that occurred when the following conditions were met:

- 1) Member has an Employee or Worker Discount
- 2) Member is overdue
- 3) System Constant #89 is set to "Y".

1.22 Set Up Sales Receipt Message

The fifth line of the receipt message is now saved and it now prints.

2.2 IOU Inquiry (Charges ONLY)

This option now shows the correct figure for the Total Charges

3.1 Sales Recap

Member Only Sales that are blocked from overdue Members now show the correct discounting in the Member Discounts field. Prior to this fix, these sales reflected as a negative member discount in the Member Discounts field.

3.34 Sales Statistics

This option now shows the correct figures when you elect to View Sales per Week for ALL Departments.

4.1 Item Enter/Edit/List/Query > Query

Item Locations now correctly display in the Item Query when choosing the criteria Locations to Include or Exclude.

Figures in the [Rightmost Column] selection of an Item Query were updated to be more accurate. The issue appeared limited to selections in Column #3 of the [Rightmost (Fifth) Column] Selection box which included Net Sales History, Returns, Spoilage (SRP) ... down to Gross Profit and COGS.

4.1 Item Enter/Edit/List/Query > Query

Origin selection is now blocked when Country/State Origin Tables are NOT built.

4.1 Item Enter/Edit/List/Query > Printing Shelf Tags

With System Constant #190 set to Yes, the shelf tag print option now correctly prompts for the number of tags to be printed.

4.1 Item Enter/Edit/List/Query > Item Import / Export

Alternate Item ID is no longer lost when exporting and re-importing. A similar problem has been corrected when importing Item Changes from CoSAT.

5.1 Enter (Place) an Order

Fixes an issue where the senior discount was added to items on days that were not set as senior discount days. The senior discount days are set in option 9.1, Enter/Edit Store Settings and they are now respected. This option has been cleaned up a bit and now gives customers the same discount when placing a special order that they would receive at the register. If the customer places a special order for a case, which is customary for special orders, the customer receives the case discount and no other discounts. In the rare instance where a customer's normal discount is greater than the case discount, the customer will receive their normal discount when buying a case.

7.4 Enter/Edit Variable Member Days

Help text and wording in this option has been updated and clarified to explain how the question, "Use Discount With Overdue Members" works.

The answers to the question works as you would expect it to work. If a member is overdue and you answer No, then the member does NOT get the Variable Member Day discount until that member pays their membership and becomes current.

The confusion comes with the list of members displayed and the column, that is now labeled, "Eligible."

Members that are marked Eligible, do not automatically get the variable member day discount. The question "Use Discounts with Overdue Members" still determines if EVERY member gets the discount or ONLY members in good standing get the discount. With the Member Day Sale set for only members in good standing, if you mark someone eligible and they are overdue, they will not get the discount until they pay up.

If you mark a member as not being Eligible in the list of members than they will never get the Member Day Discount whether they are paid up, pay up during the sale or are overdue. Marking them not eligible means this sale does not apply to that member.

7.18 Member Payments

Member Export in option 7.18 now exports correctly.

8.2 Enter Sale Prices

Fixed an issue where a current sale would occasionally overwrite other sale prices when that sale was in the middle of a longer sale. CoPOS can now stack one sale on top of another sale.

8.5 Enter Costs for Individual Items

Looking an Item up by SKU now works even if the SKU is an Item Code to a different Item. Prefix the SKU code with "/" to look up an item by SKU.

8.8.1 Process CAP Files

The alternative ID field for an item is now correctly looked at when processing items in the CAP sales file. This means that you can add the UNFI UPC codes to your bulk items in the Alternative ID field and have those items go on CAP sale automatically when importing the CAP sales file in this option.

8.8.4 Process UNFI Monthly Specials Files

Fixed an issue where occasionally a future sale would not be remembered in CoPOS.

8.8.8 Process CoPOS Sale Files

Sale Tags now print correctly.

8.20 Print MULTIPLE Shelf Tags

Units of Measure now correctly align on all Shelf Tags.

8.21 Print Shelf Tag for ONE Item

Units of Measure now correctly align on all Shelf Tags.

10.5.6 Receive items Edited BY CoSAT

Alternate Item ID is no longer lost when sending items to CoSAT for other edits and than importing item changes from CoSAT.

CoSAT - New and Changed Features:

2.3 Send Item Pricing File

Making SRP price changes in CoSAT has been made much easier. Use CoSAT option 5 "Price Check (and Change)" or option 4 "Item Enter/Edit/List" to make the SRP price change or an item cost change. After changing the price, you can send this information back to CoPOS via CoSAT option 2.3 "Send Item Pricing File." In CoPOS the Item Pricing File can be processed using CoPOS option 8.1 "Enter Item Prices," the item selection method of "2 ... External File" and than the template type of "CoPOS Pricing".

2.7 Send Items Marked as Out of Stock by this CoSAT Unit

Items can now be marked as out-of-stock in CoSAT and then sent to CoPOS.

In CoSAT use option 11 "Specify Out of Stock Items" and option 2.7 "Send Items Marked as Out of Stock By this CoSAT Unit" to mark items as out of stock and send these items to CoPOS. In CoPOS use option 10.5.7 "Receive Items Marked Out of Stock BY CoSAT" to import the Out of Stock status of these items.

System Constant Changes/Fixes:

#237 Allow Sales to be Recalled From a Different Register

Controls whether sales held at one register can be recalled from a different register.

Note: Setting this System Constant to "Y" increases the chances of overwriting a sale held at this register when recalling a sale from a different register. A single register can at most only have one sale on hold.

#238 Block Returns from Incrementing DBGK Balances

Controls whether monies originating from a Return can be posted to a Declining Balance Gift Card (DBGK)

#239 Show Unit Prices on Receipts When >1 Item Purchased

Controls whether a separate line is printed on receipts each time more than one of a specific item is purchased. Having this feature enabled saves you having to figure out the unit price when processing returns when one of a lot is returned.

Example: 3 Pizzas at \$9.49 are purchased for a total of \$28.47 and 1 is returned. Without this System Constant enabled, you are stuck having to divide \$28.47 by 3. With this System Constant enabled, you can see the unit price of \$9.49 from the line in the receipt.

#240 Allow SPINS Data to be Sent via FTP

Controls whether CoPOS can export SPINS data via the FTP feature of the Controller. In order for this to work, you need to set up a file path C:\IPC\SPINS.

#241 Use a Different Audio Alert Tone for Mis-rings

Controls whether the audio alert is issued in a different tone when a mis-ring occurs at the register. This capability is restricted to CoTERMs only.

#242 Default to Printing "This Page" When Printing a List

Controls whether the defaulted selection is set to "This Page" when printing a list. If "Y", the "This Page" is the default scope. Otherwise, "ALL" is the defaulted print scope.

#243 Prompt to Save Last Query when Query has NO Qualifying Items.

Controls whether the Item Query prompts to save a Query even if this Query has no qualifying Items.