

# Release Notes v4.4

These release notes cover all the changes made since the release of version 4.1 on June 20th 2017. Note that CoPOS version 4.2 and 4.3 were never officially released.

## CoPOS is Excited to Introduce:

### Remote Register

CoPOS can now run a register without being connected to the CoPOS server. This allows stores to easily sell items at events or at a co-op food truck or at the plant sale outside the front door. The sales can be loaded into the main CoPOS system at a later time and will utilize Register 9. This means that stores that use Remote Register should make sure they are not currently using Register 9.

### Wireless CoTERM

CoPOS can now be run on a CoTERM that connects to the server via a wireless connection. Please call CoPOS for details on the hardware needed to implement this new option.

### Email Receipts

CoPOS can now eliminate the paper receipt and email your customers their receipt if they choose. This feature requires a CoTERM. To turn on this new feature, make sure the customer has a valid email address in option 4.4, "Member Database", and turn on system constant #311. Now when a sale is recorded in CoPOS there will be an option to send an email receipt. Note that if a member/owner wants to receive an email receipt by default, this can be established for individual members by editing their email address in option 4.4, "Member Database", field 9, confirm the existing email address and then answer [Yes] to make this the default choice at the register for this co-op owner.

### Automatic Backup and Shutdown

It is always important to backup your data because unforeseen events happen more than you might expect. Working with 60 some stores around the nation CoPOS sees a wider variety of natural disasters and hardware failures than most people. To make backing up easier, CoPOS has added a new automatic backup and shut down option in CoPOS. You can now set CoPOS to backup and then shut down at a certain time every night. CoPOS has also found that the system runs better when it is shut down on a nightly basis.

### Automatic Email Alerts for Successful Backups

It is now possible to receive an Email when a backup successfully concludes. This is done via option 9.1, "Store Settings". To set this up, enter option 9.1 and choose [Save (and Continue)]. Next choose option 1 "Store Name and Address". Set up an Email Address by using the option [Edit a Field(s)] and selecting field 19. Instruct CoPOS to send the emails by responding "Y" to Field 20. Upon successful completion of a backup being written to the USB flash drive or being sent to the

CoPOS Cloud, CoPOS will send an email that states the date and time of the successful backup. The email will come from the account "backup@cloud.copos.com".

### **Incentive Program**

CoPOS now lets you set up one of the many USDA administered incentive programs, for example, Double-Up Food Bucks and Fresh Savings. All of these programs work by accruing monies when purchasing eligible Items using EBT. Users can then redeem a specified percentage, up to a given daily amount, when purchasing other Items at a later sale. CoPOS lets you enroll users, establish the eligible Items along with the percentage off, maximum usage amount, and any department restrictions. Monthly statutory reports are available.

### **Loyalty Program**

CoPOS now lets you set up a loyalty program in which individuals can earn points whenever they make a purchase. These loyalty points can then be redeemed at later sales. In addition, reporting on accruals and usage is available.

### **Integrated Credit Card Improvements**

There are many new improvements to the way credit cards are processed in CoPOS. The highlights include the ability to process two or even three credit cards in one transactions, the ability to handle EBT Cash and the big change from the credit card processors is that a signature is no longer required by the credit card companies. Gravity has also added the ability for your store to add their logo to the credit card machine. This new version has been running for a few months at a handful of locations and we have gotten positive feedback.

### **Undo Price Changes**

CoPOS now has an option that lets you reverse a price change to the item SRP (price). This is option is 8.13, "Undo (Reverse) Item SRP Changes" and it allows the user to undo the last SRP change for any set of items chosen based on the date of the last SRP change. After getting the list of items, the previous 5 SRP changes can be viewed and selected. The set of items can be based on a query, a saved list, items entered or items from an external document. Please note that options 13 through 32 on Menu 8, "Pricing/Margin Options" have been shifted down one. Thus these are now options 14 through 33.

### **Import a Single Item Field for Multiple Items**

There is a new option to import the CoPOS Item Template file for only a single item attribute using option 4.1, "Item Database" and the option to edit a single field for multiple items. This is a great new option to ensure that the file imported is only changing a single item attribute.

### **Ctrl X will Copy Data in CoPOS, use Ctrl V to Paste.**

This works in various places in CoPOS. You can copy dates, items, brand name codes, etc. Furthermore you can copy one of each type. So you can copy a date and an item and paste them in their respective fields. One example is cutting/copying prices in option 8.1, "Enter Item Prices" and

pasting those price in other items in option 8.1 or even in other options. Unfortunately Ctrl C was not an option to use for a copy shortcut in CoPOS so hopefully the good old Ctrl X for cut will work for people. Do not worry that the data is actually being cut, it is just being copied.

### **Frozen SRPs**

Have you ever had that one product or a certain brand that you need to keep at a lower margin to stay competitive in your market. Well CoPOS now makes that easier with Frozen SRPs. This new feature lets the user to mark all the products whose SRP is to remain fixed. These products can be viewed and updated separately in the pricing options and are not changed by default in any pricing options. Furthermore, if a user goes and attempts to change a price on an individual item with a frozen SRP, CoPOS will tell the user that the price has been frozen and the date it was frozen. Check out option 8.12, "Freeze/Unfreeze Item SRPs" and stay competitive in your local market with your price conscience shoppers.

## **New and Changed System-wide Features:**

### **Item Lists and Member Lists Are Available as a Data Source In Many Options**

Item lists can now be used as a selection source in most pricing options as well as in most options in menu 3, "Reports/Labels/Graphs". Member lists can be used as a selection source in most reports and inquires in menu option 7, "Membership Options". What are lists? Lists are a collection of any set of items or members and can be created in options 4.18 for items and 4.19 for members. Lists can also be saved after working with specific sets of items in other options. Member and item lists can also be created from an external data source such as a CoSAT or any list of items or members created in an Excel spreadsheet following the list templates on the CoPOS website.

### **List Selection Now Prompts for Cutoff Date**

When making your selection from item or member lists, a prompt for a cutoff date is issued. If this prompt is answered, only those lists created on or after the specified date are shown in the selection box. This is an easy way to reduce the number of lists to sort through when using lists.

### **Quickly Exit CoPOS with ".Q"**

There is now a quick way to exit CoPOS from any menu. Simply type ".q" or ".Q" and CoPOS will log out. This is especially useful for folks with user security enabled.

### **Expanded Sales Information in the Item Profile**

The Item Profile now has expanded sales information. After scanning an item for a price check or viewing an item profile from multiple locations, CoPOS now has an option for summarized sales, purchasing diversity, sales by day, top sale days, and statistics on how many members purchase the item.

## **Menu 8, “Pricing and Margin Options” has New Options, Some Options have Moved**

There are now two new options in menu 8. This means that some old trusty reports have now been shifted down, for example the report 8.29, “Cost of Good Sold By Department” is now option 8.31.

### **New Report Added: Individual Sales By Department**

CoPOS has added a new report to menu #3, “Reports/Labels/Graphs Options”. This report is "Individual Sales By Department" and the path from the main menu is 3.12 (note that the other options after this report have been shifted down by one number).

This report shows the sum of sales from a particular department across a range of days. Any sale involving an item belonging to the specified department is shown. Each sale shows:

- Sale Date
- Sale#
- Member name (if sale was to a member/owner)
- #Items in specified department sold in this sale.
- \$Value of the items in the specified department in this sale.
- \$Net Sale

## **CoPOS - New and Changed Features:**

### **1.1 Record a Sale**

When adding new members at the register, CoPOS can auto fill the city and state based on matching zip codes setup in option 4.10, “City/State/Zip”. Simply type in the zip code when prompted for the city to use autofill. This option has been updated to greatly improve the way that it works when adding or editing members. In option 4.10, a city can have multiple zip codes. This works the other way as well, if a matching city is entered, CoPOS will now prompt to use the appropriate zip code and add the state automatically.

There is now a way to freeze the flow of entering items at the register if an inactive item is entered. This is controlled by system constant, #298. When an inactive item is scanned and this system constant is set to 'Y', the cashier is prompted at the bottom of the screen to enter 'P' to proceed. This prompt continues ad-infinitum until 'P' is entered. This will prevent the inadvertent scanning of an inactive item which can result in the customer getting two free items if the cashier is not aware that the item scanned was inactive.

It is now possible to attach a special order to a sale at any point during a register transaction. Use the F4 or [Other] option and then chose [Spc Ord] and [Pickup S/O].

It is now possible to search for someone’s name anywhere in the name field of the member database. When looking up a member’s name, simply use the notation “+Name”. As an example if

someone is named Rosemary but they go by Mary, the cashier might type in “,Mary” to look for people that have a first name of Mary. But currently CoPOS will only find people whose first name begins with Mary. With this new feature you can type, “+Mary” and CoPOS will find all the members with Mary anywhere in their first or last names. So Rosemary will be a choice. This new feature also works well for people with hyphenated last names.

It is now possible to be prompted at the register when taking member discounts for member types that provide for a discount on each sale. This is controlled by System Constant #29 “Prompt for Additional OK if Member Discount Taken”.

It is now possible to have a prompt at the register for a round up donation. You can even flag individual members to be prompted independently. This is controlled by system constants #325 and #326.

A new tab has been added to the choice bar that can appear when purchasing an item sold as both a single or a pack. This choice bar is conditionally issued (see system constant #268) when a break pack item is purchased. The new tab is called [Choose]. If system constant #323 is set to Yes, this will be the default choice when selling an item that is both sold as a pack and a single. If [Choose] is selected, the prompt is reiterated after an audio alert. This has been done to prevent an inadvertent and incorrect selection of pack or single when a cashier is not paying attention.

It is now possible to set an age minimum on a product of 18 years old in addition to the original 21 year old age minimum. This will help stores comply with age restrictions when selling products containing CBD oil.

When using integrated credit card processing, CoPOS can now handle up to three credit card being used to pay for a single sale. This is controlled by system constant 308.

It is now possible to identify an Item with a 12 digit UPC code by the first several digits of its UPC code. This is done by following your entry with a “\*”. Example: “042272\*” will bring up all Items whose 12 digit UPC code begins with the six digit string “042272”. This can be useful at the register when a product barcode is poorly printed or obstructed for any reason. This searching capability is also available in other options as well. Note that this only works for 12 digit UPC codes, this function will not search for PLUs or other UPC codes longer or shorter than 12 digits.

It is now possible to print or email a member specific message on a receipt. These messages can be setup in option 4.4, “Member Database”. The messages are only printed or emailed to the specific member and can be restricted to a particular date range. The member message specified appears on the receipt near the bottom below a title line that says “! Member Message: !” and above the “Thank You” section. This could be used to give coupons to certain members such as new members or frequent shoppers.

Price overwrites can now be password protected at the register. This is done by enabling system constant 332, “Password Protect Price Overwrites at the Register”. Once enabled the first price overwrite in a sale will require a password, subsequent price overwrites in that same sale will not require a password. The password is set in option 10.10.7, “Set Default Passwords”.

It is now possible to control if the member/owner name or the member/owner number takes precedence in the display at the top of the register screen. Prior to this, the member name was displayed, followed by the member number. The display of the member number was contingent on enough space to accommodate it. Now, the member number can be displayed first, followed by the member name. The truncation will be on the member name, not the member number. This is controlled by system constant, #310, "Show Member# Followed by Member Name at Register".

An alert can now be issued at the register when purchasing in excess of 30 pounds or 30 ounces of an item on one line. Whether or not this prompt is issued is controlled by system constant, #305, "Prompt when weights over 30 (Lbs or Oz) entered at Register"

Storewide coupons can now be set to run on a specified date range as well as specific days of the week.

### **1.3 Enter a Return**

It is now possible to enable a system constant to block the cashier's ability to specify whether an item is bad or not when doing a return.

### **1.8 Sales Query**

It is now possible to query by sales that include storewide coupons and to select specific storewide coupons.

It is now possible to view the dollar amount from special orders in the rightmost column when viewing a list of sales.

It is now possible to query for sales that include a specific sales tax rate as well as sales tax amounts.

The export file from this sales query option has been augmented with the net sales of all the items sold in each department for each department. Stated a different way, for every sales transaction recorded, 17 columns have been added to this report to indicate the net department sales for each of the departments.

CoPOS can now query on sales from a particular department and look at the particular owners who purchased from that department. Having this capability lets stores see who is purchasing heavily in particular departments.

There is now an additional prompt in this query that appears when the criteria, Payment by Credit Card, is included and internal credit card processing (system constant #200) is enabled. This new prompt allows the user to select between the following options for how a credit card is processed: internal, manual, any internal, external, or any.

#### **1.12.2 Credit Cards In Inquiry**

This report now shows the average dollar amount per credit card transaction. This figure is displayed at the top of the screen in the field titled "Avg \$Slip:"

### **1.12.3 EBT In Inquiry**

It is now possible to view a summary by date and by department of the EBT tender transactions. Choose the [Summary] choice bar option and then [Department]. This information is also available through a dedicated report in option 10.4.5 "View EBT Sales By Department."

### **1.22 Sales Receipt Message**

It is now possible to specify a message to be up to four lines long and appear at the top of the sales receipt. Option 1.22 has been modified to provide a way to enter this message. If this message is omitted, receipts appear as they did before this feature.

### **1.26 Bag Charge/Credit Amounts**

CoPOS now has the capability of making bag charges taxable. The tax status of bag charges or credits is entered when entering the bag charge or credit amount in this option.

### **1.29 Cashier Performance**

It is now possible to see the basket size by cashier.

### **2.5 IOUs By Date**

This report can now be filtered by membership types or a report can be generated for a single member/owner.

### **3.1 Sales Recap**

It is now possible to view the daily sales notepad (which is maintained via option 1.13) from within the sales recap report. To do this, select the [More] tab, then select [Notes].

Going forward, the "#Transactions By Register" on page 2 of the sales recap report will be saved ad infinitum. Previously this data could be purged depending on the purging status of the register tapes in option 9.1, "Store Settings".

The Sales Tax Basis is now shown on the screen of the sales recap report if more than one tax tier is utilized and system constant #324 is enabled. This breakdown is found on page 2 of the sales recap report.

There is now an audit tool in option 3.1, "Sales Recap" that allows a reconciliation with a summary of X-tapes for a day. This tool is only available when a single day range is specified for the sales recap report. The tool is available under the choice bar option [More] then [Audit] and finally [X-Tape Audit].

### **3.9 Coupon Usage**

It is now possible to restrict this report by selected types of Storewide Coupons.

It is now possible to view a summary of different Storewide Coupons used that includes the total value of each coupon along with the number of sales where the coupon was used.

### **3.20 Daily Sales (Movement) By Item**

The quantity spoiled and the quantity low for items has been added to the export file. These fields will help these reports be even more useful when being used to place an order from the distributor.

### **4.1 Item Database (with Query)**

CoPOS now provides an additional green field that can be defined by the user in option 10.16, "Specify Custom Green Field". In addition to sorting and filtering items by this new green field, the total of products purchased with this attribute can be shown at the bottom of the receipt by turning on system constant #289, "Show Tally of Purchased Custom Green Field Items on Receipt".

It is now possible to password protect edits to the item database. This is done by setting a new system constant, #293, to "Y" and changing the default password.

The item export now puts an apostrophe in front of the Alternate Item Code. This ensures that numeric 12 (or longer) digit item codes do not show in scientific notation when importing into an Excel spreadsheet as well as preventing the lose of the leading zero on UPC codes.

The item export now includes both the "Basics" and the "Custom Green Field". There is a new CoPOS Item Template file on the CoPOS website to import these new green fields.

When the item SRP or cost is changed for an item that is sold as a pack and a single, CoPOS now prompts to change the single item price.

When an Item is reactivated and active inventory is turned on, a prompt for the QOH (Quantity on Hand) is issued. This prompt allows for pressing [Enter] to accept the current QOH of the item which is the QOH of the item when it was inactivated.

The item query now has a selection criteria for "Age Minimum". In order to achieve this, the criteria for "Vendor" and "Secondary Vendor" were consolidated. When selecting vendors, a prompt is issued to include items with secondary vendors.

CoPOS now allows the user to view the item profile while editing a single item. This is choice 9 in the [Save (Continue)] choice box. Note that the option to "EDIT Another Item" has been moved from choice 9 to choice 0 in this choice box.

It is now possible to view the Minimum Purchase Age status for items in the item query. A new "Right Column" choice has been added to the display of items that results from doing a query. This new column view will indicate if the item is set for a minimum age limit of 18 years old or 21 years old.

Alternate Item Codes can now be changed en masse using option 4.1 and the edit function for "Multiple Items, Single Field". This option can also import a CoPOS Item Template File to import alternate Item codes quickly without changing any other item attributes.

CoPOS has introduced Dietary Guides such as dairy free, gluten free, etc. These guides can be entered on a per-item basis in option 4.1, "Item Database". To see the full list go to option 4.1, "Item Database" and [Edit] an item, then choose [Save (Continue)] and option 6, Dietary. CoPOS supports a total of 28 Dietary Guides. Dietary Guides can also be queried and imported via option 4.1 using the [query] and [Import] options.

#### **4.2 Item Category Database (with Query)**

CoPOS has added a query to this option. Item Categories can be queried on the Category Code, Description, Food Status, Random Weight Status, Category Margin and SPINS Category. This feature will also be used to build more sophisticated item queries in the future.

#### **4.4 Member Database (with Query)**

When entering addresses in this option, CoPOS can auto fill the city and state based on the zip code entered. Zip codes need to be first setup in option 4.10, "City/State/Zip". After a zip code or multiple zip codes have been entered for a particular city, the user can simply type the zip code into the city field and the city/state/zip code fields will all be filled in automatically. This option has been updated recently to greatly improve the way that it works when adding or editing members in CoPOS. Also, if the city name is entered, CoPOS will now prompt to use the appropriate zip code if multiple zip codes exist for that city.

CoPOS now allows for the entry of zip codes in the zip+4 format. This is 5 digits, 1 dash, 4 digits. Example being 88007-1234.

It is now possible to have a prompt at the register for a "Round Up Donation" for individual members. This is set in option 4.4, "Member Database" using the [Edit] option followed by the option [Multiple Members, Single Field] and then selecting "Register Round Up Status". See the system constants #325 and #326 for more details.

It is now possible to view members forced as being current. This is done using a member query and including the criteria, "Members Current in Their Dues". After the criteria is approved, the user will see the following prompt, "Restrict to Members Explicitly Flagged as Current [Yes] [No]". Choose "Y" and CoPOS will only display those members explicitly marked or forced as "Current" using option 7.10, "Flag Members as Current in Payments".

The member query now has a way to select ONLY those members whose only purchase was on their join date. This is done by including the query criteria "Members with Last Sale On or After". When prompted for the date of the last sale on or after, enter "JOIN DATE" or "\*J" to see a list of members whose only purchase was on the day they joined the co-op. This feature makes it easy to spot non-active owners of the co-op.

#### **4.11 Employee Database**

It is now possible to direct a message to a specific employee to be viewed when that employee clocks in. This is done using the employee notepad found in option 4.11, "Employee Database". To utilize this option, [Edit] the desired employee, choose [Notes], then enter the message that you want to be displayed. After saving the changes, affirm the prompt that reads "Display this Message When This Employee Clocks In:" The message will now be displayed when the employee clocks into the timekeeping function of CoPOS and can be dismissed by that employee if they do not want to continue to see the message.

#### **4.17 Storewide Coupons**

CoPOS can now print scannable storewide coupons. This is done via a new choice bar in option 4.17, "Storewide Coupon". Choose [Print/Export], then choose [Print Coupons] to print a CoPOS storewide coupon that scans at the register.

Storewide coupons can now be restricted by Item Categories and can be set to run on a specified date range as well as specific days of the week.

#### **5.1 Enter (Place) a Special Order**

Added an "M" (for margin) syntax to the pricing field for calculating an item price on a special order. When you precede your response with an "M", in the price field, CoPOS will calculate the SRP based on the item's cost and the specified margin. For example M10 will calculate a price based on the item cost and a 10% margin. An alerted is presented if the margin specified is in excess of 75%.

#### **5.2 Edit an Order (Special Order)**

This option now recognizes EBT (SNAP) as a valid tender type.

#### **6.1.6 Print Inventory Sheets**

When printing the inventory sheets CoPOS can now print the item code as a UPC or EAN bar code underneath the item code. See system constant #302 for details.

#### **6.1.7 Inventory Valuation Detail and 6.1.8 Inventory Valuation Summary**

These two reports now utilize the sale cost as the cost basis if the item is on sale and has a sale cost attached to the sale when it is inventoried. They previously used the regular base cost of an item even if an item was on sale and had a sale cost when it was inventoried.

#### **6.1.8 Inventory Valuation Summary**

It is now possible to view the Inventory Valuation Detail on a per department basis from within the Inventory Valuation Summary option. Do this by selecting the choice bar option "Valuation Detail" and then the desired department followed by the ENTER key.

### **6.11 Reduction/Transfer (Multiple Items)**

It is now possible to enter notes for reduction/transfer incidents entered in option 6.11, "Reduction/Transfer (Multiple Items)". Notes can be referred to at a later time to remember why certain items were reduced or transferred. This option was previously only available when doing a reduction/transfer for one item at a time. To attach a note, simply save the multiple item reduction / transfer Incident and CoPOS will prompt the user to attach a note to each transaction that lacks a note already.

How would a reduction / transfer item already have a note? Well, if System Constant #322 is enabled, a note can be attached to each item as it is entered and thus the note attached after saving the reduction or transfer incident only gets attached to those items that do not currently have a note.

### **6.13 Reduction/Transfer Detail**

It is now possible to summarize spoilage incidents by "Item Category" using the choice bar option [Summaries]. This summary can be printed using the "Ctrl P" option while viewing. The "Item Category" is also included in the export file created by this option.

### **6.14 Spoilage By Department**

The Spoilage By Department option has traditionally calculated the spoilage percentage by taking the cost of the items spoiled and dividing it by the cost of goods sold. CoPOS has now added the ability to look at the spoilage percentage as it relates to the item SRP, which is the SRP of the item spoiled divided by the total dollars sold. This calculation can be chosen by using the choice bar option [% Spoilage].

### **6.15 Inventory Status**

The Inventory Status report now provides a summary of the active inventory valuation (cost of inventory) that is queried in this report. The summary can be seen and printed by Brand, Department or Vendor.

### **6.17 Item Reorder Information**

When printing this Item Reorder Report, CoPOS can now print the item code as a UPC or EAN bar code underneath the item code. See system constant #302 for details.

### **6.30 Non-Existing Items Scanned**

CoPOS will now automatically keep track of all 8, 12, and 13 digit codes (UPC-A, UPC-E and EAN codes) that are scanned at the register but not found in the CoPOS item database. These scans of items not in the item database are referred to as "Non-Existing Items". Each scan of a Non-Existing Item is held on file for 60 days. This option lets you selectively view the non-existing items and add the items to the system if desired.

## **7.9 Attach Sales to Members for Patronage**

It is now possible to move sales between members for purposes of patronage whereas previously this was not possible, only non-member sales previously could be attached to a member. If a sale is already attached to a member for patronage, an alert will appear. This same alert does NOT happen when moving a non-member sale to a member.

## **7.12 Overdue Members**

It is now possible to toggle the display in the report option 7.12, "Overdue Members". The default display shows the date the last payment was due, this can be switched out to view the date of the last sale to this owner. To toggle this display use the choice bar option "Rt Col" (right column).

## **7.21 Member Percentile Sales**

Provided a new option to view who the top 2% purchasing members are for any selected month, and the dollar amount of their purchases.

## **7.26 Refunded Member Equity**

CoPOS now has a new option that lets you view and report on refunded equity. This is option 7.26, "Refunded Member Equity". The reports can be filtered by membership type and refund dates. Note that the old option 7.26, "Individual Member Sales By Month" has been moved to option 7.29.

## **8.1 Enter Item Prices**

This option now allows the user to filter the items by the green fields in CoPOS. This is especially useful for working on pricing items in the NCG Co-op Basics program or for any individual pricing criteria a store wants to implement using the user defined green field in CoPOS. See option 10.19 "Specify Custom Green Field".

## **8.2 Enter Sale Prices**

This option now displays the item's current base cost, margin and SRP at the bottom of the screen when entering Sale Prices. This gives the user more information to help enter sale prices with more accurately.

The user can now enter the sale costs in this option. To enter a sale cost, type "C" followed by the cost of the item while on sale. Example: "C3.56" would be a sale cost of \$3.56. When entering sale costs in this manner, you are prompted to save the sale cost. If an item has a sale cost associated with it, the sale cost will be displayed at the bottom of the screen when assigning sale prices and costs.

## **8.5 Enter Costs for Individual Items**

It is now possible to edit the QOH (Quantity On Hand) from this option. In order to do this, you must enable system constant #290, "Allow Inventory QOH Edits from Option 8.5".

A pricing calculator has been made available in this option.

## **8.7 Process Electronic Invoices**

It is now possible to add items with a zero cost on the invoice to CoPOS. These are items that were shipped for free to the store for promotional or other reasons.

### **8.8.1 Process Co-op Deals File**

CoPOS has changed the wording of "CAP" to "Co-op Deals" throughout this option to be current with the NCG name for this discount program. This option was previously called "Process CAP Files".

### **8.8.9 Process Price Change Files - Support Added for LBMX Basics File**

CoPOS added the ability to process the NCG Co-op Basics File. CoPOS can update the item green field attribute of "Basics" and also NCG Basic pricing based on the items in the download file from the LBMX system. Please contact CoPOS to start utilizing this new feature and keep all the NCG Basic items priced correctly and flagged accurately in the database for reporting purposes.

### **8.14 Delete Future Pricing Changes**

CoPOS now has an option that lets the user delete future cost and SRP changes en masse. This is Option 8.14. Please note that the previous options 8.14 through 8.33 have been shifted down one. Thus, what was option 8.14 is now option 8.15, etc.

### **8.24 Print Shelf Tag for ONE Item**

The printing of the two tier pricing information is now available on a shelf tag. Thus a tag can say "3 for \$5" under the regular SRP. This option is controlled by system constant #300, "Show Two Tier Pricing on Shelf Tags."

### **8.28 Contribution Margin Inquiry**

The Contributing Margin Inquiry now has a summary by green fields and can be filtered by an item query, individual items, lists or standard import files.

## **9.1 Store Settings**

It is now possible to receive an email when a backup successfully concludes. This is done via Option 9.1, "Store Settings". To set this up, enter Option 9.1 and choose [Save (and Continue)]. Next choose option 1, "Store Name and Address". Set up an email address by using the option [Edit a Field(s)] and selecting field 19. Instruct CoPOS to send the emails by responding "Y" to Field 20. Upon successful completion of a backup being written to the USB flash drive or sent to the CoPOS Cloud, CoPOS will send an email that states the date and time of the successful backup. The email will come from the account "backup@cloud.copos.com".

CoPOS now allows a store to choose from five different "You Saved" messages to show on the sales receipt. The path to make the selection is option 9.1, "Store Settings" > Save and Continue > 10 More > 10 Edit "You Saved" Message on Receipt.

#### **10.1.10 Enter/Edit/View Clock In Message**

It is now possible to post a message requiring acknowledgement when an employee clocks in. This message is entered via this new option 10.1.10 in the timekeeping options. To view which employees have acknowledged the message use option 10.1.11, "Clock In Message Acknowledgements".

#### **10.2.2 View/Print Hotlists**

This option now displays and prints the Units of Sale such as by the pound or by the each for the items on the different hotlists.

#### **10.4.5 View EBT Sales By Department**

EBT Sales can now be viewed and printed on a per department basis over a range of dates.

## **CoPOS - Bug Fixes:**

### **1.1 Record a Sale**

CoPOS is now accurate in blocking the ability for a Member to do an IOU Sale when they have a balance of >90 days and System Constant #193 is set to "Y".

CoPOS no longer generates an "Other Discount" when a price of a "single" (as part of a break pack) item is overwritten. Instead a price overwrite is properly recorded.

The green status of "Free Range" now shows on register receipts.

### **1.15 Close a Register Session**

This option now correctly prints the closing date and time on the register tape when the register tape is printed from this option.

### **3.27 Best/Worst/Non Selling Items**

This option now correctly excludes Items that did not sell when instructed to do so.

### **4.1 Item Database (with Query)**

Alternate Item IDs now transfer correctly in the Item Merge option. The wording pertaining to Alternate Item IDs has also been clarified in the Item Merge option.

The SRP and margin are now correctly calculated when the cost is entered using the "C" syntax in field 8, "Item Price (SRP)", for those items whose supplier (vendor) is set up to have the SRP locked and the margin floated instead of floating the SRP and locking the margin.

### **7.19 Member Payments**

The export now works correctly when there are multiple payments in a single day.

## **CoSAT - New and Changed Features:**

**CoSAT has a new menu structure and the functions have been updated to more closely match their related functions in CoPOS.**

### **Item Alternative Codes Now Work in CoSAT**

CoSAT now recognizes Alternate Item IDs in all options.

### **10.5 Print Item Bar Code Label for ONE Item**

This new option in CoSAT lets the user print a barcode label for ONE Item. This is analogous to CoPOS option 3.14, "Print Item Barcode Labels".

## **System Constant Changes/Fixes:**

### **#167 Use Item Price at the time Special Order was placed**

Controls whether the Item Price used for a Special Order Item is the current price or the price of the Item when the Special Order was placed. If set to "Y" the price of the Item at the time the Special Order was placed is used.

### **#188 Prompt to Exempt Member Special Order Discounts (Ex: Catering)**

Controls whether your store's Special Order Discount can be suppressed in Option 5.1, "Enter a Special Order". This is sometimes used in catering situations.

This system constant has been enhanced to work correctly in situations where an unpriced item is being sold as a special order. (#2185)

### **#215 Show Accrued Patronage on Sales Receipts**

Controls whether the Accrued Patronage from a Sale is shown on the Sales Receipt. In order for Accrued Patronage to show, System Constant #77 (Accrue Patronage on a Per Sales Basis) must also be set to "Y".

**#269 Round Up Singles Price of Items On Sale**

Controls whether the Singles Price of an Item placed on sale is rounded up.

**#288 Allow CoTERM USB Imports/Exports**

Controls whether USBs attached to your CoTERM are recognized as a source for Exports and Imports. Setting this System Constant to "Y" circumvents the bottleneck found at the Server when multiple people want to Export or Import files.

**#289 Show tally of Custom Green Field Items on Receipt**

Controls whether the Total Purchase \$Amount of Items whose Green Attributes contain the Custom Green Attribute is displayed on the Sales Receipt.

**#290 Allow Inventory QOH Edits from Option 8.5**

Controls whether Inventory QOH Edits can be made from Option 8.5 In order to edit an Items QOH from Option 8.5 (Enter Costs for Individual Items) System Constant #5 (Maintain Active Inventory) needs to be set to "Y".

**#291 Use Net Cost if Reg Cost missing on CoPOS Standard Invoices**

Controls whether the Net Cost is used on CoPOS Standard Invoices if the Regular Cost is missing. If this System is not set to "Y" and the Regular Cost is missing, the Cost will be treated as a missing Cost.

**#292 Include ONLY Active Items in Item Pricing Options by Default**

Controls whether Pricing Options are restricted to Active Items Only. If this prompt is set to "Y", ONLY Items that are Active will be included when using any of the Pricing Options (Menu #9). Otherwise, these Options will prompt for Active Items Only with the default being "Y".

**#293 Password Protect Item Database Edits via Option 4.1**

Controls whether Item Edits via Option 4.1 are password protected. If this System Constant is set to "Y" a password prompt will be issued whenever an Item Edit via 4.1 is attempted. Otherwise, no special password protection in 4.1.

**#294 Allow Participation in Incentive Program Without Enrolling**

Controls whether individuals who use the Incentive Program must first be marked as registered. Individuals are registered in the Incentive Program in Option 10.12.5 (Add/Remove Incentive Program Enrollees) and you can view Incentive Program enrollees in Option 10.12.6 (View Incentive Program Enrollees). If this System Constant is set to "Y", any Member or Customer can make use of the Incentive Program. Otherwise, a Member or Customer wishing to use the Incentive Program must already be registered.

**#295 Default 'G' Gift Certificate to Internal DBGC**

Controls whether the Default when purchasing a Gift Card on a line at the Register is Internal (DBGC) or External Gift Card. When set to 'Y', the default is Internal (DBGC). Otherwise, it's External.

**#296 Show Item Code below Description on Receipt**

Controls whether an extra line showing the Item Code is printed on a Sales Receipt underneath the Item Description

**#297 Block Drawer Opening when ONLY Credit Card or DBGC tendered**

Controls whether the Cash Drawer is blocked from opening when ONLY a Credit Card or a Declining Balance Gift Card (DBGC) is tendered. When this System Constant is set to "Y" and a Sale is paid for by ONLY a Credit Card or a Declining Balance Gift Card (or a combination of the two), the Cash Drawer will NOT open.

**#298 Require Cashier to type "P" when Inactive Item entered**

Controls whether the cadence of entering Items at the Register is interrupted when an Inactive Item is entered. Setting this System Constant to "Y" will require Cashiers to enter "P" prior to continuing when an Inactive Item is entered.

**#299 Automatically check for Online Store Orders**

Controls whether Online Store Orders are automatically loaded into CoPOS. For more information on adding an Online Store, contact CoPOS.

**#300 Printing Two Tier Price Information on Tags**

Controls whether an Item's Two Tier Pricing is shown underneath the SRP on Shelf Tags.

**#301 Edit Items directly from Inventory Options**

Controls whether Item information can be directly edited from the following Inventory Options:

- 6.2 .... Enter Qty Low/High Levels
- 6.3 .... Adjust Inventory Levels By Item
- 6.4 .... Assign Locations to Items
- 6.5 .... View Items in a Specified Location
- 6.6 .... Inquire on an Item's Location
- 6.15 .... Inventory Status
- 6.16 .... Inventory Inquiry By Item
- 6.17 .... Item Reorder Information
- 6.18 .... Inventory Log
- 6.22 .... Selectively Inactivate Items
- 6.23 .... Selectively Activate Items
- 6.24 .... Replace <Nil> QOH with Zero

### **#302 Indicate System Printer Barcode capability**

Controls whether you are ever prompted to print UPC/EAN Barcodes underneath Item Codes in Options 6.1.6 (Print Inventory Sheets) and 6.17 (Item Reorder Information). This System Constant should stay at [N] unless you have a BarDIMM in your System Printer.

Note: Our standard System Printers DO NOT come with BarDIMMs but we do offer System Printers that can be configured with a BarDIMM. (#1954)

### **#303 Use Predictive Inventory to determine Qty Low/High**

Controls whether an algorithm is used to auto-populate the Qty Low and High. When this feature is enabled, CoPOS looks at a rolling total of #Items Sold. This scan is run every Monday as part of the start of day procedure and sets up the Average #Sold/Day.

If this feature is enabled, there are two parameters which need to be set up for each Vendor. These are:

Lead Time: #Days in advance that a Vendor needs to fill an order.

Order Frequency: #Days between successive orders from a Vendor.

There is also a "Safety Stock" parameter which can be set up on a per-Item basis that can serve as a buffer to handle sales volatility for each Item.

Quantity Low :  $(\text{Lead Time} + \text{Order Frequency}) * \text{Avg Sold Per Day (When NOT on Sale)} + \text{Safety Stock}$ . This is rounded up to the nearest whole number.

Quantity High:  $\text{Quantity Low} + (\text{Case Qty} * (\# \text{Items Sold in Frequency} / \text{Case Qty}))$ .

This is rounded up to the nearest whole number.

### **#304 Return ALL Transactions in batch on PAX CC Device when closing**

Have the PAX Device attached to a station transmit information back about all credit card charges in the batch prior to closing the batch. This information can be used when verifying credit card transactions.

Note: It can take several minutes for this to complete.

### **#305 Prompt when weights over 30 (Lbs or Oz) entered at Register**

Controls whether a confirmation prompt is issued when quantities in excess of 30 Lbs (or 30 Oz if sold by the Oz) are entered at the Register.

### **#306 Prompt for Credit/Debit on keypad**

Controls whether the Pax device issues the [Credit] [Debit] prompt. Using this method, the cashier is saved from having to ask the customer "run as Credit/Debit", however, the Pax device is more vulnerable to fail because a credit card is inserted early.

**#307 Prompt for Credit/Debit on CoPOS screen**

Controls whether CoPOS presents the [Credit] [Debit] prompt. If set to 'Y', CoPOS will prompt the Cashier for the credit card method (Credit/Debit). This method has been found to work smoother than having the [Credit] [Debit] prompt being issued by the Pax device because it allows the customer to insert their credit card at any time.

**#308 Allow for Multiple Credit Cards in One Transaction (ICC)**

Controls whether CoPOS will allow more than one Credit Card to be charged when a payment is made by Credit Card. When set to 'Y', an additional tab labeled [Split] is shown in the 'Card Entry' prompt. Choosing [Split] lets the cashier distribute the Credit Card Charge over three separate Credit Cards.

**#309 Allow Customer Control of EBT Payment Sources (ICC)**

Controls whether the \$Amounts to charge the two EBT Payment Sources can be explicitly stated by the customer.

The two EBT payment sources are:

- 1) EBT Food Stamps
- 2) EBT Cash Benefits

If this System Constant is set to 'Y', a box prompting for these two amounts is presented. A check is made to insure no EBT Food Stamp ineligible Items are being purchased with EBT Food Stamps.

**#310 Show Member# Followed by Member Name at Register**

Controls whether the display of the Member Name or Member# gets precedence at the register. CoPOS comes set up with the Member Name taking precedence. This System Constant lets you designate the Member# to take precedence.

**#311 Email Sales Receipts**

Controls whether Sales Receipts will be emailed to Members. Setting this system Constant to 'Y' will result in CoPOS emailing receipts to Members providing they have an email address (see Field #9, Member Database).

**#312 Prompt for Weight When Printing Labels for Items Sold by the Each**

Controls whether the Weight will be prompted for when printing labels for Items sold by the Each.

Prompting for the Weight allows the printing of the Cost per Pound on the label. This is required by certain states.

**#313 Allow Use of a 12 Digit Key FOB**

Controls whether a Member Card with a scannable 12 digit Bar Code is allowed.

### **#314 Use Fast Device Selection when Printing Reports**

Controls whether Fast Device Selection is used when selecting the Device to which a Report is printed. If Fast Device Selection is set to "Y", Device Selection is prompted for using a Choice Bar. Otherwise Device Selection is done via the "Print on Device" prompt. Fast Device selection makes device selection easier at the expense of fewer printing options. That said, many new users find it handy.

### **#315 Require Cashier type "P" when Non-Existing Item entered**

Controls whether the cadence of entering Items at the Register is interrupted when Non-Existing Items are entered. Setting this System Constant to "Y" will require Cashiers to enter "P" prior to continuing when a Non-Existing Item is entered.

### **#316 Allow Item Activation when Processing Invoices Via Option 8.1/7**

Controls whether Inactive Items can be implicitly (Option 8.1) or explicitly (Option 8.7) reactivated. Setting this System Constant to "Y" allows for reactivation using either Option 8.1 or 8.7.

In Option 8.1:

You will be prompted to Activate Inactive Items, providing you have not restricted the scope to Active Items Only. Any Inactive Items that qualified will be Reactivated when changes are saved.

In Option 8.7:

Instead of the [Post] Tab, you will see a [More] Tab. When this is selected, you can either Post to Inventory or Reactivate Inactive Items.

### **#317 Record CoPOS Server Status When Starting Up**

Controls whether the Server's Controller Settings are captured at the Start as part of the Start of Day Procedure. The advantages to saving the Controller's last settings is to record them should something unexpected happen and these settings are lost. Capturing these settings may add up to 5 seconds to the Startup procedure.

### **#318 Use Member Discount at Register for Overdue Members**

Controls whether an overdue Member receives their discount unconditionally at the register. This ONLY applies to standard pricing, NOT to Sales, Member Days, etc.

This System Constant is ignored if EITHER of the System Constants below are set to "Y":

- 1) System Constant #20 (Require Member Dues to be Paid in Full Prior to Discounting)
- 2) System Constant #113 (Require Members to be Current to Receive Discount)

**#319 Use Expanded Syntax when prompting for Loyalty at Register**

If set to "Y" prompt will read:

Member's Accrued Loyalty: \$10.00. Usable: \$5.00. \$Apply to Sale:

If set to "N", prompt will read:

Accrued Loyalty to Apply: \$10.00. \$Apply to Sale:

**#320 Allow Loyalty Program Enrollments at Register**

Controls whether Members can be enrolled in the Loyalty Program at the register. If this System Constant is set to "Y" and a Member who is not Enrolled in the Loyalty Program elects to use Loyalty, a prompt asking for the Member to enroll will be issued and if answered on the affirmative, the Member will be enrolled.

If this System Constant is set to "N", Members must already be enrolled in the Loyalty Program when attempting to use their Loyalty Accruals at the register.

**#321 Automatically Enroll New Members in Loyalty Program**

Controls whether NEW Members are automatically enrolled in the Loyalty Program This happens either when new Members are entered via Option 4.1.A or signed up at the register.

If this System Constant is set to "Y", NEW Members are automatically enrolled.

**#322 Allow Attached Notes in Option 6.11**

Controls whether a prompt for Attached Notes is issued on a per Item basis when using Multiple Reduction/Transfer Incidents (Option 6.11). Enter "Y" to be prompted for a note when entering or editing Items in this Option. Enter "N" to skip this prompt when in this Option.

**#323 Force Cashier to Choose Single or Pack for Break Pack Items**

Controls the default of the Single/Pack Choice Bar issued at the register when a customer purchases a Break Pack Item. If this System Constant is set to "Y", the default of this Choice Line is [Choose]. When this tab is selected, the prompt is reiterated preceded by an audio alert.

Note: In order for this feature to work, System Constant #268 must be set to "Y".

**#324 Show Tax Tier Basis for Different Tax Tiers on Sales Recap**

Controls whether a Sales Tax Basis summary is shown on "Page" 2 of the Sales Recap.

### **#325 Prompt Customer for Round Up Donation at Register**

Controls whether a prompt to Round a Sale up to the nearest Dollar at the Register is unconditionally issued. This Round Up prompt will be issued ONCE during a Sale.

There are THREE states of the Round Up Donation prompt which are controlled by System Constants #325 and #326, which are:

1) Always Ask ... All Sales will be prompted for a Round Up Donation. This is controlled by setting System Constant #325 to "Y".

2) Neutral ..... The Round Up Donation prompt is ONLY issued when a Member has indicated a preference to be asked for a Round Up Donation. The Member's Round Up Status is controlled using Option 4.4 > Multiple Members Single Field > Round Up Status. A neutral situation exists when BOTH System Constants #325 and #326 are set to "N".

3) Never Ask .... The Round Up Donation prompt is NEVER issued. This is controlled by setting System Constant #326 to "Y".

### **#326 Never Prompt Customer For Rnd Up Donation at Register**

Controls whether a prompt to Round a Sale up to the nearest Dollar at the Register is unconditionally BLOCKED. There are THREE states of the Round Up Donation prompt which are controlled by System Constants #325 and #326, which are:

1) Always Ask ... All Sales will be prompted for a Round Up Donation. This is controlled by setting System Constant #325 to "Y".

2) Neutral ..... The Round Up Donation prompt is ONLY issued when a Member has indicated a preference to be asked for a Round Up Donation. The Member's Round Up Status is controlled using Option 4.4 > Multiple Members Single Field > Round Up Status. A neutral situation exists when BOTH System Constants #325 and #326 are set to "N".

3) Never Ask .... The Round Up Donation prompt is NEVER issued. This is controlled by setting System Constant #326 to "Y".

### **#327 Save Symbol Table upon Error**

Controls whether the entire Symbol Table is saved when CoPOS encounters an error. Under normal circumstances this does not happen but there may be times when CoPOS supports needs more information about a specific error and will instruct you to turn this System Constant ON.

### **#328 Restrict Import/Export Path to USB Only**

This option will restrict the import and export path in CoPOS to only utilize the USB flash drive. This is the only user import/export path that should be used hence this makes for faster imports and exports in CoPOS.

**#329 Process ALL Payments at Registers via Payment Box**

Controls whether the “BIG” (All Payment Types) Payment Box is unconditionally presented when collecting Payment in Record a Sale. When this System Constant is set to “Y”, this is the case.

**#330 Block Ability to Designate an Item as ‘Bad’ in Enter a Return**

Controls whether the “Bad” Column is set to “N” and skipped in option 1.3, Enter a Return. Skipping the “Bad” designation in Enter a Return let’s you consolidate the source entries for Spoilage into Options 6.10 and 6.11, thus removing the cashier from entering Spoilage since items marked as ‘bad’ in Enter a Return are automatically spoiled out.

**#331 Show Loyalty Program Info On Receipt**

Controls whether Customer’s who are participating in the Loyalty Program are shown their current Loyalty Balance and Loyalty Accruals for this sale on the sales receipt.

**#332 Password Protect Price Overwrites at the Register**

Controls whether Price Overwrites at the register are Password Protected. This is intended to work like a “Supervisor’s Overwrite” commonly found at large supermarkets. Use of this System Constant allows for tighter controls on Price Overwrites at the expense checkout speed.