Kudos

New Dashboard

We have developed a new Dashboard for use in Counter Intelligence where you may see a summary of key information displayed on one screen.

The later versions of Counter Intelligence are now retaining information at a more granular level and this enables users to report to a level of detail previously not possible.
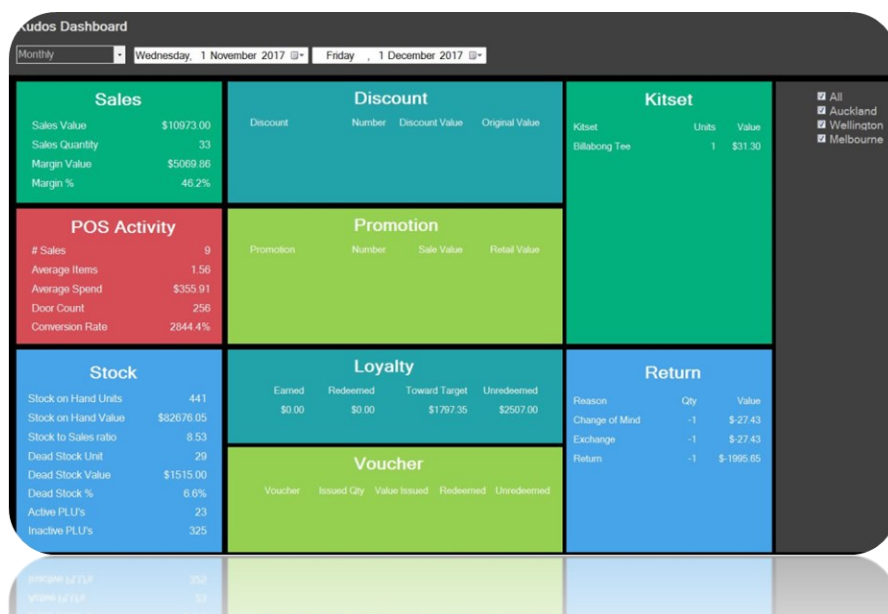
If you click on the Dashboard option it will lead you through to the screen below.

If you have been using this to click through to the Kudos KPI dashboard this is now achieved with a right click and then selecting the item.

Most figures are obvious – but those requiring explanation are:

Selection is by day, week, month, year or by selected date range.

POS Activity -Door count and Conversion Rate require a door counter to be installed.

Dead Stock – There is a new setting in Counter Intelligence where you can stipulate the number of days that stock becomes dead – ie it has not been sold or delivered.

Dead Stock Calculation (days)   180

Active PLU's – All PLU's which have had a sale in the period or which have stock on hand at the end of the period.

Inactive PLU's – All those PLU's that don't meet the Active PLU's criteria.

Counter Intelligence OFFICE

Counter Intelligence Serve

e retailer

Kudos.net.nz

Inside this issue

Sales

Sales Value	$12545.01
Sales Quantity	67.00
Margin Value	$5753.27
Margin %	45.9%

POS Activity

# Sales	26
Average Items	2.38
Average Spend	$482.27
Door Count	0
Conversion Rate	0.0%

Stock

Stock on Hand Units	416
Stock on Hand Value	$37905.16
Stock to Sales ratio	1.30
Dead Stock Units	30
Dead Stock Value	$2119.96
Dead Stock %	5.6%
Active PLU's	220
Inactive PLU's	111

Return

Reason	Qty	Value
Change of Mind	-2	$-139.61
Exchange	-1	$-27.43
Return	-2	$-2107.83

Kitset

Kitset	Units	Value
Billabong Tee	2	$66.09

Discount

Discount	Number	Discount Value	Original Value
Specified	19	$568.81	$5635.52
Imperfect	2	$410.68	$2056.48
Sale Item	2	$76.73	$517.35

Promotion

Promotion	Number	Sale Value	Retail Value
Speakers Corn...	5	$86.74	$130.22

Loyalty

| Earned	Redeemed	Toward Target	Unredeemed	Joined
$0.00	$0.00	$1086.35	$2557.00	2

Automated Upgrades

With version V11 Build 459 and above Counter Intelligence Office and Counter Intelligence POS can be upgraded through an automated process.
Under Help there is a new option – Check for Upgrade.
Kudos staff will communicate with you to advise that you have a scheduled upgrade and then first thing in the day (recommended) you will be able to click on "Check For Upgrade", enter the upgrade code provided by the Kudos Support staff and the system will check on the Kudos Cloud for an update.
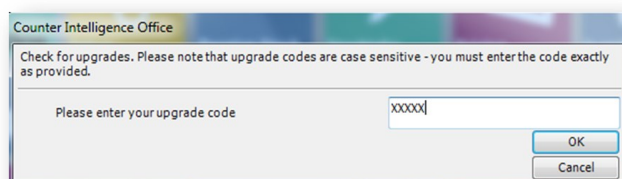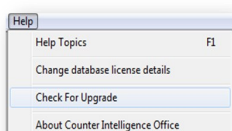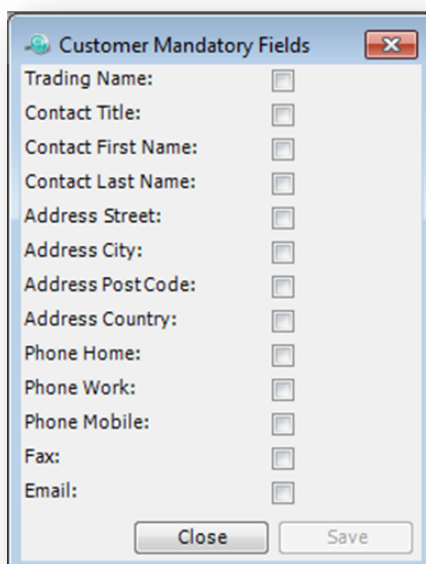

Controlling Customer Fields

When staff complete the customer fields at POS you can now stipulate which fields are mandatory.
This option can be found under the Setup menu in Office – 'Customer Mandatory Fields'.

Loyalty Improvements

There have been a number of improvements made to Counter Intelligence to provide deeper information on which to base the criteria used to reach out to your customer base.

Avoiding Duplications
The following changes are designed to catch double ups at source. Searching for names and phone numbers and the ability to maintain duplicate emails for a customer optional.

Spaces in Customer names
All erroneous spaces at the start or end of the customer names are now removed before the names are stored.

Phone Numbers
No matter how they are stored the phone number search will now:
Strip any non-numeric characters from the phone number keyed in a search   i.e. 021__014 654 becomes 021014654
When it is performing the search it will also strip out any non-numeric characters from the stored number and then compare the result with the stripped search string.

Unique Email Address
If a salesperson decides to add a duplicate account when they key the email address it will validate that it is unique.   If it finds another duplicate it will ask if you want to use this existing customer account.

Cleaning Up Duplications
Merging the two loyalty accounts has always been a problem in that the redundant account loses its history.   A new feature – "Merge Customer" allows history from one customer to merge in with that of the preferred customer account and the discarded customer to lose its history and be marked as redundant – thus preventing it from being sent to POS.
MailChimp hates duplicates - By presenting cleaner data to MailChimp there should be fewer problems with emails being rejected.

More granular marketing
Additional fields have been introduced into Counter Intelligence to make customer connections more specific, targeted and automated.
Existing fields:
Date Joined
The date that the customer was added to the customer base
Date Changed
The date that customer details have been changed – name, address, phone, email.
Note: This does not change when loyalty fields are updated.
Marketing Amount
The amount earnt towards next target.
Marketing Discount
The amount of loyalty discount available to spend.
Marketing – All Sales
The total dollar value of all sales.
New fields:
Marketing – Last Discount
The date/time that the last loyalty discount was redeemed
Last Loyalty reward amount
The amount of the last loyalty points earned
Last Loyalty reward date
The date/time that the last loyalty points were earned

Automated MailChimp interaction

Kudos have developed an automated process which will take information from your Counter Intelligence database and automatically push the
data into MailChimp via the Cloud.. This update may be set to a frequency of your choice.

This process runs as part of Kudos Cloud services the interaction is completely automated. The cost of this services is $150 per 6 months.

Prerequisites
> V11 of Counter Intelligence V11 build 245 or greater
> MailChimp Account

Possibilities with this interaction:

Join Ups
> Customers who have joined up during the day could be emailed a welcome email from Mailchimp with an offer in-store or online.

Synching Customer changes through to MailChimp
> Customers who have details changed will be updated through to MailChimp.

Loyalty Voucher Earned
> Customers who have earnt a loyalty voucher during the day can be sent an email advising them of this and encouraging them to come into store to spend it.

Prompt Customers that they are near their target
> Customers are encouraged to come into store as they are near to earning a loyalty voucher.

Prompt Customers to spend their loyalty points
> Customers are encouraged to spend the loyalty points they have earned.

Use them or Lose them
> The value and liability of Loyalty Points can become significant and at some point it is good practice to expire some of the long standing unspent vouchers. To do this a campaign picking all of the customers who were granted vouchers some years ago could be encouraged to spend or lose their loyalty points.

Hey Good looking ...

Yes - Style is important - your store needs to look great as well as run efficiently. You love the look of a tablet, but you need fully connected fixed POS.

HP has the answer for you, with the new ElitePOS G1 Retail System series. The aesthetic of a tablet, in a fixed POS. Complemented by clever and stylish peripherals.

It's no secret retail's undergoing a transformation. The act of "buying" has evolved dramatically over the past decade, with the next poised to drive even more fundamental change. Yet, the need for high performing, secure, durable and easily manageable technology still persists.

With the new HP ElitePOS and Counter Intelligence or CI Serve you can s redefine customer experience. All with a system that combines stunning, innovative design with incredible performance.

The ElitePOS' looks aren't compromised by its peripherals – choose from a cleverly integrated in-stand printer, or the stylish cube printer. Along with the a dinky magnetic docking barcode scanner.

There is a compete setup of an ElitePOS in our showroom - call for pricing
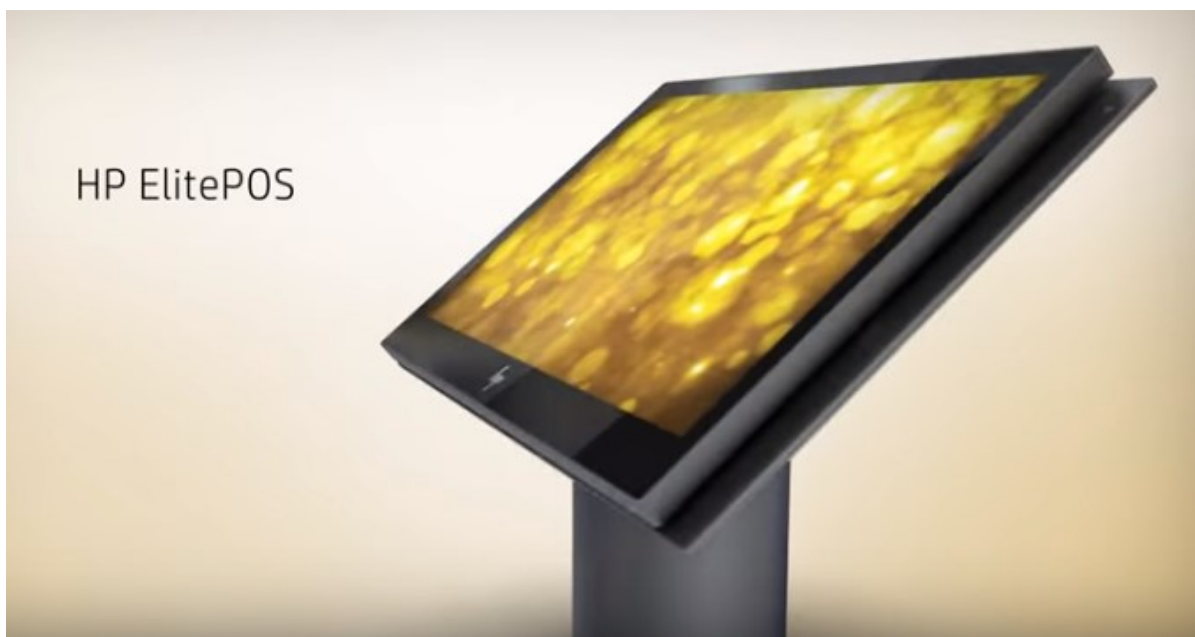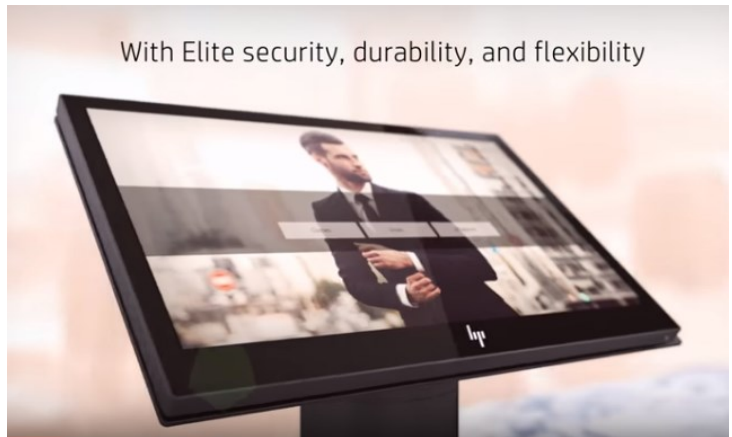
Tablets at Point of Sale

Virtually any Windows based tablet can be used as a POS device in your store. Some of these will click back into a dock-ing cradle to share the locally attached printers etc while others can use IP based printers and eftpos units for a completely mobile interaction.

Both Counter Intelligence POS and CI-Serve have the ability to email receipts so that's another step covered.

CI Serve is predominately designed for use on a Touch screen and can be scaled down to suit virtually any sized tablet.

CI-Serve now offers 95% of the existing CI POS functionality and offers a dynamic design which can be made to look good on any size tablet. Often used product keys can be programmed with their images on the front screen.

CI Serve also offers some more local POS reporting for retail staff at the counter:

Payments Integration

We have been supporting these payment methods for 6 months on our e-retailer websites and are pleased to advise the status of each of these payment methods at POS. Feedback from our retailers is that this offering has resulted in incremental sales where a customer may have hesitated before.

LAYBUY   Available now

PartPay   Available now

afterpay   Completed and currently in QC

Accounting Integration

We have had an integration with Xero for Z-Off and Suppliers Invoices for 4 years or more however the interface between Counter Intelligence and Xero involved a number of steps.   Xero asked us to rewrite the interface using their new POS API and we have been working on this for the past 4 months. The project is nearly completion and will be submitted to Xero for authorised approval. The result will be a integration which runs from our KCloud platform and seamlessly extracts the Z-Off, debtor invoices, customers, suppliers deliveries into Counter Intelligence. These interactions can be on a timed basis and will run without intervention, daily or whenever.

Accounts **s**etup in the Counter Intelligence General Ledger match through to the Chart of Accounts in MYOB.   Z-Off information, inwards goods deliveries and Suppliers returns are exported from Counter Intelligence to an interface file which is subsequently imported into MYOB.
 These steps are manual.

Versions

The current release versions of our products are:

Counter Intelligence Office	V11 Build 497
Counter Intelligence POS	V11 Build 497
Counter Intelligence Serve	V9.986
E-retailer	V3.296

To check the Version that your site is running select Help, About.

Our Support staff are working through the customer base encouraging them to upgrade to the latest release version so they can take advantage of the new features—and with the semi automated upgrade we want this to be a regular happening!

Kudos KPI – a cloud based utility that provides access to critical management information on mobile devices such as ipad/tablet and smartphone.

Just like your POS systems talk to your Counter Intelligence Office system so does Kudos KPI providing you with easy access 24/7.

This facility is available at weekly cost of $2.88 +gst.   Billed as $75 with your support fees.

On the spot stock information

Do we have stock of an item the customer asks? – don't break the conversation to go to a physical POS unit to find out - use an ipad/ tablet or smartphone on the sales floor to make a quick enquiry on

Exceptional Customer Service

Look up customer buying history when interacting with them on the sales floor – what did they purchase last time, preferences sizes etc.

Drive your business through the dashboard

- ♦ Top 5 Stock Groups
- ♦ Sales performance by hour
- ♦ Sales performance by period
- ♦ Salespersons Statistics