



## CounterPoint Prospect Questionnaire October 2016

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Questions:

What are your key requirements for this new system?

What are the key benefits you hope to see from installing a new POS system?

Top 3:

- 1.
- 2.
- 3.

What else is important to you?

What system do you use to enter sales now? That is, what system would CounterPoint replace?

Why do you want to replace it?

Oftentimes, people take the features of their existing systems for granted and just assume those will be part of a new system. What features do you rely on in your current system that need to exist in your new system?

If the list above includes reports, please provide samples of those reports and include the criteria you use to run them (e.g. period/date ranges, sort sequence, subtotals needed, whether it includes some or all vendors, departments, etc.)

Do you have any issues with power to your buildings or equipment?

How reliable is your internet service?

Do you have a wireless network now?

If so, is the network range suitable for your current and future wireless requirements?

Do you know if you have a PCI-compliant firewall device?

Please provide the brand and model of your current firewall/router and any managed switches and wireless access points.

Do you have in-house or local IT support or would you be counting on us to provide that support?

Here is a list of some of the CounterPoint components that are available. Please rate your level of interest in each:

<b>Component</b>	<b>Very Interested</b>	<b>Mildly Interested</b>	<b>Not Interested</b>
Point-of-Sale			
Mobile Point-of-Sale			
Inventory Control			
Inventory Analysis Reports			
Sales Reports			
Customer Sales Tracking			
Time Clock			
Loyalty Point Tracking			
Accounts Receivable (customer statements)			
Interface to your accounting system? Name/Version: _____			
No-fee Gift Card Selling/Tracking/Redeeming			
Layaway Tracking			
Special Order Tracking			
Quote Entry/Tracking			
Purchasing based on Minimums and Maximums			
Purchasing based on Replenishing Items Sold			
Seasonal Forecasting			
Built-in Messaging System			
Serial Number Tracking			
Gridded Item (vary by color/size/width, etc.) Tracking			
Commissions on sales			
Offline Mode and/or Off-site Sales			
Printing labels or tags			
Kit Sales			
Tracking components of manufactured items			
Generate targeted customer e-Newsletters and measure effectiveness			
Generate automatic new customer and reminder emails			
Receive text or email "alerts" of out-of-stock conditions or unusual activity			
Integrated e-commerce site			
Export data from the system			
Import updated information into the system			
Gift Registry			
Mobile scanning for receivings			
Mobile scanning for physical inventory			
Mobile scanning for adjustments			
Nursery adjustments for plant growth utility			
Nursery adjustments for custom planters and baskets utility			
Delivery Scheduling			

How many stores do you have?

Do you have any extra (non-store) inventory locations (e.g. warehouse or corporate office)?  
*(If so, please explain.)*

How many products/SKUs do you have now?

How many item groupings do you have now (e.g. departments, categories, etc.)?

How many people will be using the system at any one time?

Does the price of an item vary by store (not counting specials, markdowns or promotions)?

What percentage of your inventory is actual merchandise (e.g. pots, supplies, furniture) rather than live goods?

Do you have existing point-of-sale, mobile scanning, or label-printing equipment that you would like to use with your new system? \_\_\_\_\_ *(If so, please attach a list of this equipment, including brand name and model number of each item.)*

Would you like us to upload the data from your current system (or a spreadsheet) to your CounterPoint system? \_\_\_\_\_ If so, what data? *(Please check all that apply.)*

- Categories & Sub-categories
- Vendors
- Items (SKUs/Products)
- Inventory
- Customers
- Gift Cards

Do you know how to extract this information from your existing system or would you be relying on us to do that?

Who is your current credit card processor?

Are you looking at any other systems now? \_\_\_\_\_ If so, which ones are you looking at and what do you like about them so far?

Following is a list of equipment normally associated with a new system. Please tell us how many of each you would like us to include in our proposal and list any other hardware that you would like us to include:

Item	Qty
<u>Point-of-Sale:</u>	
POS Touchscreen Terminals	
Receipt Printers	
Invoice Printers	
Barcode Scanners	
Cordless Barcode Scanners	
Customer POS Line Displays	
Customer POS Video Displays	
Cash Drawers	
Credit Card Readers (Swipe or EMV)	
Pin-pads for debit cards	
Signature capture for credit cards, accounts receivable invoices	
<u>Other Hardware:</u>	
New Non-POS PCs (and monitors)	
Report printers	
Label printers	
Mobile Scanners to collect counts for inventory, receiving, transfers, etc.	
Mobile point-of-sale or line-busting devices	
Uninterruptible power supply units	
Commercial-grade firewalls for PCI compliance	

What else would you like us to know?