

Training and Reference Manual for



Hands-On Scenarios with complete
detailed instructions for each...

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[A] GENERAL INSTALLATION AND PROGRAM INFORMATION:

CounterMan Pro is a “real time” P.O.S. (Point of Sale) program that provides the tools necessary to manage business concepts to help you achieve success in a retail motorsport shop of today. We have incorporated the latest technology that utilizes Microsoft Visual FoxPro for the program generator and we will continue to enhance the program. Please see the installation instructions that came with your software for proper setup and system requirements. In addition, CounterMan has always provided professional and prompt technical support available through a toll-free tech support telephone number (800) 937-6590. Should you have any questions, comments, or suggestions, we urge you to contact us at your convenience. Upon successful installation of CounterMan Pro, an additional program called “Remote Administrator” will also automatically install on your server computer. This program allows CounterMan’s Technical Support access to your main computer (referred to as your “server”) so we can provide on-the-spot immediate assistance whenever needed, as it allows our technical support staff to log into your computer for updates, fixes, or even for on-line training issues if needed. In order for Remote Administrator to properly function, it requires access to the internet from the server computer. This program is free and it is fully registered by Santa Maria Software. Although Remote Administrator is not required, immediate response cannot be guaranteed without it.

CounterMan Pro is primarily an inventory control, Point-of-Sale program and it works in “real-time. What this means to you is: what you see is what you get. Because of this approach, CounterMan Pro is able to provide up to the minute information in an instant. The Point-of-Sale screen stands ready to help a customer and resembles an invoice. Several keystrokes are displayed on the screen to provide hot-keys to specific processes and can also be left clicked using the mouse. However, certain keystrokes are necessary on this screen in order to move to the next field within this screen. It is possible to move around by using your mouse, but the requirement of sequential “keyed” input will be necessary to get around the Point-of-Sale screen. For this reason, we highly recommend using the keyboard to move to the fields desired while in this screen. You will also notice that, as you move around this screen, that a row or column of “buttons” will disappear and another set will be displayed. This is in an effort to provide the user with an intuitive list of available keystrokes that perform certain functions or processes. We have provided (in these “buttons”) that include an abbreviation of the function for each, followed by the keystroke needed to perform the function. For your convenience, these functions can also be performed by left clicking over the “button”. However, you will likely find yourself often moving from mouse to keyboard when attempting to perform these functions in this manner. The main objective is to provide the user with the necessary tools and an easy way to perform each of the functions listed.

We at Santa Maria Software would like to welcome you as a user and believe we have a superior product that will continue to provide you with the tools necessary to excel in your business. Updates will continue to happen as we strive to make this great product even better. We encourage and request your input on CounterMan Pro because users like yourself are what made this program what it is today.

Thank You...

Santa Maria Software/CounterMan Staff...

[1] COUNTERMAN PRO P.O.S. SCREEN:

Fig. 1.1

The screenshot shows the CounterMan Pro P.O.S. screen. At the top, it displays 'Date 02/13/2003' and 'COUNTERMAN PRO TRAINING'. Below this, there are fields for 'Employee', 'Customer Tele (805) -', 'Name', 'E-mail', 'Account #', 'Fax #', 'Addr', 'City', and 'State'. A table in the center lists products with columns for Product Code, Description, Qty, Price, Extended Price, Available, and Other Info. The bottom section contains accounting information: Invoice Total, On Account, S/O Deposit, Applied, Total Due, Payment, and Balance Due. It also shows Amount Tendered, Change, Subtotal, Sales Tax, Invoice Total, B.O. Amount+Tax, and B.O.+Invoice Total. A vertical column of buttons on the right side includes Stock Check (F2), Service Order (F4), Warr R/O (Ctrl-F4), Special Order (F5), CPO (F3), Recall (Ctrl-F2), Invoice Msg (F6), Quote Msg (F7), Spec Ord Msg (F8), Employee Msg (F9), F&I (Ctrl-F), and Exit (Ctrl-PgDn). The Windows taskbar at the bottom shows the Start button, several icons, and the system clock at 8:33 AM.

The P.O.S. screen (fig. 1.1) is separated into three sections:

1. The top is for your “Department/Employee Code” information and for your “Customer Information”.
2. The middle of the screen is for all the items you are selling.
3. The lower portion of this screen is the “Accounting Area”. (Note the information in this area)
4. On the right of the screen you will notice a column of “buttons”. The buttons list specific hotkeys that can be used to perform the desired function. Any of these choices can be made by either using the hotkey(s) or by left-clicking on the selection of your choice.

SYSTEM DEFAULTS SETUP:

Before we begin: There are several “System Defaults” to be setup prior to using this software. “System Defaults” are a basic set of instructions that CounterMan Pro will be using on a regular basis. Changes in this area need only be made when the program is initially installed or when something changes in your shop, as related to this area:

1. Before you can access the “Main Menu”, CounterMan Pro needs to know WHO is accessing it. It is also important to understand that a “Department Code” must ALWAYS precede the “Employee Code”. This is all accomplished in the same “Employee” field, which is where your cursor is when at the “blank P.O.S. screen. In addition, it should be easy to tell where your cursor is at all times because the current field will be yellow in color. So, to access the Main Menu, you would type **1 E V A** (do not press **ENTER**) then, hold down the **ALT** key while pressing **M**.

***Note:** All menu selections are preceded by a number, making it easy to select the desired function by simply pressing the number that corresponds to it!*

2. Select “Maintenance/Display” by pressing **[1]**, then select “System Variables” by pressing **[8]**, then select “General” by pressing **[1]**
3. You should now be looking at the “System Variables General Settings” screen (fig. 1.2)
4. To move through these fields, simply tap the **[Tab]** (tab) key, or you may use the **[↓]** **[↑]** (arrow) keys. As you move around the screen, notice that the field you are in is obvious, as it changes in color (yellow).
5. The first field will be the “**Phone**”, followed by “**Fax**” number. Both of these numbers, along with the “**Email**” address, will be printed on every invoice processed.


SET SYSTEM VARIABLES SCREEN:

Fig. 1.2

The screenshot shows the "Counterman" application window with the "System Variables" menu open. The "General" settings are displayed. The "Phone" field is highlighted in yellow. The "Fax" field is (805)938-3567. The "Email" field is sales@counterman.net. The "Default Address Format" is set to "A". The "Default Area Code" is 805. The "Receiving Labels" field is 1. The "Default Label Type" is P. The "Default Print/Display Rpts" is P. The "F&I Hold Files Path" is C:\GUS\POS\. The "Blanket Discount %" is 5.00. The "Blanket Discount From Date" and "Blanket Discount Thru Date" are both / /. The "Blanket Discount Mode" is 1. The "Special Order Deposit %" is 50.000. The "Counterman Timeout Seconds" is 7200. The "INVENTORY AVERAGES" section shows "Months" as 6, "Old Months" as 0, "Average Costs" checked, and "Calc MinMax" unchecked. The "Last Month-End Process" is 10/02/2002 and the "Last Year-End Process" is 12/31/2001. A "REVERSE CHANGES" button is located at the bottom right of the form. The window title bar says "Counterman" and the taskbar shows the Start button and several open applications.

6. **Default Address Format:** provides two selections of such. A selection of **[A]** is for standard “American” format. A selection of **[E]** is also available for “European” format and enables additional address lines of information when entering a customer’s personal information.
7. **Default Area Code:** is provided, making it unnecessary to enter the area code, each time a customer’s phone number is entered from a P.O.S. transaction (or any other field that uses the telephone number). Leaving this field blank would force the user to enter the area code each time a transaction is processed. It will make it easier to have an “805” area code during this training session so, please leave the “805” as it is...
8. **Receiving Labels:** is an informational field only and cannot be changed by the user. It simply lets you know how many labels, per item being received, will be printed.

9. **Default Label Type:** offers two selections and is used when printing inventory labels. Your selections are: ☐ (for Price Labels), or ☐ (for Bin Labels).
10. **Default Print/Display Rpts:** provides either to be used as the “default”. Here you can choose ☐ to display all reports or ☐ to print them. Either selection is used as the “default” and the user still has the ability to “print” a “displayed” report if they so choose, upon running the report.
11. **F&I Hold Files Path:** is strictly for use with the Counterman F&I module and converting hold files from the DOS version of the program. This feature is only necessary for customers who use the DOS version of Counterman’s F&I module and is not needed if you have the F&I module for Counterman Pro.
12. **Security:** if checked, will enable security for the entire system. It is important to setup your employee access BEFORE enabling the security feature of Counterman Pro.
13. **Get Mechanic Code:** if checked, will require the user to pre-setup all mechanic’s names and code information in the “Mechanic Table”, under “Table Maintenance” prior to processing any “Service Orders”. As service orders are processed, there is more than one way that Counterman Pro allows for tracking “mechanic efficiency”, which is the method referred to when comparing each mechanic’s billable hours compared to the actual hours each mechanic is working. A check mark in this box tracks the mechanic that is assigned to the service order, but can be changed (if desired) at the time of processing. The mechanic that is assigned to this job at the time of processing is the mechanic that gets credit for the entire service order. Another method (other than using this “Mechanic Code”) would be to NOT check this box and setup a separate “Labor Code” for each mechanic. This approach allows tracking of each mechanic and can help when the same service job transfers between more than one mechanic. The employee who processes this work order gets credit for the parts and labor, however, this is separated and can be accounted for.
14. **Out of State Mail Order:** if checked will cause Counterman Pro to NOT charge any tax for ANY customer who lives outside the state. (this can be overridden at the P.O.S. transaction by pressing **F12**) Normally, this is used only for customers who do mail order as their primary business.
15. **Automatic Prodcodex Listbox:** if checked will enable this feature. This provides the user with the ability to list the available part numbers in the price book file for items that match the keystrokes entered, thus providing a list of part numbers to choose from. This is a very helpful tool when trying to locate superceded items. Caution should be taken before enabling this feature if Counterman Pro is being used on a Windows™ network or any kind of multi-user environment, as it tends to cause a network communications “bottle neck”. The reason for this is, Counterman Pro must open entire price books before it can display the possible selections. This feature can also be enabled and used when needed from the P.O.S. screen by pressing the ☐ key.
16. **Always Go To Notes at End of Invoice:** if checked will enable this feature. Counterman Pro has added this feature to allow for notes to be printed on the processed invoice. Place a check in this box if you plan on typing a note at the end of every invoice that is processed. You also have the option of selecting which invoices you would like to type notes on, by pressing ☐ at the time of invoice processing.

17. **Allow Labor on Service Orders Only:** if checked will not allow any Labor Codes to sold on a normal P.O.S. transaction and can only be used within a “Service Order” (beginning a transaction by pressing .
18. **Blanket Discount %:** is where the user can enter a discount percentage that will discount everything (store wide) for a specific date range. This function can be used for setting up a special “sale day” or for events, providing a blanket discount on everything in your shop. This discount would only be in affect for the date ranges that follow and only items that are check marked as “discounted” in the inventory record would be automatically discounted for these date(s) only.
19. **Blanket Discount From/To Dates:** is where the user would enter the dates of “from” and “to” for the blanket discount.
20. **Blanket Discount Mode:** is the same as the “Discount Modes” available in the “Customer” area, or when applying a “One Time Discount” and are as follows:
 - a. **1** = Retail minus %
 - b. **2** = MSR minus %
 - c. **3** = Cost plus %
 - d. **4** = Retail and Labor minus %
 - e. **5** = MSR and Labor minus %)
21. **Special Order Deposit %:** is necessary for the default percentage of every “Special Order” deposit, which will be required when processing. This amount can be overridden at the time of the sale, but the percentage here will be requested each time a “Special Order” is processed. If you have enabled Counterman Pro Security feature, you must have management access to override this percentage amount.
22. **Counterman Timeout Seconds:** is used for closing Counterman Pro after no keyboard activity for as many seconds entered here. (7200 = 2-hours)
23. **Inventory Averages:** This is a system variable that Counterman Pro uses when resetting the inventory reorder points. This is valuable tool and we will attempt to help you understand how it works. We believe, if you can understand the concept behind this function and put it to use, that you will have a greater understanding of what to order and when. By studying the past sales history of each individual item you sell, it will be easier and more profitable to only order those items that you know will sell. Add to this, even the seasonal items that seem to sell better during certain times of the year. Now if we could examine each and every inventory item using this type of calculation, imagine how inventory turns would go up, inventory levels would go down, and profits can go where they belong, in your pocket! At the end of every month it will be necessary to perform certain “month end” processes. These processes include several reports that provide you with up to the minute information concerning your shop and how it is performing. For now, we will be focusing on an inventory control tool called “Resetting Reorder Points”. The “Inventory Averages” is where Counterman Pro gets the information about how many months and which months to use when running this process. If you “Reset Reorder Points” and are not satisfied with the outcome, there are several reports you can run before adjustments that can be made to suit your individual shop. After this process is completed, we are confident will help you in your inventory purchasing decisions. In addition, you can always set the reorder levels lower for more conservative inventory levels. The bottom line is, you are the one in control. Counterman Pro simply helps you obtain the inventory levels you need to have the items

on hand that actually sell and to make decisions on moving the items out of your shop that do not, thus freeing up funds that can be used for the items that have a better sales history.

- a. **Months:** refers to how many **total months** used for “Resetting Reorder Points”
 - b. **Old Months:** refers to how many previous months (last year) will be used in the calculation for “Resetting Reorder Points”. This is NOT added to the total months, rather it is included within.
 - c. **Average Costs:** if checked, is used for “Cost Averaging” of existing and new inventory as it is received.
 - d. **Calc Min/Max:** is used by CounterMan Pro to calculate the minimum/maximum reordering levels based off of your past sales history. This is an incredible tool that can dramatically help you with the ordering process by only providing suggested reorders for items that have a proven track record of past sales. This is where you would setup the “default” on whether or not to have every inventory record calculate this information or not, as inventory is added.
 - e. **REVERSE CHANGES:** is a “button” that can be pressed by left clicking the mouse, or by tabbing through until it is highlighted, then pressing will revert back to all the previous defaults.
24. **Last Month-End/Last Year-End Process:** Are both informational fields only and cannot be changed by the user. The information displayed is exactly what it is and is directly affected by the date these processes last took place.

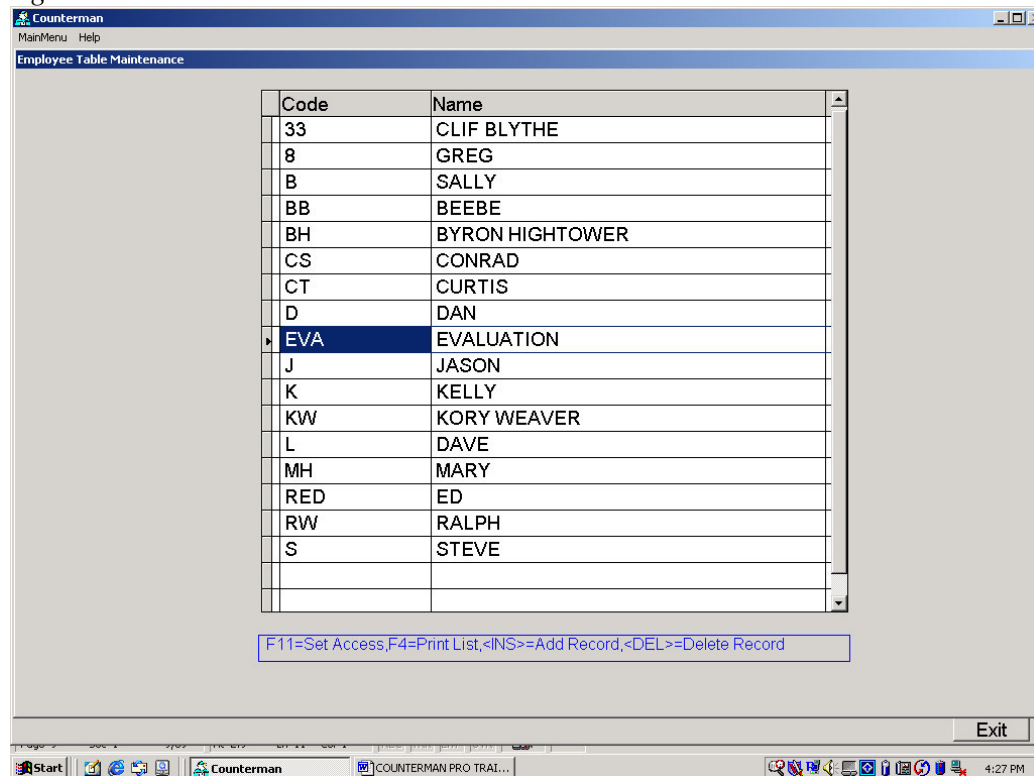
[2] SETTING UP YOUR EMPLOYEES:

Counterman Pro ALWAYS needs to know WHO it is that is accessing the system. Whether it's a normal P.O.S. transaction or an in-depth report, it will be necessary to have an "Employee Code" before continuing. This area is where we setup all of the employees that will be using Counterman Pro.

1. Before you can access the "Main Menu", Counterman Pro needs to know WHO is accessing it. It is also important to understand that a "Department Code" must ALWAYS precede the "Employee Code". This is all accomplished in the same "Employee" field, which is where your cursor is when at the "blank P.O.S. screen. So you would type **[1][E][V][A]** (Do not press **[ENTER]**) then hold the **[ALT]** key and press **[M]**
Note: All menu selections are preceded by a number, making it easy to select the desired function by simply pressing the number that corresponds to it!
2. Select "Utilities" by pressing **[2]** then select "Employee Maintenance" by pressing **[A]**

EMPLOYEE TABLE MAINTENANCE SCREEN:

Fig. 2.1

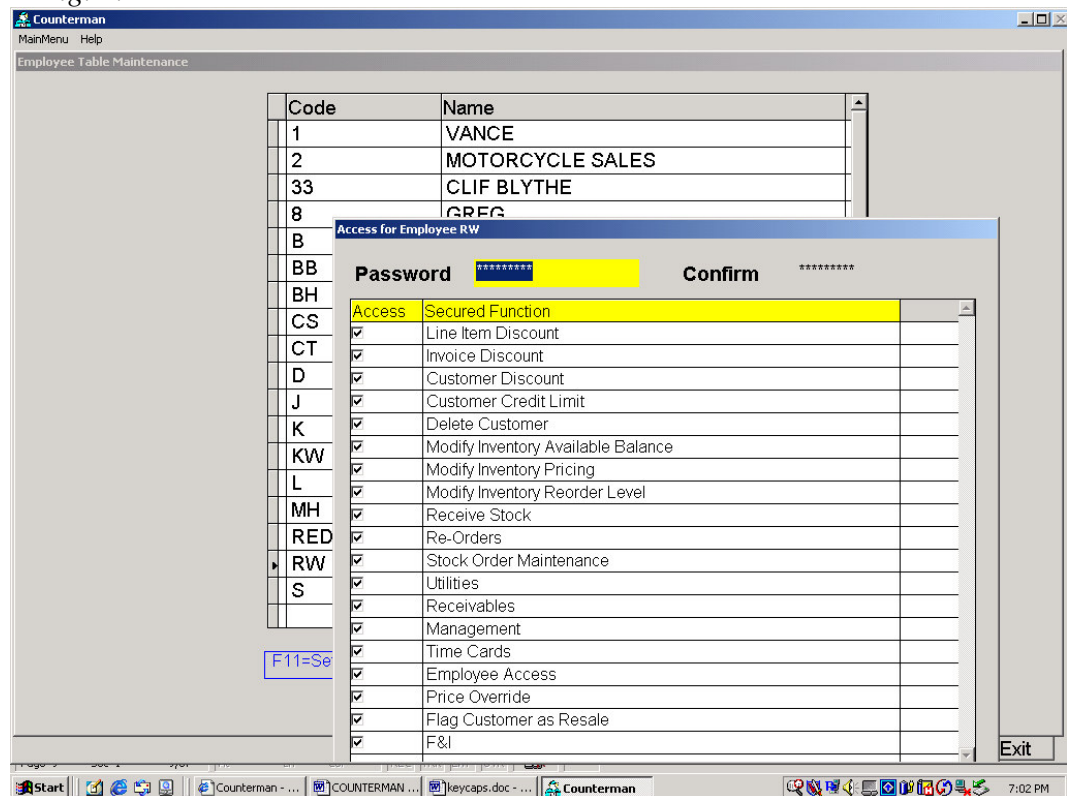


3. This is the "Employee Table Maintenance" screen (fig. 2.1). From here, the user is able to add, edit, delete, and set security access for each employee. Keep in mind the importance of NOT duplicating an existing "Employee Code"! To add yourself as a new employee, press the **[INS]** (Insert) key. This will bring you to an available (empty) "Code" area.
4. Enter an "Employee Code" and note that you will be using this code from this point on. Acceptable characters must be "Alphanumeric" and may contain one to three characters. Once this has been entered, press the **[TAB]** (tab) key once.

5. You should be positioned under the “Name” field now. Just type your name, the way you would like it to appear on any invoices processed, now press the **[Tab]** key again.
6. If you plan on utilizing the “Security” features of Counterman Pro, it will be necessary to “Set Access” for each employee. This is done by:
 - a. Choose the “Employee Code” you would like to set access for.
 - b. Press **F11** to open the “Employee Access” screen (fig. 2.2)
 - c. Enter the password (which will default to the “Employee Code”) and press the **[Tab]** key once.
 - d. Confirm password by entering it a second time and press the **[Tab]** key once.

SET EMPLOYEE ACCESS SCREEN:




Fig. 2.2



- e. Now you should be in the “Access” column. Make your selections for the areas in which you would like this employee to have access to by pressing the **[SPACE]** bar key, then press the **[↓]** key to continue on to the next selection.
 - f. After setting access to the desired areas, press the **[ESC]** key to save. This will return you to the “Employee Table Maintenance” screen.
7. Press **[ESC]** again to close the “Employee Table Maintenance” screen and save your entries.

[3] PROCESSING TRANSACTIONS:

This is where most everything starts, at the P.O.S. (Point Of Sale) screen. The scenario is, you have a new customer who wants to purchase a couple of items. Because you understand the benefit of adding new customers to your ever-growing customer database, you'll want to get all of his information. So, you can start by entering the customers phone number, or by entering their name. For this scenario we will use their phone number.

1. Begin a P.O.S. transaction by entering your "Department/Employee Code" and press the  (tab) key once, or the  key once. This will take you to the "Telephone" field.
2. Type in this customer's telephone number, which is (805)555-1212 and press the  (tab) key once.
3. This will result in this prompt:

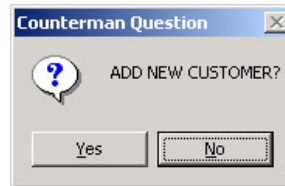



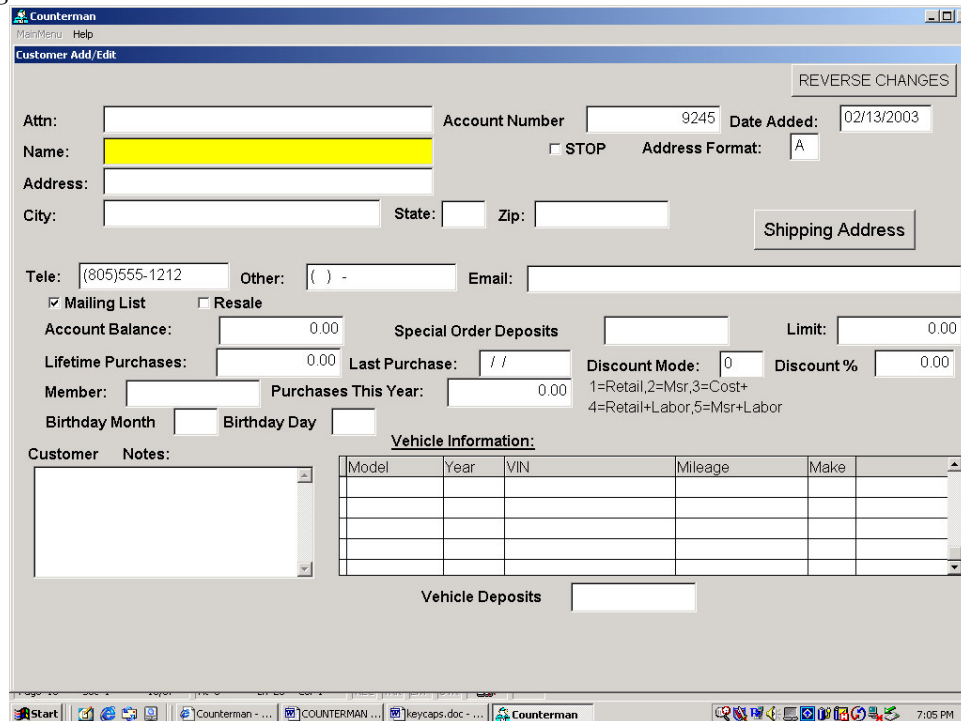


Fig 3.0

4. Select "Yes" (to add a new customer) by pressing the  key once, then press .
5. You should now be looking at the "Customer Add/Edit" screen (fig. 3.1)
6. Enter the customer's information as shown in Fig 3.1 (*note: Your instructor will explain each field in this screen*)
7. As you input this customer's information, be sure to use the  (tab) key to move forward through each of the fields.

CUSTOMER ADD/EDIT SCREEN:

Fig. 3.1

A screenshot of the Counterman software's "Customer Add/Edit" screen. The window has a menu bar with "Main Menu" and "Help". The title bar says "Counterman" and "Customer Add/Edit". The screen contains various input fields and checkboxes. At the top right is a "REVERSE CHANGES" button. Fields include "Attn:", "Name:" (highlighted in yellow), "Address:", "City:", "State:", "Zip:", "Tele:" (with "(805)555-1212" entered), "Other:", "Email:", "Account Number" (9245), "Date Added:" (02/13/2003), "STOP" checkbox, "Address Format:" (A), "Shipping Address" button, "Mailing List" (checked) and "Resale" (unchecked) checkboxes, "Account Balance:" (0.00), "Special Order Deposits" (0.00), "Limit:" (0.00), "Lifetime Purchases:" (0.00), "Last Purchase:" (//), "Discount Mode:" (0), "Discount %" (0.00), "Member:" (blank), "Purchases This Year:" (0.00), "Birthday Month" and "Birthday Day" fields. Below these are "Customer" and "Notes" fields. A "Vehicle Information" section contains a table with columns: Model, Year, VIN, Mileage, Make. Below the table is a "Vehicle Deposits" field. A legend at the bottom right explains discount codes: 1=Retail, 2=Msr, 3=Cost+, 4=Retail+Labor, 5=Msr+Labor. The Windows taskbar at the bottom shows the Start button and several open applications including Counterman, COUNTERMAN, and keycaps.doc.

8. If you make a mistake while entering this customer's information, simply use the key to go back "up" and make your corrections.
9. Once all information has been properly entered, press the key once to save it.
***NOTE:** Please keep in mind, in order for Counterman to accept any changes to any filed, always TAB out of the field after making changes!!!*
10. Now you should see Jeff Ziegler's name on the screen. Just press to accept him as the current customer.
11. Notice that the "Customer Information" (address, telephone, email, etc.) now appear on the screen.
12. Now we can enter the items Mr. Ziegler would like to purchase. Enter all of the items as shown in Fig. 3.2 below.
13. Enter each product code then press the (tab) key, enter the quantity then press (tab) key will then take you to the next line item. Repeat these steps as necessary until all items have been entered.

P.O.S. TRANSACTION IN PROGRESS SCREEN:

Fig. 3.2

Counterman 30-Day Evaluation

Date 06/19/2002
 Employee 1 *** RALPH
 Customer Tele (805)555-1212 Name JEFF ZIEGLER E-mail jeffz@hotmail.com
 Account # 1 Addr 123 SOME STREET Fax #
 Discount % 0 Mode 0 City ANYTOWN State CA Zip 99999

Product Code	Description	Qty	Price	Extended Price	Available	Other Info
11124	OIL SEAL	1.00	3.10	3.10	3.00	
20-50	99816-2050 OIL	3.00	3.45	10.35	308.00	
25-250	CHROME OIL FILTER,5 SPEED	1.00	7.62	7.62	-1.00	
		0.00	0.00	0.00	0.00	

Invoice Total 22.70 Amount Tendered 50.00 Subtotal 21.07
 On Account 0.00 Change 27.30 Sales Tax 1.63
 S/O Deposit 0.00 Payment Method 1
 Applied 0.00 1=\$ 2=Ck 3=VISA/MC 4=Oth
 Total Due 22.70 5=Charge 6=Credit S=Split
 Payment 22.70 Process Transaction
 Balance Due 0.00 P=Process M=More D=Delete Q=Quote
 L=PickList S=SaveOnly Ver:06-10-2002Beta

14. Once all items have been entered, press the key once to move to the "Accounting" portion of the screen.
15. This is a simple "Cash Transaction", so press at the "Payment" field to accept full payment.
16. He hands you a \$50.00 bill for payment, so enter in "Amount Tendered" and press .
17. He's paying by cash, so the "Payment Method" is .
18. To process this transaction and print a receipt, accept the default of in the "Process Transaction" field by pressing .

A “Cash Transaction” is a transaction with no customer information taken at the time of the sale. Under normal circumstances, you would not want to process this type of transaction. However, different shops use this type of transaction because they do not want this customer in their “Customer Database”. This is not what most shops want or need to do but it is in place and it needs to be covered. There really is no advantage to using this method, other than for a quick “Cash Sale”. Another consideration is that CounterMan Pro will **ONLY** allow a “Payment Method” by “Cash” on a “Cash Transaction”. Visa/MasterCard payments, Check payments, and Charge sales cannot be accepted when using the “Cash Transaction”. This is because the “Cash Transaction is exactly that, a CASH TRANSACTION. Other reasons for handling this type of sale in this manner is for the protection of your shop, for credit card charge backs, or bounced checks. You would need a way to contact this individual for what ever action was necessary. All things considered, this is a quick way to take care of a customer who wants to hand you some cash and we always want to do everything we can to relieve them of their money as promptly as possible, right? The following steps will guide you through a “Cash Transaction”.

- ### CASH TRANSACTION SCREEN:

[illegible]

- PAGE: 15

- Look at the printed invoice and notice that, under “Customer Name” it shows “Cash”.

[4] SPECIAL ORDER TRANSACTIONS:

ONE TIME DISCOUNTS:

SPLIT PAYMENT METHODS:

In the following scenario we will cover “Special Orders”, “One Time Discounts”, and how to handle “Split Payment Methods”. We’ll use Jeff Ziegler’s account again, as he returns to your shop and wants to purchase a pair of mufflers that you don’t have in stock. In an effort to sell these mufflers to him, you find that they are “clearance units” from your supplier so you offer him a discount on them. He gets so excited about the discount that he would like to pay for them in full but will need to pay for them in part by check and the balance by credit card.

- Start a new transaction for Jeff Ziegler by entering your “Department/Employee Code” and press the **[TAB]** (tab) key once. This will take you to the “Telephone” field.
- Type in Jeff Ziegler’s telephone number, which is (805)555-1212 and press the **[TAB]** (tab) key once.
- Press the **[ENTER]** key to accept this customer. You should now be in the “grid” of the P.O.S. screen.
- Now enter the “Product Code” (part number) for this pair of mufflers he would like: **[1][1][−][1][2][4][ENTER]**
- We will need to “mark” this item for “Special Order” before continuing. To accomplish this, hold down the **[CTRL]** key and tap the **[F5]** key. Notice that a red “S” appears on that same row, indicating that this item will be “Special Ordered”.
- Now enter the quantity **[1]** (1-pair) and press the **[ENTER]** key once.
- Because this item will be discounted 15% off of the MSR price, we now need to apply this discount to the “Special Order” transaction. To apply a “One Time Discount” for this transaction, first place the cursor on the item to be discounted. Press the **[↑]** key once so the 11-124 “Product Code” is highlighted.
- Press the **[F5]** key to open the “Discount” window (fig. 4.1)

ONE TIME DISCOUNT WINDOW:

Fig. 4.1

The screenshot shows the CounterMan 30-Day Evaluation PARTS screen. At the top, it displays the date 06/19/2002 and employee information for RALPH. Customer information for JEFF ZIEGLER is entered, including phone number (805)555-1212, address 123 SOME STREET, city ANYTOWN, state CA, and zip 99999. The main grid shows a single item: 11-124 TAPER MUFFLERS-80UP FX/SOF, with a quantity of 1.00, price of 101.99, and extended price of 101.99. A red 'S' is visible in the 'Other Info' column. A discount window is open over the item, showing 'Discount' options: 'This Item' (selected) and 'All Items'. The 'Percent' is set to 15.00, and the 'Amount' is 0.00. The 'Mode' is set to 2. At the bottom of the discount window, it says '<Esc> to Exit'. The bottom of the screen shows invoice totals: Invoice Total 0.00, On Account 0.00, S/O Deposit 0.00, Applied 0.00, Total Due 0.00, Pmt+Deposit 0.00, and Balance Due 0.00. It also shows payment options: 1=Retail, 2=Msr, 3=Cost+, 4=Retail+Labor, 5=Msr+Labor. The bottom right corner shows 'Ver 06-10-2002 Beta' and an 'Exit' button.

9. Press the **[Tab]** key once to move into the “Percent” field and enter the discount percentage of **[1][5]** and press the **[Tab]** key once.
10. Because this is being discounted off of MSR pricing, enter **[2]** in the “Mode” field and press the **[Tab]** key once.
11. Press the **[ESC]** key once to close the “Discount” window. Notice that the discount is now shown in **RED** under the customer’s name on the P.O.S. screen.
12. Press the **[PG DN]** key to access the “Special Order Deposit” screen (fig. 4.2)
13. Because this item will be paid for in full, type in **[1][0][0]** at the “Percent” field and press the **[Tab]** key once.

SPECIAL ORDER DEPOSIT SCREEN:

Fig. 4.2

The screenshot shows the CounterMan 30-Day Evaluation PARTS screen. At the top, it displays customer information: Date 06/19/2002, Employee 1 *** RALPH, Customer Tele (805)555-1212, Name JEFF ZIEGLER, E-mail jeffz@hotmail.com, Account # 1, Address 123 SOME STREET, City ANYTOWN, State CA, Zip 99999. Below this is a table with columns: Product Code, Description, Qty, Price, Extended Price, Available, and Other Info. The first row shows Product Code 11-124, Description TAPER MUFFLERS-80UP FX/S, Qty 1.00, Price 101.99, Extended Price 101.99, Available 0.00, and Other Info S. Below the table is the Special Order/Layaway Deposit window. It has fields for Percent (100) and Amount (51.00). Below these is another table with columns: Prodcode, Description, Deposit, Qty, Price, and Extended. The first row shows Prodcode 11-124, Description TAPER MUFFLERS-80UP FX/S, Deposit 51.00, Qty 1.00, Price 101.99, and Extended 101.99. At the bottom of the screen, there are fields for Total Due, Pmt+Deposit (51.00), Balance Due, Process Transaction (P=Process M=More D=Delete Q=Quote L=PickList S=SaveOnly), B.O.+Invoice Total (109.89), and Ver.06-10-2002Beta. There is also an Exit button.

14. Notice that the entire deposit amount is placed in the “Pmt+Deposit” field. Since we will be accepting this amount, press **[ENTER]**. You should now be positioned in the “Amount Tendered” field. Press **[ENTER]** which moves you to the “Payment Method” field.
15. In “Payment Method” press **[S]** for “Split” payment then press **[ENTER]**. This will bring up the “Split Payment” window (fig. 4.3). Notice that this window indicates the amount of the transaction on the bottom (Remaining) and will show how much additional needs to be collected in order to satisfy the balance.
16. No cash is involved, so press **[Tab]** out of the “Cash” field.
17. He’s paying \$50.00 by check and the balance by Visa card, so enter **[5][0]** in the “Check” field and press the **[Tab]** key once.
18. The balance will be paid for by Visa card, so type in the “Remaining Balance” in the “Visa/MC” field and press the **[Tab]** key once.
19. The amount shown to the right of “Remaining” should now show: “0.00” so, press the **[ESC]** key once to close the “Split Payment” window, then **[ENTER]** to process this transaction.
20. Take a look at the printed invoice. Notice that the “Method of Payment” and “Special Order Deposit” information are all printed, making it all easy to understand.

SPLIT PAYMENT WINDOW:

Fig. 4.3

The screenshot shows the CounterMan 30-Day Evaluation PARTS window. At the top, it displays the date 06/19/2002, Employee 1 (RALPH), and Customer Tele (805)555-1212. The customer's name is JEFF ZIEGLER, and the address is 123 SOME STREET, ANYTOWN, CA 99999. The email is jeffz@hotmail.com. Below this is a table with columns: Product Code, Description, Qty, Price, Extended Price, Available, and Other Info. The first row shows Product Code 11-124, Description TAPER MUFFLERS-80UP FX/S, Qty 1.00, Price 101.99, Extended Price 101.99, and Available 0.00. A 'Split Payment Method' dialog box is open in the center, showing a list of payment methods: Credit Applied (0.00), Cash (0.00), Check (50.00), Visa/MC (59.89), and Other (0.00). The 'Other' method is selected. Below the dialog, the 'Invoice Total' is 0.00, 'On Account' is 0.00, 'S/O Deposit' is 0.00, 'Applied' is 0.00, 'Total Due' is 51.00, 'Pmt+Deposit' is 109.89, and 'Balance Due' is 0.00. The 'Total' is 109.89, and 'Remaining' is 0.00. The 'Invoice Total' is 109.89. The bottom of the window shows the version 06-10-2002Beta and an 'Exit' button.

21. Now, if we take a look at Jeff Ziegler's "Customer Record", we'll see that this "Special Order Deposit" has been inserted into his record. This process actually attaches this money to this "Special Ordered" item and will remain until he picks the item up from your shop.
22. To look at Jeff Ziegler's account, simply begin a new P.O.S. transaction the same as before.
23. Once you are in the "grid", press the F12 key once, then press E to "Edit Customer Record" (fig. 4.4). As you can see, the "Special Order Deposit" field has been populated with the amount of the "Special Order" he just placed.
24. Press **[ESC]** **[ESC]** when finished with this screen.

CUSTOMER ADD/EDIT SCREEN:

Fig. 4.4

The screenshot shows the CounterMan Customer Add/Edit screen. At the top, it displays the date 06/21/2002 and the name JEFF ZIEGLER. The address is 123 SOME STREET, ANYTOWN, CA 99999. The phone number is (805)555-1212, and the email is jeffz@hotmail.com. Below this are fields for 'On Account' (0.00), 'Special Order Deposits' (109.89), and 'Limit' (0.00). The 'Lifetime Purchases' field shows 101.99, and the 'Last Purchase' date is 06/24/2002. The 'Discount Mode' is set to 0, and the 'Discount %' is 0.00. The 'Member' is HOG, and the 'Purchases This Year' is 101.99. The 'Birthday Month' is 8 and the 'Birthday Day' is 10. The 'Customer Notes' field is empty. The 'Vehicle Information' table shows the following data:

Model	Year	VIN	Mileage
SHOVEL	1979	1HD1ABC123M123456	70000

The 'Vehicle Deposits' field is empty. The bottom of the window shows the version 06-10-2002Beta and an 'Exit' button.

[5] SPECIAL ORDER FOLLOW UP AND CANCELATIONS: TRANSFERING A SPECIAL ORDER TO A LAY-AWAY:

Let's say for instance, the next day Mr. Ziegler calls you up and wants to know the status of his "Special Order" item? Now we will see how to check on the actual "status" of his "Special Ordered" mufflers and be able to provide him with an estimated e.t.a. Or, what if he decided he didn't want this item after all? Well, we will also learn how to cancel the "Special Ordered" item quickly and easily. But what if your parts man "extraordinaire" found this item "in-stock"? There would be no need to order it from the vendor. Here we will learn how to transfer this item to a "Lay-Away" which will set it aside for this customer and remove it from the reorder list in one easy step.

1. Start a new transaction for Jeff Ziegler by entering your "Department/Employee Code" and press the **[F5]** (tab) key once. This will take you to the "Telephone" field.
2. Type in this Jeff Ziegler's telephone number, which is (805)555-1212 and press the **[F5]** (tab) key once.
3. Press the **[ENTER]** key to accept this customer. You should now be in the "grid" of the P.O.S. screen.
4. Press **F12** to bring up the "Customer" window. Now press **[R]** to open the "Review Special Orders" window (fig. 5.1)
5. Your instructor will explain each field in this screen and how you will be able to use this information to know exactly "where" in the system this item is.
6. Notice also, on the lower portion of this window (in **BLUE**) are some additional keystrokes that are available.

REVIEW SPECIAL ORDER SCREEN:

Fig. 5.1

Counterman
Main Menu Help

Date 06/19/2002
Employee 1 *** RALPH
Customer Tele (805)555-1212 Name JEFF ZIEGLER E-mail jeffz@hotmail.com
Account # 1 Addr 123 SOME STREET Fax #
Discount %0 Mode 0 City ANYTOWN State CA Zip 99999

Special Orders

Prodcode	Description	Qty	Date	OP	Deposit	Order Dt	Rcvd Dt	Rcvd	Pickup
11-124	TAPER MUFFLERS-80UP	1.00	06/19/02	Y	109.89	/ /	/ /	0	/ /

F4=Transfer to Layaway, =Cancel

Applied
Total Due
Payment
Balance Due

0.00

Process Transaction
P=Process M=More D=Delete Q=Quote
L=PickList S=SaveOnly

Invoice Total
B.O. Amount+Tax
B.O.+Invoice Total
Ver:06-10-2002Beta

Exit

TRANSFER SPECIAL ORDER TO LAY-AWAY STATUS:

- a. For instance, if you found that this item was actually "in-stock", you would not want it to show up on a "Reorder List", you would need to apply the item as "Received" in the customer's record, plus, you would need this item set aside and

labeled for this customer. All this can be handled in one easy step by pressing the **F4** key and answering **Y** “Yes” to the following prompt: **(BUT DON’T!)**

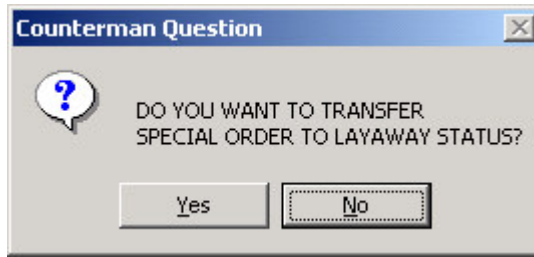


Fig 5.2

DO NOT DO THIS!!!

- b. Note that when you choose to transfer a “Special Order” item to “Lay-Away” status, a label will automatically be printed for this customer.

CANCELATION OF THE SPECIAL ORDERED ITEM:

- a. Or, should Jeff Ziegler decide to cancel this “Special Order”, you could do that from here. But what of his deposit? That would need to be transferred from his “Special Order Deposit” to his general “Account Balance”. Again, Counterman Pro can handle this task for you quickly and easily by pressing the **DEL** key once and answering **Y** “Yes” to the following prompt:

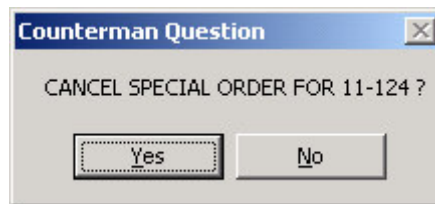


Fig 5.3

DO THIS ONE!!!

- b. Note that when a “Special Order is cancelled, Counterman Pro will confirm that this customers “Special Order Deposit” has been added to their regular “Account Balance” by the following information window:

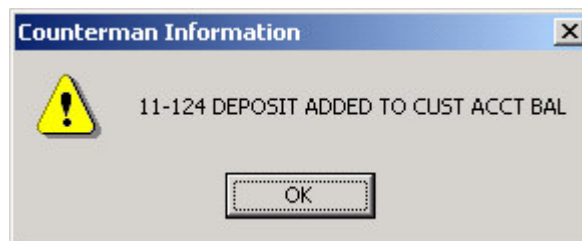


Fig 5.4

APPLYING ACCOUNT BALANCE TO A SPECIAL ORDER:

RE-INSERT THE SPECIAL ORDERED ITEM:

Due to the importance of understanding the entire “Special Order” loop, and because we cancelled Jeff Ziegler’s “Special Order”, we will need to re-insert that same “Special Order” to allow this item to show up on the “Reorder List” and continue the “Special Order” process. However if you remember, we applied his “Special Order Deposit” to his regular “Account Balance”. So this time, we’ll be using his existing “Account Balance” and re-apply it back to

the “Special Order” mufflers. Press **[ESC]** **[ESC]** to return to the transaction in progress for Jeff Ziegler.

1. Press **[ESC]** **[ESC]** to return to the transaction in progress for Jeff Ziegler.
2. Now enter the number for the mufflers he wants: **[1]** **[1]** **[+]** **[1]** **[2]** **[4]** **[ENTER]**
3. We will need to “mark” this item for “Special Order” before continuing. To accomplish this, hold down the **[CTRL]** key and tap the **[F5]** key. Notice that a red “S” appears on that same row, indicating that this item will be “Special Ordered”.
4. Now enter the quantity **[1]** (1-pair) and press the **[ENTER]** key once.
5. Because this item will be discounted 15% off of the MSR price, we now need to apply this discount to the “Special Order” transaction. To apply a “One Time Discount” for this transaction, first place the cursor on the item to be discounted. Press the **[↑]** key once so the 11-124 “Product Code” is highlighted.
6. Press the **[F5]** key to open the “Discount” window (fig. 4.1)
7. Press the **[Tab]** key once to move into the “Percent” field and enter the discount percentage of **[1]** **[5]** and press the **[Tab]** key once.
8. Because this is being discounted off of MSR pricing, enter **[2]** in the “Mode” field and press the **[Tab]** key once.
9. Press the **[ESC]** key once to close the “Discount” window. Notice that the discount is now shown in **RED** under the customer’s name on the P.O.S. screen.
10. Press **[PG DN]** to move to the “Accounting” section of the P.O.S. screen. Notice that when you do, Counterman Pro will prompt you with information regarding this customer’s existing “Account Balance”:

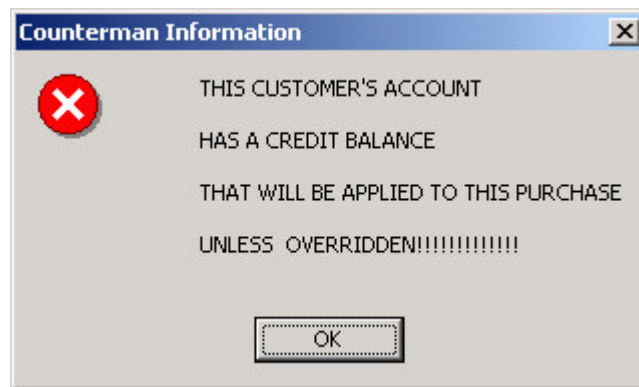


Fig 5.5

11. Just press the **[ENTER]** key once to confirm this information window.
12. Because we need to apply the entire amount to this “Special Order”, type in the full amount (shown on the lower right of your screen) in the “Applied” field.
13. This will open the “Special Order Deposit” screen. In the “Percentage field, type in **[1]** **[0]** **[0]** **[ENTER]** to apply 100% of the deposit to this “Special Order”
14. The “Pmt+Deposit” field should now have 0.00 in it, so press the **[ENTER]** key to move to the “Payment Method” field.
15. We are not taking any “Payment” this time, so just press the **[ENTER]** key again to process this transaction.
16. Now, if we go back and look at Jeff Zeigler’s customer record...
7. Start a new transaction for Jeff Ziegler by entering your “Department/Employee Code” and press the **[Tab]** key once. This will take you to the “Telephone” field.

- ### REVIEW SPECIAL ORDER SCREEN:

[illegible]

[6] SPECIAL ORDER LIST REPORT:

Usually on a daily basis, depending on how much “Special Order” business your shop does, a “Special Order Report” for any items you have **not** ordered from your vendor(s) needs to be run. Because most shops do most of their business utilizing special orders, it is crucial that these items be placed on order promptly. This not only processes “Special Order” items quickly and efficiently, it also keeps your customers very happy. The report we need to run is a simple list of any items that have been “Special Ordered” by your customer, but have not been ordered (by you) from the vendor(s).

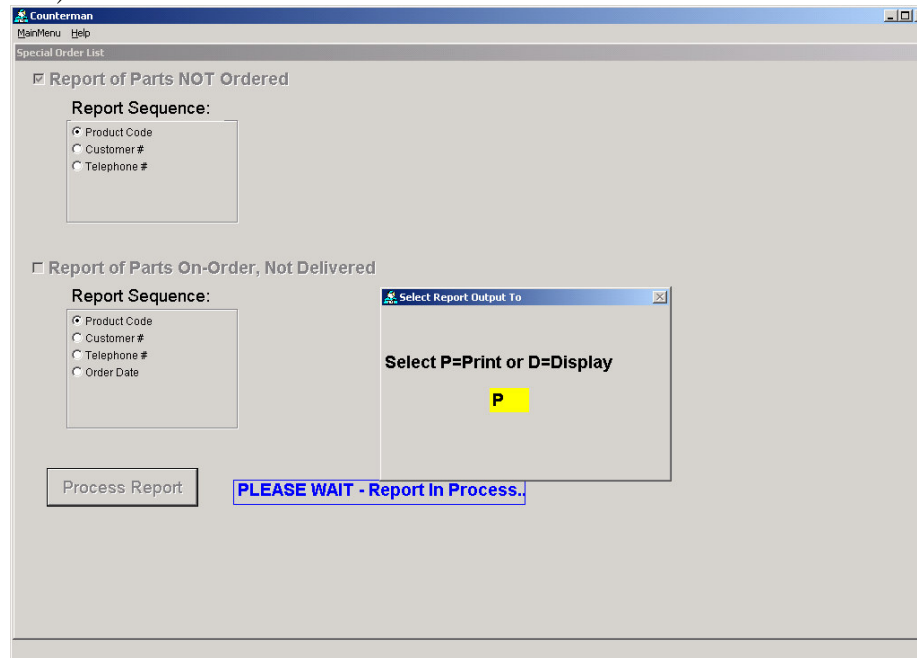
1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”

***Note:** All menu selections are preceded by a number, making it easy to select the desired function by simply pressing the number that corresponds to it!*

3. Select “Reports” by pressing **[3]**, then select “Special Order Lists” by pressing **[2]**
4. We need the “Report of Parts Not Ordered” so, press the **[SPACE]** bar to place a check mark to select this report (fig. 6.1)

SPECIAL ORDER REPORT SCREEN

(Fig. 6.1)



5. Press the **[TAB]** key three times to highlight the “Process Report” button and press the **[ENTER]** key once.
6. At the prompt, enter **[P]** to print this report (rather than display it), then press **[ENTER]**
7. Note that the item (11-124 Mufflers) is on this list. With this report in hand, we are now ready to place our “Purchase Orders” by using the Counterman Pro “Reorder List”.

[7] USING THE REORDER LIST:

This is likely the most useful tool in the Counterman Pro arsenal. By using this tool, there is much that can be seen and understood about your inventory, sales history, past profit margins, and much, much more. Using the report we just ran, we can see that there are several vendors we need to order from to satisfy our “Special Order” customers. Keep in mind (when using the “Reorder List” function in Counterman Pro), that it will generate a “SUGGESTED” list of items that need to be ordered. The process that is used to determine what items appear on this “Reorder List” is quite complex and must meet certain criteria. The first search overrides all the others, as the program will add any “Special Ordered” items to the list automatically. Doesn’t matter if the item is in stock or not, if your employee “Special Ordered” it, it will be on this “Reorder List”. The only other criteria is, if the “Balance” is less than the “Reorder Level” or less than the “Maximum Balance”, this also will cause these items to appear on the “Reorder List”. Setting the “Reorder Levels” is a function Counterman Pro can also accomplish for you and is covered later on during this class. Look again at the “Special Order Report” we just ran. In the column “Product Code” it is easy to tell by looking at these part numbers, which vendors we need to order from. For now, we’ll use the CCI (Custom Chrome, Inc) “Reorder List” to continue with the “Special Order” loop so we can further understand how it all comes together.

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. Select “Maintenance/Display” by pressing the **[1]** key once.
4. Select “Inventory” by pressing the **[1]** key once.
5. Select “Reorders” by pressing the **[4]** key once.
6. Select “CCI” by pressing the **[2]** key once.
7. At the following prompt, answer **[Y]** (yes) to “Generate a Suggested Order”:

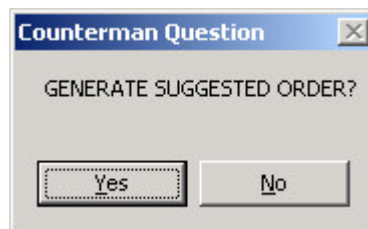


Fig 7.0

8. Because the data we are using is from an actual HD franchise dealership, there isn’t much to order from CCI, but we can see that the “Special Order” mufflers (11-124) are on this list. See the “Reorder List Screen” (fig. 7.1)
9. Now you can see at a glance some valuable information that can help you in making decisions for this order (fig. 7.1):
 - a. The “Purchase Order Number” is listed for you at the top of the screen.
 - b. The “Total Amount” for this order is tallied for you also.
 - c. The vendor’s Phone, Fax, and Customer Number are listed near the top.
 - d. Past Sales History and Average Monthly Sales figures are listed on the lower portion of the screen.

- e. Price Quantity Breaks are listed on the lower portion of the screen.

REORDER LIST SCREEN:

Fig. 7.1

[illegible]

10. Special notice should be taken at the many keystroke options listed at the bottom of the screen (in **BLUE**). For instance, let's assume you don't know anything about why this item is on your "Reorder List"? Fast information is available by pressing the **F6** key (fig. 7.2). Your instructor will explain the fields and additional information available from this screen.
11. Also note that (while in the **F6** screen) a nice tool has been added that allows the user to "Reprint" an invoice! Just highlight the transaction of your choice, then press the **F7** key once.
12. Special Note! If you move the mouse pointer into the grid on this screen, additional "Tool Tips" can be seen that show additional keystrokes available from within the grid.
13. Press the **ESC** key once to back out of the "Sales History" Screen.
14. To add an item to this list, press the **INS** key once. Type **13-199** **ENTER** for a quantity of **1** **ENTER**
15. If you don't think you need a particular item, just highlight it and press the **DEL** key once. A black box will show to the right of that item, indicating that it is marked for deletion. To permanently remove this item from the list, exit out of the "Reorder List", then go back into it.
16. To print this order (without posting it), press the **F4** key once.

SALES HISTORY SCREEN:

Fig. 7.2

Date Sold	Qty	Price	Margin	Invoice#
06/20/2002	1 S	101.99	35.7878223	3
10/30/1999	-1	92.98	29.5654980	115690
10/30/1999	1	92.98	29.5654980	115690

Order Summary:
 Total Value Of Order: 65.49
 Next P.O.#: 2
 For Vendor: CCI
 Phone: 1800 359 5700
 Record: 1 Of 1
 Cust#: 934581

Item Details:
 Prodcode: 11-124
 Description: TAPER MUFFLERS-80UP FX/SOFTA
 Reorder Qty: 1
 Spec: 1.00
 Available: 0.00
 Order Cost: 65.49

Summary:
 Sales Total Past 12 Months: 0
 Price Qty: 65.99 1
 Reorder Level: 0

Footer: F11=Inventory Rec,F3=Fresh Order,F4=Post

17. Once you are satisfied with how this order looks, it will be necessary to “Post and Print” it. This is the process that actually shows the items have been ordered. Press the **[F5]** key once, and answer **[Y]** (yes) to the following prompt:

CounterMan Question

OK TO POST & PRINT STOCK ORDER?

Yes No

Fig. 7.3

18. Posting a “Reorder List” will open a “Notes” window (fig 7.3a), where it is possible to type in a message to your sales rep. or for some information for yourself. If you do not need any notes, just press **[ESC]** here. Otherwise, type in what ever you want, then press the **[Tab]** key once.

NOTES WINDOW:

Fig. 7.3a

Order Summary:
 Total Value Of Order: 152.68
 Next P.O.#: 1
 For Vendor: CCI
 Phone: 1800 359 5700
 Record: 1 Of 2
 Cust#: 934581
 Added: 0

Item Details:
 Prodcode: 19-801
 Description: MONTEREY SOLO SEAT,SOFTAILS
 Reorder Qty: 1
 Spec: 1.00
 Available: 0.00
 Order Cost: 144.89

Item Details:
 Prodcode: 34-226
 Description: LT. WGT. BALACLAVAS
 Reorder Qty: 1
 Spec: 1.00
 Available: 0.00
 Order Cost: 7.79

Summary:
 Sales Total Past 12 Months: 0
 Price Qty: 146.99 1
 Reorder Level: 0
 Maximum Balance: 0
 Qty On Order: 0

Footer: F11=Inventory Rec,F3=Fresh Order,F4=Print List,F5=Post&Print Order,F6=Sales History,<@IS>=Add Prodcode,=Delete

Stock Order Notes:
 Please advise of shipping date and total amount of order (including shipping) a.s.a.p.
 Thanx,
 Ralph..

19. This process will clear the screen and print the “Purchase Order”. It is now up to you to actually place the order by phone or by fax to CCI.

MORE ON THE REORDER LIST:

Due to the lack of data in the previous scenario, more information is available by running a Harley Davidson “Reorder List”, so let’s do that:

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. Select “Maintenance/Display” by pressing the **[1]** key once.
4. Select “Inventory” by pressing the **[1]** key once.
5. Select “Reorders” by pressing the **[4]** key once.
6. Select “Harley Davidson” by pressing the **[1]** key once.
7. At the following prompt, answer **[Y]** (yes) to “Refresh Existing Order”:

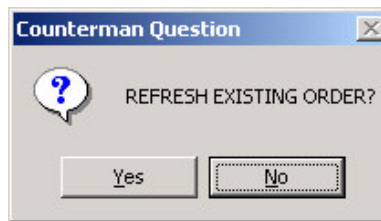


Fig. 7.4

8. As you can see, there is a lot more data to play with here.
9. Anytime there is an existing “Reorder List” that was not previously posted, the Counterman question “Refresh Existing Order” will appear. This allows the user to go back to an existing order and retain the way it was, when it was last on the screen.
10. In addition to the keystrokes listed, there are others also available. If you’ll move the mouse pointer into the grid of the “Reorder List”, additional keystrokes are listed in, what we refer to as, “Tool Tips”.
11. Post and Print this order by pressing **[F5]** key. Answer **[Y]** (yes) to the following prompt:

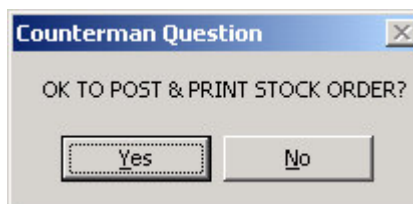


Fig. 7.5

12. You will again see the “Notes” window, just press the **[ESC]** key once to close it.

[8] RECEIVING STOCK, LINE BY LINE:

This is a function that normally goes on, on a daily basis. As “Special Orders get processed, daily sales occur, and inventory gets depleted, “Purchase Orders” get placed and inventory shipments arrive. This is the “profit circle” we deal with everyday. In order to keep this process in motion, it is imperative that items get received promptly and accurately. There are two ways of “Receiving Stock” that will be addressed in this lesson. The best approach to this process is to make sure the vendor places your “Purchase Order Number” on the packing slip when the order is shipped. When the shipment arrives, it is a simple task to “Receive Stock” by the P/O (purchase order) number. There can be instances when there is no “Purchase Order” and Counterman Pro allows for this scenario by not requiring one. However, if there is no P/O, then there is no way to determine if all the items you ordered, have actually been received. First, we will run through the process of “Receiving Stock” without a P/O number. This is the process that is also used when entering your inventory for the first time. Next we will run the process of “Receiving Stock” using a P/O number.

Receiving Stock Line by Line, NO P/O:

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. Select “Maintenance/Display” by pressing the **[1]** key once.
4. Select “Inventory” by pressing the **[1]** key once.
5. Select “Receive Stock by Line” by pressing the **[3]** key once. You will be prompted for a “Purchase Order Number”, just press **[ENTER]** here to “Receive Stock” without a P/O Number.
6. Now enter the “Product Code” (part number) to receive by typing it in here. Type: **[1][1][][1][2][4][ENTER]**
7. The following ‘Counterman Question’ will allow you to print an “Alignment Label”, which allows the user to make sure the labels will be printed correctly and centered properly on the label. Just answer **[N]** (no) to this prompt for now.

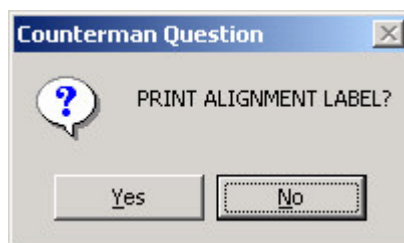


Fig. 8.0

8. This opens the “Receive Stock” screen and allows the user to enter how many of this item to be received (fig. 8.1).

RECEIVE STOCK SCREEN

Fig. 8.1

CounterMan
MainMenu Help
Receive Stock

Order# 1 Vendor Code CCI Special Orders

Product Code 11-124 Description TAPER MUFFLERS-80UP FX/SOFTAIL

Qty This Receipt 1 #Labels 0 Type B Unit Cost 65.49 Date Received 06/21/2002

Selling Price 101.99 Gross Profit% 35.79 Bin Location

Related Part Number
80017-85
TR663022

Swap To Product Code

☐ Backordered ☐ Cancel Order ☐ Cancelled Backorder

Qty Ordered 1

Qty Received 0

Date Ordered 06/21/2002

F11=Inventory Rec, F5=Post Receipt

9. Enter the quantity received: **[1]** and press the **[Tab]** key once.
10. Normally here, you would type in the quantity of labels desired, but for our purposes (and because we do not have a label printer) just enter **[0]** (zero) here and press the **[Tab]** key once.
11. Press the **[F5]** key once to “Post Receipt” of this item.
12. At the following prompt (Fig 8.2), answer **[Y]** (yes) to “Post Receipt To Special Order(s)”

CounterMan Question

POST RECEIPT TO SPECIAL ORDER(S)?

Yes No

Fig 8.2

13. You should now be ready to receive another item. This process is repeated until the receiving process is completed.
14. Press the **[ESC]** key once when finished with this process.

Receiving Stock Line by Line WITH P/O Number:

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or

- c. Use the mouse and left-click on “Main Menu”
3. Select “Maintenance/Display” by pressing the **[1]** key once.
4. Select “Inventory” by pressing the **[1]** key once. Select “Receive Stock by Line” by pressing the **[3]** key once.
5. You will be prompted for a “Purchase Order Number”. Enter the P/O number for the Harley Davidson Purchase Order we created earlier and press the **[ENTER]** key once.
6. At the following prompt (fig. 8.3), answer **[N]** (no) to print an “Alignment Label”:

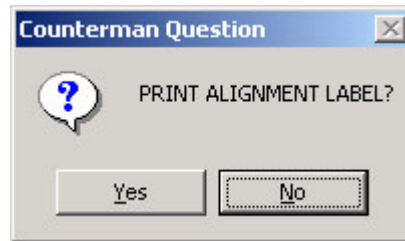


Fig. 8.3

7. You should be in the “Receive Stock” screen (fig. 8.4) now. Notice that the part number shown, is the first part number on that P/O and has been filled in for you. Also notice that the “Quantity” you originally ordered is also filled in for you.

RECEIVE STOCK SCREEN:

Fig. 8.4

8. Press the **[Tab]** (tab) key once to accept the “Received Quantity” shown. Notice that the number of labels changes to the same number ordered.
9. Your instructor will now explain what all of the fields here are used for.
10. Note the two “hot keys” listed in **BLUE** on the lower portion of the screen. Press the **F11** key to put you in “Edit Mode” for the selected “Product Code”. After viewing this inventory record, press the **[ESC]** key once to return to the “Receive Stock” screen.

11. To “Post Receipt” of this item, press the **F5** key once. This will automatically print any labels, then display the next “Product Code” in order of the P/O.
12. It is important to understand, as you are “Receiving Stock”, to check the cost on the packing slip against the cost on the P/O to insure all information is correct. Should the cost, retail, profit margin, or bin location change, simply pressing the **Tab** key will move you into those fields where changes can be easily made right from this screen.
13. Normally, this process is repeated until the entire P/O has been received, but for now, we’ll say we are finished using this method, so we can see how the next function: “Receiving Stock in Bulk works.
14. When finished “Receiving Stock”, press the **ESC** key repeatedly, until you reach a blank P.O.S. screen again.

[9] RECEIVING STOCK IN BULK:

This is a method of “Receiving Stock” that was put in place in lieu of the tedious task of “Receiving Stock By Line”. Although it is much faster, caution should be taken before using this method, as there are different (additional) keystrokes necessary to accomplish some tasks. Also, use of the “Swap To Part Number” feature does not work here, and ALL “Special Orders” WILL apply (no matter what) when “Receiving Stock In Bulk”. Everything being considered, this method can be a real time saver when it comes to receiving inventory from a P/O and there are some pretty cool tools at your disposal when utilizing this method.

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. Select “Maintenance/Display” by pressing the **[1]** key once.
4. Select “Inventory” by pressing the **[1]** key once. Select “Receive Stock in Bulk” by pressing the **[2]** key once.
5. You will be prompted for a “Purchase Order Number”. Enter the P/O number for the Harley Davidson Purchase Order we created earlier and press the **[ENTER]** key once.
6. This will bring up the entire “Purchase Order” on to the screen (fig. 9.1) for you.

RECEIVE STOCK IN BULK SCREEN:

Fig. 9.1

CounterMan

ManMenu Help

Receive Stock in Bulk

Vendor

HD

Order# 2

Prodcode	Description	Recvd Qty	Spec	# Labels	Typ	Cost	BO	Cancel	
11105	O-RING	1	0	1	P	0.10			
11117A	O-RING	5	0	5	P	0.20			
11161	RETAINING RING	1	0	1	P	1.75			
12052	OIL SEAL	1	0	1	P	1.41			
16719-99	GASKET, ROCKER COV	2	0	2	P	2.24			
25416-84B	O-RING, CLUTCH COVE	1	0	1	P	0.84			
26995-86B	SEAL, INTAKE MANIFO	3	0	3	P	1.06			
29985-87	32 AMP HIGH OUTPUT	1	1	1	P	113.97			
34901-85A	GASKET, PRIMARY CO	3	0	3	P	8.08			
36753-87A	CLUTCH CONTROL, FX	1	1	1	P	19.27			
41145-97	VALVE CAP, B&S LOGC	1	0	1	P	4.62			
45875-84A	OIL SEAL	2	0	2	P	5.12			
46106-00	DETACHABLES LOCK-2	1	1	1	P	36.95			
53116-97DH	TOUR PAK, VIVID BLAC	1	1	1	P	298.42			
56110-98	HANDLEBAR, BLACK, 1	1	1	1	P	26.97			
59141-98	LICENSE PLATE FRAM	1	0	1	P	14.97			
61742-93T	TANK TRIM ADAPTER	1	1	1	P	6.73			

F11=Order Rec,F4=RePrint Order,F5=Post Receipts,F6=Sales History,F7=Notes,=Cancel Order,<Ctrl>-B=Backorder

7. Highlight the first item on the list that indicates that there is a “Special Order” pending for the item. You can accomplish this by using the **[↓]** (down arrow) key until you reach “Product Code” # 29985-87.

8. Now press the **F11** key once to open the “Stock Order Record Display/Edit” window. Notice the available information from this screen (fig. 9.2).

STOCK ORDER RECORD DISPLAY/EDIT WINDOW:

Fig. 9.2

CounterMan
Main Menu Help

Receive Stock in Bulk

Vendor HD Order# 2

Prodcode	Description	Recvd Qty	Spec	# Labels	Typ	Cost	BO	Cancel
11105	O-RING	1	0	1	P	0.10		
11117A	O-RING	5	0	5	P	0.20		
11161								
12052								
16719-99								
25416-84B								
26995-86B								
29985-87								
34901-85A								
36753-87A								
41145-97								
45875-84A								
46106-00								
53116-97DH								
56110-98								
59141-98								
61742-93T								

Stock Order Record Display/Edit

Order# 2 Vendor HD

Product Code 29985-87 Description 32 AMP HIGH OUTPUT ALTERNATOR

☒ Open Item ☐ Backordered ☐ Cancelled Backorder

Qty Ordered 1 Date Ordered 06/21/2002 Unit Cost 113.97

Qty Received Date Received

F11=Order Rec, F4=RePrint Order, F5=Post Receipts, F6=Sales History, F7=Notes, =Cancel Order, <Ctrl>-B=Backorder

9. If you need to change something in the “Inventory Record” itself, you can press the **F11** key again. This will place you in “Edit Mode” for the selected inventory item. Press the **[ESC]** key once to return to “Stock Order Record Display/Edit” screen.
10. Also notice there is a “button” called: “S/O Not Recvd”. Pressing the **[ENTER]** key once, or, left clicking this button with the mouse will open the “Special Order Information” window (fig. 9.3).
11. It is important to understand, this is an “informational” window only. It can provide you with information with regards to the original ‘Special Order’, but none of this information can be edited from here.
12. Press the **[ESC]** key once to close the “Special Order” information window.
13. Press the **[ESC]** key once more to close the “Stock Order Record Display/Edit window.

continued, next page...

SPECIAL ORDER INFORMATION WINDOW:

Fig. 9.3

[illegible]

14. Normally, we would “Post Receipt” of this “Purchase Order”, but due to possible label printer issues, press ^ repeatedly to exit back to a blank P.O.S. screen.
15. Note: If we had processed this “Receiving Process”, all stock labels would be printed, all “Special Orders” would be properly applied, and all quantities would be added to the inventory records. All of this happens in very few keystrokes, thus saving the user much time when “Receiving Stock”

To recap what we have accomplished so far on the “Special Order Loop”, to where we are now:

- So what happens now? Well, Mr. Ziegler calls up and wants to know what's happening on his "Special Order" mufflers. As many different processes are happening by different employees at the same time for many different customers, you may not recall exactly what the status is on his S/O. To find out, simply bring his account up from the blank P.O.S. screen. You will notice right away that the item automatically appears on the screen. So you can inform him that his mufflers have arrived! But additional information is also at your fingertips, as we'll see as you follow along in the following steps. First off, assume Jeff Ziegler calls you up on the phone and wants to know the status of his mufflers he ordered. With Mr. Ziegler on the phone, you could:

- SPECIAL ORDER PICKUP SCREEN:**

[illegible]

Fig. 10.2

[illegible]

CUSTOMER EDIT SCREEN:

Fig. 10.2

CounterMan
Main Menu Help

Customer Add/Edit

REVERSE CHANGES

Attn: Account Number 1 Date Added: 06/21/2002

Name: JEFF ZIEGLER ☐ STOP Address Format: A

Address: 123 SOME STREET

City: ANYTOWN State: CA Zip: 99999 Shipping Address

Tele: (805)555-1212 Fax: () - Email: jeffz@hotmail.com

☒ Mailing List ☐ Resale

On Account: 0.00 Special Order Deposits 109.89 Limit: 0.00

Lifetime Purchases: 0.00 Last Purchase: / / Discount Mode: 0 Discount %: 0.00

Member: HOG Purchases This Year: 0.00 1=Retail, 2=Msr, 3=Cost+
4=Retail+Labor, 5=Msr+Labor

Birthday Month 8 Birthday Day 10

Customer Notes:

Vehicle Information:

Model	Year	VIN	Mileage
SHOVEL	1979	1HD1ABC123M123456	70000

Vehicle Deposits

13. Now, if we access Mr. Ziegler's account once more, we'll see that his "Special Order Deposit" field has been decremented the amount of the "Special Order".
14. Begin a normal P.O.S transaction by entering your "Department Code" followed by your "Employee Code" and press **ENTER**.
15. Type in Mr. Ziegler's phone number and press **ENTER**, or press **ENTER** past the "Tele" field, into the "Name" field and type in his name (or the first part of his name) and press **ENTER**.
16. Press **F12** to access the "Customer Edit" screen.
17. Press the **↓** key once to highlight the "Edit Customer" button and press the **ENTER** key once.
18. Notice the "Special Order Deposit" field is now 0 (zero).
19. Press **ESC ESC** to back out of this function.
20. Press **ESC** again to abort this transaction and "Cancel This Invoice"
21. Answer **Y** (yes) to the following prompt (fig. 10.3) to "Cancel This Invoice" and return to a blank P.O.S. screen.

Fig. 10.3

CounterMan Question

DO YOU WANT TO CANCEL THIS INVOICE?

Yes No

[11] SERVICE REPAIR ORDERS: SERVICE SPECIAL ORDERS:

There are some important factors to consider when using the “Service Repair Order” function in Counterman Pro. The first is that, this function is not designed to totally replace the hand written “Repair Order”, it is intended to enhance it. Due to the fact that a “Repair Order” is almost never processed at the time it begins, it is necessary for Counterman Pro to set inventory “aside” for this job until it has been completed. In the past (DOS version) we have referred to this process as “Allocating Inventory”. Counterman Pro takes a little different approach to this scenario, as the opening questions (when beginning an R/O) have changed to make more sense to the user. Rather than ask “Allocate Inventory to this Transaction?” (as in the DOS version), Counterman Pro now asks: “Is this a Quote?”. The reason for this change is simple, because the only time you would not allocate inventory, is when you are printing a “Quotation”. The process is virtually the same, the verbiage has been changed to protect the innocent, or “make more sense”. This process of allocating inventory, what we now refer to as: “Reserved for Service” is necessary because the item(s) you are installing on this customer’s motorcycle are no longer available for sale in your shop, yet they have not been sold yet either. These items are in “limbo”, sort of like a “part purgatory”, if you will... Once the R/O (Repair Order) has been processed, these items come out of the “Reserved Service” field.

1. To begin a “Service Order”, press the **F4** key once.
2. Because we are considering this an “actual service job”, answer **N** (no) to the following prompt (fig. 11.0). This will cause all items to be “Reserved for Service” as they are entered into the P.O.S. grid.

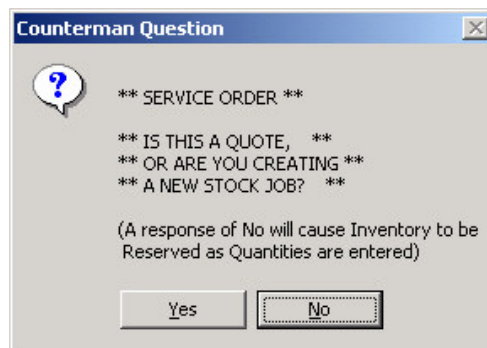


Fig. 11.0

3. Now, you can enter your “Department/Employee Code” in the “Employee” field and press the **ENTER** key once.
4. This will move you to the “Mechanic” field. It is important to understand that all mechanics in your shop must be setup (see “Mechanic Table” later in this book) in order for this process to continue. You will not be able to use your “Employee Code” as a “Mechanic”. For this scenario, we’ll use Vance as the “Mechanic”, so press **1** in this field, then press **ENTER**.
5. “Service Orders” require customer information to continue, so let’s use Jeff Ziegler’s account again.
6. Type in Mr. Ziegler’s phone number and press **ENTER** then press **ENTER** again to select (alternately, you could press **ENTER** past the “Tele” field, into the “Name” field and type in his name (or the first part of his name) and press **ENTER**).

7. Notice that the “Select or Add Customer Motorcycle” window pops up (fig. 11.1). We’ll be working on his existing bike, so just press **[ESC]** to select it.
8. Jeff needs an oil change for that old Shovel, so enter the “Product Code” for his filter: **[2][5][][5][4][5][ENTER]**
9. Oh boy, you don’t have this item in stock... That’s ok, hold down the **[CTRL]** key and tap the **[F6]** key once to mark this item for “Special Order”! (*new feature in Counterman Pro*)
10. Enter the quantity of **[1]** and press **[ENTER]**

SERVICE REPAIR ORDER (SELECT or ADD CUSTOMER MOTORCYCLE):

Fig. 11.1

Counterman
 Date: 06/24/2002
 Employee: 1 *** RALPH
 Customer Tele: (805)555-1212
 Account #: 1
 Discount: %0 Mode: 0
 Name: JEFF ZIEGLER
 Address: 123 SOME STREET
 City: ANYTOWN State: CA Zip: 99999
 E-mail: jeffz@hotmail.com
 Fax #:
 Mechanic: 1
**** SERVICE ORDER ****
PARTS

Product Code	Description	Qty	Price	Extended Price	Available	Other Info
		0.00	0.00	0.00	0.00	

Select or Add Customer Motorcycle

Model	Year	VIN	Mileage
SHOVEL	1979	1HD1ABC123M123456	70000

Invoice Total: 0.00
 On Account: 0.00
 S/O Deposit: 0.00
 Applied: 0.00
 Total Due: 0.00
 Payment: 0.00
 Balance Due: 0.00

Amount Tendered: 0.00
 Change:
 Payment Method: 1=\$ 2=Ck 3=VISA/MC 4=Oth
 5=Charge 6=Credit S=Split
 Process Transaction: P=Process M=More D=Delete Q=Quote
 L=PickList S=SaveOnly

Subtotal: 0.00
 Sales Tax:
 Invoice Total:
 B.O. Amount+Tax:
 B.O.+Invoice Total:
 Ver:06-21-2002Beta
 Exit

11. Ok, now let’s add the oil to this process by typing: **[5][0][ENTER]** then the quantity of three: **[3][ENTER]**
12. Notice that Counterman Pro inserts a red **S** for the “Special Order” item and a red **A** for the “Allocated” item into the grid, just to the right of the “Available” field.
13. It will be necessary to put this transaction on hold until the filter comes in AND until the oil change is actually completed. To accomplish this, hold down the **[CTRL]** key and tap the **[F2]** key.
14. In the “Save As Name” type in the number found on the “Hand Written R/O” which is **[2][1][2][3][4]** and press the **[TAB]** key once.
15. Type in the notes as shown in fig. 11.2, then press the **[ESC]** key to save this transaction.
16. By placing this item on “Special Order”, it will automatically be reserved for this “Service Order” as soon as it has been received. So the normal sequence of events would occur (i.e. Running the “Reorder List”, placing the “Purchase Order”, then “Receiving” the item into stock). Of course, this item would show up with any other “Special Ordered” items that were placed prior to the last “Reorder List”.
17. So if we replicate the process we ran earlier and open the “Reorder List” for CCI, we’ll see that the item we just “Special Ordered” is now on that list. (Your instructor will guide you through this process).
18. Now, go ahead and “Receive” the item into stock (we covered this earlier, but your instructor will also guide you through this process).

SERVICE ORDER/SAVE FOR RECALL SCREEN:

Fig. 11.2

CounterMan 30-Day Evaluation **** SERVICE ORDER ****

Date: 06/24/2002
 Employee: ***
 Customer Tele: (805)555-1212
 Account #1
 Discount %0 Mode 0
 Name: JEFF ZIEGLER
 Address: 123 SOME STREET
 City: ANYTOWN
 State: CA Zip: 99999
 E-mail: jeffz@hotmail.com
 Fax #

Product Code	Description	Qty	Price	Extended Price	Available	Other Info
25-545	OIL FLTR PERF-FORM53UP/H	1.00	8.71	8.71	0.00	S
60	99816-60 60W OIL	3.00	3.25	9.75	9.00	A
		0.00	0.00	0.00	0.00	

Save For Recall
 Save As Name: Z1234
 Notes: Special ordered the oil filter, eta: 3-days...

Invoice Total: 10.51
 On Account: 0.00
 S/O Deposit: 0.00
 Applied: 0.00
 Total Due: 10.51
 Pmt+Deposit: 0.00
 Balance Due: 0.00

Process Transaction:
 P=Process M=More D=Delete Q=Quote
 L=PickList S=SaveOnly

B.O. Amount+Ta: 9.75
 B.O.+Invoice Total: 19.90
 Ver: 06-21-2002Beta

Exit

19. With the item now received into inventory, let's "Recall" the saved "Service Order" by holding down the **CTRL** key and tap the **F2** key. This will bring up the "Recall Transactions" window (fig. 11.3)
20. You can locate the one you are looking for quickly by typing the first character it was originally saved under. Press the **Z** key, and you should see the previously "Saved Transaction".

RECALL TRANSACTION WINDOW:

Fig. 11.3

CounterMan 30-Day Evaluation

Date: 06/25/2002
 Employee: ***
 Customer Tele: () -
 Account #
 Discount % Mode
 Name:
 Address:
 City:
 State:
 Zip:

Product Code	Description	Qty	Price	Extended Price	Available	Other Info
		0.00	0.00	0.00		

Recall Transaction
 XW3
 XW4
 XX1
 XX3
 XX4
 XY1
 XY2
 XY3
 XY4
 Z1234

Invoice Total: 0.00
 On Account: 0.00
 S/O Deposit: 0.00
 Applied: 0.00
 Total Due: 0.00
 Payment: 0.00
 Balance Due: 0.00

Process Transaction:
 P=Process M=More D=Delete Q=Quote
 L=PickList S=SaveOnly

B.O. Amount+Ta: 0.00
 B.O.+Invoice Total: 0.00
 Ver: 06-21-2002Beta

Exit

21. Once you have located the previously saved transaction, press the **[ENTER]** key once to open the transaction and place it on the screen.
22. At the following prompt (fig. 11.4) answer **[N]** (no) to the question: “Is This a New Job?” by just pressing the **[ENTER]** key once to accept the default of “NO”.

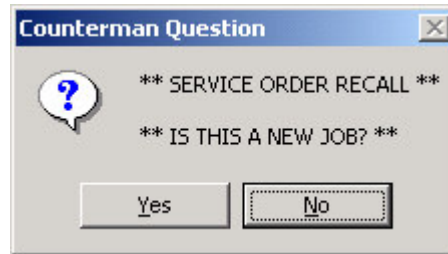


Fig. 11.4

23. This will bring up a second “Counterman Question” (fig. 11.5) that asks: “Is This a Quote, Or Are You Creating a New Stock Job?” Because this is NOT a “Quote” and we are NOT creating a “Stock Job”, the answer to both of these questions is **[N]** (no). This is also the default answer, so just press the **[ENTER]** key once to accept the default answer.

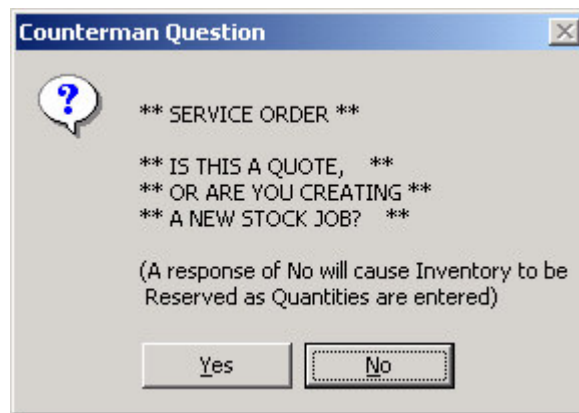


Fig. 11.5

24. This will bring up the “Service Order” with all the items listed, exactly the way you saved it before. Now press the **[ENTER]** key twice to bring up the “Select or Add Customer Motorcycle” window.
25. We’ll be performing the work on Jeff’s “79 Shovel”, so just press the **[ESC]** once to select it.
26. You’ll notice that the “Special Order Oil Filter” now shows a red “**P**” in the right column. This signifies a “Special Order Pickup” and Counterman Pro handles this automatically for you.
27. We also have “Recalled” this “Service Order” for another reason. The mechanic found a cracked oil line fitting while doing the oil change and needs to add the fitting to this “Service Order”.
28. Type in a “Product Code” of **[2][6][4][9][6][F][7][5]** and press the **[ENTER]** key once.
29. For a quantity of **[1][ENTER]**
30. You’ve got 1 ¼ hours of “Labor” tied up in this job, so enter a “Product Code” of **[L]** for “Labor” and press the **[ENTER]** key once.
31. For a quantity of **[1][.][2][5][ENTER]**

32. Now, save this job again by holding down the **CTRL** key and tap the **F2** key.
33. Notice that the “Save As Name” is the same as it was when it was “Recalled”.
34. Press the **Tab** key once and type the additional “Notes” in the field as shown below (fig. 11.6).

SAVE FOR RECALL SCREEN:

Fig. 11.6

CounterMan 30-Day Evaluation ** SERVICE ORDER **

Date: 06/26/2002
 Employee 1: RALPH
 Customer Tele: (805)555-1212
 Account # 1
 Discount % 0
 Mode 0
 Name: JEFF ZIEGLER
 E-mail: jeffz@hotmail.com
 Address: 123 SOME STREET
 City: ANYTOWN
 State: CA
 Zip: 99999

Product Code	Description	Qty	Price	Extended Price	Available	Other Info
25-545	OIL FLTR PERF-FORM53UP/HD	1.00	8.71	8.71	-1.00	P
60	99816-60 60W OIL	3.00	3.25	9.75	6.00	A
26496-75	FITTING	1.00	5.80	5.80	0.00	A
L	LABOR PER HOUR					

Invoice Total 98.64
On Account 0.00
S/O Deposit 0.00
Applied 0.00
Total Due 98.64
Payment 0.00
Balance Due 98.64

Save For Recall
 Save As Name: Z1234
 Notes:
 Special ordered the oil filter, eta: 3-days...
 Found cracked oil fitting, replaced it

Process Transaction: P=Process M=More D=Delete Q=Quote L=PickList S=SaveOnly
 B.O. Amount+Tax: 0.00
 B.O. Invoice Total: 98.64
 Ver: 06-21-2002 Beta

35. The work has been finished and we move on to the last part of this “Service Order”, when the customer (Jeff Ziegler) comes back in to pick up his bike.
36. So from a blank P.O.S. screen (one last time), hold down the **CTRL** key and tap the **F2** key to “Recall” this “Service Order”.
37. Press **Z** to show the “Saved Transactions” that begin with that letter, and make sure the one saved as “Z1234” is selected, then press the **ENTER** key once.
38. Again answer “NO” to both of the following “CounterMan Questions” (fig. 11.7 & fig. 11.8) by accepting the default, press the **ENTER** key on “NO” at both prompts.

Fig. 11.7

CounterMan Question

?? SERVICE ORDER RECALL ??

?? IS THIS A NEW JOB? ??

Yes No

Fig. 11.8

CounterMan Question

?? SERVICE ORDER ??

?? IS THIS A QUOTE, ??

?? OR ARE YOU CREATING ??

?? A NEW STOCK JOB? ??

(A response of No will cause Inventory to be Reserved as Quantities are entered)

Yes No

39. Keep in mind, we are simply “Recalling” this transaction so it can be finalized and “cashed out”. So, the default answers (“NO”) to the “Counterman Question” prompts are your normal choice.
40. Press the **[ENTER]** key once to accept the “Employee/Department” code, then **[ENTER]** again to accept the “Mechanic Code” as it was when this “Service Order” was last saved.
41. Press the **[ESC]** key once to accept the “79 Shovel” as the bike we are performing the work on. This will place you into the “grid”.
42. We’re now ready to take Mr. Ziegler’s money from him, so press the **[PG DN]** key once to get to the “Accounting” portion of the P.O.S. screen.
43. To accept the “Payment” in the amount of this transaction, just press the **[ENTER]** key to move to the “Amount Tendered” field.
44. He’s paying by Visa Card. Since you are not “Tendering” any cash, just press the **[ENTER]** key once to bypass the “Amount Tendered” field and move to the “Payment Method” field.
45. “Payment Method” is Visa, so press the **[3]** key once and press **[ENTER]**
46. Notice that the default is showing a “M” (More) in the “Process Transaction” field. This provides the opportunity to add additional “Notes” and add disclaimers if desired. Press the **[ENTER]** key once.
47. Although we could add notes to this transaction here, there is nothing further that needs to be added, so press the **[ESC]** key once at the “Transaction Completion” screen (fig. 11.9) to “Process and Print” this “Service Order”.

TRANSACTION COMPLETION SCREEN:

Fig. 11.9

Counterman
Main Menu Help

Date 06/26/2002
Employee 1 *** RALPH
Customer Tele (805)555-1212
Account # 1
Discount % 0 Mode 0

Counterman 30-Day Evaluation
PARTS
Name JEFF ZIEGLER
Addr 123 SOME STREET
City ANYTOWN State CA Zip 99999

E-mail jeffz@hotmail.com
Fax #

Mechanic 1

Product Code	Description	Qty	Price	Extended Price	Available	Other Info
25-545	OIL FLTR PERF-FORM53UP/HDI					
60	99816-60 60W OIL					
26496-75	FITTING					
L	LABOR PER HOUR					

Notes:
Special ordered the oil filter, eta: 3-days...
Found cracked oil fitting, replaced it.

☒ Print Disclaimers

Save for Recall
Change Printer

Currently Selected Invoice Printer
HP LaserJet 1200 Series

Invoice Total	98.64	Amount	96.76
On Account	0.00		
S/O Deposit	0.00	Payment	1.88
Applied	0.00	1=\$ 2	
Total Due	98.64	5=Ch	
Payment	98.64	Proce	98.64
Balance Due	0.00	L=PickLi	0.00

Exit

48. The normal rule-of-thumb is to “delete” any transactions that have been processed, because you no longer need them. At the following prompt (fig.11.10), delete the previously “Saved Transaction” by answering ☒ (yes). Press the key once, then press the key once.

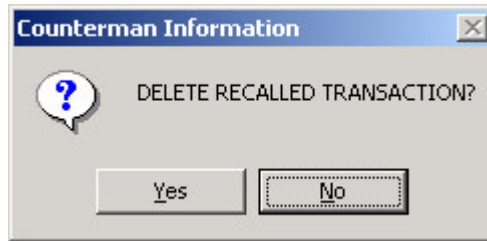


Fig. 11.10

49. When you “Delete Recalled Transaction”, Counterman Pro will provide an information window, letting you know that the deletion was successful (fig. 11.11).



Fig. 11.11

50. Take a look at the printed invoice. Notice that the vehicle VIN, model, year, and mileage are all printed on the invoice. Counterman Pro not only prints this information, it also saves it, so it can be recalled later. For instance, if the customer comes in six months later and wants to know what his mileage was at his last oil change, Counterman Pro could provide this information through a report.
51. Also notice that all of the “Notes” we typed in, have been printed on the “Service Invoice”, providing your customer with valuable information concerning his motorcycle.

This is a very useful tool that will likely be used more than any other by Parts and Service employees. The “Stock Check Screen” provides an array of information at a touch of a button. Information that answers questions like: Do we have this item in stock? What is the Retail Price? What is the MSR price, or the Cost? Is the item available from a different supplier, and if so, how can I compare Costs through different suppliers? With the answers to these questions and more, you can begin to understand what an incredibly valuable tool the “Stock Check Screen” is. Let’s say that a customer comes into your shop and wants to find out the availability of an HD seal, part number 11124. Of course the “Stock Check Screen” can be used to check your inventory level, but maybe you can get this item from a different supplier? Or, maybe at a better cost? Or maybe you just want to know which vendors carry this item? In the following lesson we will learn how to use the F2 “Stock Check Screen” and all the tools associated with it.

- ## STOCK CHECK SCREEN:

[illegible]

- PAGE: 45

Recording Lost Sales:

- Also, towards the top of the screen, are the words: “** Lost Sale ? **” in red. This is asking the user a question. Is this a “Lost Sale”? “Lost Sales” can be recorded from here and a “Lost Sales Report” can be ran to find out which items your losing sales on. To record a “Lost Sale” for this item, simply press the **L** key once.
- Counterman Pro will confirm that the “Lost Sale Recorded” with the following prompt (fig. 12.2). Press **ENTER** once to acknowledge the confirmation.



Fig. 12.2

Related Product Codes:

- Notice that there are several ‘Related Product Codes’ listed in the grid. If you find that you would rather use one of the part numbers listed in the grid, you can bring that “Product Code” to the top of the “Stock Check Screen” by highlighting the item of your choice using the **↓** and **↑** keys to make your selection, then press **ENTER** once to bring it to the top.
- To revert back to the original “Product Code” you entered, simply press the **Q** (letter) key once.
- At a glance you can easily compare the “Retail Price” here, you’ll also notice that some of the prices look a bit steep for a seal. This is due to the fact that, most of the prices you see are listed at “Pack Quantities”
- When the “Description” says: “** NOT STOCKED **” it means that Counterman Pro has located the information on this item from the “Price Book” file. If the “Description” says: “** No Record Exists **” it means the item cannot be found in “Inventory” OR in the “Price Book” files and is likely because that vendor’s “Price Book” NOT in your list.

Comparing Vendor’s MSR/Cost:

- Comparisons between vendors, for “like items” is a cinch using the “Stock Check Screen”. Simply press the **R** key once to view actual “MSR” and “Cost” for the listed item from all the vendors on the screen.

Balance Editing and More:

- Let’s just say you just went to the bin and pulled one of these seals for a customer, but you found that there is actually seven of them on hand, in stock! Counterman Pro can save you a bunch of keystrokes by allowing the user to edit the “Balance” available from right here!
- Press the **F11** key once to go to “Quick Edit” mode in the “Inventory Screen” (fig. 12.2).
- Notice that the selections available can be viewed by pressing the **T** (tab) key.
- Press the **T** (tab) key five times, until you reach the “Balance On Hand” field. Now, press the **7** key once to change the “Balance On Hand” to the actual quantity you have, then press the **T** (tab) key to move out of the field. Now press **ESC** to return to the “Stock Check Screen”.

INVENTORY QUICK EDIT SCREEN:

Fig. 12.2

CounterMan
Main Menu Help

Inventory Record Display

Product Code 11124 **Date Added** / /

Description OIL SEAL ☒ **Inven Total** ☐ **Labor** ☒ **Update From Price Book**

Cost 1.12 ☐ **Cost On GPM** ☒ **Taxable** ☒ **Discounted** ☐ **Calculate Min/Max**

Selling Price 3.10 **Bin Location** B4 **Pack Qty** 5 **Sold By** EA **Cat Page**

Gross Profit% 63.8709677 **Reorder Level** 2 **Maximum Balance** 2

Suggested Retail 2.50 **Qty On Order** 0 ☐ **BO** **Rcv Date** 04/25/2001

Note 2000

Balance On-Hand 7.00
Reserved-Service 0.00
Reserved-Spec 0.00

Vendor Code HD
Item Category HD

1-Special Ord 0
2-Reserved Detail
3-Disclaimers
4-History

Related Part Number
54-043
DSDS194420
TR492483
CS092601
VT14-0600
MW95-709
MGBH11124

Qty Sold MTD 0.00
Cost MTD 0.00
Sales MTD 0.00
Margin % 0.0000000

Qty Sold YTD 1.00
Cost YTD 1.12
Sales YTD 2.94
Margin % 61.9047619

12 Month Sales Total 2.00
Avg Monthly Sales 0.3333 (6MOS)

<Esc> to Exit

15. Additional keystrokes are also available from the “Stock Check Screen” and they are listed on the lower portion of the screen in BLUE.
16. The only other keystroke available that is NOT listed allows the item on the top of the “Stock Check Screen” to be “pasted” right into the grid, when a transaction is currently in progress.
17. To perform the process in step #16, you would need to be in the middle of a transaction, positioned in the grid, on the “Product Code” field. You could then use the “Stock Check Screen” by pressing the **F2** key. Then, enter the “Product Code” and press **ENTER**. To “paste” this item right into your P.O.S. screen press the **SPACE** bar key once.

[13] CASH PAID OUTS:

It never fails, it's inevitable, you'll need cash for something, sometime, when you least expect it. Whether it's a nut or bolt you don't have, but need it to complete a job, or it's gas for a bike in the Service Department. Or maybe you need to pay a C.O.D. and there's no one in the shop who can write a check. Whatever the case may be, there is likely a time when you'll need to pull cash out of your drawer to pay for something. It's to your advantage to keep track of "Cash Pay Outs", as they are considered a tax write off and are expenses for supplies needed for your business. It is important to understand however, that the proper account be charged for the "Cash Pay Out". With this in mind, you may want to setup particular accounts, strictly for this purpose.

Setting Up GL Accounts For Cash Paid Outs:

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **ALT** key, then tap the **M** key, or
 - b. Tap the **ALT** key, then press the **ENTER** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. Select “Maintenance/Display” by pressing the **F1** key once.
4. Select “Table Maintenance” by pressing the **F9** key once.
5. Select “Chart of Accounts Table” by pressing the **F7** key once.
6. This will open the “Chart of Accounts” GL listing (fig. 13.1). The list that you now see was originally converted from the HD shop and was not in use at the time of this writing. We are going to add an account for the purpose of “Shop Supplies”, so press the **INS** key once to add a new record.

CHART OF ACCOUNTS SCREEN:

Fig. 13.1

[illegible]

7. Enter **1000** in the “Account Number” field and press the **Tab** key once.
8. Now enter the words: SHOP SUPPLIES in the “Description” field and press the **Tab** key again.
9. In the “YTD” (Year To Date) field, just press **Tab**, then press **Tab** again past the “Current” field.
10. The “Type” of account this is will be a “2” for an “Expense” GL account, so enter **2** then press the **Tab** key once. There are 10 possibilities available here. The four different “Type” of accounts that were setup from the conversion of the DOS version of CounterMan here are:
 - 0 = INCOME
 - 1 = C.O.S. (Cost Of Sales)
 - 2 = EXPENSE
 - 3 = OTHER
11. We want to be able to use this for our “Cash Paid Outs” so, in the “CPO Selection” (Cash Paid Out) field enter **T** (true) and press the **Tab** key once.
12. Notice that the only valid selections for this field are **T** (true), **Y** (yes), **F** (false), or **N** (no).
13. Once your data looks like the data in Fig. 13.1, press the **ESC** key once to close this window.

Cash Paid Out Process:












1. From a blank P.O.S. screen, with your “Department/Employee Code” filled in, press the **F3** key once. This will open the “Cash Paid In/Out” screen (fig. 13.2).
2. Press the **Tab** key twice to reach the “Employee” field. This field is provided just in case the employee using the “Cash Paid Out” function is not the same employee on the P.O.S. screen. Note that the “Employee Code” is masked (***) and will default to the employee on the P.O.S. screen.

CASH PAID OUT SCREEN:

Fig. 13.2

The screenshot shows the CounterMan 30-Day Evaluation PARTS screen. The main window has a title bar "CounterMan" and a menu bar "Main Menu Help". The date is 06/27/2002. The employee is 1 *** RALPH. The customer tele is () -. The name is blank. The account # is blank. The discount % is blank. The mode is blank. The address is blank. The city is blank. The state is blank. The zip is blank. The product code is blank. The description is blank. The qty is 0.00. The price is 0.00. The extended price is 0.00. The available price is blank. The other info is blank. The invoice total on account is 0.00. The S/O deposit applied is 0.00. The total due is 0.00. The payment balance due is 0.00. The process transaction is P=Process M=More D=Delete Q=Quote L=PickList S=SaveOnly. The B.O. Invoice Total is blank. The version is 06-21-2002Beta. The exit button is visible.

The "Cash Paid Out/In" dialog box is open, showing the "Cash Paid OUT" radio button selected. The employee field is masked with ***. The G/L Account # is 1000. The amount is 20.00. The description is GAS FOR ZIEGER'S BIKE. The process button is highlighted.

3. We won't need to change the "Employee Code", so just press the  (tab) key again.
4. Notice that the available "GL Accounts" scroll list pops up for you now. You could make a choice using the mouse, or simply type in the account you want to use. Enter  then press the  key once.
5. Enter the amount for this "Cash Paid Out":  and press the  (tab) key once.
6. Type the "Description" for the "Cash Pay Out" as shown in figure 13.2 and press the  (tab) key once.
7. Press the  key on the "Process" button to process this "Cash Paid Out".
8. Notice the printed output has an area for a signature and a date for the person or employee who is receiving the cash.

Cash Paid In Process:

9. If you didn't notice already, no motorcycle tank will hold \$20.00 in gas (at least not yet). So, your employee comes back with a receipt and the change and we need to know how to handle this scenario.
10. The process is identical to the instructions for doing a "Cash Paid Out", the only difference is that the "Cash Paid In" must be selected.
11. We will need to do a "Cash Paid In" for the amount of the change, using the same "GL Account" number and pretty much the same information as before. The difference being, we choose the "Cash Paid In" selection. This will not only keep track of the dollars going in and out, it will also keep your cash drawer in balance.

[14] MESSAGE CLIPBOARDS:

The value of communicating with your customers is almost as important as making sales to them. Providing information that let's your customer know, you have their "best interest" in mind goes a long way. A tool Counterman Pro has available to help with this is called "Clipboards". A "Clipboard" is some information you would like to either convey to every customer who leaves with a "Quotation", an "Invoice", or a "Special Order". It might be something simple like your store hours, or your website address. Other information could include dates and times for special events, return policies, or global disclaimers, or just a simple "Reminder" to yourself. Here we will learn how to use the different "Clipboards" available in Counterman Pro.

Invoice Message Clipboard:

This information will be printed on each and every invoice you process. This is where you should place any "global information" you want all customers to see

1. Access the "Invoice Message Clipboard" window, from a blank P.O.S. screen, by pressing the **[F6]** key once (fig 14.1).
2. Press the **[Tab]** key once to move to the message area of this window and into "Edit Mode" for this "Clipboard".

INVOICE MESSAGE CLIPBOARD WINDOW:

Fig. 14.1

The screenshot displays the Counterman Pro software interface. At the top, the title bar reads "Counterman". Below it, the menu bar shows "Main Menu Help". The main window is divided into several sections. On the left, there's a form with fields for "Date" (06/27/2002), "Employee" (1 *** RALPH), "Customer Tele" (), "Account #", "Discount %", "Mode", "Addr", "City", "State", and "Zip". In the center, there's a section for "Counterpart 30-Day Evaluation" with a "PARTS" label. To the right, there's a section for "E-mail" and "Fax #". Below these, there's a table with columns: "Product Code", "Description", "Qty", "Price", "Extended Price", "Available", and "Other Info". The table has one row with values: "0.00", "0.00", "0.00". Overlaid on the bottom right is the "Invoice Clipboard" window. It has a date field set to "09/18/2001". The main text area contains a yellow message: "DON'T FORGET, THE SHOP BIRTHDAY PARTY IS ON JUNE 2, 2002 AT NOJOQUI FALLS! RAFFLE TICKETS FOR AN XL883 CUSTOM ARE AVAILABLE NOW!!! *NO RETURNS ON CLEARANCE ITEMS". Below this, it says "***** THANK YOU, COME BACK SOON *****". Further down, it lists "BUSINESS HOURS: MONDAYS: CLOSED, TUESDAY-SATURDAY: 9:00-6:00, SUNDAY: 9:00-4:30". At the bottom of the clipboard window, there are buttons: "Add", "Del", "Next", "Prev", "Home", "End", "Edit", and "Esc". Below the clipboard window, there's a section for "Invoice Total", "On Account", "S/O Deposit", "Applied", "Total Due", "Deposit", and "Balance Due". At the very bottom, there's a "Process Transaction" section with a legend: "P=Process M=More D=Delete Q=Quote L=PickList S=SaveOnly". To the right of this, it says "B.O.-Invoice Total" and "Ver:06-21-2002Beta". An "Exit" button is located at the bottom right.

3. Pressing the **[Tab]** key again will move you down to the button choices at the lower portion of this window.
4. Note that Counterman Pro allows the user to have more than one of these "Clipboards", but the one that will be printed, on a daily basis, is the one with the newest date associated with it.
5. Press the **[ESC]** key to close this window.

Quotation Message Clipboard:

This information will be printed on each and every quotation you print.

6. Access the “Quotation Message Clipboard” window, from a blank P.O.S. screen, by pressing the **F7** key once.
7. Press the **Tab** key once to move to the message area of this window and into “Edit Mode” for this “Clipboard”.
8. Pressing the **Tab** key again will move you down to the button choices at the lower portion of this window.
9. Note that Counterman Pro allows the user to have more than one of these “Clipboards”, but the one that will be printed, on a daily basis, is the one with the newest date associated with it.
10. Press the **ESC** key to close this window.

Special Order Message Clipboard:

This information will be printed on each and every “Special Order” you process that was started using the **F5** key.

11. Access the “Special Order Message Clipboard” window, from a blank P.O.S. screen, by pressing the **F8** key once.
12. Press the **Tab** key once to move to the message area of this window and into “Edit Mode” for this “Clipboard”.
13. Pressing the **Tab** key again will move you down to the button choices at the lower portion of this window.
14. Note that Counterman Pro allows the user to have more than one of these “Clipboards”, but the one that will be printed, on a daily basis, is the one with the newest date associated with it.

Notes Message Clipboard:

The “Notes Message Clipboard” works differently than the other ones do. It is very date sensitive and will open a “reminder window” with the message that was previously entered, on the date it is set for. This is how it works:

15. Access the “Notes Message Clipboard” window, from a blank P.O.S. screen, by pressing the **F9** key once.
16. This time, set the date for today and press the **Tab** key once.
17. Type in any message you want to in the window and press the **Tab** key again.
18. Now, Press the **ESC** key once to close the window.
19. Exit the Counterman Pro Program by holding down the **CTRL** key and tap the **PG DN** key once. This process will take you back to the Windows Desktop.
20. Re-open Counterman Pro to see your message in a window (fig. 14.2)
21. Press the **ENTER** key once to let Counterman Pro know, you have read the message.

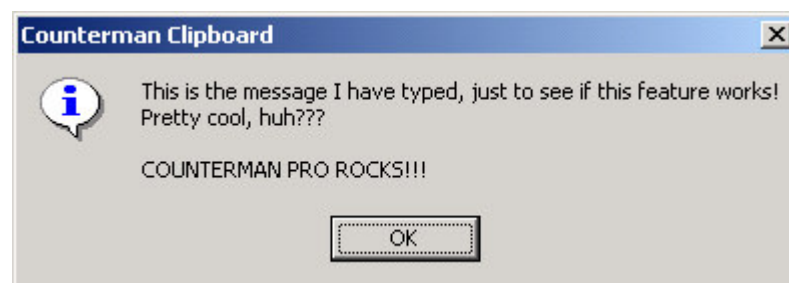


Fig. 14.2

[15] DAILY CASH DRAWER REPORT:

Balancing the cash drawer every night can be a chore, but Counterman Pro can help with this process and help keep it straight. No matter how many transactions get processed though out the day, it is to your advantage to balance the “Cash Drawer Report” each night at the close of business. This report will help by tallying the Cash, Checks, Credit Card, and Charge sales, in addition to totaling the Deposits Applied to Sales, Deposits Received on Account, Warranty Repairs, and all Labor sales. Normally an “Audit Trail Report” is run, to display the detail of each sale. Along with this, is a “Summary Report” that totals everything, plus a “Customer Account Summary Report” that simply shows how much credit your shop has extended, and how many dollars you are holding on customer’s accounts. All of this can be easily handled with one “Daily Cash Drawer Report”, as you will see in this next scenario...

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. Select “Reports” by pressing the **[3]** key once.
4. Select “Cash Drawer Reports” by pressing the **[1]** key once.
5. Make the selections as shown in Fig. 15.1 by using the **[↓]** **[↑]** keys to move between fields, and using the **[SPACE]** bar key to make the selections.

DAILY CASH DRAWER REPORT SCREEN:

Fig. 15.1

Counterman
MainMenu Help

Cash Drawer Reports

☒ Print Customer Account Summary
☐ Display Summary to Screen
☒ Print Daily Report Form
☒ Detail Audit Trail
☒ Show Profit% instead of Cost for each transaction
☐ Report by Drawer
☐ Report by Department

Date Range 05/05/2002 - 05/05/2002

Process Report

6. Press the **[TAB]** (tab) key repeatedly, until the “Process Report” button is highlighted then, press **[ENTER]** to process this report.

MONTH END REPORTS AND PROCEDURES:

It is very important to understand that Counterman Pro is a “real-time” program. This means that things happen in the program, as they happen in your shop. For example, when someone purchases an item, the inventory record is immediately adjusted, when someone places a “Special Order”, the deposit is immediately applied to their account, when someone uses an existing account balance, it gets immediately adjusted out of their account. There is no “batch process” that needs to happen for daily activity. For this reason, it is of the utmost importance that the “Month End Reports and Procedures” happen AT the close of the current month, each month. Although you may not need every report that is in this section, chances are you will need most of them, and some cannot be recreated at a later time. You may not think you need it now, but come time for an audit or the “need” for the information contained in some of these reports, you’ll likely be glad you ran them. Some reports can be recreated later and some cannot. If you decide not to run a particular report at the close of a month, it may (or may not) be possible to recreate that report later. We recommend over doing this, as it’s usually better to have “more” information, rather than “less”.

Balance Less Than Zero Report:

The “Balance Less Than Zero Report” is necessary to insure that ALL reports that have anything to do with inventory (or inventory value) are valid. Negative balances in your inventory records will result in devaluation of your inventory “cost value”. Run the “Balance Less Than Zero Report” and (with this information) investigate the discrepancies and make the adjustments, as necessary, in the “Inventory Record(s)”.

Note: This Report CANNOT be recreated later!

INVENTORY ACTIVITY REPORT (Balance Less Than Zero Filtered) SCREEN:

Fig. 15.1

Select	Filter Field or Calculation	Operation	Value	Thru Value
<input type="checkbox"/>	Notes	CONTAINS		
<input type="checkbox"/>	Order/Receive Date	EQUAL		
<input type="checkbox"/>	Order/Receive Date	RANGE	01/01/1980	07/01/2001
<input type="checkbox"/>	Pack Qty	RANGE		
<input type="checkbox"/>	Price	RANGE		
<input type="checkbox"/>	Product Code	RANGE		
<input checked="" type="checkbox"/>	Qty Available	LT	0	
<input type="checkbox"/>	Qty Available	GT	0	
<input type="checkbox"/>	Qty Available	EQUAL	0	

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.

2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” select **[4]** “Filtered Reports”.
4. Select **[2]** “Inventory Activity” (fig. 15.1).
5. Select “Detail Report” by pressing the **[F5]** (tab) key until this selection is highlighted, then place a check mark in this box by pressing the **[SPACE]** bar key once.
6. Press the **[F5]** (tab) key to move into the “Filter Conditions”.
7. Using the **[V]** key, tap it repeatedly until you reach the filter line that says: “**QTY AVAILABLE..... LT**” (less than) and select it by pressing the **[SPACE]** bar key, then press the **[F5]** (tab) key three times.
8. Press the **[PG DN]** key repeatedly until you reach the “Process Report” button and press the **[ENTER]** key.
9. Of course, any discrepancies need to be addressed, and the necessary adjustments made to your inventory before continuing...

Monthly Cash Drawer Report:

Similar to the “Daily Cash Drawer Report”, this will provide you with “date range” information on all sales for the entire month. At this point, you should be familiar with the “Daily Cash Drawer Report”. The main difference in the “Monthly Cash Drawer Report” is to provide information for the entire month.

Note: This Report CAN be recreated later!

MONTHLY CASH DRAWER REPORT SCREEN:

Fig. 15.2

CounterMan
MainMenu Help
Cash Drawer Reports

☒ Print Customer Account Summary
☐ Display Summary to Screen
☐ Print Daily Report Form
☐ Detail Audit Trail

☐ Report by Drawer
☐ Report by Department

Date Range 05/01/2002 - 05/31/2002

Process Report

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” select **[3]** “Reports”.
4. Select **[1]** “Cash Drawer Reports” (fig. 15.2).
5. Press the **[SPACE]** bar key to select “Print Customer Account Summary”.
6. Using the **[TAB]** (tab) keys or the **[↓]** **[↑]** keys, move to the “Date Range” fields and enter the first day of the month (for this scenario will be 05/01/2002) and press the **[TAB]** (tab) key once.
7. Now enter the last day of the month (for this scenario will be 05/30/2002), then press the **[TAB]** (tab) key again to highlight the “Process Report” button and press **[ENTER]**

Service Department Report:

This report will provide valuable information on your “Service Department” for the following categories: Parts and Labor, by “Mechanic”, with dates and invoice numbers, then total all of this information on the last page of the report.

Note: This Report CAN be recreated later!

SERVICE DEPARTMENT REPORT SCREEN:

Fig. 15.3

Select	Filter Field or Calculation	Operation	Value	Thru Value
<input type="checkbox"/>	Customer#	EQUAL		
<input type="checkbox"/>	Dept	EQUAL		
<input type="checkbox"/>	Employee	EQUAL		
<input type="checkbox"/>	Hour Invoice Processed	RANGE		
<input type="checkbox"/>	Netsale	RANGE		
<input type="checkbox"/>	Notes	CONTAINS		
<input type="checkbox"/>	Payment Method	EQUAL		
<input type="checkbox"/>	Sales Tax	RANGE		
<input type="checkbox"/>	Taxable Sale	RANGE		

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or

- b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” select **[4]** “Filtered Reports”.
4. Select **[4]** “Service Department Report” (fig 15.3)
5. Enter the “Date Range” from the first day of the month, through the last day of the month.
6. Press the **[F5]** (tab) key until “Detail Report” is highlighted, then press the **[SPACE]** bar key to select it.
7. Press the **[F5]** (tab) key to move to “Report Sequence” and make your selection by using the **[↓]** **[↑]** keys, then press the **[SPACE]** bar key to make your selection.
8. Press the **[F5]** (tab) key once, then press the **[PG DN]** key repeatedly to highlight the “Process Report” button and press **[ENTER]**

Employee Activity Report:

This is a report summary that is similar to the “Cash Drawer Report”, however, it is separated by “Employee”. A great tool to help track employee performance and; can be used as a tool for paying commissions based on employee performance.

Note: This Report CAN be recreated later!

EMPLOYEE ACTIVITY REPORT SCREEN:

Fig. 15.4

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”

3. From the “Main Menu” select **[3]** “Reports”.
4. Select **[3]** “Employee Activity Report” (fig. 15.4)
5. Using the **[Tab]** (tab) key or the **[↓]** **[↑]** keys, select “Report by Employee” and press the **[SPACE]** bar key to select it.
6. Leave the “Specific Employee” field blank, and press **[Tab]** (tab) or use the **[↓]** **[↑]** keys to move to the “Date Range” fields.
7. Enter the “Date Range” from the first day of the month, through the last day of the month, then press the **[Tab]** (tab) key to highlight the “Process Report” button, then press **[ENTER]**.
8. Press the **[ESC]** key repeatedly to exit this area.

Customer Account Report:

This is a “real time” report that provides information on customers who have an existing account balance. This report is normally used in conjunction with running statements (covered later), so you will know who to send statements to. The information contained in this report changes on a daily basis!

Note: This Report CANNOT be recreated later!

CUSTOMER ACCOUNT REPORT SCREEN:

Fig. 15.5

Select	Filter Field or Calculation	Operation	Value	Thru Value
<input type="checkbox"/>	Resale Customer	EQUAL	.T.	
<input type="checkbox"/>	SpecOrder Deposits	RANGE		
<input type="checkbox"/>	State	EQUAL		
<input type="checkbox"/>	Telephone#	RANGE		
<input type="checkbox"/>	Total InHse Chg/Cred/LayDep	RANGE		
<input checked="" type="checkbox"/>	Total On Account	NOTEQUAL	0	
<input type="checkbox"/>	Zip Code	RANGE		
<input type="checkbox"/>	Zip Code	EQUAL	93444	

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or

- c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” select **[4]** “Filtered Reports”.
4. Select **[3]** “Customer Account Report” (fig. 15.5)
5. Press the **[Tab]** key once to highlight “Detail Report” and press the **[SPACE]** bar key to select it.
6. Press the **[Tab]** key once, then using the **[↓][↑]** keys, select the “Report Sequence” by pressing the **[SPACE]** bar key on your selection.
7. Press the **[Tab]** key once to move to the “Filter Condition” area. A filter MUST be selected here, but we want to include ALL customers with an “Account Balance”. So, using the **[↓][↑]** keys, highlight the filter that says: “Total On Account” and press the **[SPACE]** bar key to select it, then press the **[Tab]** key once.
8. Anytime you are using a “Not Equal To” type filter, you MUST enter a “Value” for it to be valid. We’re using all customers who have any kind of “Account Balance” so, in the “Value” field enter **[0]** (zero) and press the **[Tab]** key once.
9. Press the **[PG DN]** key repeatedly until the “Process Report” button is highlighted then press **[ENTER]**.

Update Sales History EOM/EOY:

This is not only a report; it is also a process. This should only be run AFTER the “Less Than Zero Report” has been printed and the necessary adjustments have been made to your inventory records. This process will clear out the current month (by replacing the current sales amounts with a zero) to make room for the next month. As Counterman Pro keeps track of your sales history on a monthly basis, this process needs to take place at the close of each month.

Note: This Report CANNOT be recreated later!

UPDATE SALES HISTORY EOM/EOY SCREEN:

Fig. 15.6

Counterman
Main Menu Help

Inventory Activity Summary - Month/Year End Sales History Update

Report Sequence:

☐ Vendor
☒ Category
☐ Vendor/Category

For Month-Year 5 - 2002

LAST MONTH-END RUN FOR 0-0
 LAST YEAR-END RUN FOR 0-0

☒ Run Month-End Update Process
☐ Run Year-End Update Process

Process Report

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” select **[3]** “Reports”.
4. Select **[7]** “Update Sales History EOM/EOY” (fig. 15.6)
5. Select the “Report Sequence” by using the **[↓]** **[↑]** keys, then press the **[SPACE]** bar key on your selection.
6. Press the **[Tab]** (tab) key once. The field: “For Month-Year”, should have the ending month and year in it now.
7. Press the **[Tab]** (tab) key repeatedly until you reach the “Run Month-End Update Process” field and press the **[SPACE]** bar key to select it.
8. Press the **[Tab]** (tab) key twice, until the “Process Report” button is highlighted, then press the **[ENTER]** key once.
9. Answer **[Y]** (yes) to the following “Counterman Question” (fig. 15.7) on your screen:

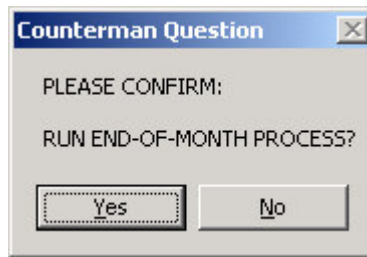
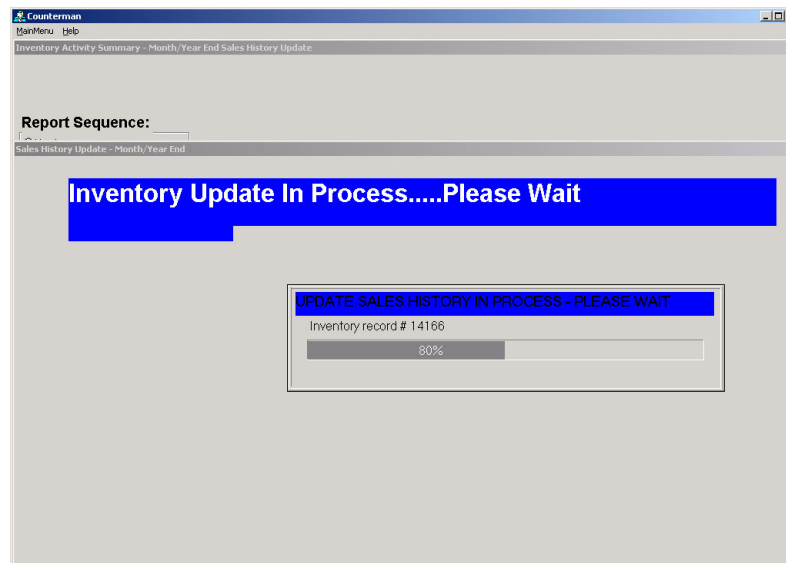


Fig. 15.7

10. Once the process is running, you should see a screen similar to the one in Fig. 15.8

SALES HISTORY UPDATE IN-PROCESS SCREEN:

Fig. 15.8



10. After this process has finished, the following “Counterman Information” window will appear (fig. 15.9). Just press the key once to confirm the completion of this process.



Fig. 15.9

Resetting Reorder Points:

No report generated from running this process. It is however, imperative that this process be performed along with your month end activities to insure proper updating of the “Reorder Levels” in the inventory database. Counterman Pro uses this information to provide accurate reorder quantities, which is used from within the “Reorder Lists”. Unless this information is updated regularly, the system cannot report usable reorder quantities for you. Using the “Reorder List” is an extremely valuable tool provided by Counterman Pro that relies highly on this process! It only takes a moment and is more than worth the effort.

Note: This process CANNOT be recreated later!

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the key, then tap the key, or
 - b. Tap the key, then press the key, or
 - c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” select “Maintenance/Display”.
4. Select “Inventory”.
5. Select “Reset Reorder Points”
6. At the prompt: “Reset Reorder Points?” (fig. 15.10) answer ☒ (yes).
7. This will cause a process to happen, however, no report is generated.

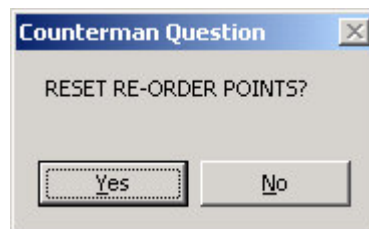


Fig. 15.10

Accounts Receivable, Statements Process:

This feature enables the user to send out a “Statement” to any customers who have a negative account balance. This works like a credit card statement, as it is a monthly process that not only keeps track of “Customer Accounts” for you, but also indicates purchases, deposits, invoice numbers, dates, and any deposits that were applied

purchases from the customer's account balance. This information affects the "Customer Account" balances daily, but gets updated on a monthly basis (see "Accounts Receivable Month End Update" on page #60) and will only indicate "current charges" on the printed "Statements".

Note: Statements CANNOT be recreated later!

PRINT CUSTOMER STATEMENTS SCREEN:

Fig. 15.11

Select	Filter Field or Calculation	Operation	Value	Thru Value
<input checked="" type="checkbox"/>	Any Deposit On Account	RANGE	-9999999	-1
<input type="checkbox"/>	Area Code	EQUAL		
<input type="checkbox"/>	Birthday Day	EQUAL		
<input type="checkbox"/>	Birthday Month	EQUAL		
<input type="checkbox"/>	City	EQUAL		
<input type="checkbox"/>	Customer Account #	RANGE		
<input type="checkbox"/>	Customer Name	RANGE		
<input type="checkbox"/>	Date Added	RANGE		
<input type="checkbox"/>	Discount Mode	EQUAL		

1. Always remember to first type in the "Department/Employee Code" before accessing the "Main Menu".
2. Access the "Main Menu" by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on "Main Menu"
3. From the "Main Menu" select **[5]** "Accounts Receivable".
4. Select **[3]** "Statements" (fig. 15.11).
5. Press the **[TAB]** key once, then using the **[↓]** **[↑]** keys to select the "Report Sequence" you want to use, then press the **[SPACE]** bar key to select.
6. Press the **[TAB]** key to move to the "Filter Condition" area, then select the filter called: "Any Deposit On Account" by pressing the **[SPACE]** bar key once.
7. Press the **[TAB]** key once to move to "Value" field and enter: **[9]** **[9]** **[9]** **[9]** **[9]** **[9]** **[9]** **[9]**.
8. Press the **[TAB]** key once to move to the "Thru Value" field and enter: **[9]** **[1]**, then press **[TAB]**.
9. Press the **[PG DN]** key repeatedly until the "Process Statements" button is highlighted, then press **[ENTER]**.

Accounts Receivable Report:

This report will show all credits and debits to each individual account, along with the corresponding invoice numbers and dates. On the last page, Counterman Pro will total this information for you.

Note: This Report CANNOT be recreated later!

ACCOUNTS RECEIVABLE REPORT SCREEN:

Fig. 15.12

Select	Filter Field or Calculation	Operation	Value	Thru Value
<input type="checkbox"/>	Amount	RANGE		
<input type="checkbox"/>	Amount	NOTEQUAL	0	
<input checked="" type="checkbox"/>	Closed	EQUAL	.F.	
<input type="checkbox"/>	Customer Account#	EQUAL		
<input type="checkbox"/>	Invoice#	EQUAL		
<input type="checkbox"/>	Voided	EQUAL		

1. Always remember to first type in the “Department/Employee Code” before accessing the “Main Menu”.
2. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
3. From the “Main Menu” press **[5]** “Accounts Receivable”.
4. Select **[2]** “Receivables Report” (fig. 15.12).
5. Set the “Date Range” from the first day of the month through the last day of the month and press the **[TAB]** (tab) key once.
6. Select the “Report Sequence” by using the **[↓]** **[↑]** keys, then press the **[SPACE]** bar key on your selection.
7. Press the **[TAB]** (tab) key to move into the “Filter Condition” area.
8. Using the **[↓]** **[↑]** keys, highlight the filter that says: “Closed”, then make sure the “Value” field has .F. in it and press the **[SPACE]** bar key twice.
9. Press the **[PG DN]** key repeatedly, until the “Process Report” button is highlighted, then press **[ENTER]**. Press **[ESC]** when finished.

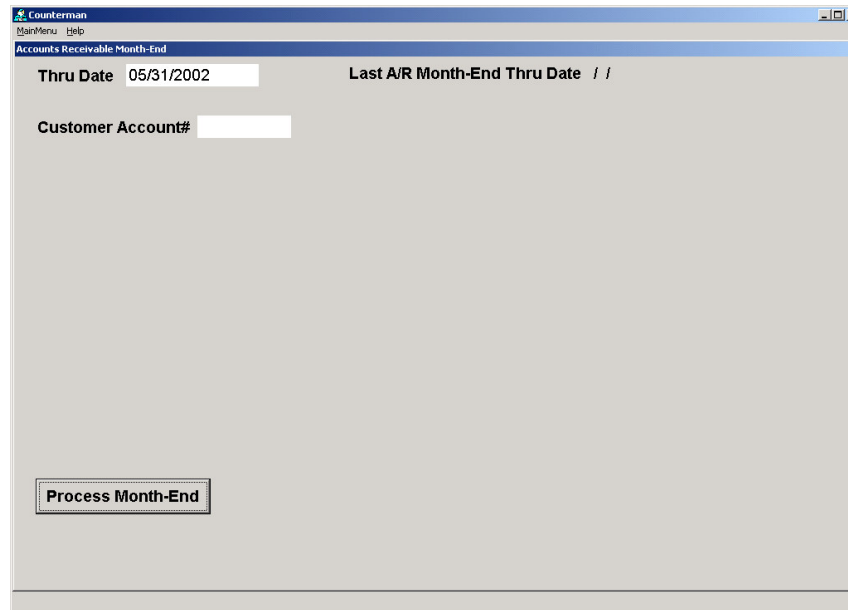
Accounts Receivable Month End Update:

This is usually the last process that needs to be run and there will be no printed output. This process simply updates the customer receivables records by adding together all of their credits and debits and moving the total into the “Previous Balance” field. If this process is not completed, the entire account history for any invoices that affect the customer account balance, will always print on the “Customer Statements”. Similar to a credit card statement, this process allows Counterman Pro to only show the detail of the current month’s charges at the end of the closing month, on the printed “Statements”.

Note: This process CANNOT be recreated later!

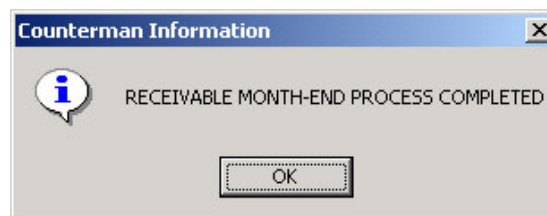
ACCOUNTS RECEIVABLE MONTH END UPDATE SCREEN:

Fig. 15.13

The screenshot shows a software window titled "Counterman" with a menu bar containing "Main Menu" and "Help". The window's title bar also includes "Accounts Receivable Month-End". Inside the window, there are two input fields: "Thru Date" with the value "05/31/2002" and "Last A/R Month-End Thru Date" with the value " / /". Below these is a label "Customer Account#" followed by a blank input field. At the bottom left of the window is a button labeled "Process Month-End".

1. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
2. From the “Main Menu” press **[5]** “Accounts Receivable”.
3. Select **[6]** “Month End Update” (fig. 15.13)
4. Leave the “Customer Account #” field blank, so all accounts will be updated.
5. Press **[5]** (tab) key twice to highlight the “Process Month End” button, then press **[ENTER]**.
6. Counterman Pro responds with the following prompt (fig. 15.14), press **[ENTER]** to confirm.

Fig. 15.14

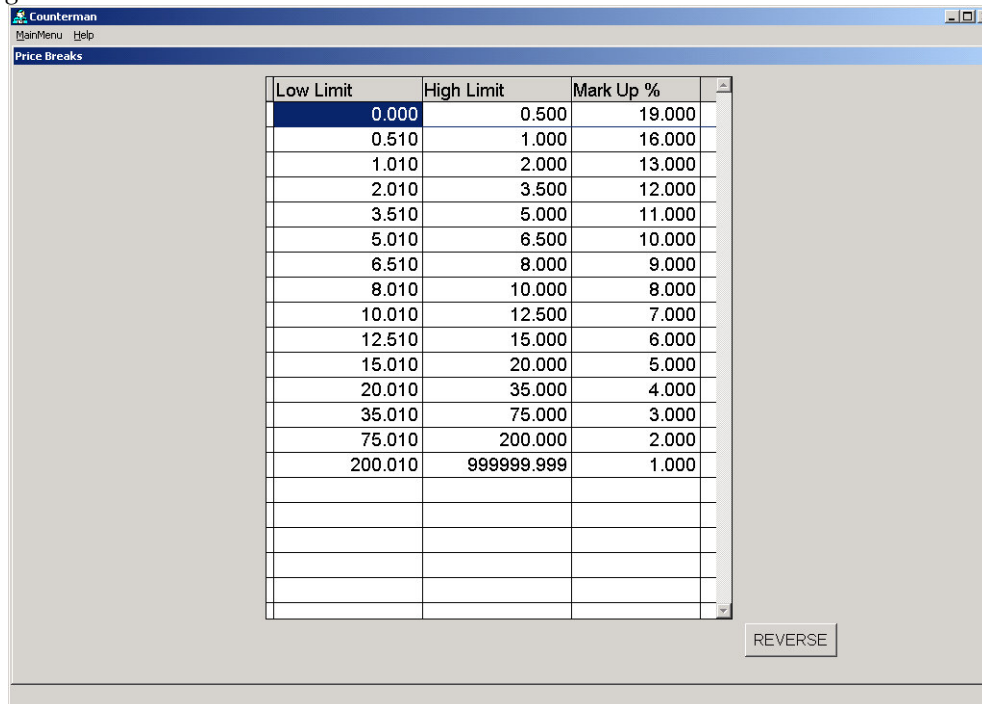


[16] FLEXIBLE PRICING/HOT RODDING:

Hot Rodding is a great tool that can help you increase your profit margin, while staying close to the existing MSR pricing from individual vendors. This process relies on the pricing structure that is pre-setup in the “Flexible Pricing” area of Counterman Pro (fig. 16.1). There are two different approaches to implementing this process, but both will change the current selling price in the “Price Book” records. It’s just a matter of what price you want to base the changes on. You can choose to bump the selling price, based off of the current “MSR”, or off of the current “Cost”. Of course you will want to setup the “Flexible Pricing” table ahead of time, but the decision of which approach you’ll be taking must be made first, in order to accomplish the desired selling price. If you decide to use the “MSR + %” method, Counterman will use the percentages you have pre-setup in “Flexible Pricing” and “times” that number by the “MSR” figure in the “Price Book”. If you decide to use the “Cost + %” method, Counterman will still use the percentages you have pre-setup in “Flexible Pricing” and “times” that number by the “Cost” figure in the “Price Book”. The result of either process replaces the current selling price. In Fig. 16.1 below, notice there is a “Low Limit”, a “High Limit”, and a “Mark Up %”. Although the numbers in Fig. 16.1 reflect “Hot Rodding” from the “MSR” price, it can also be used when basing it off of “Cost”. However, the “Mark Up %” numbers must be considerably higher because the “MSR” is not even considered in the calculation. For this scenario, we will use the “MSR + %” method.

PRICE BREAK SCREEN:

Fig. 16.1





The screenshot shows the Counterman software interface with the 'Price Breaks' screen active. The window title is 'Counterman' and the menu bar includes 'Main Menu' and 'Help'. The screen displays a table with three columns: 'Low Limit', 'High Limit', and 'Mark Up %'. The table contains 16 rows of data, with the first row highlighted in blue. A 'REVERSE' button is located at the bottom right of the table area.

Low Limit	High Limit	Mark Up %
0.000	0.500	19.000
0.510	1.000	16.000
1.010	2.000	13.000
2.010	3.500	12.000
3.510	5.000	11.000
5.010	6.500	10.000
6.510	8.000	9.000
8.010	10.000	8.000
10.010	12.500	7.000
12.510	15.000	6.000
15.010	20.000	5.000
20.010	35.000	4.000
35.010	75.000	3.000
75.010	200.000	2.000
200.010	999999.999	1.000

1. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”

2. From the “Main Menu” press **[1]** “Maintenance/Display”.
3. Select “Flexible Pricing” by pressing **[3]**
4. Select “Price Breaks” by pressing 1 (fig. 16.1)
 - a. All numbers in the “Low Limit” field will represent the MSR (low price), and all numbers in the “High Limit” field will represent the MSR (high price). All “Price Book” items that are within these price ranges will be marked up by the percentage in the “Mark Up %” field and the result will replace the existing selling price in the “Price Book”. Press **[ESC]** to close this screen.
5. Access the “Main Menu” again by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
6. From the “Main Menu” press **[1]** “Maintenance/Display”.
7. Select “Flexible Pricing” by pressing **[3]**
8. Select “Adjust Price Books” by pressing **[2]**
9. Select “Adjust CCI Price Book” by pressing **[2]** this will open the “Adjust Price Book Pricing” screen (fig. 16.2).

Fig. 16.2

10. This is where the choice, mentioned in the opening paragraph, is made. If you were basing the changes using the “Cost + %” method, it would be necessary to place a check mark in the “Apply Mark Up % as Gross Margin %” box. We are using the “MSR + %” method for this scenario, so make sure this box is **NOT** checked.
11. Press the  key once to highlight the “Process” button, then  to begin the process.
12. Using the “Cost + %” works the same, the only difference being how the numbers are setup in “Flexible Pricing” and the calculation would be done off of the current “Price

Book” cost, rather than the MSR and the selection would change by checking the appropriate box under: “Apply Mark Up % as Gross Margin %”.

UPDATE INVENTORY FROM PRICE BOOKS:

This is the last step that is necessary after implementing the “Flexible Pricing/Hot Rodding” procedure. However, this is also the last step that will be necessary after installation of a “Price Book Update CD” that you receive on a monthly basis from Santa Maria Software. It is important to understand the difference in the two files. One is your “Inventory” file, the other is your “Price Book” file. Do not confuse the two, as they are separate files. It is very important that both of these files contain the same pricing information. The implementation (should you decide to use it) for “Flexible Pricing/Hot Rodding” needs to happen each time a “Price Book” is updated. Even if you don’t use the “Flexible Pricing/Hot Rodding” method, it will still be necessary to apply the new pricing to your “Inventory” files any time the “Price Book” files are changed.

1. Access the “Main Menu” by any of the three methods listed below:
 - a. Hold down the **[ALT]** key, then tap the **[M]** key, or
 - b. Tap the **[ALT]** key, then press the **[ENTER]** key, or
 - c. Use the mouse and left-click on “Main Menu”
2. From the “Main Menu” press **[1]** “Maintenance/Display”.
3. Select “Flexible Pricing” by pressing **[3]**
4. Select “Update to Inventory” by pressing **[3]**
5. Select “CCI” by pressing **[2]**
6. This will open the “Update Inventory from Price Book” screen (fig. 16.3).

UPDATE INVENTORY FROM PRICE BOOKS SCREEN:

Fig. 16.3

The screenshot shows the 'Update Inventory from Price Book' screen in the CounterMan software. The window title is 'CounterMan'. The menu bar includes 'MainMenu' and 'Help'. The main area is divided into several sections:

- Date:** 07/03/2002
- CounterMan 30-Day Evaluation**
- Employee:** 1 *** RALPH
- Customer:** Tele () - Name [] E-mail []
- Account #:** []
- Discount:** []
- VENDOR:** CCI - +CUSTOM CHROME EXT 20:

The main section contains a list of options with checkboxes:

- ☒ **Update Cost** (highlighted in yellow)
- ☒ **Update Price**
- ☒ **Update Suggested Retail**
- ☒ **Update Catalog Pg#**
- ☒ **Update Description**
- ☒ **Update Package Quantity**
- ☒ **Update Unit of Measure**
- ☒ **Maintain Gross Profit %**
- ☒ **Update Related Part #'s**
- ☒ **Print Stock Labels**
- ☐ **Print One Label Per Part**
- ☒ **Prompt for # Labels to Print**
- Print Sequence for Labels** P (P=ProdCode, B=BinLoc)

At the bottom, there is a 'Process' button.

7. Care should be taken when making the choices in this screen (fig. 16.3) as the answers will directly affect your inventory:

UPDATE INVENTORY FROM PRICE BOOKS SELECTIONS:

- ✓ **Update Cost:** If checked, will replace the “Cost” in your current inventory to the new “Cost” from the “Price Book” file. Keep in mind, that this selection will increase the current value of your inventory by replacing the value with a higher one.
- ✓ **Update Price:** If checked, will replace the “Selling Price” in your current inventory to the new “Price” from the “Price Book” file. If “Flexible Pricing/Hot Rodding” was applied, the “Hot Rodded” price will be used.
- ✓ **Update Suggested Retail:** If checked, will replace the “MSR” in your current inventory to the new “MSR” from the “Price Book” file.
- ✓ **Update Catalog Pg #:** If checked, will replace the “Catalog Page Number” in your current inventory to the new one from the “Price Book” file.
- ✓ **Update Description:** If checked, will replace the “Description” in your current inventory to the new “Description” from the “Price Book” file. If changes are frequent in this area, uncheck this box.
- ✓ **Update Package Quantity:** If checked, will replace the “Package Quantity” in your current inventory to the new “Package Quantity” from the “Price Book” file. This is usually how the item is purchased from the vendor.
- ✓ **Update unit of Measure:** If checked, will replace the “UOM” in your current inventory to the new “UOM” from the “Price Book” file. This is usually how you sell the items to the customer.
- ✓ **Maintain Gross Profit %:** If checked, will do a mathematical calculation using the existing “Profit Margin %”, “times” it by the new “Cost”, and put the result in the “Selling Price” field. Normally uncheck this box, especially if you have applied “Flexible Pricing/Hot Rodding” to the current “Price Books”.
- ✓ **Update Related Part #'s:** If checked, will replace ALL “Related Part Numbers” in your current inventory to the new ones from the “Price Book” file. If you spend time inputting your own “Related Part Numbers”, you would loose this work if this selection is made.
- ✓ **Print Stock Labels:** If checked, will print “Stock Labels” according to the remainder of the questions, for every item that has a price change applied to it.
***** FOR THIS SCENARIO, DO NOT CHECK THIS BOX! *****
- ✓ **Print One Label Per Part:** If checked will only print a single label for each item that gets updated.
- ✓ **Prompt for # of Labels to Print:** If checked, will prompt you for “How many” labels to print as the process runs. The default will be for the quantity currently in stock.
- ✓ **Print Sequence for Labels:** Here you have the choice of printing labels by “B” (Bin Location) sequence, or by “P” (Product Code) alphanumeric sequence. Simply make a selection of ☐ B or ☐ P.
- ✓ **Process:** Pressing here will start the update process.

[17] HOT KEYS & TOOL TIPS:

A “Hot Key” is a keystroke, or set of keystrokes, that can accomplish a particular task for you. CounterMan Pro has embedded many “Hot Keys” throughout the program and we will provide an explanation of most of them here. Usually, a list of possible “Hot Keys” can be found on the lower portion of whatever screen you are currently in. However, it is not always practical to list them in every possible screen you happen to be in. The normal rule-of-thumb to find a particular list of “Hot Keys” is by using the mouse. If you move the mouse into the “grid” on most screens, a short list of available “Hot Keys”, for the area you are currently in, will appear. We call this list: “Tool Tips”. This list of “Tool Tips” will only appear for about five seconds but if that is not enough time, just slightly move the mouse again (but stay in the “grid”) and the list will appear again.

FROM P.O.S. (Point Of Sale) SCREEN:

From the P.O.S. Screen (No Transaction in Progress):

- | | |
|------------------------------------|---------------------|
| 1. On-Screen Help | F1 |
| 2. Stock Check Screen | F5 |
| 3. Cash Paid Out | F3 |
| 4. Service Order | F4 |
| 5. Warranty Order | CTRL / F4 |
| 6. Special Order (everything) | F5 |
| 7. Invoice Message Clipboard | F6 |
| 8. Quotation Message Clipboard | F7 |
| 9. Special Order Message Clipboard | F8 |
| 10. Notes Message Clipboard | F9 |
| 11. Exit CounterMan Pro | CTRL / PG DN |
| 12. Access Main Menu | ALT / M |
- (MUST HAVE DEPARTMENT/EMPLOYEE CODE ENTERED!)*

From the P.O.S. Screen Grid (Transaction in Progress):

- | | |
|--|--|
| 1. On-Screen Help | F1 |
| 2. Stock Check Screen | F5 |
| 3. Edit Product Description | F4 |
| 4. One Time Discount | F5 |
| 5. Mark Item for Special Order | CTRL / F5 |
| 6. Mark Item for Lay-Away | SHIFT / F5 |
| 7. Scroll List Toggle | F9 |
| 8. Quick Edit Inventory Record | F11 |
| 9. Customer Information Window | F12 |
| 10. Add Item to Lost Sales Report | CTRL / L |
| 11. Erase Selected Item/Quantity | CTRL / Y |
| 12. Erase All Items/Quantities | CTRL / Z |
| 13. Move to (lower) Accounting Section | PG UP or PG DN |
| 14. Abort Current Transaction | ESC |
| 15. Move through the Grid | ↓ ↑ → ← or Tab or ENTER |

FROM THE REORDER LIST:

- | | |
|---|---|
| 1. On-Screen Help | F1 |
| 2. Stock Check Screen | F5 |
| 3. Refresh Current Order | F3 |
| 4. Print Current Order List (not posting) | F4 |
| 5. Post & Print Current Order | F5 |
| 6. Selected Item Sales History | F6 |
| 6a. Reprint Selected Invoice | F7 |
| 7. Quick Edit Inventory Record | F11 |
| 8. Add Item to Order | INS |
| 9. Mark Item for Deletion from Order | DEL |
| 10. Move through the Grid | ↓ ↑ → ← or Tab (tab) or ENTER |
| 11. Exit Reorder List Function | ESC |

FROM FILTERED REPORTS:

- | | |
|-------------------------------|---|
| 1. On-Screen Help | F1 |
| 2. Stock Check Screen | F5 |
| 3. Enter a New Filter (build) | F11 |
| 4. View Selected Filter Usage | F12 |
| 5. Move Through Fields | ↓ ↑ → ← or PG DN or PG UP |
| 6. Select a Filter | ENTER or SPACE bar |
| 7. Move to Process Report | PG DN (several times) |
| 8. Exit This Function | ESC |

GENERAL COMMANDS:

- | | |
|---|---|
| 1. Move Through Fields | ↓ ↑ → ← or Tab (tab) |
| 2. Make a Selection | ENTER or SPACE bar |
| (ALWAYS TAB OUT OF THE FIELD AFTER SELECTING IT!) | |
| 3. Save Your Changes and Exit | ESC |
| 4. Access the Main Menu | ALT / M |
| 5. Get Help | F1 |
| 6. Stock Check Screen | F2 |
| 7. Exit CounterMan Pro | CTRL / PG DN |