Counterman Newsletter

New! *For Counterman Pro Users*

As we continue to make improvements for Counterman Pro, we will inform you of these updates and enhancements in this newsletter. We strive to provide the tools and features Counterman users have requested. Listening to your comments and suggestions provides us greater insight to your software needs. We encourage you to contact us with these comments and suggestions by email or phone call. There are very nice updates for this release:

⇒   **Vendor Returns (14) Reconciliation**
As promised in our last newsletter, a means of reconciling any Vendor Returns (invoices processed under payment method 14) has been implemented in this version. As credit memos are received, they can be entered from the Maintenance/Display Menu, A-Vendor Returns selection.   A new report is now available from the Reports Menu called: "Vendor Return Report".   This allows you to reconcile the credits received -vs- credits pending. Additionally, all vendors on invoices processed under Payment Method 14 (vendor returns) MUST be setup with a Cost + 0 discount (this is because they're just not going to give you more credit than you originally paid).   Thanks to Mercedes at Redhill Motorcycle Werx for this great suggestion!

⇒   **Refresh ReOrder List F3 Confirmation**
When pressing the F3 key, while in the ReOrder List (purchase orders) to refresh or clear an existing purchase order screen has never had a way to "cancel" before committing to the refresh process. A new "confirmation" window will now appear after pressing the F3 (refresh order) selection and allow a means of backing out of the refresh process. Additionally, an issue when using the F6, F11 or F2 function(s) from the ReOrder List (QTY column) has been taken care of too. Special thanks go out to Curtis at Action Cycles for this one!

⇒   **Purchase Order Export/Import**
Two new suppliers have been added to the ever-growing list of vendors/suppliers who allow purchase order importing into their dealer websites. Western Power Sports and Fox Racing have both been working with Counterman to enable this time saving feature! If you have the latest program file that came with this newsletter, the only other thing you'll need

to do to enable this in Counterman is to open the Vendor Table, highlight WP or FX, press F11, and enter "FC" in the eFormat field, that's it!

⇒   **30-UP Bulk Inventory Labels**
We mentioned in the last newsletter about a new feature for Inventory labels printing in "bulk" and a filter can be used for the labels desired. An issue that was causing bar codes to print on 30-up labels (when no bar code was desired) has been taken care of.

⇒   **Zero Negative Balances!**
As part of the month-end process we always suggest that you run a Negative Inventory Report. These are caused by selling items that you do not have in stock. In order to prevent the month-end Inventory Activity Report from reducing the value of your available "in-stock" inventory, any negative inventory items should be investigated and adjusted prior to running the EOM processes. This update will help this process with a new selection in the Utilities Menu called "Zero Negative Available Balances". This process will not affect the inventory total balance. So, if there are inventory items in Reserved Service, a report will be generated and those items will still need to be adjusted manually. However, the process will be much easier and most users will want to look at the negative balances prior to just zeroing them out. Obviously, you can't sell what you don't have. But in an effort to promptly take care of your customers, selling into the negative is a necessary evil.

⇒   **Multiple Vendors in Single ReOrder List**
Ever need to combine more than one vendor on a single purchase order? This process is now available when selecting "Other Vendors" from the ReOrder List. You will now be prompted for the "Primary Vendor" Code, then, in the field below you can enter additional vendor codes. Just be sure to separate each vendor code with a comma in between each code. Now you can run a combined purchase order for say, Parts Unlimited and Drag Specialties all in one. Or, combine on a single P/O: Honda, Yamaha, Kawasaki, Polaris, ect… You can now combine multiple vendors/suppliers in the field provided below the Primary Vendor code. Thanks go to Rodney at Rodney's Cycle House for this long awaited enhancement!

INSIDE THIS ISSUE:

UPDATED PRICE BOOKS (ON THIS DATE CD)

AN	Arlen Ness	**KM****	Kawasaki	**TM****	Triumph Motorcycle
BD**	Big Dog	**KN**	K&N Engineering	**TR**	Tucker Rocky
BM**	BMW	**KA**	Kuryakyn	**VT**	Tedd's V-Twin
CA	Castle Sales	**MA**	Marshall Dist.	**WP**	Western Power
CCI	Custom Chrome	**MU**	Mid USA	**YA****	Yamaha
CV	Cycle Visions	**PU**	Parts Unlimited	**ZP**	Zippers Performance
DS	Drag Specialties	**RO**	Romaha		**** OEM Dealers,**
FX	Fox Racing	**SM**	Southern Motorcycle		**Or, will include**
HH	Helmet House	**SZ****	Suzuki Motors		**Retail Pricing Only!**

Did somebody say:
"Ape Hangers?"

(*Yes, this photo is real*)

Allocating/Reserving Inventory on Service Repair Orders …

When I was running a shop, this was a feature I couldn't function without. With an incredible number of Service Repairs open and many bikes being worked on at the same time; while trying to maintain reasonable inventory stocking levels, the process of "setting inventory items aside for my open jobs" literally made it all possible without scrambling my brain. Some users have difficulty understanding this process and others have difficulty in putting into practice. This short article addresses those concerns and my hope is that you will embrace this simple feature (if you haven't already) and/or at least gain a better understanding of how it works and how Counterman has made great strides in making it even better (see the enhancement for "Reconciling Reserved Service/Allocated Items" below).

When starting any Service transaction, Counterman will begin by asking a question: "Is this a Quote?" How you answer this question determines whether inventory will be Reserved (or Allocated) for it. What does this mean? If your answer to that question is "NO" (not a quote) it means that this is an actual Service job and Counterman will take inventory away from the available inventory balance and move it to the "Reserved Service" field in inventory. The result is, that item is no longer available for any other transaction and is "Allocated" to the Service Repair Order you currently have open on the screen. When that R.O. is saved, the allocation is set and the item is not available for any other R.O. nor is it available for sale over the counter. It is virtually locked into that job. This is extremely helpful when reordering items for stock. Now you can reorder that item for the next customer, or service job that needs it without running out of them. Then when that job is done, you recall the saved Service Repair Order and process it. Sounds easy, and works great. However (in the past), starting the job as a "Quote", or neglecting to save the job in progress, or some other process has allowed for erroneous Service Allocations. But constant updates and enhancements to the program means this is usually a non-issue now. Although there's always someone out there that can find a way (in the program) to negate what we have worked so hard to prevent. But with the updates, enhancements, and utilities now available, the likelihood of this happening is (for the most part) non-existent.

If you do not currently use the Repair Order process, or maybe you wait until the job is done before entering it into Counterman, I would encourage you to give it a chance. If you have been using it, you likely already know how well it has been working, but check out the newly added utility below. Either way, Counterman Support Staff is ready to help you with this feature. If you have questions or concerns on this, please contact us. We're here to assist you and have a desire to help in any way we can.

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tech@counterman.net

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New For Counterman Pro Users *(…continued)*

⇒ **Reconciling Reserved Service/Allocated Items**

Reconciling inventory items that have been Reserved on Service Orders has just been made easier! One means of keeping the items "Allocated" for Service Repair Orders, as compared from inventory (under "Reserved Service") has always been accomplished by running the "Allocated Parts List" report. This will generate a report that allows you to compare to the actual Service RO's you have pending (or bikes currently being worked on). But what about items that have been allocated for a job, that no longer have a job associated with them? Although Counterman has taken huge efforts to prevent this possibility, it still happens from time-to-time. Normally caused by running a Service Quote, but not telling Counterman it was a Quote at the beginning. So you would be allocating inventory, then printing it as a quote (and not saving). Then there's the issue where non allocated items have been processed directly from a Service Order "Quote", which has resulted in negative service allocations. Some users feel this process is complex, so they make a decision NOT to use it. Unfortunately, this is a bad decision. By not using this feature, Inventory items can "appear" available for sale or use on another repair job. Reserving (or Allocating) items for jobs in progress has extremely high value because you can easily see where your inventory items are going, in addition to having what you need, when you need it. Counterman has gone to great lengths to insure this process does not cause erroneous Service Allocations (a.k.a. "Reserved Service"). All the possible necessary coding has been in place for a long time and this system is very stable. However, there's always a user out there who can find a way to make the Allocated items not balance with the Reserved Service items. With this release there will be a new feature in the Utilities Menu to match the Reserved Service items to actual pending Service Repair Orders. Additionally, this process will generate a list of adjusted items for your review. With this new process in place, you will always be able to know for sure, only items that are allocated are also Reserved for Service.

⇒ **Duplicate Customers? Try the Customer Merge!**

Many of you have asked for it, now it is a reality. Here's the scenario: You have a customer, who's name is "Bob Smith". He's a regular and frequents your shop for his motorcycle needs. But one day his phone number changed and your employee couldn't find them in Counterman. So he adds Bob under the new phone number. And then, to make matters even worse, someone else adds him again under the name of "Robert Smith". Now he's in Counterman under three different names. A new feature, you'll find in the Utilities Menu, called "Customer Merge" allows you to actually merge the data from one customer, into another. This process will also move all history, lifetime purchases, discounts, motorcycle VIN information, and account balances from one account to another, while rendering the old account unusable by replacing the old customer name (previously in the "Merge From"), to "X MERGED WITH 9999" (where 9999 is the "Merged to" customer account number. Both accounts will have a note placed into the "Notes" field about the "Merge to" and "Merge from" accounts, along with the date and Employee Code that made the change. This has been a long awaited request that will help solve issues related to duplicate customers.

⇒ **Customer Labels From Motorcycle Filter**

Here's a nice "Customer Address Label" feature that has been added to an existing process. Let's say you would like to send a mailer to all customers who own a particular Make and/or Model, or maybe that have certain characters in the VIN? We have just added a label printing feature into an existing process that used to be a report only. From "Filtered Reports", B-Customer Motorcycle Filter now allows you to print "Address Labels" for select customers who can be filtered by the Motorcycle: Make, Model, Year, and/or VIN. Additionally, these can be combined (i.e. Make AND Year, or Model AND Make, etc...) Options are also available for printing on 30-up Avery label sheets or 1-up to your normal label printer. Naturally, the option to print the report is still available.

PLEASE!!! SEND US YOUR SUGGESTIONS:

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