

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:

⇒ **Profit Margins for Service Dept. Report**

To allow for additional tracking for the Service Department, we have added the ability to check Profit Margins on the “filtered” Service Department Report. This change also includes all internal sales (using payment method 12) for the Service Department. This report can be filtered by single (or multiple) mechanics and can help in the area of mechanic efficiency and profitability. In addition, the profit margins will be displayed (if run in detail) for individual transactions with each invoice number printed for your review. At the end, this report will also total all transactions within the filter criteria and show the accumulative profit margin for all. Special thanks to Lowell at Bikers Edge in Wichita, KS for this cool enhancement!

⇒ **Customer History Available From Menu**

The ability to access your customer’s transaction history (which has always been easily accessible from the P.O.S. screen) can now be accessed from the Menu option, under 1-Maintenance/Display 2-Customers. Invoice reprinting is also available from both places. Thanks go out to Matt at A1 Parts in Brookfield, MA for this great suggestion!

⇒ **Network User-License Counter Updated**

In the past, Counterman has always recorded the computer name AND the login name as a full user in the system. This prevented multiple log-in names from the same computer station. In order to allow multiple log in names, we have taken a different approach to this process and now allow for it. So if you have a station with Counterman installed, you can setup additional log-ins for your employees and Counterman will not count them as additional users. This can be helpful if you have sensitive data and/or programs that you do not want your employees to

have access to. We again appreciate the input from A1 Parts in Brookfield, MA for another nice enhancement!

⇒ **Restock Charge on Vendor Returns**

When using the “Internal Payment Method” of 14 for Vendor Returns, often times the vendor/supplier will charge a restocking fee for returned merchandise. Counterman has setup an allowance for this for any Vendor Returns and will automatically deduct (from the cost level pricing) the percentage entered at the beginning of the transaction. No longer will it be necessary to do the math to figure out your restock charge, as Counterman will do it for you! So, when you begin any transaction for a customer who is preset for a Cost+0 discount, a Counterman window will pop-up to ask you if it is a Vendor Return? If not, just Escape past this window. But if it is a vendor Return, enter the percentage of the restock fee and Counterman does the rest! A note at the bottom of the invoice will say: “TOTAL REFLECTS A XX% RESTOCK CHARGE” (where XX = the percentage you enter). This enhancement is a result of several Counterman user requests.

⇒ **PDF Emailing for Invoice Reprints**

Several users have requested that we allow for the same PDF e-mail process we currently allow for (when an invoice is processed) when reprinting an invoice. This has been implemented in this release. If you still like the old way Counterman did this (in text format) we can easily switch you back, just give us a call and we’ll delete a single file that controls this process.

⇒ **Snap-On’s Parts Manager Pro Interface**

For many OEM franchise shops that use Counterman, an on-screen computerized micro-fiche system known as “Parts Manager Pro” is used instead of paper catalogs to locate items their customers want. This is a helpful tool that Counterman now has a full interface with. Items can be selected from Parts Manager Pro and a list built. Then, when the list is complete, it’s a matter of just a click or two to import those part numbers directly into Counterman. If you are interested in an on-screen microfiche system, Counterman interfaces with several of them, including PartSmart, HLSM, and now Parts Manager Pro. Special thanks to Chris at Anchorage Yamaha for his help on this!

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UPDATED PRICE BOOK VENDORS (ON THIS



AD	Advantage Performance
BD	Big Dog Motorcycles
BI	Bell Industries
BM**	BMW
CA	Castle Sales
CCI	Custom Chrome, Inc.
CO	Colony
CV	Cycle Visions
DS	Drag Specialties
HD**	Harley-Davidson™
HH	Helmet House

HO**	Honda
KA	Kuryakyn
KM**	Kawasaki
KN	K&N Engineering
KT**	KTM Sport Motorcycle
MA	Marshall
MC	McDonald (cost only)
MD	Mustang Distributing
MU	Mid USA
NL	Nichols M/C Supply
PO**	Polaris/Victory

PU	Parts Unlimited
RO	Romaha
SB	Sullivan Brothers
SN	Sullivans USA
SZ**	Suzuki Motorcycle
TM**	Triumph Motorcycle
TR	Tucker Rocky
VT	Tedd’s V-Twin
WP	Western Power
YA**	Yamaha Motorcycles

IMPORTANT!

(NEW) = New Price Book Vendor!

**** = OEM Franchise Only! (or retail prices only will be provided)**

Custom Chrome no longer has quantity breaks!

Santa Maria Software



Contacting Counterman is EASY!

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Yes, it really!!!

Gunbus™ 410 cubic inch displacement v-twin engine! We included a picture with the model so you can visualize the size of this monster. This 45 degree 6728 cc V-Twin runs through a 3 speed tranny with reverse is made in England and looks pretty good. This is actually going to go into limited series production and a sidecar will be available as well which might help with balance when waiting at a light. I don't even want to think about a driveway tip over!



See for yourself at: <http://www.leonhardtweb.de/en/gunbus/design.htm>

All New Warranty Processes!!!

To address the issues several users have brought to the table about their Warranty processing, Counterman has made some really fine enhancements that allow for different methods of handling them. As of the update included with this newsletter, you will notice many new features available for warranty transactions.

There are many motorcycle manufacturers out there these days with many Counterman users who carry more than one line of motorcycle. Each of these manufacturers (it seems) all need to process warranty repairs in a different manner. Tracking credits and payments on either parts and/or labor can be a challenge. We have addressed just about every scenario possible in our new Warranty transactions and tracking utilities. Do you need to accept payments (in Counterman) from manufacturers for the warranty work you do for them? Now you can. Do you get paid for labor and credited for parts (or visa-versa), and need to track this type of income in Counterman? Now you can. Do you ever have a combination Warranty and Customer pay that you would like to complete on a single transaction in Counterman? Now you can. We have allowed for the many different things that happen as part of your warranty processes and the different approaches that all the different manufacturers use.

Here are some changes you will notice when using the Warranty process:

1. When you start the initial Warranty transaction for your customer, (from the customer VIN window) Counterman will need to know who the manufacturer is that will be paying for it. The default selections for how your warranties will be processed can be pre-defined through the Counterman Vendor Table. It is very important that the proper

selections are made in order for the desired default methods to appear upon processing. Of course these can be changed at time of processing, but setting the "defaults" will insure mistakes are not made. To set these defaults, access the Main Menu, 1-Maintenance/Display, 9-Table Maintenance, 2-Vendor Table. Select the Warranty vendor, then press the F11 key to set the defaults as desired. Repeat this process for any vendors/manufacturers that you do warranty repairs for.

2. The Warranty transaction will present a new window upon processing where you can select the different methods for credits and payments. These selections will display the defaults that you have pre-setup in step #1. If there are any items that the customer will be paying for, just uncheck the box for those items. Should the credit and/or payment of either parts and/or labor 'change' at the point of processing, you have the option of making those changes at this point. In addition, if there are items that the customer will be paying for (which are non-warranty items), simply un-check those items. Any un-checked item(s) will be assumed "customer pay". Click the "Calculate" button, then click "Confirm" to process the transaction. If there are any items that are to be paid (in other words, you will be receiving a check for that part of the Warranty), then a secondary invoice will print, following the customer's Warranty receipt. This second invoice will be for the manufacturer and is considered a "receivable" record in Counterman.
3. When the Warranty credit(s) and/or the Warranty payment(s) come in, you can enter that information into Counterman. Often times these amounts can differ from the

amount you originally processed in Counterman. We have made this easy to deal with too. Credits can be entered separately from payments, as the Warranty will remain open until you check a box labeled "PIF" (which stands for "Paid In Full"). Once this box is checked, the Warranty is considered closed. To Reconcile Warranty Credits and process Warranty payments in Counterman, from the Main Menu, select 1-Maintenance/Display, 6-Warranty RO's, then select Warranty Reconciliation. Use the "Find" button to locate the Warranty record you wish to work on, then press the F5 key to process Warranty Credit or Payment. In this area the original Warranty amounts will be displayed and smaller (or larger) amounts can be entered if necessary.

4. Warranty Reconciling, Warranty Maintenance, and Warranty Reporting are all available now, right from the Main Menu, 6-Warranty RO's.

Finally, please know that Counterman has gone to great lengths to make this new Warranty process, function in just about every motorcycle shop environment. We have attempted to take every possible scenario into consideration while making this new enhancement available to Counterman Pro users. As usual, any input you may have on this process is welcome. Special thanks go out to Rodney's Cycle House in Little Rock, AR and Big Dog Motorcycles for all their help and input putting this new enhancement all together. Thank you, and ride safe!

- Ralph Weaver

New For Counterman Pro Users (...continued from page 1)

⇒ All New Warranty Processes!

Difficulties with processing, tracking, and accepting payments for Warranty work performed in your shop, is now a thing of the past! Counterman has spent much time and effort into presenting you with a newly formulated Warranty process that is not only highly functional, but allows for just about any scenario. From the customer to the manufacturer, whether you receive credits or payments from the manufacturer for Warranty work you performed. Even an enhancement that allows for partial payments by the customer at time of processing, Counterman can now do it all! You say the Manufacturer only pays for the labor and credits you for the parts? Or visa-versa? Or the amount you originally processed on the Warranty is different from the credit and/or payment you received from the manufacturer? Or maybe the customer wants to purchase something in your shop on the same transaction as their warranty items? Counterman now allows for all these different scenarios and more with this newly released Warranty process. If you process Warranties in Counterman, then this is for you. If you have never processed a Warranty in Counterman because the software was unable to accommodate the processes that your manufacturer demands, then this is for you! Please take the time to read the article above: "All New Warranty Processes". You'll be glad you did! We again give thanks to Rodney's Cycle House in Little Rock, AR and Big Dog Motorcycles for their help in bringing you this awesome enhancement!

⇒ F3, F7, F8 Disabled in POS Screen

Issues directly related to the F3, F7, and F8 keys are now non-existent in Counterman Pro. As these keys were not used for anything when in the middle of a transaction, we have disabled them all-together. If you happen to accidentally press one of these keys from a transaction, nothing will happen. Thanks go out to Athens Sport Cycles in Athens, OH for catching this one. Thanks guys...

⇒ F&I Enhancements

As we continue to enhance the Counterman F&I module we have added two

new features that we are confident will be welcome enhancements:

◆ F&I Other Phone Number Search

This added feature will make it easier to locate your customers who have provided you with more than one telephone number. We enabled a similar enhancement about a year ago that allows a search for customers by either their primary telephone number, or by their "other" phone number when performing a regular Point of Sale transaction to search for a customer. Cell phones are a thing of the future and many customers have more than one number where they can be reached. This release allows you to find a customer from within the F&I program by either telephone number. Thanks go out to RPM Motorcycle Service in Nashua, NH for this added feature.

◆ F&I Profit Margins to Exclude Trade-In Values

A common request for Counterman F&I users is to NOT include the value of the trade-in when calculating the profit on a motorcycle sale. Even though, technically speaking, it does decrease the profit because you are adding to the cost of sales, the price for the trade-in. But this cost can be considered an added cost to your major unit inventory, which is how Counterman will treat trade-in values with this new update. Profits on motorcycle sales will no longer deduct the trade-in value from the profit on the sale and all employee activity reports and cash drawer reports will show the profit margins accordingly. Thanks to Bikers Edge in Wichita, KS and to Randy's Cycles in Huntley, IL for this suggestion that we are confident will appeal to all Counterman F&I users.

PLEASE!!! SEND US YOUR SUGGESTIONS:

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