

Counterman Quarterly 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 a phone call. You will find very nice updates for this release:

⇒ **Service Related Mailing Labels**

We have had the ability to create customer mailing labels from the Service Department Report for quite sometime now, but several users have expressed the need to send this information to a file for a mail-order service to send service related information to them. Building a name/address file, in a 'CSV' format means you can provide this information to a mail order company that can generate mailers for you. With this release, you will find a new check box in the Service Department Report that allows for this option. This is yet another tool that allows you to target your service customers and filter the output for specific customers, then build a CSV name/address file for the mailing list. Additionally, this CSV file can be opened and edited using a spreadsheet program like Excel.

⇒ **In Use By... Issue for Multi-User Networks**

Counterman multi-user network customers have been seeing this message that pops up for no apparent reason that states "This customer in use by computer station name", when in fact it is not. This was originally put in place in an effort to prevent multiple stations from accessing the same customer at the same time. However, Windows networks have been holding on to file handles and have subsequently held onto the customer files at the workstation (client). In simple terms, Counterman thinks the file is open somewhere on the network, even though it is not. In order to maintain this control, if Counterman thinks the customer file is open, it will simply present a selection window where you can

continue, if desired. This will allow access like it normally would and should prevent this from causing no access to the customer's records and allow transactions to be processed with out hindrance.

⇒ **Flexible Pricing Update "ALL"**

This was an update we released on the last CD that allowed you to update all Vendors with a single process. However, an unforeseen process was causing some users to receive a Counterman error message when running this process. This has been addressed with this update and the "1430 error" that some users have gotten has been fixed.

⇒ **ReOrder List Displays Inventory "Cost"**

The Counterman ReOrder List is the tool used for creating purchase orders and there is a large level of information available when building a P/O. As of this update, true "cost" (from the inventory file) is now displayed on this screen.

⇒ **Invoice Header: Email Address/Web Address?**

In the past, Counterman has allowed users to input their own email address as part of the header information printed on the top of all invoices. However, several users have expressed the desire to have their web address in this area instead of an email address. With this update, Counterman will look for the "@" character that is always in all email addresses. If the "@" character is found, the printed email address will continue to work as normal. However, if no "@" character is found, the header information will print "web.", followed by the web address you enter in System Variables, General area. So what this means is, if you would like to continue to have your email address printed on your invoices and quotes, there will be no change. But if you want your web address printed on your invoices and quotes, Counterman will print "web." instead of "email" in this area. This is part of the invoice/quote header information that you can change as desired. From the Main Menu, 1.-Maintenance/Display, 8-System Variables, 1-General. If the "@" character is not there, the web address will print.

Continued... →

INSIDE THIS ISSUE:

New! Enhancements for <i>Counterman Pro Users</i>	1
Updated Price Book Vendors On This CD...	1
CONTACT INFO COUNTERMAN	2
New Enhancements for <i>Counterman Pro Users</i> <i>(continued...)</i>	2
<i>Counterman Pro</i> TECH TIPS Updating Inventory From Price Books	2

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 34-NEWLY UPDATED PB'S!

IMPORTANT!!! CUSTOM CHROME IS NOW PROVIDING PACK QUANTITIES, RESULTING IN PACK QUANTITY BREAK DOWNS FOR CCI ITEMS!

AD	Advantage Perf.
AP	Andrews Products
AR**	Arctic Cat
AU**	Aprilia USA, Inc.
BM**	BMW
BI	Bell Industries
CA	Castle Sales
CCI	Custom Chrome
DS	Drag Specialties
FH	Fulmer Helmets
FX	Fox Racing
HD**	Harley-Davidson

HH	Helmet House
KM**	Kawasaki M/C
KN	K&N Engineering
MA	Marshall Dist.
MD	Mustang Dist.
MP	Motion Pro
MU	Mid USA
PS	P.C. Sunglasses
PO**	Polaris/Victory
PT	Power Twins
PU	Parts Unlimited
RO	Romaha

RW	Rowe U.S.A.
SB	Sullivan Brothers
SI	Sudco International
SM	Southern Motorcycle
SN	Sullivans USA
SZ**	Suzuki Motorcycle
TR	Tucker Rocky
VT	Tedd's V-Twin
WP	Western Power
YA**	Yamaha Motorcycle



IMPORTANT!

(NEW) = New Price Book

**** = OEM Franchise Only!**
(If non-franchise retail prices only will be provided)

Custom Chrome is now supplying quantity breaks in their price book!



COUNTERMAN

Contacting Counterman is EASY!

Phone: (800)937-6590 (toll free)
Fax: (805)929-8267
Email: support@counterman.net
ralph1@counterman.net

Eric Buell's 2012 1190RS Superbike



T E C H T I P S

RESETTING REORDER POINTS

This is another time-saving tool Counterman makes available that can save a tremendous amount of time, while providing accurate reorder levels for inventory items, based on proven past sales history. This process takes into consideration the number of months (that you select) to look at for this process. It also considers seasonal items and will reset the Min/Max reorder levels according to the variables you setup. Of course there will always be items that you want to control and not let Counterman do them for you, such as many service related items. However, if you let Counterman do most of this process for you, it can be a great tool. The emphasis to get across here is that the user (you) is in full control of how these levels are set, even though Counterman does the actual process. Please keep in mind, this process does require that you run the month-end process (Update Sales History EOM/EOY) on a regular basis and have some history to pull from. This article will explain how to set this all up and how it all works together for the desired result. Reorder Levels are used when generating a Suggested Reorder List, also known as a "Purchase Order". Due to the nature of how this process is completed, before running the third step, we strongly recommend a full backup!

First, we must consider how many, and which, months to use for Counterman to look at for sales history. This is set in the System Variables/General screen. On the lower portion of this screen is a field labeled "Months" and "Old Months". Months, refers to the total number of months to be used for past sales information. Old Months refers to future months from sales history of the previous year, which allows for seasonal projections. So if you have Months=6 and Old Months=3, Counterman will look back from the previous three months, and forward three months from last year's sales history. You can play with these months as you like until you find the numbers that best suit your shop.

Second is to inspect and edit, as needed, the Re-Order Levels grid. This is located from the Main Menu, 1-Maintenance/Display, 7-Re-Order Levels and controls how many of each item you want to stock, if you sell X-number within the number of months mentioned above. To attempt to put this in as simple terms as I know how, there are five columns in this grid. The first two columns are "Minimum Bal" (reflected in Inventory Maintenance as "Reorder Level") and "Maximum Bal" (reflected in Inventory Maintenance as "Maximum Balance"). Both of these are used to set the Re-Order points according to the history number sold in the next two fields; known as "Monthly Low Avg" and "Monthly High Avg", which reflect the actual average sales numbers for each item. For example, if you look at the second two columns first, Counterman will find those items that have sold between "Monthly Low" and "Monthly High" and reset the "Reorder Level" and Maxi-

New! For Counterman Pro Users (continued)

⇒ Time Stamp on Invoices

This was a request from Action Cycles in Colorado Springs, CO to aid them in store security. We felt this enhancement could help other users too, so with this update it is now available. The "Time Stamp" will print just to the right of the date on all invoices and quotes. However, because this requires a special invoice format file, it will be necessary to contact Counterman Technical Support, should you want this enhancement. We will then need to get some files from you, then send a custom link to enable this enhancement.

⇒ Discounted Check Box Updated

In the "Inventory Maintenance" screen, there is a check box labeled "Discount". If checked, discounts are allowed for that item (this is the default setting). If unchecked, discounts are not allowed. However, in some cases Counterman was allowing discounts on unchecked inventory items, primarily for cash customers. With this release, the unchecked "Discount" check box overrides any other setting and will not allow any discounts on that item.

⇒ When does my License Expire?

Although some of our older users actually own their software, most Counterman users do not. They are under a signed agreement that allows use of the software and at the end of that agreement a reoccurring payment is due. Once payment has been received, the agreement renews itself and we send an update through an email link. The issue here is to find, somewhere in Counterman, when the program is set to expire? Payments are due by the end of the month invoices are mailed. Counterman provides a 5-day "grace period" beyond the due date to provide enough time to process your payment. The expiration date is always on the 5th. Counterman sends invoices out the first week of the month due. We have (and will continue to) put a notice on-screen that provides a message (when you start the program) that you have X- number of days before the license expires. This notice will display for 7-days and continue to count down. However, with this release you can check your current expiration date by accessing the Main Menu, 1-Maintenance/Display, 8-System Variables, 1-General (lower right).

imum Balance" according to proven sales history and the variables you have pre-setup. If you have never used this feature before, you will notice that Counterman has some numbers pre-set in here. These reflect the history numbers used at an actual shop and are fairly conservative. You'll notice, at the top that these numbers are set to keep in stock, the average monthly amount of what is sold. However, because this is based on monthly averages, as the Monthly Low and Monthly High numbers get higher, the stocking amounts (Minimum Bal and Maximum Bal) start to go lower than the number sold per month numbers. This is because you likely order more often than once a month. But the lower sales numbers, you want to keep on hand to insure you don't lose a sale. Again, you have the control here and you can find the best numbers to suit your shop's needs.

Third, we implement the process. Once everything is set in the first and second steps, we're ready to send these numbers to existing inventory items. This final process requires exclusive use of the Counterman data, so if you are a multi-user customer, all stations (except the one you are working from) should have Counterman totally closed. Additionally, a backup is strongly recommended, as there is no feature for Un-Doing this process. Another consideration is, if you look on an Inventory Maintenance screen, you will see a check box in the upper-right corner labeled: "Calculate Min/Max". By default, this box should be checked for all items as they are entered into inventory, but any inventory items that have this box unchecked will be omitted from this process. This is how you stay in control of any items that you want to manually set the Reorder Levels yourself. So for any items that you want to be in control of, rather than letting Counterman control them, uncheck this box. We also recommend running a "Combined Reorder List" prior to Resetting Reorder Points in order to provide a to compare how things changed after you run it. Finally, to implement this process, select the Main Menu, 1-Inventory, 8-Reset Re-Order Points. Counterman will display the months you have selected to be used for this process. Once you confirm this information, press Enter, or click the "Process" button. This actual process will only take seconds to complete. Now re-run the "Combined Reorder List" and compare it to the first one you ran. You should see some notable differences. If you have never run this process before, the differences can be quite dramatic.

One final note... If you are unhappy with the outcome, you can always play with the numbers in the second step, or use different number of months in the first step. This is where you have additional control. By setting the Min/Max Bal levels lower, you will have Reorder Levels set more conservatively. By changing the Months or Old Months, Counterman will apply the history from those months and you will see the differences reflected in the Combined Reorder List. The bottom line is, this can greatly help with saving you money by keeping enough inventory to "not run out", while insuring you don't order too much of what you don't need.