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 Payment Method 14**

Internal Payment Methods have been available in Counterman as a means of relieving inventory, without directly affecting the cash drawer. They can be of big help when moving inventory around within your shop. A few years ago we added to this list by allowing for **Vendor Returns** (*payment method 14*). Unfortunately, many users did not like it because it caused a negative balance in the vendor's account. As of this update, that will no longer be an issue. We will also be providing a means of reconciling returned merchandise (to vendors) with credits provided (from vendors) for those returns.

⇒ **No More (annoying) CAPS LOCK!**

The CAPS LOCK will now automatically turn off when Counterman is minimized, then back on again when Counterman is maximized again. Also, when exiting the program, the CAPS LOCK will be turned off. The benefit of this new feature should make many of you very happy.

⇒ **Network Customer Lock**

Customer Records will now be locked for network Counterman customers so that two stations will not be able to access the same customer anymore. This will relieve issues in regards to processing transactions for the same customer from more than on station.

⇒ **Bulk Inventory Labels**

Inventory labels can now be printed in "bulk" and a filter can be used for the desired labels. Additionally, you can select to print on 30-up label sheets (Avery 5160) and can choose to print one label per item within the filtered range.

⇒ **Payments ROA Re-Printable in History**

Prior to this update, when Re-Printing Invoices from Customer History, invoices with no parts or labor on them were not re-printable unless an invoice number was known ahead of time. These were invoices that had payments R.O.A. (Received On Account) or deposits received on account. Now all R.O.A. invoices can be re-printed right from P.O.S. and will indicate, before being re-printed, if it is an R.O.A. invoice.

⇒ **Two New Sales Reports Available!**

To help you better understand the movement of inventory through out your shop, two new reports are available from the Reports Menu.

Sales History Report.

You can choose to run this report by either Category, OR by Vendor. Additional selections include the History quantity information from the EOM (End Of Month) "Summary" and/or quantity and $ (value) from "Detail" History. You can choose particular month(s) and years, up to two years ago.

12-Month Sales Quantity Report.

This one will provide a 12– Month, detail level, item-by-item sales quantities sold, from the Month and Year you enter. Additional selections include: By Category -or- By Vendor.

⇒ **New Counterman Splash Screen**

When Counterman Pro is loading, you should now see a new "Splash Screen". We just thought we'd dress it up a bit for 2008.

continued on next page...

INSIDE THIS ISSUE:

UPDATED PRICE BOOKS (ON THIS DATE CD)

AR	Artic Cat	**HD****	Harley-Davidson	**MD**	Mustang Dist.	**TR**	Tucker Rocky
AN	Arlen Ness	**HH**	Helmet House	**NL**	Nichols M/C Supply	**VT**	Tedd's V-Twin
BD**	Big Dog	**HO****	Honda	**PU**	Parts Unlimited	**VS**	Vanson Leathers
BI	Bell Industries	**KM****	Kawasaki	**PO****	Polaris	**WP**	Western Power
BM**	BMW	**KN**	K&N Engineering	**PT**	Power Twins	**YA****	Yamaha
CB	Corbin	**KK**	KK Motorcycle	**RO**	Romaha		
CA	Castle Sales	**KT****	KTM Sport M/C	**SM**	Southern Motorcycle	**** OEM Dealers,	
DE	Diamond Engineering	**MA**	Marshall Dist.	**SB**	Sullivan Brothers	or will include	
DS	Drag Specialties	**MT**	MC Advantages	**SZ****	Suzuki Motors	Retail Only!	
FH	Fulmer Helmets	**MU**	Mid USA	**TM****	Triumph Motorcycle		

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EOM/EOY END OF MONTH/YEAR PROCESSES…

Happy New Year! OK, 2007 is now over and we have a new year to look forward to. The first issue on the table is: Did you run your EOM/EOY (End Of Month, End Of Year) Updates in Counterman? These are very critical update processes that will clear the previous "Month-End" and "Year End" sales history numbers out and set them to zero, making room for the next month and the new Y.T.D. numbers for the coming 2008 new year. Running this process will provide Counterman with the information needed so that Counterman will have the correct answers when you ask questions like; "Did I sell more of these last year?" or "How does this year's sales compare to last year's for a particular vendor, supplier, or category?" These are just a couple of questions you'll likely need the answers to at one time or another. Not to mention how critical these updates are when making inventory purchasing decisions for your shop. The EOM/EOY processes don't really take very much time to complete and can save you untold amounts of time and cash when you need it (which is always, isn't it?). As we usually make it a point to stress the importance of profit margins, taking the small amount of time it takes to close each month (when each month comes to an end) provides the ability for Counterman answer these questions and more. To better understand what I mean by doing a "month-end" close, here is what Counterman does during that process:

If you look at an Inventory Screen for any item that you sell, you'll see some numbers on the right/lower of the screen. These numbers represent the sales history for MTD (Month To Date) and YTD (Year To Date). In order for this information to be correct, month-end and year end requires proper month-end and year-end closures. When you update sales history EOM/EOY, these fields are zeroed out to make room for a new month/year numbers. But this information does not get thrown away, not by any stretch of the imagination. They are placed into the History Summary and History Detail area of the Inventory screen. Notice the buttons on the lower left of the screen labeled "4-History Detail" and "5-History Summary". The EOM/EOY processes are what cause those fields to be populated with the numbers from each month-end and each year-end close. If you need help with any of these processes, we are here to help. Additionally, a full walk thru is available in the Training and Reference Manual you received with your Counterman Software package, beginning on page 54.

Email: support@counterman.net

(800)937-6590

New For Counterman Pro Users *(…continued)*

⇒ **Service Order/Special Order Linking**
An enhancement has been added with a button that allows you to unlink Special Ordered items from a Service Repair Order. This works a little differently than the old way of using the Ctrl/K then F7 to "Link/Unlink" in that, now, when you "Unlink" (using the button below the grid that shows as: "UnLink Ctrl-F12"), the Special Ordered item is now sent to the P.O.S. screen and remains as an open Special Order from there. Unlinked items can now be re-linked, or, left on the normal non-service P.O.S. screen as an open Special Order. It is UNDERLINED VERY IMPORTANT to understand that this process only works AFTER you save the service R.O. in process. So remember to press the Ctrl/F2 keys after any linking or unlinking of Special Ordered items! Additionally, if there happen to be any deposits involved in any unlinked Special Order items, any associated dollar amounts will be placed into the customer's normal account balance.

⇒ **Transaction History by Employee**
Ever wish you could see an itemized list of items sold by a particular employee? Or maybe you want to see how many employees sold a certain item? Thanks to Lowell at Bikers Edge in Wichita, KS now you can. We simply added a new means for the report "Sequence" on the existing Transaction History Report.

⇒ **Invoice Void—Different Date?**
If you have ever 'hosed' a Cash Drawer Report by voiding an invoice from a previous date, you're going to appreciate this one. Here's the scenario: You have an invoice that happened yesterday with a mistake on it. You use the Void Invoice process to fix the mistake, but cause another issue. You see, when you void and invoice, the process creates a new invoice that reverses everything that happened on the original invoice. But since it's a different day, it throws off the Cash Drawer Report! As of this update, if you attempt to void an invoice from a previous day, you'll get a warning message, along with an opportunity to back out of the void process.

⇒ **Insert a Blank Line "Between" Number**
Ever wish you could insert a Labor Code in between some numbers? Or add a part number in-between other numbers on the POS screen? Now you can! Just highlight the number and press the "Insert" key to put a blank line above the highlighted number! Then move to that field to add part numbers or labor codes.

⇒ **View/Re-Print Past Month End Reports**
It has been difficult in the past, to view past Month-End Reports without diving into some old file box to find the one you're looking for; and Counterman is on a 'never ending quest' to get their users (you) to properly close out each month and year on time. But what if you want to see the information on one of those past reports? Say, a year ago? Six month ago? Well, you no longer have to dig into that old file box to reprint a past Month-End Activity Report! As of this update, all Month-End Activity Reports, including the inventory value information, will be re-printable. So, six months down the road, you'll be able to look back at your sales history MTD (month to date), YTD (year to date), and view what your inventory value was when you closed that particular month. IMPORTANT! This is NOT retroactive! Counterman will begin to store past month-end reports as of this update!

PLEASE!!! SEND US YOUR SUGGESTIONS:
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