

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:

⇒ Inventory Deviation Reporting

This new report has been created to provide a way to easily see the difference in inventory values, before and after physical inventory counts and adjustments. In other words, What is my inventory value "before" counting everything then (after counting and making adjustments) what is the value "after"? What is the deviation between before and after? This new "Deviation Report" can provide this valuable information at any given anytime. For example, once you run the Inventory Activity Report and select the check box: "Capture for Deviation Report", Counterman saves this value. So anytime after, it will compare this captured value to current inventory value and displays all this information and the differences (deviation) within the Deviation Report. This can also be helpful for month-end, as you will easily be able to see the difference in the value of your inventory from month-to-month. If this value is important for you, you may want to consider adding this report to your month-end processes. This new information is not retroactive because these values were not previously captured, however, from this release forward, they will be.

⇒ Service Reminders

Did you know, you can setup Service Reminders that are directly linked to a form letter right inside Counterman? If you have never used Service Reminders, check out the detailed setup instructions on the next page of this newsletter under "Tech Tips". With this release we have made the process of generating

Service Reminder Letters much simpler. In addition to selecting the Service Reminder Type and the Letter to print, you can now select the Date Range for the Service Reminders that are Due. This is a great way to let your customers know they are important to you, by reminding them that they are likely due for a particular service.

⇒ Gift Certificate "Security"

Counterman has always allowed users to sell Gift Certificates. However, if you use the User Security option in Counterman, editing the amount for a Gift Certificate at point-of-purchase used to be cumbersome unless the user has clearance to edit the sale price from the P.O.S. transaction. With this release the price of a Gift Certificate can be edited by anyone. However, the product code you use for Gift Certificates MUST be "GIFT" in order for this to function correctly. If you sell Gift Certificates AND use Counterman User Security, selling and redeeming them has just become much easier to contend with.

⇒ Customer Maintenance "ADD"

Many users have requested a way to add customer records apart from starting a transaction for them. It is a common practice for shops to have clipboard on the counter, where the customer can write down their name, address, phone number, email address, etc... then later have an employee enter those customers into Counterman. With this release we have made this process easier by adding an "ADD" function direct from the Customer Maintenance screen. It is important to understand, adding customers from this area does NOT check for duplicates the way it does from the P.O.S. screen. For this reason, care should be taken to insure customer information is not already in the system. If you are concerned with duplicating customer information, we suggest adding new customers in the traditional way, from the P.O.S. transaction screen. Depending on user input, we may consider adding this type of duplicate customer search to this new "ADD" function from the Customer maintenance screen.

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

IMPORTANT!!! CUSTOM CHROME NO LONGER PROVIDES PACK QUANTITIES, RESULTING IN NO MORE QUANTITY BREAK DOWNS FOR CCI ITEMS!

AD	Advantage Perf.
AR	Arctic Cat
BD**	Big Dog
BI	Bell Industries
BM**	BMW
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
KT**	KTM Sport M/C
MA	Marshall Dist.
MU	Mid-USA
PO**	Polaris/Victory
PU	Parts Unlimited

SB	Sullivan Brothers
SM	Southern Motorcycle
SN	Sullivans USA
SZ	Suzuki Motorcycle
TM	Triumph Motorcycle
TR	Tucker Rocky
VT	Tedd's V-Twin
WP	Western Power
YA	Yamaha Motorcycle



IMPORTANT!

(NEW) = New Price Book

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

Custom Chrome no longer has quantity breaks!

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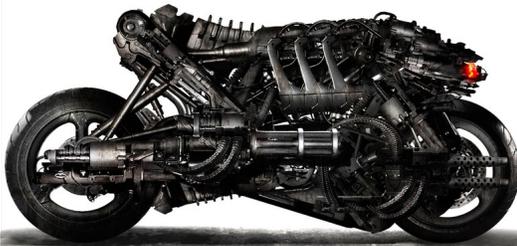


COUNTERMAN

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Terminator Salvation Motorcycle



TECH TIPS

SERVICE REMINDERS

Counterman had a process in place for many years that allowed you to stay in touch with your service customers, by reminding them they may be due for a service. This is an incredible tool that not only helps increase business in your service department, but also lets your customer know you have their best interest in mind. In this Tech-Tip I will explain how to setup and use Service Reminders. These explanations are in detail, but are fairly simple to setup. With this release, we have enhanced on the report itself, making it easier to understand and simpler to use.

Setting Up Service Reminders:

1. Define the basic **Service Reminder Types** you want to use. Access the Counterman Main Menu and then select 1-Maintenance/Display, 9-Table Maintenance, then down to B-Service Reminder Types. Make a new entry under "Reminder For What Service" by pressing the "Insert" key and typing in the name of the reminder. Press the "Tab" key once and type in a number under "Common Frequency in Months". This represents, how long after the initial service, do you want to remind your customer, they are due for their next service.
2. Build a Letter to use that will be sent to your customer(s) when you process the Service Reminders. Here you can type up your own letter, as it relates to the Service Reminder, to your customer(s). The format is similar to a "form letter", where you can personalize them to the customer with little effort. If you do not know what a "form letter" is; it is a letter that uses the same information for multiple customers, but can be personalized with each customer's name, account number, last service date, etc... Counterman can pull this information from existing databases and use that information within the form

New! For Counterman Pro Users (continued)

⇒ Service Repair Order Creation Date

Have you ever had a large Service Repair Order in your system, like a crash repair, and don't have a quick easy way to tell how long it's been in your shop? Or maybe you would just like to know the date you began work on a specific bike? As of this release Counterman will begin storing the date for Service Repair Orders and displaying that date on the screen. Unfortunately, this cannot be retroactive, so any currently pending Service Repair Orders will not display this information. However, any Service Orders created from this point forward will display the original "save" date in the upper right of the screen.

⇒ Service Scheduler Enhancements

In the last Counterman Newsletter we released an enhancement called the "Service Scheduler" to help you with scheduling service jobs for your shop. As part of this and all enhancements, we asked for input on this new feature. Many have spoke and we have listened to your suggestions for this new feature and have made several "behind the scenes" enhancements and fixes, including a firm link

to the "Notes" area connected to each.

⇒ Warranty Info on Cash Drawer Report

Ever since we released the new Warranty processes back in early 2009 some customers have had a challenge reconciling New Charge Sales on the Cash Drawer Report. With this release we have made some changes, both to the Summary and the Detail Audit portions of the Cash Drawer Report in an effort to clarify any Warranty charges or credits. On the Summary Report, a new line will print in the left column indicating the total of any new charges or credits for warranty transactions and these will no longer be included under "New Charge Sales". On the Detail Audit Report, all warranty transactions will be indicated with a "W" under the "Paid By" column. In addition, a separate "Warranty Detail" report page will print indicating the date, amount, invoice number and total due. These enhancements should make the Warranty Credits and New Warranty Charges easier to spot and reconcile the Cash Drawer Report on a daily basis. We encourage your further input for these processes!

letter. Although it is not required to use this data, it does personalize the letter to your customer.

3. You are now ready to start collecting the data needed for generating Service Reminders. When you begin a Service Repair Order, Counterman will automatically open the VIN window where you add or make a vehicle selection for the unit you are going to perform the service on. Notice the "Reminder" field on the lower area of this VIN window. Make a selection from the scrollable list of "Reminders" that you previously setup in step #1. Now simply continue the service as you normally would. If you forget to select a "Reminder" when the service is originally initiated, you can always return to the VIN window and make a selection, provided you do so before the service transaction is processed. To return to the VIN window with a Service Order on screen, press the F12 key (or click the button), then press (or click) "V" (VIN).
4. When you're ready to generate the Service Reminders, access the Main Menu, 3-Reports, then C-Service Reminders. In the following screen you can choose to print "All" Reminders, or make a selection from the list of Reminder Types (step #1). Next you can choose the letter to print for these Reminders (step #2), then select "For Service-Due Date Range", from and thru dates. It's a good idea to run your Service Reminders as part of the month-end processes in order to prevent printing duplicate letters.

"Service Reminders" is another example of the available tools Counterman makes available to you, enhancing your relationship with your customers, keeping them safe on the road by "reminding" them to keep their ride in the best possible condition and ready to ride. Counterman is happy to help you setup your Service Reminders and we urge you to contact us for help or concerns for your shop and how it relates to Counterman...



... Ralph Weaver