

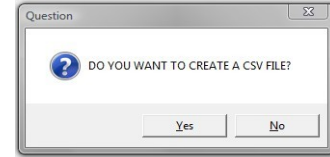
Counterman Quarterly Newsletter

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:

selected a Report Sequence by "Name", Counterman will ask you:



Answering "Yes" to this question will create the CSV file in the Cman8\Data folder. The information exported will include each individual item sold with the invoice number, Customer name & address, date, product code, description, quantity, price, extended price, and the invoice level tax amount. Excel allows you to add particular cells together, allowing for enhanced accounting possibilities. However, it is important to mention that any changes made in Excel will not be held within Counterman.

⇒ Internal Sales Tax Information

Because Internal Sales (in most cases) are taxable sales, we have added additional detail to the "Cash Drawer Report Summary". First off, any "Non-Taxed" item(s) sold exists in inventory as a "Non-Taxed" item, preventing any tax to be charged when processed. These can include such items as labor, and/or services provided. Additionally, "Non-Taxed" items can include Out-Of-State Mail Order transactions or sales to Resale customers. An "Internal Sale" in Counterman is a processed transaction with a specific Payment Method of 10 (New Bikes Sales), 11 (Used Bike Sales), 12 (Service Department), 13 (Parts Department), or 14 (Vendor Returns). If you are processing an Internal Transaction, someone is ultimately responsible for the tax on that item. It's not uncommon to not charge tax on New or Used Bike Sales, as tax is charged for items as part of the end-sale to the customer. However, any items sold internally and used in your shop are indeed taxable. In an effort to help sort this all out, we have added a new column to the "Cash Drawer Report Summary" that will show a summary of tax charged for all Internal Sales transactions.

⇒ Invoice Reprints/Time Code

At the beginning of this year we added an enhancement that could print the 'time-of-day' on invoices with the time they are processed. However, reprinted invoices did not include this enhancement. With this release, all invoice reprints will include the time stamp.

⇒ Automatic PDF Invoice Creation/Storage

This is a process that will create and store all P.O.S. transactions as a 'PDF' file. A 'PDF' (stands for "Portable Document Format") is a small file that is an actual picture of the created document. PDF's were created by Adobe™ Systems in 1993 to allow for an accurate image file of the document, small enough to email and store. PDF files require Adobe Reader™ in order to view them, so if you plan to use this enhancement, Adobe Reader™ will need to be installed in your Windows™ software (it's a free download) but it is highly likely, you already have it. Counterman will continue to store your invoice reprints the same way we always did, but this enhancement will allow for the new PDF format. Counterman will not automatically install this enhancement! It will be necessary to let us know that you want it, at which time we will walk you through a quick step that enables this feature. Once enabled, Counterman will store all POS transactions in a special folder and name the PDF's with the actual invoice number. F&I invoices will not be stored as PDF's (for now).

⇒ Address/CSV-Transaction History Report

Several requests to add the customer's address to the current Transaction History Report have resulted in this enhancement. When running the Transaction History Report by Name, the printed output will now include the customer's full address. If you chose to run this report by "Name Sequence", the report itself will separate each customer's invoice and provide the total sales and tax amounts for each invoice. At the end of the report there will be a total for "Parts/Labor Net Total". In addition, an option to create a 'CSV' file (a.k.a. an Excel spreadsheet) can be performed as part of this process. Provided you have

INSIDE THIS ISSUE:									
New Update for Counterman Pro Users	1								
Updated Price Books On This CD...	1								
CONTACT INFO COUNTERMAN	2								
Counterman Pro	2								
<table border="1"> <tr> <td>T</td><td>E</td><td>C</td><td>H</td> </tr> <tr> <td>T</td><td>I</td><td>P</td><td>S</td> </tr> </table>		T	E	C	H	T	I	P	S
T	E	C	H						
T	I	P	S						

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 30-NEWLY UPDATED PB'S!

IMPORTANT!!! CUSTOM CHROME IS **NO LONGER** PROVIDING PACK QUANTITIES, RESULTING **NO** PACK QUANTITY BREAK DOWNS FOR CCI ITEMS!

AD	Advantage Perf. Dist.
AR**	Arctic Cat
BM**	BMW Motorcycle
CA	Castle Sales
CB	Corbin
CCI	Custom Chrome
DS	Drag Specialties
FH	Fulmer Helmets
FX	Fox Racing
HD**	Harley-Davidson

HH	Helmet House
KA	Kuryakyn
KM**	Kawasaki M/C
KN	K&N Engineering
KT	KTM Motorcycle
MA	Marshall Dist.
MC	McDonald (COST ONLY!)
MU	Mid USA
MW	Midwest Motorcycle
PO**	Polaris/Victory

PT	Power Twins
PU	Parts Unlimited
SB	Sullivan Brothers
SM	Southern Motorcycle
SN	Sullivans USA
SZ**	Suzuki Motorcycle
TM**	Triumph Motorcycle
TR	Tucker Rocky
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 has **stopped** supplying quantity breaks in their price book!



T E C H T I P

The following article was from the January—March 2009 Newsletter, but I felt it was important to reprint it, as several questions have surfaced concerning Warranty Repairs and how to best deal with them.

COUNTERMAN

Contacting Counterman is EASY!

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

WHERE IS VANCE?



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. 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!

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 (Jan-Mar 2009), 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 and/or the Warranty payment comes 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.