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:

⇒ **Update Price Books—Faster!**

To help speed up the process of "Update Price Books" from the 2-Utilities Menu, we have put in place a file marker that will now know if that particular price book has been previously updated and will now skip over any price books that have not been recently installed, resulting in a much faster process.

⇒ **Email Address Export Function**

As we have an ever increasing number of Counterman users who want to send unsolicited email (aka SPAM) to their customer base for events, specials, or other shop related information. This is a great way to keep your customers informed. However, the process of extracting names and email addresses from Counterman into a form that allows your email program to import has previously been a task that was difficult for some users to contend with. In an effort to simplify this process, we have added a new process directly from inside Counterman, in the "Customer List Report". So you would select the Customer List Report from the Filtered Reports Menu and check the box labeled: "Create Aemail.csv File". Be sure to select the filter of "Email Address - Contains - @". This will insure that you only get customers who have valid email addresses. Process the report (either to screen or to printer) and the following information will inform you that the file "Aemail.csv NAME/EMAIL FILE CREATED IN DATA FOLDER", which means that "Aemail.csv" is in the C:\cman8\Data folder. Just about every email program allows an import process for a CSV formatted file. This simple and straight forward process will make it easier to export your customer names and email addresses direct from Counterman! This enhancement was the result of many requests from Counterman users to simplify this process.

⇒ **Quick Books 2009 COA Export/Import**

Counterman has always had the ability to interface with Quick Books for account payables, through an export/import "IIF" files process. With the release of Quick Books 2009 this process has become an issue due to Quick Books using a center dot instead of a period between the COA number and COA name. Counterman can now create a CSV file of the existing COA files and properly inserts the center dot into the COA file for a hassle free import/export process. Counterman will look for a QB09COA.CSV file and use it if it exists (this is the file with the center dot), if it does not exist, the older method is still available and recommended for users with Quick Books 2008 and earlier. The Quick Books interface will populate the assigned COA's on a daily basis. It is a simple interface that will enter the data from the Counterman Cash Drawer Report daily. If you are interested in interfacing with Quick Books, please contact us and we will be happy to help you get things setup!

⇒ **Duplicate Items on Service Orders**

When you have a long Service Repair or Warranty Order, it can be difficult to view all items on the screen at one time. Counterman uses a fairly large font to keep the items on the screen easy to read, so only eleven items can be seen on the screen until you scroll up or down to see additional items. This can result in duplicating items that you may not see in the current screen view. With this release we have enabled a safeguard that checks for duplicate items and will open a Counterman Question on the screen that will inform you when a duplicate item is entered: "Item already exists in this transaction, ok to add another?" It will be necessary to answer this question before continuing. It is important to note that you will only be prompted on duplicates when in a Service or Warranty transaction. This should prevent you from accidentally charging the customer more than once for the same item. Also, we could not make this new feature retro-active; which means if you have an existing Service or Warranty transaction in a hold status, it will not check for duplicate items. However, any new Service or Warranty transactions will use this new enhancement. There were several users for this request, so thank you to all of you (you know who you are)!

INSIDE THIS ISSUE:

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 33-NEWLY UPDATED PB'S

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

Code	Vendor	Code	Vendor	Code	Vendor
BD	Big Dog Motorcycles	KM**	Kawasaki	SN	Sullivans USA
BM**	BMW	KN	K&N Engineering	SZ**	Suzuki Motorcycle
CA	Castle Sales	KT**	KTM Sport Motorcycle	TM**	Triumph Motorcycle
CCI	Custom Chrome, Inc.	MA	Marshall	TR	Tucker Rocky
DS	Drag Specialties	MU	Mid USA	VT	Tedd's V-Twin
DU**	Ducati	NL	Nichols M/C Supply	WO	World of Powersports
FX	Fox Racing	PO**	Polaris/Victory	WP	Western Power
HD**	Harley-Davidson™	PT	Power Twins	YA**	Yamaha Motorcycles
HH	Helmet House	PU	Parts Unlimited	ZP	Zippers Performance
HO**	Honda	RO	Romaha		
JG	James Gaskets	SB	Sullivan Brothers		

IMPORTANT!

(NEW) = New Price Book Vendor!

** = OEM Franchise Only! (or retail prices only will be provided)
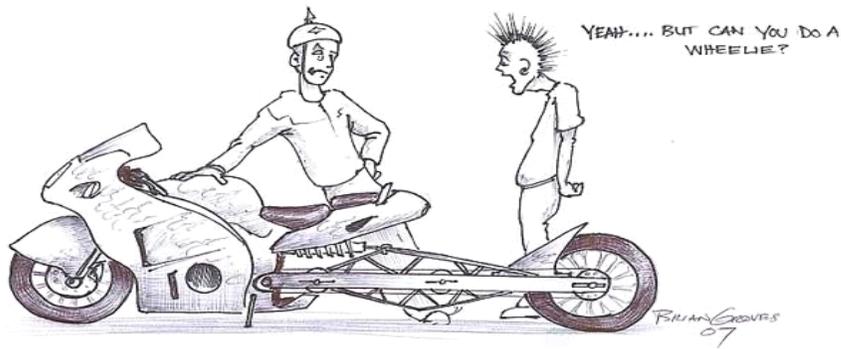
Custom Chrome no longer has quantity breaks!

YEAH.... BUT CAN YOU DO A WHEELIE?

BRIAN GROVES 07

FEATURES and BENEFITS

Counterman is a known as a 'DMS', which is to say: "Dealer Management System" software. What this actually means is, Counterman is designed to handle just about ever facet of your shop. Sure it is an easy to use Point of Sale and Inventory Control tool; but did you know there is large *Benefit* available right at your fingertips? A 'DMS' should include the *Features* that are designed to *Benefit* the shop. Over the years Counterman has made great strides to bring you the *Features* you have asked for. Are you taking advantage of these *Features*? For out of these *Features*, one can reap a higher level of *Benefit*.

Is 'Profit Margin' always on your mind? It should be, because that term equates to the amount of money you will have left in your pocket after each and every sale. Counterman is always ready to help you increase your 'Profit Margins' (which is a 'benefit') with the many features it has available. In this troubling economy, it is becoming increasingly important to squeeze as much *Benefit* as we can from the tools we have available to us. Counterman is one of those tools.

For instance; did you know that you have reports available to you that will help you target slow moving product? You may be wondering, so how does that help me? What do I do with this stuff that doesn't sell? I can't send it back to the vendor, and I don't want to take a loss on it! It is important to understand that, everyday it sits on your shelf, you are losing money on it. So run the reports, pull those items off the shelf and put them on a 'sale table' or list them on Ebay. But always mark them way down. These items have been on the shelf too long and can possibly produce some working capital, even if you have to sell them below your original cost. After all, they've been sitting on the shelf for a year now, they're all paid for and no one is beating down your door to buy them. But for the right price and with the right marketing, they might just sell. Let's say you have products on the shelf that have not moved in the last 12 months. You have a cost investment of $5,000 on these products. Those items were paid for a long time ago and you sure could use that money now. If you were to sell those items at 10% below cost, you could generate $4,500 capital. I bet you could use $4,500 about now huh?

In these tough economic times, it's time we jumped into the *Features* that Counterman has to offer and subsequently reap the *Benefits*! Counterman is your tool to accomplish this. We would urge you take full advantage of the many tools Counterman has put at your fingertips to help increase your capitol and your profit margins! If you need some coaching on how to generate the reports necessary to take these steps, the support team at Counterman is ready to help you!

By: Ralph Weaver

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

⇒ **History Detail in Inventory Maintenance for Warranty Items**

Difficulties in being able to tell if an item was sold under a Warranty or not when viewing the "History Detail" from Inventory Maintenance have been eliminated with this update. If an item was sold on a Warranty transaction, a "W" next to the price will indicate as such. In addition, if an item has a corresponding Manufacturer's Warranty transaction associated, it will be displayed in the "History Detail" with an "M" next to the price. Only the original Warranty item is counted as actual movement on the item, which will aide in tracking all of the activity for Warranty related items.

⇒ **Cash Drawer Audit Report - Warranty**

All Warranty related Invoices/transactions printed on the Cash Drawer Report, Detail Audit Trail page will now be easy to spot! Under the column heading "Type" will be an "M" (for Manufacturer's Warranty) if the transaction has a Warranty related item(s) included. This will also be true when taking a payment or credit during the Warranty Reconciliation process for Warranty related transactions. This is in an effort to help make better sense of these types of transactions on the Cash Drawer Detail Audit Trail Report.

⇒ **Warranty Reconciling Made Easier**

Warranty payments/credits are now much easier to understand, as we improved on the language terminology on the Warranty Reconciliation screen and added new buttons for an improved warranty reconciliation process. This should make the entire process much easier to understand and use. Additionally, the crediting transaction (when posting a Warranty payment) will now be displayed to the screen and can selectively be printed if desired. This will help for those of you who want/need a paper trail for your Warranty processes, as you can now print the related transaction information for you Warranty records. Thanks to Rodney at Rodney's Cycle House for his continued assistance with this new Warranty process!

⇒ **And .99 Cents?**

For the past 10+ years I have had customers tell me that they prefer NOT to use the Flexible Pricing processes Counterman has available, mostly due to the fact that they were unable to make the "cents" on every item .99… Personally, I never liked making items end in .99 because I always felt that the customer knew that this was a means of taking more of their money than was necessary. But the bottom line is, everyone does it! And the customer really doesn't pay that much attention to it. So I gave in and made it possible to truncate all prices with .99 cents. So if an item sells for $6.45, this process will round it up to $6.99. It's important to understand that even if the item is currently at $2.01, this process will round it up to $2.99. This new process is made available through the "Update Inventory From Price Books" process and will also be applied to newly added items coming from the price book files. By default, this feature is not available, so please let us know if you would like to use it and we will help you get it turned on. It only takes a second to do.

⇒ **Not Clocked in Warning**

A process is now in place for Counterman users who use the Time Clock feature, where Counterman will know if an employee is trying to log in to do a transaction, but has not Clocked In with the Time Clock process yet. This feature will let the employee know that they have not clocked in by displaying an "information window". Of course they can continue with the transaction, as this is merely an information window, but it will be necessary to click "OK" to this window in order to continue the transaction. This feature is controlled with a text file and by default will not be active.

PLEASE!!! SEND US YOUR SUGGESTIONS:

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