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:

⇒ **Xactfit-Counterman Interface**
Santa Maria Software has been working with Xactfit and now has the interface in place. If you don't know what Xactfit is, simply put, they provide a method of locating items by year, make, and model (similar to how an auto parts store would). Xactfit's focus is on the Tucker Rocky parts, with additional vendors following suit soon. Parts Unlimited, Drag Specialties, Western Power Sports, Motorcycle Stuff, and Custom Chrome are slated to come on board soon! The idea is to display a list (with pictures) of items available that only fit on specific make(s) and model(s).   The interface Counterman has is when the items are selected, you can drop them into the POS screen.   For more information about Xactfit, they can be reached at:

Xactfit   Phone: (866)951-MOTO (6686)
          Website: www.x-actfit.com

⇒ **On-Screen Help File**
We have just finished converting the entire Counterman Complete Manual into a help file format that has a full Table of Contents and a full Index. After this update has been ran, a simple F1 keystroke will open this mouse driven help file, which is similar to most Windows® based help files. You can click on particular chapters, or go into the index portion to find the topic you need help with.

⇒ **Set Inventory Discount Flag (globally)**
Profit Margins have always been a major concern in any business. If you have ever been at a Counterman Training Class, you know that we make every attempt to help you understand this process and have shown you several tools Counterman DMS Software has that can help with increasing your profits. Unfortunately, many suppliers do not understand the level of profit margin that is necessary to maintain a retail shop. These suppliers allow for a "shorter than needed" profit margin, resulting in less than adequate profit % when their items are sold. This new process is another one of those tools that can help with your profit margin, while targeting only those suppliers with short margins. There is a check-box for each individual inventory item called "Discounted", which allows Counterman to apply a discount when selling that item from point of sale.   By default, the Discount flag for all items is checked to allow the discount.   This tool is now available from the Utilities Menu and allows you to globally affect all inventory items within a specific vendor code or a specific category by un-checking the Discounted box. The result is, all items within the selected vendor code or category can no longer be discounted. So even though there is a "short profit margin", at least you will not be discounting those items any further.

⇒ **Email PDF Files of Invoices/Quotes**
PDF *(acronym means: Portable Document Format)* documents are vastly becoming the industry standard for computer documents. They are relatively small files that are easy to send and easy to open through email. In the past, Counterman has had the ability to send invoices through email in a TXT file format. But different resolutions, font issues, and Windows® versions have made it difficult to maintain the spacing in a text file. Add to this, new security issues in all the different email programs and you end up with a mess on your hands (or rather we do). This update helps solve these issues and more, by streamlining the email process into a PDF file that can be transmitted directly from Counterman. This update should have installed all the files necessary to make this all happen. However, some setup changes need to be made in Counterman in order enable it. First and foremost, you will need internet access from your Counterman computer. Additionally, your email service provider assigns to you a SMTP *(acronym means: Simple Mail Transfer Protocol)* address that is needed in order for Counterman to access your email account, which ultimately sends the email. As long as you have these two things, we can likely have you up and sending invoices and/or quotes in a PDF format, though your email in no time at all. If you are interested in this function, we can certainly help. Please have your SMTP information at your disposal when you call us.

INSIDE THIS ISSUE:

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD)

WE HAVE ADDED SEVERAL BRAND NEW VENDORS TO THE LIST BELOW, INDICATED BY (**NEW**)
IMPORTANT!!! CUSTOM CHROME NO LONGER PROVIDES US WITH A PACK QUANTITY, RESULTING IN NO MORE QUANTITY BREAK DOWNS FOR CCI ITEMS!

AC	Acerbis	**HO****	Honda	**NL**	Nichols M/C	**SI**	Sudco International
AD	Advantage Perf.	**HT**	Hot Toppers	**NF** (NEW)	No Fear	**SZ****	Suzuki Motors
AR**	Arctic Cat	**KM****	Kawasaki	**PS**	P.C. Sunglasses	**TM****	Triumph Motorcycle
BI	Bell Industries	**KN**	K&N Engineering	**PU**	Parts Unlimited	**TL** (NEW)	Troy Lee Designs
BM**	BMW	**KK**	KK Motorcycle	**PO****	Polaris/Victory	**TR**	Tucker Rocky
CA	Castle Sales	**KW**	Kustomwerks	**PT**	Power Twins	**UA** (NEW)	Utopia Optics
CCI	Custom Chrome	**LP**	Lockhart Phillips	**SS**	S&S Performance	**VL**	Van Leeuwen
DS	Drag Specialties	**MT**	MC Advantage	**SH** (NEW)	Schwinn Scooters	**VH**	Vega Helmets
FL	Flanders	**MU**	Mid USA	**SM**	Southern M/C	**WN**	Win Products
FH	Fulmer Helmets	**MW**	Midwest Motorcycle	**SY** (NEW)	Spy	**YA****	Yamaha Motorcycle
HD**	Harley-Davidson	**MD**	Mustang Dist.	**SL**	Starklite Cycle		

IMPORTANT!

(NEW) = New Price Book Vendor!

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

Custom Chrome no longer has quantity

Santa María Software

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Here is an interesting photo of an actual Harley -Davidson bottom end with Ducati cylinders and heads.

(*Yes, this photo is real and this engine runs*)

F&I Updates and Enhancements

F&I (Finance and Insurance) is an add-on module available for Counterman DMS that aids the user when selling new and/or used vehicles. These Updates and Enhancements have been made to the F&I program to make it even better.

- *Major Unit Inventory, VIN required or cannot be reserved, cannot be "in stock", and inventory balance will indicate 0 (zero)*
- *Find option now offers search methods that include either by Model or by Stock Number for faster, easier access to units.*
- *When a unit is sold, any previous quotes for that unit will be purged and stored in a database. This can be reported on and a new F&I report called: Purged Quotes Reporting can be ran to locate them.*
- *Inventory Maintenance now checks Major Unit Inventory (if user has F&I) and confirms if it is in Maj Unit Inv, if purchased, balance can only be 0 (zero).*
- *"In Stock" flag automatically set to T (true) if balance is 1 (one), or to F (false) if balance is 0 (zero).*
- *Major Unit Inventory sets POS Inventory to 1 (one) if "In Stock" is checked, and sets POS Inventory to 0 (zero) if "In Stock" is unchecked.*
- *Duplicate VIN's are not allowed to be entered in Major Unit Inventory.*
- *Major Unit Inventory Purging process has been put in place, along with a new Major Unit Filtered Report process to report on Major Unit Inventory.*
- *Automatic deletion of Major Unit Inventory record, IF POS Inventory for that Major Unit has been deleted.*

Special thanks to Lowell and Amber at Bikers Edge in Witchita, KS for their assistance in making these changes to the Finance and Insurance module for Counterman Pro.

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New For Counterman Pro Users *(...continued)*

⇒ **Special Order Prompt**

We have made several efforts to help prevent negative inventory balances (like making the balance available RED when zero or less are available) from P.O.S. However, negative inventory items usually end up being a "necessary evil" that have to be investigated and adjusted as part of the month end processes. As of this update, when you enter a part number that has a zero balance, Counterman will see it (right after you enter a quantity that is greater than the available balance) and put a question on the screen that asks: "Item Not In Stock, Would You Like To Special Order?". Answering "No" to this question will still allow you to sell into the negative. Answering "Yes" will automatically flag this item for Special Order. Thanks go out to Steve at SKS Motorcycles in Lilburn, GA for this great suggestion! **_NOTE_**: *If you like the old way of doing this, we can easily turn this function off, just let us know.*

⇒ **Send Email, History, and Print Special Orders - Hot Keys Added**

In an effort to help maintain eye contact with your customer Counterman usually negates the use of the mouse when possible when navigating from the P.O.S. screen. However, these three functions (Send Email, History, and Print S/O) did not have pre-set Hot Keys associated with them when using the F12, Edit Customer process form P.O.S. but now they do! Just press the #1, 2, or 3 key from the customer name field to use these processes and negate the mouse. Of course the mouse can still be used if desired.

⇒ **Time Clock Display - Insert Key Added**

Adding additional records to the Time Clock Display has been made easier, just press the Insert key! When using the Time Clock function, it sometimes becomes necessary to edit or add a record. Prior to this update, adding a record was not possible without clocking in and/or out first. Now you can go directly into the Time Clock Display, enter the employee code that you need to add a record for, then press the Insert INS key. This will insert a blank line and put today's date in for you. Alternately, you can change the date to whatever date you need. Then just enter the time(s) you need to add.

⇒ **Labor Hours Added to the Service Department Report**

Dollar totals and sub-totals have always been a part of the Service Department Report because we felt this was the most important data to print on this report. A recent request from Steve and Roxanne at Beemer's & More in Fort Collins, CO has shown us the importance of having the actual number of hours on this report, in addition to the dollar totals. The number of labor hours is already there, we just need a way to add them all up. With this update all labor hours will be calculated and summarized at the bottom of the Service Department Report. Additionally, because this is an actual calculation of existing data, Service Department Reports from past dates can now be ran to print the summarized labor hours. This new feature is available from both the "Detail" and "Summary" reports. Thank you, Beemer's & More for this great suggestion!

⇒ **Clipboards and VIN Windows Now -Centered-**

Due to different computer monitors and different computer resolutions, keeping each display window can be a challenge. Some users have said the VIN window (when using the Service Order or Warranty Order process) was cutting off the right end of these windows, resulting in difficulty seeing "all" of the information within the VIN window. This update addresses this issue and the VIN window is now centered. Alternately, the VIN window can also be moved if desired, to enable viewing what's behind it. We have also done something similar to the clipboard windows. From blank POS (column of buttons shows on the right of the POS screen), F5, F7, F8, and F9 are all "Clipboard Windows" that have particular, date sensitive information that gets printed and/or displayed, depending on the process. A similar issue that was cutting off the right side portion of these windows has been addressed with this update by -centering- these windows.

PLEASE!!! SEND US YOUR SUGGESTIONS:

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