

# 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:

"Inventory Activity Report" by vendor. All three values will be on this report, including: Cost, Selling Price, and MSR price. This report will print as normal if the Report Sequence selected is by Category instead of by Vendor, so if you like it the old way, it's still available...

⇒ **CATEGORY XX added for Special Ordered items...**

Categorizing inventory is a way of separating items in groups (see article on page 2 for important information about setting up Inventory Categories.) In the past, defining these Categories has been difficult for items flagged as "Special Order" from the Point of Sale screen. Special thanks go out to Doc at Doc's Motorcycle Parts in Waterbury, CT for this suggestion and for his patience in waiting for it to become available. Once the new version is installed (version 06/24/2007), when an item is Special Ordered at Point of Sale, a Category of "XX" will be applied to the inventory record. Because "XX" is now the Category for Special Ordered items, filtered reports will now show all Special Ordered items that have the "XX" Category applied to them. Additionally, changes to these Categories can be made easily from Inventory Maintenance because they can be filtered. Remember, a "filter" is a comparison tool and (with this filter set) will only display items with the "XX" Category. The filter to use should look something like this:

CATEGORY EQUAL XX

⇒ **Inventory Total Retail Value**

Ever like to know what your inventory is worth at "full retail value"? Many users have requested a way to see the "Retail Value" of their existing inventory and this update provides a way. Previously, Counterman only provided for "Cost" value information only. This update allows the user to see the value of their inventory at Retail (selling price) value and at MSR (suggested retail) value when running a

⇒ **Bin Loc./Category Changes**

A new process in the Utilities Menu is now available which will "GLOBALLY" change either Bin Location (from one Bin Location to another) or Categories (from one Category to another). As items are relocated in your shop, you can now easily apply the changes to the Bin Location in Counterman. Additionally, Categories can be changed in a similar fashion to allow "Global" changes Categories. Thanks to Dave at "The Shop" in Ventura, CA for this suggestion.

⇒ **CATEGORY QQ added for Quoted items...**

Similar to the Category for "XX", we have further addressed the Category scenario here for items that are entered on the POS screen, but never sold, special ordered, or otherwise processed. If an item is "Quoted", (or for any reason, typed into the sales grid) at POS, a record of that inventory item is added to your inventory database automatically. The reason Counterman handles new items this way to enable you to perform different tasks on those items that cannot be accomplished unless inventory records exist for them. This new process applies a Category of "QQ" for anything that has been added to inventory through the POS screen as a "Quote" or otherwise processed. Just like the XX scenario, you can locate and make adjustments on these items if desired. Or, you can leave them as they are for a list of "Quoted" inventory items. Additionally, existing items with a "QQ" Category will be changed to "XX" if they are Special Ordered.

**SEND US YOUR SUGGESTIONS:**

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## UPDATED PRICE BOOKS (ON THIS CD)

\*\* = OEM OR RETAIL ONLY!

- |                                |  |                                |
|--------------------------------|--|--------------------------------|
| <b>AU</b> Aprilla USA          | <b>KM**</b> Kawasaki                       | <b>SB</b> Sullivan Brothers    |
| <b>AR**</b> Arctic Cat         | <b>KN</b> K&N Engineering                  | <b>SP</b> Sampson Motorcycle   |
| <b>BD**</b> Big Dog Motorcycle | <b>KW</b> Kustomwerks                      | <b>SM</b> Southern Motorcycle  |
| <b>BI</b> Bell Industries      | <b>MI</b> Motobooks (NO COST! RETAIL ONLY! | <b>SN</b> Sullivans USA        |
| <b>BM**</b> BMW Motorcycles    | <b>MU</b> Mid USA                          | <b>SZ**</b> Suzuki Motors      |
| <b>CA</b> Castle Sales         | <b>MZ**</b> Moto Guzzi                     | <b>TM**</b> Triumph Motorcycle |
| <b>CCI</b> Custom Chrome, Inc. | <b>PG</b> Piaggio                          | <b>TR</b> Tucker Rocky         |
| <b>FL</b> Flanders             | <b>PO**</b> Polaris (Victory)              | <b>VL</b> Van Leeuwen          |
| <b>HD**</b> Harley-Davidson™   | <b>PT</b> Power Twins                      | <b>YA**</b> Yamaha Motorcycles |
| <b>HO**</b> Honda Motorcycle   | <b>PM</b> Performance Machine              |                                |
| <b>JD</b> J&D Walter           | <b>RE</b> Rivera Engineering               |                                |

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The picture above is a "student concept" rendition of an Aprilia 1000cc. We just thought the image was interesting.

## INVENTORY CATEGORIES? For What? *(by Ralph Weaver)*

Categorizing your inventory can provide you with valuable information about your inventory, you may not otherwise ever see. If you have had the opportunity to be a part of Counterman training, you have a fairly good understanding of how this works. Whether you have or have not been trained in the proper use of Inventory Categories in Counterman, I would encourage you to read on...

To start, it is important to understand what an Inventory Categories are, and the intention behind them. Categorizing each inventory item will help separate your inventory beyond the realm of "where you buy it from." We all purchase (from several suppliers) things like: leather apparel, helmets, lubricants, gaskets and seals, chrome accessories, collectables, etc. Well, Categorizing these items can help provide the information necessary to utilize additional tools Counterman already has. You can use these tools to analyze how each Category performs on a sales level and how well each Category of items move in and out of your shop. For example, if you want to see how well helmets are selling, a report can be filtered to provide the information. However, it requires that each inventory item has a valid Category applied to it. The ideal means of accomplishing this task would be during the "Receive Stock" process in Counterman. As items are added to inventory, proper Categories can be selected. If desired, you can always go back later to change the Category for each individual inventory item, but using Categories from the get-go is the way to handle it if possible. *(The last paragraph in this article will explain how to setup Categories.)* Once you have established your Categories, it will be necessary to define which Category should be linked to each item in inventory. This may sound like a lot of work, but it will pay off in the end, and applying correct Categories to new items has been made easier with this new update. By default, any item added to inventory has a Category that matches the Vendor Code. This is because some users have decided not to use this tool. But if you'll take the time to do this process, you will have a great tool at your fingertips. If you have your Categories in place, just run the Inventory Activity Report and sequence it by Category to get all the sales related information for each Category. Existing Category users will find the new Category enhancements (see page 1) extremely helpful.

### **Setting Up Categories:**

To setup Categories, we recommend you attempt to make as few as possible, this will result in an easy-to-read report. Once you have your Categories defined, you can add them to Counterman. In Counterman Pro, access the Main Menu, select 1-Maintenance & Display, then 9-Table Maintenance, then 1-Category Table. You'll notice there is a record for each price book vendor already in this table. Press the h(insert key) to add a new Category. Enter the Category "Code", press v (tab key) and enter a "Name" for the Category. Repeat this process until all Categories have been added. Now as you add inventory to stock, just select the desired Category for each inventory item.

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