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:

⇒   **New Drop Shipment Logic in Place!**

As this industry relies more and more on the web for purchases and on-line stores, Counterman has made great strides in the area of "Drop Shipments" to aid in this process. A "Drop Ship" is when you sell an item to your customer without ever physically touching that item. In other words, many vendors allow for direct shipments from their facility direct to your customer. So the item can be advertised and ordered from you, but when the customer receives the item, it appears (to the customer) to come from your shop. However, it is actually "drop shipped" direct from the supplier. In this scenario it is not necessary to stock these items or handle them in any way. With this release (version 12/19/2008 or later), items can be flagged for "drop ship" from the POS screen. A separate ordering area is also available for ordering drop shipment items and will include the shipping address for the customer. We have also added a method of reconciling these "drop shipments" once you have verification from the supplier that the item(s) have been shipped.

⇒   **Receive Date to Order/Receiving Report**

Several Counterman users have requested that we add the actual "Receive Date" to the existing Order/Receiving Report. As this can be valuable information, the date each item was received is now included in this report.

⇒   **License Updates, Updated**

Multi-user license (or lease) updates can be a challenge when running this process from a workstation. Counterman has addressed this challenge and made the entire process much easier. It no longer matters if you are on the main (server) computer, or at a workstation (client) computer anymore. In addition, it is no longer necessary to know the mapped drive letter that represents the main (server) computer. Counterman has taken all the guess-work out of this process by coding it into the program itself. As long as you can receive email from a computer station that uses Counterman, this new process will be seamless. Where before, the process would need you to enter the drive letter associated with the main (server) computer, will no longer be necessary. This is now all handled internally.

⇒   **Activity Report Spacing**

On the Inventory Activity Report, Counterman has always included Grand Totals for all "inventory valued" items on the last page of this report. For shops out there who are fortunate enough to be doing enough business, these totals could crunch into each other making it rather difficult to read. Thanks go out to Jeff at Empire Cycles in Amityville, NY for this observation which resulted in the fix for it.

⇒   **Service Dept Report, Mail Labels, Call List**

Several users have requested a means in which to access customers that have had Service work done on their motorcycles. Not only a list, but a way to send out mailers to these customers too. So Counterman has added these features to the existing Service Department Report. You now have the opportunity to select many options at the top of the Service Department Report screen that includes: Summary Report, Detail Report, Customer List, Mailing Labels, and 30 (labels) per page. When selecting "Customer List", you will get a report, by customer that includes the customer's name address and phone number. This list can be used as a Call List to contact your customers that have had service done within the date ranges you entered at the beginning of the report. Additionally, if Mailing Labels is selected, you can have Counterman print out address labels for all of the selected customers too. The option to print on either 30-up labels is also available.

⇒   **Mail List Checkbox, Off if no Address!**

In an effort to keep a valid list of customers and insure these customers are included on your mailing lists, Counterman has always (by default) checked the Mail List checkbox for you every time a new customer is added to the system. However, this "default" action can cause some issues if address information is not

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UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD)

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

AJ	Adjure Lighting	**HO****	Honda	**PU**	Parts Unlimited
AD	Advantage Performance	**KM****	Kawasaki	**RE**	Rivera Engineering
BI	Bell Industries	**KN**	K&N Engineering	**RO**	Romaha
BM**	BMW	**KR**	Kerr Leathers	**RW**	Rowe USA
CA	Castle Sales	**KT****	KTM Sport Motorcycle	**SB**	Sullivan Brothers
CCI	Custom Chrome, Inc.	**MA**	Marshall	**SM**	Southern Motorcycle
CG	Cometic Gaskets	**MU**	Mid USA	**SN**	Sullivans USA
DS	Drag Specialties	**MP**	Motion Pro	**SZ****	Suzuki Motorcycle
FX	Fox	**MD**	Mustang Distributing	**TM****	Triumph Motorcycle
GW	Gardner-Wescott	**NL**	Nichols M/C Supply	**TR**	Tucker Rocky
HD**	Harley-Davidson	**PO****	Polaris/Victory	**WP**	Western Power
HH	Helmet House	**PT**	Power Twins	**YA****	Yamaha Motorcycles

IMPORTANT!

(NEW) = New Price Book Vendor!

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

Custom Chrome no longer has quantity breaks!

Couple of bike pics taken at the Big Twin West Show last year...

On-Line Shopping & Counterman?

That's right, and it's coming, and coming very soon too! As this industry moves closer and closer towards the enhanced technology that is available today, Counterman is making great strides in moving with it. There has been a very high increase in the number of on-line stores. Online shopping is becoming more and more commonplace. It has been predicted that US online shoppers will double to 132 million in the next five years. Obviously, the hectic schedules people have today necessitates a means of saving time and online shopping has met that need. Selling on the internet is a viable option to any business because of relatively low cost in getting started, along with the wide geographic range of customers that can be targeted. The possibilities are virtually endless. Another plus when considering selling online is, you don't have to stock the items you sell, provided the shipping time allows for enough time for you to order it and ship it out to your customer. There are also many suppliers who will drop ship these items for you.

With this information it is pretty easy to tell, an online store can and will increase sales if done in a smart fashion. First, consider the product or service you want to sell online and whether there is a market for that product or service. It will also be necessary to have your own domain name (website) to host the online store. Then consider the shopping cart you want to use. Potential shoppers will need a secure shopping cart to process their order and selecting one that enhances the shopping experience will help when that shopper considers returning to your site to buy more items. Having pictures available and valuable information about the product is also extremely helpful. With a eye pleasing , informative website and a comfortable check-out (shopping cart), you are on your way to making $$$ in your webstore!

Now how can Counterman help with all of this? I'm glad you asked… If you read the "New For Counterman Pro Users" on page one of this newsletter, we have already put in a process for drop shipments. By the time the trade shows in Cincinnati and Indianapolis are upon us, we will have the means of importing orders from a shopping cart directly into Counterman. So you can take your orders from your shopping cart and import those orders direct to the counterman POS screen for processing and tracking. And because Counterman allows for shipping from on-hand inventory and/or drop shipments from the same transaction, the entire process will be a smooth one. But we don't stop there. Counterman will also be capable of uploading inventory items directly into your list of items for sale on your online webstore too! Obviously, images are not stored in Counterman, so it will be up to you to link images to the inventory that gets uploaded. This process alone will save hours of time, while keeping your webstore up-to-date with the most current inventory and pricing.

Look for this new enhancement, along with additional information about setting up your online store by the end of January 2009! Counterman plans to debut this feature at the upcoming trade shows:

V-Twin Expo in Cincinnati, OH (booth #1111)
Dealer Expo in Indianapolis, IN (booth #7144)

See you at the shows!

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

⇒ **Mail List Checkbox, Off if no Address! (continued…)**

correctly entered. Counterman addresses this issue by checking to see if address information was entered when leaving the add/edit screen. If no address information exists for this customer, then the Mail List Checkbox will automatically be unchecked. The result should be fewer labels with no addresses. Sorry, but this is not retroactive. If you have existing customers with no addresses and would like to uncheck the Mail List Checkbox for a boatload of them, please let us know. We have available, a program that can take care of this process for you all at once.

⇒ **Cash Drawer Audit Totals Corrected**

In a recent update Counterman started totaling the columns on the Cash Drawer Audit Report. This is a handy tool that allows you to double check the totals on the Cash Drawer Summary page. It has been brought to our attention by Susan at Alter Ego Cycles that the Taxed and Non-Taxed Subtotals were not adding up correctly. With this new version, Counterman is adding these columns correctly.

⇒ **Safety Nets in Place for Setting Filters**

Users who have used the Filtered Reports area of Counterman software, likely already know what the available benefits are from the customization that this type of reporting can do for them. Adding new filters is a great way to go even further with these types of reports, by creating filters that can extract only the information you want. Until now, there has really been no policing the creation of custom filters to insure the filter is a valid one. We have addressed this issue by validating any new filters that are created. If you happen to put something in one of the filter fields that is not allowed (like a letter in a numeric-only field), Counterman will display information about the mistake and not allow you to save the filter until a correction has been made. Because this process is not retroactive and if you have existing filters that are invalid, Counterman will display a similar message to let you know that the filter will not be set. In these cases, the report will try to run anyway, but the output will not use the set filter. This should help in filter creation and filter selection when running any filtered report.

⇒ **F&I Enhancements**

As we continue to enhance the Counterman F&I module we have added two new features:

♦ **F&I Major Unit Reporting**

This is a filtered report where custom filters may be selected to view a list of Major Units. You can find units by color, model, stock number, VIN, etc… Customize this report by creating your own filter(s) too. This is a nice addition to be able to track and confirm existing and sold vehicles. The same "Safety Net" is in place for this newly added reporting that will validate any filters you create.

♦ **F&I Major Unit Purge**

A method of purging (erasing) old vehicles from the Major Units database has made the selection of vehicles much easier. This "purge" process can provide a list of Major Units that will be purged prior to actually purging them. Upon selecting the Major Unit Purge process, Counterman will provide a checkbox (which is checked by default) to provide a list of untis that will be purged, once the box is unchecked. Options to select Purge Units With Purchase Date Aged greater than XX-days, and/or by Unsold Units With Date Aged greater than XX-days can also be selected.

PLEASE!!! SEND US YOUR SUGGESTIONS:

EMAIL: tech@counterman.net
           ralph1@counterman.net
           support@counterman.net