

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:

customize the output for the items included.

⇒ **Flexible Pricing Update “ALL”**

There are two areas of consideration when updating the inventory pricing information within Counterman, both should be considered after “Updating Price Books”.

The first is optional and allows you to manipulate the selling price over (or under) the MSR (Manufacturers Suggested Retail) price. This process directly affects the actual price book file (not your inventory file). We have made this process faster and easier with this update. If you use the same flexible pricing percentages across the board for all price book vendors/suppliers, you can now choose to update “ALL” of them at the same time. Normally, this process is done by selecting one vendor/supplier at a time because profit margins vary between vendors/suppliers. To use this new feature, it is available as a new option from the Main Menu, 1-Maintenance/Display, 3-Flexible Pricing, 2-Adjust Price Books, 4-Adjust ALL Price Books.

The second is not optional. Although many Counterman users neglect this process, it is very important, as it will insure you have the most current pricing at all times. This process is: “Update Inventory From Price Books”. The idea here is to use vendor/supplier information to update any existing inventory records. This is accomplished by using the price book data provided by Counterman and it also allows for flexible pricing changes that you are in total control of. It is a procedure that (in the past) has been cumbersome, but a necessary evil. It takes a little time to process this information, but the benefits can be mind boggling. Whether or not you apply the “Flexible Pricing” process, you can now update all inventory records at once when running the process of “Update Inventory From Price Books”. This dramatically speeds up this entire process, while insuring you always have the most current pricing information for your vendors and suppliers. This feature is available from the Main Menu, 1-Maintenance/Display, 3-Flexible Pricing, 3-Update To Inventory, 4-ALL Vendors. →

⇒ **Inventory Modification Reporting**

Several users have requested a means of tracking changes made to inventory quantities. Although there has already been security applied to the quantity field in inventory, even those employees with access to making changes can now be held accountable for editing the available balance. This new report has been created to provide a way to find out which inventory items have had any quantity changes manually adjusted, along with who actually made the changes. This new report, called the “Inventory Modification Report” can be found in the Reports Menu.

⇒ **Transaction History by Vendor or Category**

The “Transaction History Report” can help dramatically by providing history information on a specific customer, item, sale type, etc, etc... But one thing you could previously not do is filter items sold under a specific category or vendor. With this update we have addressed this and now this report can include a specific category or vendor. This can be very helpful when you want to see how many times (during the date range you enter) you sold a certain item. We have also added sub-totals with profit percentages and a sales grand total at the end of the report. Need to see the actual number of invoices for each time you sold an item? This report will provide the answers, complete with Customer Number, Product Code, Description, Invoice #, Quantity, Price, Date, Extended Price, and Profit %, all within the specific vendor or category you select. Additionally, this report allows for filtering so you can further



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UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 26-NEWLY UPDATED PB'S!

IMPORTANT!!! CUSTOM CHROME IS NOW PROVIDING PACK QUANTITIES, RESULTING IN PACK QUANTITY BREAK DOWNS FOR CCI ITEMS!

AD	Advantage Perf.
AR	Arctic Cat
BM**	BMW
CA	Castle Sales
CCI	Custom Chrome
FX	Fox Racing
HD**	Harley-Davidson
HH	Helmet House
KA	Kuryakyn
KM**	Kawasaki M/C

KN	K&N Engineering
KT**	KTM Sport M/C
MA	Marshall Dist.
MT	MC Advantages
MU	Mid USA
PO**	Polaris/Victory
RO	Romaha
SB	Sullivan Brothers
SM	Southern Motorcycle

SN	Sullivans USA
SZ**	Suzuki Motorcycle
TM	Triumph Motorcycle
TR	Tucker Rocky
VT	Tedd's V-Twin
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 is now supplying quantity breaks in their price book!

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Be sure to stop by the Counterman booth #642 at the V-Twin Expo in Cincinnati, OH this year! We will be debuting a new "front end" for Counterman point of sale screen processes!



T E C H T I P S

UPDATING INVENTORY FROM PRICE BOOKS

Counterman goes to great lengths to make sure you have the most current and up-to-date pricing information from the vendors and suppliers you use on a regular basis. Part of our staff is dedicated to contacting these vendors/suppliers on a regular basis in order to get this valuable information from them. After which, we convert this data to be used within Counterman DMS software. Once these processes are completed and tested, we make them available to our users immediately on line. If you have downloaded price book files using the program called "Counterman Update Manager" (Counterman supplies this program free of charge), then you already understand what a benefit this can be. If you would like to use this feature, the download for the Counterman Update Manager is available at our website. Additionally, we release a Price Book Update CD on a quarterly basis for those users who cannot (or prefer not to) download them. Bottom line is, we make a very strong effort to insure you have the latest information from your vendors/suppliers as quickly and accurately as possible. However, we still get calls from users who say something like: "The prices Counterman show for this (or that) vendor are wrong!" Obviously this does happen from time to time, but more often than not, the cause is not the Counterman software. Several things come in to play that can cause incorrect pricing information. First and foremost is whether we have received current data from the vendor/supplier, as many of them make it difficult to obtain the price book data on a regular basis. But the biggest reason is due to the user (you), who has not properly updated inventory records within the software to properly reflect changes from the vendors/suppliers AFTER running the price book update Counterman supplies. This is a process that is definitely necessary if you want to keep your pricing information as current as possible. In the past, it was a little cumbersome because

New! For Counterman Pro Users (continued)

⇒ Price Book Listing Report

This report has been updated to work the same way that the "Inventory Listing" report does, where you can select the column headings and the pricing for each. For a long time this report was not working correctly, but with this update it works very well and enhancements have been made to make it even better. Additionally, price book files can now be exported to an Excel spreadsheet file right from this report by simply selecting a checkbox. Excel spreadsheet files can be used for multiple purposes. This report can be found from the Main Menu, 3-Reports, D-Price Book Listing(s), and from 4-Filtered Reports, E-Price Book Listing(s).

⇒ Special Order Label Reprints

If you ever need to reprint a Special Order Label, the process has always been available from the Inventory Menu, but requires you to enter the vendor code and date received. With this update we have made this process a little simpler by allowing the Special Order Label Reprint from the Special Order Maintenance screen. This is a secondary means of

printing a Special Order Label, should you have an issue where the label either jammed or did not print during the receiving process. From the Special Order Maintenance screen, with the record you want on the screen, select "Print" and Counterman will present you with a question to print either the label or the Special Order record.

⇒ 40-Column Receipts for Service?

Since allowing for the smaller 40-column receipts for point-of-sale transactions on thermal printers, users have requested the ability to print Service and Warranty Repair Orders on regular size paper because there is much more information on this type of transaction. With this release, users of the 40-column receipt printers can now expect their service orders to be sent to their report printer. Report printers must be setup to allow for 80-column printing (normal 8 1/2" x 11" paper) to allow for all of the report information to print. This will only be for users of the 40-column receipt printer and all other customers will not be affected by this feature. Special thanks go out to Rich at Ride or Race Moto Source in Reno, Nevada for this great suggestion!

the process of "Updating Inventory From Price Books" meant you had to do each vendor/supplier individually, one at a time. Counterman originally did this on purpose so you could control how each vendor/supplier updates separately. However, because most users now simply update the information the same way across the board for all vendors/suppliers, we have made this process much easier with this update, where you can update all of them in one process.

Just in case you are not running this process, I have included some basic information on how to begin below:

1. After updating your price book files by using either the Counterman Update Manager, or by running the Price book Update CD, it will first be necessary to Update Price Books from the Utilities Menu, 5-Update Price Books. This will license the price books and allow you access to them.
2. Although I'm not covering the details of this process here, if you plan to apply "Flexible Pricing" or "Hot Rodding" to the price book files, this is when you want to run this **"optional"** process.
3. Backup your Counterman data! If, for some reason, you're not happy with the results, restoring a backup is the easiest way to put things back to where they were before performing this process.
4. To "Update Inventory From Price Books" (if multi-user license make sure Counterman is closed on all stations except for the station you will be using) and run it from the main (server) computer if possible (it's faster).
5. From the Main Menu, select 1-Maintenance/Display, 3-Flexible Pricing, 3-Update To Inventory, 4-ALL Vendors. Be careful when answering the questions on the screen that follows, most notably, do not update "Cost" when selecting to Update ALL! This will cause you to lose your cost information because you are replacing the existing cost with the price book cost. We're happy to assist with this process too!

... Ralph Weaver

