

Counterman Newsletter

New!

For Counterman Pro Users



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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:

⇒ **Length for Cash Drawer Worksheet**

Special thanks to Dave at The Shop in Ventura, CA for this enhancement. The Daily Worksheet on the Cash Drawer Report has been stretched to allow for additional room and now uses the entire sheet of paper.

⇒ **Warranty Quote?**

Special thanks go out to Jeff at Empire Cycles for this one. When printing a Warranty Repair Order as a "Quote", the words "Warranty Quote" will now be printed at the top of the printed quotation.

⇒ **F5 Posting from BinLoc Field**

Requested by several users who have been unable to receive stock (by line) once they have tabbed into the BinLoc field. This has been taken care of and pressing F5 from the BinLoc field will now post receipt of the item. This should relieve the confusion on receiving parts by line.

⇒ **Discount Message**

One of the features that Counterman has always had, is a message that prints "Today you saved \$5.53" (or whatever the actual amount was in savings), if there was a discount applied to the transaction. If you turn the discount message off, this message will no longer

printing on the invoice.

⇒ **Special Order Totals**

Ever want to inform your customer of the entire total after the invoice prints? Or if you take a deposit on a Special Order and you need to be able to plainly see the balance that will be due when your customer picks up the item? Here's another implemented suggestion from Dave at The Shop in Ventura. On the line that shows the customer's Special Order Deposit amount, is an added line that shows the entire Special Order (Back Order) Amount + Tax.

⇒ **Service Order/Special Order Linking**

This is likely our biggest update for this release. Many users have requested this feature and it is finally here. When Counterman Pro was released, in 2002, we soon found it necessary to allow existing Special Order items to be "linked" to a Service Repair Order. The simplest way to achieve this was to create a window, whereby you could select the item(s) to "link". This worked very well, however, the item(s) did not show in the sales grid of the transaction, resulting in confusion. As of this update, all "linked" Special Order items will now show in the sales grid. If there was a previous deposit on the Special Order item(s), that money goes to the customer's general account balance. The second thing Counterman users wanted was to be able to cancel, or "unlink" the Special Order item(s) from the Service Order. You will notice a new button that allows you to unlink these items, which will put them back to the normal POS sales screen. Of course, you can re-link them, if so desired...

SEND US YOUR SUGGESTIONS:

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UPDATED PRICE BOOKS (ON THIS DATE CD)

AR Artic Cat	KM** Kawasaki	SM Southern Motorcycle
BD Big Dog	KN K&N Engineering	SS S&S Performance
BI Bell Industries	KK KK Motorcycle	SB Sullivan Brothers
BM** BMW	KW Kustomwerks	SN Sullivans USA
CA Castle Sales	MU Mid USA	TM** Triumph Motorcycles
CV Cycle Visions (new)	NL Nichols M/C Supply	TR Tucker Rocky
DS Drag Specialties	PU Parts Unlimited	WP Western Power
EM Eastern Motorcycle	PA Paughco	WB White Brothers
FX Fox Racing	PO** Polaris	** OEM or Retail Only!
HD** Harley-Davidson	PT Power Twins/Parts Canada	

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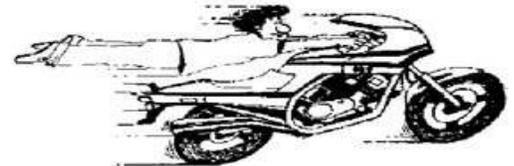
COUNTERMAN UPDATE MANAGER

In our last update we made a new program available to you to enhance the updates for Counterman. This update not only keeps your price books as current as possible, it also checks for any program and license updates. Technology has made it possible for us to capitalize on the many features available to us on the web. If you are a Counterman user, the Counterman Update Manager should be at the top of this list. This awesome program will compare your existing price book files and let you know if there are newer versions available. In addition, Counterman "License (lease) customers can update their program fast and easy. We even take it a step further as you can update your program file to make sure you have all the latest and greatest tools Counterman has to offer. All this is available to current Counterman customers and you no longer have to wait for the next price book update CD to get them. If you haven't installed this incredibly helpful tool, consider doing so at your earliest convenience.

To be able to use this new feature, we call the "Counterman Update Manager", you will need an internet connection. We recommend a fast connection (broadband) especially if you will be getting Price Books as most are rather large, but any connection will do. You will also need to close out of Counterman on all your stations, just like when you run your Price Book CD's. And for the Counterman PRO users, you will also need to run "Update Price Books" from the "Utility" menu (just like you would for a normal CD Price Book Update) after the update has completed.

After you run the enclosed Price Book CD and choose to install the Counterman Update Manager, you can then access this new program by clicking on your "Start" button, then "Programs" (or "All Programs"), and then "Counterman Update Manager." We're excited about this new tool and hope you are too. As always, just give us a call if you have any questions.

Email: support@counterman.net **(800)937-6590**
tech@counterman.net



Are You Running "Month End?"

This month we would like to address an extremely important issue regarding End Of Month/End Of Year that we seem to get many calls on. To help with this procedure, we have an instruction sheet available of the basic procedures for month end. This includes step-by-step procedures on how to carry out each procedure and is available (FAX) upon request. Additional information can be found in the Counterman Training and Reference Manual.

Because Counterman is a "real time" program, it is critical that these procedures are carried out at the end of each month. One of the more critical reports is the "Update Sales History EOM/EOY". This report provides a huge amount of information about how your inventory is moving through your shop, in addition to the actual value of the inventory you currently have on hand. In order to insure the accuracy of this report it is necessary to make sure that there are no inventory items with a negative balance.

So, the first report should be a filtered "Physical Inventory Worksheet" using a BALANCE -LT- 0 (balance less than zero) filter. After this report is run, you can investigate the discrepancies, make the appropriate adjustments to the inventory levels, and get increased accuracy from the information supplied by the "Inventory Activity Report". The Inventory Activity Report can be ran at any time; and it is recommended to be ran before running the "Update Sales History EOM/EOY" process. This will insure that the proper totals are moved over into the sales history for each individual item.

After this report runs, your sales history totals will zero out for the current month; making room for a new month of totals. This history is stored in inventory history and is used for valuable information when re-ordering inventory and reporting how often you sell individual items. This process may seem like a hassle to you, but someday, you'll thank me...

... Ralph Weaver