

Counterman Newsletter

New! For Counterman Pro Users



INSIDE THIS ISSUE:

New Update for Counterman Pro Users	1
Updated Price Books On This CD...	1
CONTACT INFO COUNTERMAN	2
TAKING ADVANTAGE OF COUNTERMAN?	2
New Update for Counterman Pro Users (...continued)	2

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:

⇒ Automatically add Shop Supplies?

After several requests (most recently from Steve over at SKS Motorcycles in Lilburn, GA) we have added the ability to automatically add Shop Supplies to Service Repair and/or Warranty Repair Orders. In order for this to work, it will be necessary to have a pre-setup product code of "SS" for "Shop Supplies", PLUS, a text file has to be present in the path (on the server station) called: "SHOPSUPP.TXT". We made the decision to control this enhancement with this TXT file so we could add this feature exclusively for users who request it. If you would like to add this feature, just give us a call and we'll help you get it all setup, it only takes a minute...

⇒ Detailed Credit Card Breakout

Here is another feature available for you, made upon request and again controlled with a text file. This feature comes to us by suggestion from Eagle Rider in Las Vegas, NV; performs a detailed tax breakout of all payment methods on a summary level, as part of the Cash Drawer Report. The additional page on the cash drawer report will summarize each payment method, Total Sale, Taxable amount, Non-Taxable amount, and Total Tax charged for each payment method. This feature is controlled with a text file named: BREAKOUT.TXT must reside in the Counterman path. If you would like to add this feature, just give us a call and we'll help you get it all setup, it only takes a minute...

Smaller Receipts for Thermal Printers

Thanks to Bikers Edge in Whichita, KS for this cool suggestion: A nice enhancement is now available upon request to print receipts (invoices) on a 40 column Thermal Receipt Printer. Thermal Receipt Printers are approximately 1/4 the size of a normal laser printer and will help save a tree or two by print-

ing all invoices on half the paper normally required. We have formatted this smaller receipt to include as much data as possible, however, most of the description will not be printed due to size limitations. If you are interested in implementing the "Smaller Receipts" in your shop, give us a call and we'll help you get it all setup.

Reorder List Enhancements

A little known keystroke, available from the POS screen that can help save time has always been available in Counterman, where; when the cursor is on the Product Code area of any transaction, then F2 (Stock Check) is pressed, the part number on the F2 screen (press spacebar) can be pasted directly into the POS sales grid. As of this update, you can now use this same function from within any Reorder List. Additionally from the Reorder List, is the confirmation of multiple vendors when refreshing (F3) the order. The F3 "Refresh Order" will now list all vendors previously on the order and allow for editing and/or adding vendors. When the order is refreshed, only those vendors included in this list will be included in the order.

⇒ Create Filter Button

Counterman has always had the ability to add new reporting filters (F11) in order to customize any Filtered Reports currently available. To add to Counterman's "click-ability", all filtered reports now have a button you can click to add a new reporting filter. In this screen, you can design your own filters. Not that this is a new "function", just a new and easier method of opening the Add New Reporting Filter screen.

⇒ Other Phone Number Search

Several users have requested a means in which to access a customers account by using the secondary telephone number. Here it is... From POS, when accessing a customer by their telephone number, Counterman will now search both the primary Phone Number, and the "Other" Phone Number fields in the customer record to locate a particular customer. Often times customers have multiple telephone numbers and this enhancement makes searching for those customers much easier. We should note that, if the customer is in fact, located on the "Other" Phone number, the primary phone number will continue to be displayed on the POS screen. Thanks to Sucker Punch Sally's for this one!

Continued, on next page...

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!

AD	Advantage Perf.
AR**	Arctic Cat
BD**	Big Dog
BI	Bell Industries
BM**	BMW
CA	Castle Sales
CCI	Custom Chrome, Inc.
CO	Colony
DI	Dixie International
DS	Drag Specialties
EM	Eastern Motorcycle
HD**	Harley-Davidson

HH	Helmet House
HO**	Honda
JM	Jim's Machining
KA	Kuryakyn Holdings
KM**	Kawasaki
KN	K&N Engineering
KT	KTM Sport Motorcycle
MA	Marshall
MU	Mid USA
NL	Nichols M/C Supply
PA	Paughco
PO	Polaris/Victory

PR	Pro One Machine
PT	Power Twins
PU	Parts Unlimited
SM	Southern Motorcycle
SZ**	Suzuki Motorcycle
TA	Targa Accessories
TM**	Triumph Motorcycle
TR	Tucker Rocky
VT	Tedd's V-Twin
WP	Western Power
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

Santa Maria Software



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Couple pics of a chopped
"Vincent" taken at the Big Twin
West Show last year...



TAKING ADVANTAGE OF COUNTERMAN?

Are you taking full advantage of what CounterMan has to offer? Did you know that CounterMan is designed with the main intention of saving you time and money? Have you ever wondered about the different aspects and profit margins of your shop? Do you take the time to read about the enhancements that are printed in this newsletter? If you have answered "no" to any of these questions, we would like to help you better understand what our goals are here at Santa Maria Software, with and through CounterMan DMS and how we can help you with things like: increasing profit margins, decreasing inventory levels, and have increased efficiency in your service department. The following are some steps I would take on a regular basis to insure my shop was operating at peak performance at all times...

REPORTS

CounterMan provides reports as a means to keep an eye on your shop's performance. There are several reports available that can help you understand why your business is doing, how it is doing. Examining your Parts Dept and Service Dept with reports that are designed specifically for each.

Filtered Reports can further dissect things by isolating the information contained within the report, based off of the information you are looking for, resulting a customized reporting feature. Finding the items in your store that have good (or bad) margins, and/or fast (or slow) moving items can help you in your purchasing decisions. Selling off slow movers to increase cash flow makes it easier to keep the items that sell on hand. Bottom line is, by diving into many of the reports CounterMan has to offer, you have information at your fingertips that can aid you in making the business decisions necessary for a successful motorcycle shop.

PURCHASE ORDERS

If you are not using CounterMan to generate your Purchase Orders, you are missing out on an incredible time-saving tool. It is important to mention here, CounterMan is known as a DMS, which is to say: Dealer Management System. As with any system, all aspects of your business should be filtered through CounterMan. If this is done properly, CounterMan can provide the information and answer the ques-

tions you (or your customer) may have at any time. Now back the Purchase Orders... As you generate a purchase order, CounterMan checks for any existing Special Orders that have not been ordered from the supplier(s) yet and will populate the P/O with these items, in addition to any items that have fallen below normal stocking levels. Recent enhancements can also build a file that can be later uploaded to the suppliers dealer websites. So from the onset, CounterMan provides the items on the P/O, then allows for importing these items to the supplier's dealer websites, resulting in a posted and ordered purchase orders without the need to type in individual part numbers!

ENHANCEMENTS

CounterMan is successful because we hear you when you speak. We listen your suggestions and make changes to the software to help make life easier and more profitable in your shop. We would urge you stay tuned for new enhancements to the program, as we welcome (and need) your suggestions!

— Ralph Weaver

New For CounterMan Pro Users (...continued from page 1)

⇒ Previous Month End Processes, NOT ALLOWED

We have ran into several instances where users have run month end processes for previous months. As you may (or may not) know, CounterMan is a "Real Time" program and sales history information is collected as it happens. So closing a previous month can only cause some type of unwanted results. A safeguard has been implemented within the program to prevent the possibility of running a month end process that has an older month than that of the previous updated information.

⇒ Ctrl/Y Leaves the Cursor at the Next Line

Have you ever had this experience before? You have one of those long Service Repair Orders and, using the Ctrl/Y button to delete an existing line item (which works well), but only to find your cursor has moved all the way down to the end of the entire transaction? This was happening because CounterMan always wanted to end up on a blank line and the nearest blank line was at the end of the transaction. Thanks go out to Rachel at Suckerpunch Sallys in Scottsdale, AZ for bringing this to our attention. This annoying little issue is now a non-issue. As of this update, deleting a line item from any transaction will result in dropping the cursor down one line. This should help in keeping your place, when going through those long crash jobs, or any transaction that has multiple items on it. This will also enhance the ability to "put things where you want them" on the invoice too. Additionally, in case you did not already know this, if you ever need to insert a blank line in between two items on the POS screen, you can easily accomplish this by moving the cursor to that line and pressing the "Insert" key. This allows you to add items in between the lines, or just put a "space" between items. This "space" will print as a blank space too.

⇒ Part Number Merge Process

Here's another fine example of how CounterMan listens to their users and makes changes for the greater good. Again we give thanks to Rachel over at Suckerpunch Sallys in Scottsdale, AZ for this new and very cool feature. This

can be found in "Inventory Maintenance" and is designed to actually merge two different part numbers into one. The issue was; there are two part numbers and they are virtually the same item. Either superseded or maybe purchased from two different vendors. In any event, they have different part numbers and both have some sales history. This process will merge the sales history and the available quantities together, while applying the "merge-to" as the valid vendor code. The process will also flag the "merge-from" item as obsolete, while placing their respective part numbers into the related part number fields to let the salesperson know that the old number should not be sold anymore. Here is how it works: From Inventory Maintenance do a "Find" for the item you want to merge from. Press X (or click the XFR button) to transfer the information. Enter the part number you want to transfer TO. If CounterMan does not find this item existing in you current inventory, it will just transfer the information into the new number. However, if CounterMan DOES find this number in your existing inventory, there will be a confirmation window that will pop up and ask if you want to transfer the information from one part number to the existing one, resulting in "merging" the data of the old part number into the Transfer TO part number.

⇒ F&I Enhancements

Two F&I enhancements have been added to this update: First off, trade-in values are no longer considered when calculating profit margins on the sale of a vehicle. Additionally, tax amounts can include (or not include) the value of the trade, plus or minus the payoff amount. Secondly, previously sold VIN numbers were not allowed to be sold again. Due to taking in trades which were originally sold by the same shop, this is now allowed. Thanks to Lowell and Amber out at Bikers Edge for these great F&I suggestions!

PLEASE!!! SEND US YOUR SUGGESTIONS:

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