

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:

⇒ **Increased Speed Generating ReOrders**

A change made in how the ReOrder List is generated has provided much faster speed for the process. As a result, generating large ReOrder Lists are displayed much quicker. Thanks to Randy at Cycle Visions in San Diego, CA for his patience and perseverance in getting this process up-to-speed.

⇒ **Special Order Tax Displayed**

Tax on Special Order transactions can be difficult to understand. Technically, you do not apply any tax amounts collected when your customer initially places a Special Order in your shop. At this time, Counterman records a "Deposit on Account" for the customer and attaches this deposit to the item. This way, the deposit amount will only be applied when the customer picks up the Special Ordered item. That said, if you accept 100% deposit on your Special Orders, the tax total is included in the 100%, and this is where the process can cause some confusion. Even though the customer is paying the entire amount (including tax), Counterman does not apply the deposit amount against the calculated tax until the item is actually picked up by the customer. Some customers have requested to know what the exact tax amount is, before the initial transaction is processed. With this in mind, and as of this update, we have added a field to the "Special Order Deposit" window, which will display the "PIF Tax" amount (PIF=Paid In Full) for all items that have been flagged for Special Order. In addition, this amount will be displayed in red on your screen. Thanks to

Warren at Warren's Cycle in Round Lake Heights, IL for this great suggestion.

⇒ **Special Orders on Hold Service Files**

Counterman has always allowed users to delete "hold files". A "hold file" is a transaction that has been placed on hold until it can be edited and/or completed. By default, these "hold files" should be deleted after they are processed. However, deleting them is totally up to the user (you). Some users can get concerned when deleting anything on a computer, no matter how well they understand the implications of doing so. Once a "hold file" has been processed, there is normally not much reason to retain it; because once it has been processed, the transaction can easily be displayed to screen or reprinted. Consider what would happen if one of these "hold files" gets deleted with open Special Orders pending? Obviously the Special Order items "should" be either taken off of the "hold file", by moving to a normal P.O.S. screen for the customer, or cancelled altogether. As of this update, Counterman will not allow "hold files" to be deleted until any open Special Order items have been dealt with first. Special thanks go to Shoeman at Shoeman's Custom Cycle in Reno NV for this update.

⇒ **Where's my Cursor?**

Counterman has gone to great lengths to put the current active field in YELLOW, so you can always tell what field Counterman is active in, at any given time. When "Recalling" a "hold file" Counterman would always set the cursor in YELLOW on the first upper left field, under the "Product Code" column. However, if the "Recall" is a Service Repair Order, placing the cursor (in YELLOW) at the top upper left field has been known to cause some havoc. If the user is not paying attention, it is easy to overwrite the first item on the recalled Service Order. With this update, all service related "Recalled hold files" will set the active cursor field (in YELLOW) in the product code column, UNDER the LAST item on the screen, in a blank field. Thanks to Andy at Signature Cycles in Eleva, WI for this one!

INSIDE THIS ISSUE:

New Update for <i>Counterman Pro Users</i>	1
Updated Price Books On This CD...	1
CONTACT INFO COUNTERMAN	2
New Update for <i>Counterman Pro Users</i> (continued...)	2
<i>Counterman Pro</i> TECH TIPS	2

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 34-NEWLY UPDATED PB'S!

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
BI	Bitwell
CA	Castle Sales
CCI	Custom Chrome
DS	Drag Specialties
FX	Fox Racing
HD**	Harley-Davidson

HH	Helmet House
JM	Jim's Machine
KA	Kuryakyn
KM	Kawasaki M/C
KN	K&N Engineering
KT**	KTM Sport M/C
MA	Marshall Dist.
MU	Mid-USA
MW	Midwest Motorcycle
PO**	Polaris/Victory
PU	Parts Unlimited

RE	Rivera Engineering
SB	Sullivan Brothers
SM	Southern Motorcycle
SN	Sullivans USA
SP	Samson Exhaust
SS	S&S Performance
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!
(or retail prices only will be provided)

Custom Chrome no longer has quantity breaks!

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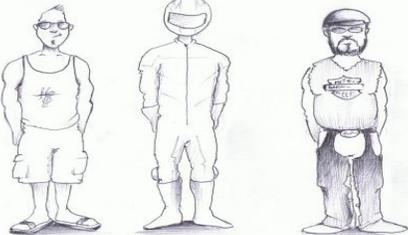


COUNTERMAN

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SQUID ORGAN DONOR MECHANIC



TECH TIPS

INTERNAL PAYMENT CODES

Counterman provides several "Internal Payment Codes" that allow you to virtually sell items to your shop for various reasons. Most of our long-time users understand how using these "Internal Payment Codes" can relieve inventory without affecting the tangible cash flow on the daily "Cash Drawer Report". You may ask, "Why would I want to sell anything to myself?" The short answer is, there are several reasons to want to do this. These include, but are not limited to:

- ◆ New or Used vehicle "add-ons"
- ◆ Service "come-backs"
- ◆ Service Department "consumables"
- ◆ Advertising & Promotion and give-away products

And the list goes on... Anytime you find yourself in a situation where you need to remove an item from inventory, but a customer is not directly purchasing that item, it can likely be charged to an "Internal Payment Code". Some examples would be: If you happen to have a used Sportster for sale and you believe it would sell faster if it was lowered and had forward controls; then you could charge the parts and labor out to the "Internal Payment Code" for "Used Bike Sales". Or if your mechanic adjusted the valves on a bike and just happened to pinch the rocker box gaskets on reassembly, you could charge the parts and mechanic labor to the "Internal Payment Code" for Service Department. The same goes for lubricants, brake cleaner, chemicals, misc nuts and bolts, etc... that the service department "consumes" (by the way, you should also be charging the customer for these things under Shop Supplies, but that's a different tech tip). Then there is an "Internal Payment Code" for the Parts Department. Personally, I used this code for charging out give-away stuff. You give a t-shirt to a customer and it makes him feel good that he got something for free. However, if you keep

New! For Counterman Pro Users (continued)

⇒ Excel™ Export Includes Descriptions

Previously, when running the Inventory Listing Report and exporting it to an Excel™ spreadsheet, inventory descriptions were not included. As of this update, the inventory descriptions will be included with the Excel™ export file.

⇒ Service Scheduler Now Available!

Counterman is proud to release the internal "Service Scheduler" for this update. Please be aware of the fact that this feature will be enhanced to meet your needs. We will continue to strive to make this "Service Scheduler" a tool that is easy to use and functional for your shop. We encourage your input for any future changes and enhancements.

You will notice a new button and hot key in the column of buttons on the top/right in the P.O.S. (point of sale) screen. Click this option (or press F12) to open the "Service Scheduler". The "Service Scheduler" uses the "mechanic code" to link to the calendar date(s) for each scheduling. Choosing a "mechanic code" is required, because we are scheduling me-

chanic's dates and times. Should you want to view the existing schedule for that day, it is necessary to first enter a mechanic code in order to access the "Service Scheduler". Once a "mechanic code" is selected, you can view that mechanic's scheduling to see their available time slots for any given day. If the schedule for the selected mechanic doesn't work for the customer, you can select a different mechanic, or a different day/time. We have also provided a "Notes" area, where you can insert any important information connected with the repair. The inserted "Notes" will help when the customer comes in for his appointment. Once the Scheduler window is open, you can view additional scheduling for any particular day as a whole and print the daily scheduled items for any day you wish. This allows you to view any openings you may have for all mechanics at the same time for any given day. It is important to understand, this new "Service Scheduler" is linked to the Mechanic and the Date. Please take the opportunity to put this new "Service Scheduler" to the test and let us know if you have any ideas for future enhancements!

track of these types of give-aways, they can be a write-off under "Advertising and Promotion" at the end of the year. All "Internal Payment Codes" are entered at the end of the transaction, in place of regular Payment Codes. For instance, where you would normally select 1=Cash, 2=Check, 3=Visa-M/C, etc... This is where you would enter the appropriate "Internal Payment Code". Although "Internal Sales" will not affect the cash in/out of the drawer, they are reported as part of the Cash Drawer Report and can be filtered through the Invoice Audit Report also. Below is a list of all of the available "Internal Payment Codes":

- 10.....New Bike Internal Sales
- 11.....Used Bike Internal Sales
- 12.....Internal Sales to Service Department
- 13.....Internal Sales to Parts Department
- 14.....Exclusive, Returns to Vendors

The last "Internal Payment Code" of 14, not yet discussed, is designated for parts returns to Vendor(s). To use this function it will be necessary to first setup the vendor as a customer. When doing so, be sure to click the "Resale" flag and set them up as a Cost+0 (zero) customer. When starting a transaction and Counterman sees you have chosen a customer who automatically gets a Cost+0 (zero) discount, you will be asked to enter the percentage for any restocking charge the vendor may be applying for the return. If there is no restock charge, you may simply ESC (escape) out of this window and continue with the return. Once the transaction has been processed reconciling the Vendor Returns to any credits received can be done through a Menu option. Vendor Returns Reporting is also available to provide proper tracking of all returns owed and credits provided. If you need further explanation of this process, please contact our helpful technical support staff. It is our desire to help in any way we possibly can...

 ... Ralph Weaver