

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:

“Summary Report is selected the individual total detail for each invoice is not printed, but the “Net Sale” total is, providing a report that will show a summarized level of how much each of the customers spend within the date range selected. Another great suggestion from Jeff over at Zipper’s Performance.

⇒ **Emailing Invoices/Quotes Setup Process**

Counterman has had the ability to email PDF copies of invoices and/or quotes from within the software for a long time. We now have a setup program that takes the pain out of getting this working. All you need is to have Outlook or Outlook Express setup as your default email program and this new setup process will do the rest. It is downloadable from www.counterman.net, so please let us know if you’d like to enable this feature.

⇒ **Recall Transactions Creation/Modified Dates**

When recalling a service repair order, many users have requested the ability to easily see when the service began, and when was it last modified? This is now displayed right on the “Recall” window.

⇒ **Print Summary or Detail From Inv. Maint.**

The ability to view Sales History Summary or Detail has always been available from Inventory Maintenance. With this update you can now easily print this information after viewing it by pressing F7.

⇒ **Old Inventory Report**

This new report has been added from a request by Doc’s Motorcycle Parts, Inc. in Waterbury, CT. It allows you to choose the date “Added Prior To” and the date of the “Last Sale Prior To”, with the output including Part Number, Description, Bin Location, Balance Available (will only be included in the report if one or more) Cost, Price, Date Added, and Date of Last Purchase. This report should be highly valuable in targeting inventory items that are slow movers, and/or have been on the shelf for way too long. Once you have these items selected, you can sale tag them and use the dollars for inventory items that your customers actually want. This is another great tool to help you control your inventory.

⇒ **Order Receiving Report Enhancement**

An enhancement to the existing Order Receiving Report has been added to include (and print) the actual “Received Cost” of each item received. In addition to providing a grand total for the selected items. This can be helpful if you ever want to know the actual value of received items.

⇒ **Transaction History Report “Name Sort”**

Counterman’s “Transaction History Report” has been enhanced yet again, to include the profitability of individual customers. If you select a Report Sequence by “Name”, this report will now include the Cost, Extended Price (sold for), and the profit margin % for individual items. This is a valuable report that can help show your profit for individual items on a customer level. Thanks to Jeff at Zipper’s Performance for this great suggestion.

⇒ **Invoice Audit Report Enhancement**

This is a nice enhancement to the existing “Invoice Audit Report”. Once the report is selected and a Date Range has been entered, choose either a “Summary or Detail” Report, then select a Report Sequence by “Name”. If you want to include only those customers who get a specific pre-set discount, you can enter the “Discount Mode” in the field provided, otherwise just leave it blank then select the desired filter. The output of the “Detailed Report” will print (or display) the Customer Account Number, Customer Name, Lifetime Purchases, YTD Purchases, Invoice Number and Net Sale, with a total summarized for each individual customer. If a

INSIDE THIS ISSUE:

New! Enhancements for Counterman Pro Users	1
Updated Price Book Vendors On This CD...	1
CONTACT INFO COUNTERMAN	2
HLSM Interface for Counterman Pro Users	2
Counterman Pro TECH TIPS On-Screen Microfiche/Interface	2

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 46-NEWLY UPDATED PB'S!

IMPORTANT!!! CUSTOM CHROME IS **NO LONGER** PROVIDING PACK QUANTITIES, RESULTING **NO** PACK QUANTITY BREAK DOWNS FOR CCI ITEMS!

AC	Acerbis
AD	Advantage Perf. Dist.
AR**	Arctic Cat
BA	Barnett Tool
BM**	BMW Motorcycle
CA	Castle Sales
CO	Colony
CG	Cometic Gaskets
CCI	Custom Chrome
DI	Dixie International
DS	Drag Specialties
EM	Eastern Motorcycle
FL	Flanders
FX	Fox Racing
GW	Gardner Wescott
HD**	Harley-Davidson

HH	Helmet House
HT	Hot Toppers
KA	Kuryakyn
KM**	Kawasaki M/C
KN	K&N Engineering
KT	KTM Motorcycle
KW	Kustomwerks
MA	Marshall Dist.
MU	Mid USA
MW	Midwest Motorcycle
PA	Paughco
PM	Performance Machine
PO**	Polaris/Victory
PR	Pro One
PT	Power Twins
PU	Parts Unlimited

RE	Rivera Engineering
RO	Romaha
SB	Sullivan Brothers
SM	Southern Motorcycle
SN	Sullivans USA
SP	Samson Motorcycle
SZ**	Suzuki Motorcycle
TM**	Triumph Motorcycle
TR	Tucker Rocky
VH	Vega Helmets
VL	Van Leeuwen
WN	Win Products
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 has stopped supplying quantity breaks in their price book!

Santa Maria Software, Inc.
d.b.a. Counterman
P.O. Box 1239
151 W. Dana Street, Ste. 202
Nipomo, CA 93444

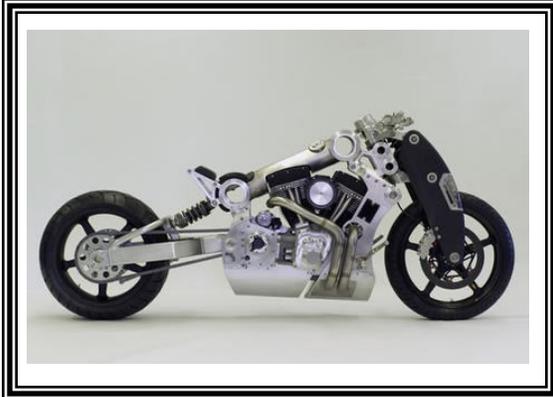


COUNTERMAN

Contacting Counterman is EASY!

Phone: (800)937-6590 (toll free)
Fax: (805)929-8267
Email: support@counterman.net
ralph1@counterman.net

Do you know this bike?



HLSM On-screen Microfiche

File Tools Notes Search Search Supersession Information View Image Viewing Tools Help Update Needed

REF. NO.	PART NUMBER	DESCRIPTION	FAT BOY REQ	Superseded P/N
1	765	PLUG	4	
2	895	SCREW	12	
3	8972	WASHER	2	
4	9215	NEEDLE BEARING, LEFT SIDE OF CAMSHAFTS	2	
5	11140	O-RING	2	
6	11273	O-RING	2	
7	12068	OIL SEAL	1	

TECH TIP

On-screen Microfiche — Counterman Interface

For anyone who might be too young to know what “microfiche” is, it’s a small sheet of film, about 6” X 4” with a microscopic exploded views, similar to what you would see in a parts book, stored on them. A magnifying “reader” was then used to be able to view these sheets in order to locate the item(s) your customer was searching for. This “Microfiche Reader” was about the size of an older small television set and the microfiche film sheets were usually stored in a file box. Even though this system took up much counter space, it was almost always less than having all those parts catalogs taking up even more room. The parts person would look up the item then write down the part number(s). The computer has provided a means to make this process even easier with increased features and benefits. You can build a list of items right from the Microfiche software for different makes/models, which is much easier than going from page-to-page and parts book to parts book. Basically, on-screen microfiche is an on-screen catalog/parts book.

In case you didn’t already know, Counterman interfaces with several on-screen microfiche systems, including HLSM, PartSmart, and Parts Manager Pro. Counterman allows a direct import of items selected from these “electronic catalogs” (or on-screen microfiche) systems directly into the point-of-sale screen. So looking up items, building a list of items, then just a couple of clicks to send them over to Counterman. From this point, you sell or special order them for your customer, as availability and current pricing for all of them will display immediately in the Counterman point-of-sale screen, the same as they would if you typed or scanned them in manually. Either franchised or non-franchised dealers, on-screen microfiche systems are the way to go. HLSM can take care of both franchise and non-franchise shops electronic microfiche needs and they carry many of the manufacturers, including: Arctic Cat, Can-Am, Harley-Davidson, Honda, Kawasaki, KTM, Polaris/Victory, Sea Doo/Ski Doo, Suzuki, and Yamaha. The screen shot in the image above is from

HLSM. In their software you can build a “Pick List” from as many of the installed manufacturers as you like. Once you’ve finished, just “Post” the Pick List. Then from Counterman, click “PckLst” (or press Ctrl/F11) to list the selected items to be imported into the point-of-sale screen. That’s all there is to it!

Above is a screen capture of HLSM Microfiche. As you can see, it is very similar to a parts catalog. Just select the area of the vehicle you need, then select the items your customer wants, by building a “Pick List”. Once that Pick List is complete, it is only a couple clicks to import into Counterman!

If you are interested in HLSM, Part Smart, or Parts Manager Pro Microfiche systems, here is their contact information:

HLSM Microfiche:

Website: <http://hslm.com/>

Phone Number: (570)719-9000

ARI PartSmart:

Website: <http://www.arinet.com/solutions/products/partsmart/>

Phone Number: (800) 755-6040

Parts Manager Pro:

Website: http://sbs.snapon.com/dealer/electronic_parts_catalogs/powersports.htm

Phone Number: (877) 417-4245 (Power Sports)

As mentioned, Counterman interfaces with all three of these systems. Not all of these companies have every make/model available, so you may want to check which one suits your needs best. Additionally, both ARI PartSmart and Parts Manager Pro may (or may not) service non-franchise dealers. Once you have made a selection and have signed up with the microfiche systems company that best suits your needs, Counterman is happy to help you setup the interface and supply the additional files as needed for your selected system. Once everything is in place and setup, we are confident you will find this feature to be an awesome tool that will not only ease the pain of looking up the parts your customers need, but also save you time in the process.

Ralph Weaver...

