

Counterman Quarterly Newsletter

Tech Tip of the Month...



INVENTORY CATEGORIES?

Categorizing your inventory can provide you with valuable information about your inventory, you may not otherwise ever see. If you have had the opportunity to be a part of Counterman training, you have a fairly good understanding of how this works. Whether you have or have not been trained in the proper use of Inventory Categories in Counterman, I would encourage you to read on. To start, it is important to understand what a Inventory Categories are, and the intention behind them. Categorizing each inventory item will help separate your inventory beyond the realm of “where you buy it from.” We all purchase (from several suppliers) things like: leather apparel, helmets, lubricants, gaskets and seals, chrome accessories, collectables, etc. Well, Categorizing these items can help provide the information necessary to utilize additional tools Counterman already has. You can use these tools to analyze how each Category performs on a sales level and how well each Category of items move in and out of your shop. For example, if you want to see how well helmets are selling, a report can be filtered to provide the information. However, it requires that each inven-

tory item has a valid Category applied to it. The ideal means of accomplishing this task would be during the “Receive Stock” process in Counterman. As items are added to inventory, proper Categories can be selected. If desired, you can always go back later to change the Category for each individual inventory item, but using Categories from the get-go is the way to handle it if possible. (The last paragraph in this article will explain how to setup Categories.) Once you have established your Categories, it will be necessary to define which Category should be linked to each item in inventory. This may sound like a lot of work, but it will pay off in the end, and applying correct Categories to new items has been made easier with this new update. By default, any item added to inventory has a Category that matches the Vendor Code. This is because some users have decided not to use this tool. But if you’ll take the time to do this process, you will have a great tool at your fingertips. If you have your Categories in place, just run the Inventory Activity Report and sequence it by Category to get all the sales related information for each Category separated into readable columns.

INSIDE THIS ISSUE:	
Inventory Categories	1
Updated Price Books On This CD...	1
CONTACT INFO COUNTERMAN	2
Understanding Filters	2
Counterman/ClearGate interface Upgrade	2

UPDATED PRICE BOOK VENDORS (FOR THIS RELEASE) 42-NEWLY UPDATED PB'S

AD Advantage Performance	GW Gardner Wescott	MC McDonald (cost only)	SP Samson Motorcycle
AR** Arctic Cat	HD** Harley-Davidson	MP Motion Pro	SS S&S Performance
AT Automatic Dist. (NEW!)	HH Helmet House	MU Mid USA	TL Troy Lee Designs
BA Barnett Tool & Eng.	HQ** Husqvarna	PO** Polaris/Victory	TM** Triumph Motorcycle
BM** BMW	JG James Gaskets	PT Power Twins	TR Tucker Rocky
CA Castle Sales	JM Jim's Machining	PU Parts Unlimited	VL Van Leeuwen
CCI Custom Chrome	KA Kuryakyn	RE Rivera Engineering	VT Tedd's V-Twin
CG Cometic Gaskets	KM** Kawasaki Motorcycle	RO Romaha	WN Win Products
DS Drag Specialties	KN K&N Engineering	SB Sullivan Brothers	WP Western Power
FH Fulmer Helmets	KT** KTM Motorcycle	SM Southern Motorcycle	YA** Yamaha M/C
FX Fox		SN Sullivan's USA	

IMPORTANT!
(NEW) = New Vendor/Supplier!
**** = OEM Franchise Only!**
(or retail prices only will be provided)
Custom Chrome no longer has quantity price breaks!

Santa Maria Software, Inc.
d.b.a. Counterman
P.O. Box 1239
Nipomo, CA 93444



www.counterman.net

COUNTERMAN

Contacting Counterman is EASY!

Phone: (800)937-6590 (toll free)
Office: (805)929-8266
Fax: (805)929-8267
Email: support@counterman.net

Free Upgrade!
New Features and Benefits!

- Embedded payment solution lets you process credit card payments without ever leaving POS screen.
- Increased efficiency saves you money and your staff time
- Eliminate errors by eliminating double input.
- Automatic Recurring credit card payments saves you time!
- Increase customer satisfaction and save time at the register
- Combined batch reports take less time to reconcile against your bank account
- Eliminate the bulky credit card terminals
- Flexibility and customizable features

"The CounterMan integration has made it more convenient to take payments at individual stations"
Rich "MotorSource"

"The integration has been great and I like it because it has made my daily routine quicker. I don't have to deal with terminals, paper, ink or double entry. Saves me a lot of time"
David "The Shop"

COUNTERMAN
www.counterman.net

CLEARGATE
Advancing Payment Technology

Understanding Filters...

What is a "Filter" and what are they used for? I am going to attempt to put in simple terms the reason and usage for "Filters" and attempt to shed some light into how they work and how they can help your business. I know it can be confusing, but please stick with me. By the end of this article you will have a much better understanding of the how/why of "Filters".

In Counterman a "Filter" is used as a tool to help narrow a search and to allow for an added layer for reporting and displaying the output. It provides a means of locating data (i.e. inventory item, customer, transaction, etc...) specific to what you are looking for. A simple example would be to locate inventory items that have gone to negative balances (meaning you sold something to someone, even though Counterman said you did not have any in stock). This is a common report included in the 'End of Month' processes. Counterman uses a "Filter" of: "Quantity Available, Less Than, Zero". But the actual filter looks more like: "Qty Available, LT, 0" Where the Qty Available is the "Filter Field or Calculation", the LT is the "Operation", and 0 is the "Value". So the way it works is, Counterman looks at the field "Quantity Avail" in inventory then uses the "Operation" (in this example "LT" for "less than") to know the type of calculation it will be using, then uses the number in the "Value" for the search. The result is to report (or display) only those items which are within the criteria of the filter. In this example the only items on the report would be negative balance inventory items. But this example is just the 'chip of the iceberg', so-to-speak... You can use

filters in many different reports and displays. Additionally, Counterman allows for 'combining filters' to further narrow your searches. Consider the following example. Let's say you want to run a mailing list of your customers, but your customer list is very large and sending mailers can be expensive. So narrowing down this list to contain customers who have made a purchase recently and have a valid address can easily be accomplished by setting a couple of filters. You can even narrow it down even more by filtering a range of zip codes. Or, maybe you just want a list of customers that have a valid email address so you can bulk email everyone in that 'Filtered' list. Inventory "Filtering" is also very useful. Say you want to see the items you sell the most. Or maybe items that you make the best profit margins. How about a list of items that are not being taxed? Or maybe a list of items that have not sold in the last year (or longer)? The possibilities are endless. Once you begin to understand and delve into the "Filters" in Counterman, you will be enlightened to know much more about your customers, your inventory, your transactions, employees, mechanics, etc... as these "Filtering" processes begin to make sense. You can check the profitability of select customers, or see which of your employees is performing the best. Knowledge of these key features not only provides information about your business, they can also help you in making smart business decisions and ultimately, help increase your profit.

Ok, armed with this knowledge of how "Filters" can help your business, I will

now attempt to take some of the confusion out of understanding the "Filtering" processes. Some things to keep in mind when using "Filters":

1. The filter condition is comparing the information in a particular field to what you have entered into the "Filter Value".
2. You can always combine "Filters" to further narrow you search.
3. Setting a "Filter" does not change the layout of a report, it just changes the information included.
4. If you need a "Filter" that isn't listed, you can always add new ones to suit your needs.
5. Understand the available "Filter Operation" you are using and make sure it makes sense.
6. If unsure about how to use or set a "Filter" for your needs, know that we are here to help you!

I have included a list of "Filter Operations" at the bottom of this page that explains what each of them do. Hopefully I have explained "Filters" so you have a better understanding of how they work and how to use them. I would encourage you to try different "Filter" scenarios, or maybe come up with a question where a filtered report could possibly provide the answer. As always, we are here to help. Should you need assistance with a "Filter", or if you would like to propose a question that could possibly be answered by setting a "Filter", or a combination of "Filters", just contact our technical support staff. We will be happy to guide you to the correct "Filter" or help you better understand the resulting report.

Ride Safe...

Ralph Weaver



Below is a list of "Filter Operations" and their meaning in Counterman:

CONTAINS	Must match the string of characters in a field entered in "Value"
EMPTY	Must be an empty field with nothing in it. "Value" field must be blank!
EQUAL	Must be an exact match of what is entered in the "Value"
GT	Mathematical value of higher (Greater Than) what is entered in "Value"
GTEQ	Mathematical value of higher or equal (Greater Than or Equal to) entered "Value"
INLIST	Allows for specific, multiple values, separated by a comma, as entered in "Value"
LT	Mathematical value of less (Less Than) the number entered in "Value"
LTEQ	Mathematical value of less or equal (Less Than Equal to) number entered in "Value"
NOTEMPTY	Must contain any character in the field. (Not Empty) "Value" field must be left blank!
NOTEQUAL	Mathematical value that does not match (Not Equal) the number entered in "Value"
RANGE	Mathematical value (Range) between number entered in "Value" and "Thru Value"

RANGE Filter:

Just a quick note on the use of the filter operation of "Range". This is the only filter operation where you will need a "Value" and a "Thru Value". The resulting display and/or report will include information that are in-between the data entered between "Value" and "Thru Value". All other filter conditions do not need a "Thru Value".