Counterman Quarterly Newsletter

UDERSTANDING FILTERS

INSIDE THIS ISSUE:

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 is 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

UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) *30-Newly updated PB's!*

AD	Advantage Performance	**HH**	Helmet House	**PU**	Parts Unlimited
AR**	Arctic Cat	**HQ****	Husqvarna	**RO**	Romaha
ARC**	Arctic Cat (Canada)	**KM****	Kawasaki M/C	**SB**	Sullivan Bros.
BM**	BMW Motorcycle	**KN**	K&N Performance	**SM**	Southern Motorcycle
CA	Castle Sales	**KT****	KTM Sport Cycle	**SN**	Sullivan's USA
CCI	Custom Chrome	**MC**	McDonald ATV	**TM****	Triumph Motorcycle
DS	Drag Specialties	**MU**	Mid USA	**TR**	Tucker Rocky
FX	Fox	**OX**	Oxford Products	**VT**	Tedd's V-Twin
FH	Fulmer Powersports	**PO****	Polaris/Victory	**WP**	Western Power
HD**	Harley-Davidson	**PT**	Power Twins	**YA****	Yamaha

IMPORTANT!

** = OEM Franchise Only! (If non-franchise retail prices <u>only</u> will be provided)

Custom Chrome has <u>stopped</u> supplying quantity breaks in their price book!

COUNTERMAN

— Concept Motorcycle —

UDERSTANDING FILTERS (continued)

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!
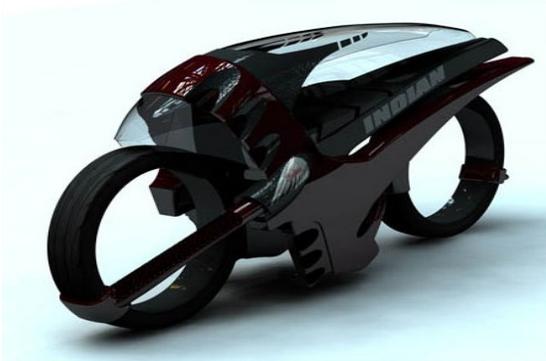
I have included a list of "Filter Operations" at the bottom of this page that explains what each of them do. Hopefully I have explained "Filters" so you have a better understanding of how they work and how to use them. I would encourage you to try different "Filter" scenarios, or maybe come up with a 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 by 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…

"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 coma, 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"

*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". Also, it is imperative that you 'TAB' out of the "Value" and "Thru Value" fields before processing! If you need any assistance with filters and their usage, please contact our friendly technical support staff!*

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