

Counterman Quarterly Newsletter



Service Scheduler

Do you schedule service for you customers? Were you aware that there is a nice tool within Counterman specifically made for scheduling upcoming service jobs? This feature has been available within Counterman for a long time, but as it turns out, the Scheduler is rarely used. We hope this is due to either not knowing it was there, or, maybe just a lack of knowledge on how to use it. I will do my best to explain the functions of the Service Scheduler, while explaining how to use the many features.

Often times, Counterman users will have some separate software or even use the manual method of setting service appointments. Not only will the Counterman Service Scheduler save time (as it can eliminate other means of scheduling service), but can help you be more efficient and professional for your customers. This makes setting up appointments for service customers nice and handy, right from the Counterman point-of-sale screen. The customer does not need to be present, as you can schedule the work, choose the vehicle, assign a mechanic, set the time and date for the job, and enter any special notes necessary for the repair. Viewing jobs for individual mechanics is a simple task that can be performed at any time. Adding jobs, or changing appointments are easily performed functions.

On the upper-right of a blank point-of-sale screen is where you select to open the Service Scheduler, by clicking "Scheduler" or by pressing F12 (note: you must have Dept+Empcd filled in before opening) and a window similar to the image below will appear. To view appointments for a specific mechanic for appointments previously entered, just enter that mechanic code in the first field. Otherwise, enter the customer information to start a new appointment and the next window opens:

Left clicking in the "Vehicles" field will display any/all vehicles this customer owns. Select the vehicle to work on by a left click. Once you choose a "Mechanic", a new window opens that will show a calendar of the current month beginning with today's date, and listing times from 6:30am until 7:30pm. This grid will also display any previously set appointments for the mechanic chosen. A current month calendar is displayed in the upper right of this screen, allowing you to quickly choose any date/time. Simply left click any cell that corresponds to the appointment date/time and the customers vehicle information is automatically entered into that cell. Right click the cell to add any notes about the repair.

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UPDATED PRICE BOOK VENDORS (FOR THIRD QUARTER 2016) 35-NEWLY UPDATED PB'S!

| | |
|------|------------------|
| AD | Advantage Perf. |
| AR | Arctic Cat |
| BM** | BMW |
| CA | Castle Sales |
| CCI | Custom Chrome |
| CO | Colony |
| DS | Drag Specialties |
| HD** | Harley-Davidson |
| HH | Helmet House |
| HQ** | Husqvarna |
| JM | Jim's Machine |
| KA | Kuryakyn |

| | |
|------|--------------------|
| KM** | Kawasaki M/C |
| KN | K&N Engineering |
| KT** | KTM Sport M/C |
| MC | McDonald |
| MP | Motion Pro |
| MU | Mid-USA |
| OA | Oakley (NEW) |
| OX | Oxford Prod. (NEW) |
| PS | PC Sunglasses |
| PO** | Polaris/Victory |
| PR | Pro-One |
| PT | Power Twins |

| | |
|------|---------------------|
| PU | Parts Unlimited |
| RO | Romaha |
| SM | Southern Motorcycle |
| SS | S&S Performance |
| TL | Troy Lee Designs |
| TM** | Triumph Motorcycle |
| TR | Tucker Rocky |
| VT | Tedd's V-Twin |
| WP | Western Power |
| YA** | Yamaha Motorcycle |
| ZP | Zippers Performance |

➔

IMPORTANT!

(NEW) = New Price Book

** = OEM Franchise Only!
(or retail prices only will be provided)

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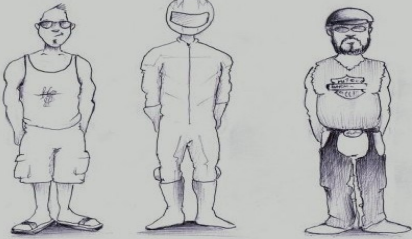
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COUNTERMAN

Contacting Counterman is EASY!

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SQUID ORGAN PENCOR MECHANIC



Service Scheduler (continued)

Schedule for Mechanic 2

Click month or year to change

| | | | | | | | | | | |
|------|----------|-----------|------|----|----|----|----|----|----|----|
| 2015 | January | July | July | Su | Mo | Tu | We | Th | Fr | Sa |
| 2016 | February | August | 2016 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 2017 | March | September | | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| | April | October | | 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| | May | November | | 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| | June | December | | 31 | | | | | | |

F3-Start Date 07/12/2016

To Schedule

Right-Click a Cell for Notes

Click here for Daily Schedule

Click a 'start date'

| Time | Tu 07/12/2016 | We 07/13/2016 | Th 07/14/2016 | Fr 07/15/2016 | Sa 07/16/2016 | Su 07/17/2016 | Mo 07/18/2016 | Tu 07/19/2016 | We 07/20/2016 | Th 07/21/2016 | Fr 07/22/2016 | Sa 07/23/2016 | Su 07/24/2016 |
|---------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 6:30AM | | | | | | | | | | | | | |
| 7:00AM | | | | | | | | | | | | | |
| 7:30AM | | | | | | | | | | | | | |
| 8:00AM | | | | | 2001 HD 01FL | | | | | | | | |
| 8:30AM | | | | | | | | | | | | | |
| 9:00AM | | | | | | | | | | | | | |
| 9:30AM | | | | | | | | | | | | | |
| 10:00AM | | | 88 FXRT-(316) | | | | | | | | | | |
| 10:30AM | | | | | | | | | | | | | |
| 11:00AM | | | | | | | | | | | | | |
| 11:30AM | | | | | | | | | | | | | |
| 12:00PM | | | 2009 HD FLHR | | | | | | | | | | |
| 12:30PM | | | | | | | | | | | | | |
| 1:00PM | | | | | | | | | | | | | |
| 1:30PM | | | | | | | | | | | | | |
| 2:00PM | | | | | | | | | | | | | |
| 2:30PM | | | | | | | | | | | | | |
| 3:00PM | | | | | | | | | | | | | |
| 3:30PM | | | | | | | | | | | | | |
| 4:00PM | | | | | | | | | | | | | |
| 4:30PM | | | | | | | | | | | | | |
| 5:00PM | | | | | | | | | | | | | |
| 5:30PM | | | | | | | | | | | | | |
| 6:00PM | | | | | | | | | | | | | |
| 6:30PM | | | | | | | | | | | | | |
| 7:00PM | | | | | | | | | | | | | |
| 7:30PM | | | | | | | | | | | | | |

Click in cell(s) to Schedule/UNschedule/REschedule a vehicle

Done-F7

To change any appointment date and/or time, left click the original appointment date to clear it, then left click the new date from the available cells to automatically move the information for the new date. All notes are carried over to the new date. Schedules for individual mechanics are separated by their mechanic code. You can also look at prior schedules for the displayed mechanic by pressing F3 and manually enter a "Start Date". When done, just click the "Done" button (lower right) or press the F7 key. If you have any questions or concerns in regard to the Counterman Service Scheduler, please contact our technical staff at (800) 937-6590 and we would be happy to assist.

INTERNAL PAYMENT METHODS/USAGE

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 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". The great thing about "Internal Sales" is the fact that they **will not** affect the cash in/out of the drawer, but allow you to track anything you sell to (or consume in) your shop. Although they are not included in the cash in or out of the daily drawer totals, they are reported in a separate section of the Cash Drawer Report Summary 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

