

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:

⇒ **Service Repair Order Changes**

Several Changes have been made to the Service Repair Order process in Counterman for this update. Several users have requested the ability to omit the hand written repair order from the normal service write-up process, while other users just like the way it is now. In our efforts to keep everyone happy, we have found a compromise that should be acceptable for everyone. The idea here is to have the proper disclaimers and permissions printed on the customer's estimate. One of the challenges was the actual verbiage for this information, along with having enough room for a customer signature. In this release (version 01/13/2012 and later) text from the "Quotation Clipboard" will print in arial-7 font, which is a much smaller print size and should allow for enough room for the long disclaimer/permission verbiage with enough room for a customer signature. The actual verbiage for this can be entered by the user (you). There are several examples of suggestions available all over the web and we would urge you to find the one that best suits your needs, then edit as necessary. Counterman suggests you check your local/state laws to make sure everything required is in this verbiage. It is important to mention, any Counterman users who have had their shop logo embedded into the software by us will need to contact Counterman for a special file update **IF** you would like to use this new feature. Otherwise the font size will remain the same. With this in mind, we have added a comment line to the Service Repair Order which allows for a customer signature/date line, acknowledging the vehicle has been picked up.

Another added enhancement to the Service Repair Order that works in conjunction with the one above is for the top of the Quotation. We feel it is important to remove the word "Quotation" if the intention is for an

actual estimate. When Counterman sees allocated inventory on the Service Repair Order and it is printed as a quote, the top on the printed save file will have the word: "Estimate" instead of "Quotation". This entire process can be a little confusing because of the initial question Counterman asks (when starting or recalling a Service Repair Order) "Is This a Quote?". The fact that it is NOT a quote, yet when you print a copy for your customer to sign, a selection of "Quotation" must be selected. This is only because the printed output is not an actual transaction. Perhaps in a future update we will add a selection of "Print Estimate" to avoid this confusion moving forward. For now, as long as you are allocating inventory towards the repair order, the word "Estimate" will print when a Quotation is selected. I should note, this process works the same for Warranty Repair Orders.

⇒ **Transaction History Report—Cost/Total**

Cost and Sales Totals have been added to the current Transaction History Report, both on a summary level and Grand Totaled at the end of the report. A nice feature that can show profitability on either a customer, vendor, or category level. Also, if product code Sequence is selected, individual part numbers and individual profit percentages for each will print, along with summary totals. Find out if a customer generates a profit, and what that profit percentage is. Or look at individual vendors or categories to make sure your making the proper margins from them. The changes to the Transaction History Report now puts all of that and more into perspective.

⇒ **Inventory Turns/Performance Index**

For the past 25+ years, even when Counterman was a DOS based program, we have always calculated the 'Annual Inventory Turns' the same. The basic definition of 'Annual Inventory Turns' is the number of times you sell your inventory within the year in relation to how many you have ordered/stocked throughout that same time period. This is valuable information, as it allows assessment of how quickly you are selling (turning over) your inventory. With this release, the Inventory Activity Report will now show this information based on the past 12 months in addition to the YTD (Year To Date) information that has always been part of this valuable report.

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UPDATED PRICE BOOK VENDORS (ON THIS UPDATED CD) 30-NEWLY UPDATED PB'S!

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

AD	Advantage Perf. Dist.
AR**	Arctic Cat
BM**	BMW Motorcycle
BI	Bell Industries
CA	Castle Sales
CCI	Custom Chrome
DS	Drag Specialties
FX	Fox Racing
HD**	Harley-Davidson
HH	Helmet House

KM**	Kawasaki M/C
KN	K&N Engineering
KT	KTM Motorcycle
MA	Marshall Dist.
MU	Mid USA
PO**	Polaris/Victory
PT	Power Twins
PU	Parts Unlimited
RO	Romaha
SB	Sullivan Brothers

SM	Southern Motorcycle
SN	Sullivans USA
SS	S&S Performance
SZ**	Suzuki Motorcycle
TL	Troy Lee Designs
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! (If non-franchise retail prices only will be provided)

Custom Chrome has stopped supplying quantity breaks in their price book!

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Hard to believe, it's 'that time' again... The V-Twin Expo will be upon us on Feb. 4th thru 6th. They expect an extremely good turn out for both exhibitors and dealers this year.

If you plan on attending the V-Twin Expo in Cincinnati, OH. Please stop by the Counterman booth #642 to say hello and ask us about anything!

New! For Counterman Pro Users

⇒ New Hold Files Report

From the Reports Menu there used to be a report called "Allocated Parts List", used for checking the items that have been set aside (allocated) for Service Repair Orders. This report allows you to list all Allocated items and display the 'Hold File' name that is associated with each item. We have expanded on this report and it is now called "Hold File Lists". All of the features that were in the old "Allocated Parts List" are still there, but two new 'Report Sequence' options are available with additional detail added to the report. If you select a Report Sequence by "Detail", each hold file will be detailed with part numbers, descriptions, quantity, price, date, and a Y/N (Yes/No) field that indicates Allocated or Not. There is also a column to let you know if any of the items on the Hold File are flagged for Special Order. Each hold file is summarized at the top with the Hold File Name, Creation Date, the 'Type of Service Order' it is with an "S" (for a standard Service Order) or a "W" (for a Warranty Service Order). If you need a less-detailed report, select a "Report Sequence" by Product Code to generate a list, in part number order. Or Sequence by Hold File name to list the same in Hold File Name order. In all of the above cases output will list all Hold File names, part numbers, descriptions, quantities and date. There is one more "Report Sequence" you can select to only list the Hold File Names, Creation Dates, Type, and Mechanic.

⇒ PDF Invoice Copies

Designed to work with recent enhancements to the invoice/quote email processes in Counterman, this feature will store your invoiced transactions using the popular format of 'PDF'. As explained in the last (third quarter) newsletter, this feature will store an actual snap-shot of the printed invoice. This not only makes them available for emailing, but also provides additional control over them. These files can be accessed the same way you would any PDF file. Counterman will use the PDF copy when reprinting invoices, which provides an actual picture of that invoice for the reprint function. Due to the success of this enhancement, with this update we have also added F&I invoices to be saved as PDF files too. These are saved in the PDFS folder and named accordingly: with an "I"+the invoice number.

If you have not requested to enable this process, it will not be available to you. It is necessary to create a special folder on the main (server) computer in order for this enhancement to work. We encourage you to contact Counterman Technical Support to help you add this enhancement. However, it only requires a folder to be created on the main (server) computer, under the Cman8 folder, called PDFS. Once this folder exists, Counterman will automatically store Invoices (in PDF format) in this folder. Once this is setup, you can access them at will.

TECH TIP BACK UP!!!

Well, are you? Do you perform regular backups of your Counterman data? Counterman has made backup programs available for each and every user. I cannot stress how important it is to backup your data. In the unfortunate event that you experience a computer failure (heaven forbid!), your entire business resides on that computer. All of your inventory and customers, all your tax reporting information and transactions, all your vendors and purchase orders... Just about everything about your business is on that little box. Hard drive and other related computer failures are eminent, whether you choose to believe it or not. Computers are machines and machines fail (just take a look in your service department). In order to insure against total loss of this data, a simple, daily backup procedure is strongly suggested. The backup programs Counterman has made available to all users will compress all of your important files into a single file, then store them on a flash drive. Even if you have a large number of files, this process only takes minutes to complete. There are also 'off-site' backup providers that keep your data backed up on a computer somewhere else. Bottom line is, you need to back up your files! Take it from someone who has

heard all the horror stories! Unfortunately, by the time I get the call, it's usually too late... When computer failure happens, the first question I ask is: "When was the last time you backed up Counterman?" I can feel the tension in my neck as I await the answer that I know is coming: "Backup? Um, I think we did that a X-months ago". So the only option is to reinstall Counterman and restore from data that is X-number of months old, then begin the tedious process of re-entering everything that happened from the hard copies (transactions processed and items received), provided those hard copies are even available. And that's the lucky ones! It is sad to say, many do not backup at all. On the other hand, if you perform daily backups and a computer catastrophe does happen, restoration of the program and the data is fairly painless. Of course computer repair or replacement is necessary, but at least your data is secure and can be restored. Counterman always helps (to the best of our ability) with customers who have experienced unrecoverable computer failures, but having a current backup is crucial to the success of this endeavor. Counterman has special backup programs for both 32-bit and 64-bit computers. Please contact our technical support team if you would like help getting this setup. We want to help BEFORE your computer fails!

Ralph Weaver

