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6. Introduction – Counterman File

The Counterman File menu option is used to assign specific codes to a particular counterperson. It also stores sales figures for the current day as well as month to date totals for each individual counterperson. There are a maximum of 62 countermen records (**A-Z, a-z & 0-9**) that are continuously updated when invoices are finalized through point of sale, receipts are applied through the **<F2>** (*Apply Receipts*) mode of point of sale and the running of the Daily Sales Analysis. Counterman information can be screen displayed or printed at any time through the Daily Sales Analysis menu option.

<< COUNTERMAN UPDATE PROGRAM >>		
COUNTERMAN: A	NAME: ALLAN	TODAY IS: 12/02/2000
INVOICE PRINTER #:2	USE / to display totals for DSA Counterman Range.	
INTERIM PRINTER #:2		
INVOICE/TAPE: I		
	CURRENT DAY	MONTH TO DATE
NET SALES	\$ 1802.04	\$ 0.00
COST OF SALES	\$ 1133.43	\$ 0.00
# OF INVOICES	20	0
# OF LINE ITEMS	67	0
CORE SALES	\$ 45.00	\$ 0.00
CASH SALES	\$ 1975.62	\$ 0.00
TAXABLE SALES	\$ 1802.04	\$ 0.00
TAX COLL/SALES	\$ 108.58	\$ 0.00
A/R RECEIPTS	\$ 150.00	\$ 0.00
CHARGE SALES	\$ 0.00	\$ 0.00
# OF OVERRIDES	2	
GROSS RECEIPTS	\$ 2125.62	\$ 0.00
LABOR CHARGES	\$ 20.00	\$ 0.00
MISC CHARGES	\$ 0.00	\$ 0.00
GST COLLECTED	\$ 0.00	\$ 0.00
F1 CALL COUNTERMAN F10 RECORD CHANGES F11 EXIT PROGRAM		

This chapter of the user's manual will aid and instruct in the correct method of assigning sales clerks and printer assignments to counterman codes. It will also give a detailed explanation of all information fields stored within the counterman code records.

6.1 Creating A Counterman Record

- From the *Autologue Main Menu*, enter **4** (*Counterman File*) and press **<Return>**.

The *Counterman Update Program* screen will be displayed as shown:

<< COUNTERMAN UPDATE PROGRAM >>		
COUNTERMAN: █	NAME:	TODAY IS: 12/02/2000
INVOICE PRINTER #:	USE / to display totals for DSA Counterman Range.	
INTERIM PRINTER #:		
INVOICE/TAPE:	CURRENT DAY	MONTH TO DATE
NET SALES		
COST OF SALES		
# OF INVOICES		
# OF LINE ITEMS		
CORE SALES		
CASH SALES		
TAXABLE SALES		
TAX COLL/SALES		
A/R RECEIPTS		
CHARGE SALES		
# OF OVERRIDES		
GROSS RECEIPTS		
LABOR CHARGES		
MISC CHARGES		
GST COLLECTED		
F1 CALL COUNTERMAN F10 RECORD CHANGES F11 EXIT PROGRAM		

- With the cursor positioned at the **COUNTERMAN:** prompt, enter the letter or number (**A-Z, a-z** or **0-9**) in which to create a counterman record for and press **<Return>**.
- With the cursor positioned at the **NAME:** prompt, enter the name of the counterperson (i.e. **RICK**) and press **<Return>**.

The name entered can be up to 15 characters.

- With the cursor positioned at the **INVOICE PRINTER #:** prompt, enter the printer number (i.e. **0-99**) where invoices are to be printed and press **<Return>**.
- With the cursor positioned at the **INTERIM PRINTER #:** prompt, enter the printer number (i.e. **0-99**) where interim invoices are to be printed and press **<Return>**.
- With the cursor positioned at the **INVOICE/TAPE:** prompt, enter a receipt type of **I**(Invoice) or **T**(Tape) and press **<Return>**.
- With the cursor again positioned at the **NAME:** prompt, press the **<F10>** (*Record Changes*) key to save the entered changes.

The cursor will return to the **COUNTERMAN:** prompt and the user can create another counterman record as previously described or press the **<F11>** (*Exit Program*) key to exit back to the *Autologue Main Menu*.

6.2 Viewing A Counterman Record

To view a particular counterman record, follow the steps below:

- From the *Counterman Update Program* screen and with the cursor positioned at the **COUNTERMAN:** prompt, enter the letter or number (**A-Z, a-z** or **0-9**) of the counterman record to be viewed and press **<Return>**.

- To view another countermand record, press the <F1> (*Call Countermand*) key. The screen will be cleared and the cursor will again be positioned at the **COUNTERMAND:** prompt, enter the letter or number (**A-Z, a-z** or **0-9**) of the countermand record to be viewed and press <Return>.

To return to the *Autologue Main Menu*, press the <F11> (*Exit Program*) key.

If a countermand record is currently being used within point of sale, the screen will display a *RECORD IN USE* message in the lower right hand corner of the screen. Try again once the countermand code is exited out of point of sale.

6.2.1 Viewing Totals For All Countermand

To view sales totals for all countermand codes setup within the Daily Sales Analysis default, follow the steps below:

- From the *Countermand Update Program* screen and with the cursor positioned at the **COUNTERMAND:** prompt, enter / and press <Return>.

The screen will now display totals for all countermand codes within the range setup in the DSA defaults (which stores the beginning and ending countermand codes to run the daily sales analysis).

☞ **Note:** If no DSA defaults are set, the totals will be for all countermand codes!!

6.3 Assigning A Printer For Each Countermand

When creating a countermand record, each countermand must be assigned a printer number on which his finalized invoices will print and a printer number on which his interim invoices or “pick tickets” will print.

All countermand codes can be assigned to the same printer assignment or separately if there are two or more invoice printers. All countermands assigned to the same invoice or interim printer assignment must use the same invoice or tape receipt type.

The printer assignment must be a number between one and ninety-nine (1-99) and typically will be as follows:

Printer #	Function
1	Management Report Printer
2	Invoice Printer
3	Invoice Printer
4	Pick Ticket Printer
9	Multi-Store Remote Invoice Printer

If there is only one printer, all countermands must be assigned to printer #1. If there are two printers, countermands are typically assigned to printer #2 for printing invoices and pick tickets.

To view a counterman printer assignment, follow the steps below:

- From the *Counterman Update Program* screen and with the cursor positioned at the **COUNTERMAN:** prompt, enter the letter or number (**A-Z, a-z** or **0-9**) of the counterman record to be viewed and press **<Return>**.
- With the cursor positioned at the **NAME:** prompt, press **<Return>**.
- With the cursor positioned at the **INVOICE PRINTER #:** prompt, enter the printer number (i.e. **0-99**) where invoices are to be printed and press **<Return>**.
- With the cursor positioned at the **INTERIM PRINTER #:** prompt, enter the printer number (i.e. **0-99**) where interim invoices are to be printed and press **<Return>**.
- With the cursor positioned at the **INVOICE/TAPE:** prompt, press the **<F10>** (*Record Changes*) key to save the entered changes.

The cursor will return to the **COUNTERMAN:** prompt.

To return to the *Autologue Main Menu*, press the **<F11>** (*Exit Program*) key.

6.4 Assigning A Receipt Type For Each Counterman

All counterman codes must be assigned an "Invoice" or "Tape" receipt type for both his finalized and interim invoices.

An "Invoice" type receipt uses pre-printed multipart invoice paper for printing 80 column invoices. Changes to the invoice format can be made through the *Format Point Of Sale Screen & Invoice* menu option within the *System Commands* menu. Shown below is a sample of the standard "Autologue Invoice Format".

PAGE 1 OF 1

A ABC GARAGE
123 ANY ST
BUENA PARK CA. 92601

P/O# 58693

INV# 65071
CUST# 200
DATE MM/DD/YY
Doc# 85

CHARGE SALE Fri Apr 29 10:03:45 YYYY

ITEM	DESCRIPTION	MFR-PART NUMBER	LIST PRICE	CORE VALUE	UNIT PRICE	CODES	QTY	ITEM TOTAL
1	AC SPARK PLUGS	ACD-R45T	2.83	0.00	1.48	N	8	11.84
2	DIST ROTOR	FKO-FO-99	3.19	0.00	2.18	N	1	2.18
3	DIST CAP	FKO-FO-100HD	18.11	0.00	12.38	N	1	12.38
4	LIFTERS	JTT-817	6.95	0.00	3.28	N	16	52.48
5	REGROUND CAM	CAM-CV12	49.00	25.00	29.00	*N	1	54.00
6	TIMING CHAINS	LIN-499	21.86	0.00	15.35	N	1	15.35
7	TIMING CHAIN SPROCKETS	LIN-S390	17.86	0.00	12.68	*N	1	12.68
8	TIMING CHAIN SPROCKETS	LIN-S391	14.82	0.00	9.63	*N	1	9.63
ACS Computer Systems								
NOTE		NON TAXABLE	CORE	TAXABLE	TAX %	TAX \$	TOTAL SALE	
		170.54	25.00	0.00	8.250	0.00	170.54	
RECEIVED BY:								
CODES								

PLEASE PAY THIS AMOUNT

Thank You!

Sample Invoice

A “Tape” type receipt uses 3¼” roll paper in a 40-column printer for printing tape receipts. Shown below is a sample of the tape format. Note that the tape format uses the customer names stored within customer 0 as its heading.

Autologue Demonstration Software				
A	CASH SALE		MM/DD/YY	
250	FREEHOLD EXXON			
		INVOICE #	149	
QTY	PART NUMBER	UNIT	CD	PRICE
1	BCA-A3	8.44	N	8.44
	BOWER BEARINGS			
8	ACD-46	1.04	N	8.32
	AC DELCO SPARK PLUGS			
LABOR	0.00	NON TAX		16.76
MISC	0.00	CORE		0.00
DISC	0.00	TAXABLE		0.00
		TAX		0.00
		TOTAL		16.76
AMOUNT				
TENDERED	20.00	CHANGE		3.24

Typically wholesalers will use “Invoice” type receipts and retailers will use “Tape” type receipts.

When printing a receipt for a payment, the system will always use the “Invoice” format.

6.5 Assigning A Printer For Remote Part Transfer Tickets

Based upon the invoice printer assignments of counterman code **X**, remote part transfer tickets will be instructed where to print. Remote part transfer tickets will not print if assigned to an invalid printer number or printer number nine.

Remote part transfer tickets will print automatically at the store from which merchandise is being transferred. The transfer ticket will print the part number, quantity, store number to which the merchandise is being transferred to and an optional message.

For additional information, refer to the *Multi-Store* section of the user's manual.

6.6 Fields Of Information

- Net Sales:** The invoiced value of all merchandise sold minus the value of all inventory and warranty returns, and invoice discounts given (Lab/Misc codes C and D). It does not include core charges, core returns, and labor and freight charges.
- Cost Of Sales:** The value of all merchandise sold and returned. Cost of sale per item is calculated by multiplying the price 0 or average cost (if using average cost for cost calculations) for the part number times the vendor net percentage times the quantity sold or returned. It does not include Labor/Misc. cost of sales values.
- Number Of Invoices:** The total number of finalized cash and charge invoices printed. Pick tickets/Interim invoices do *not* update this field.
- Number Of Line Items:** The total number of extended lines on all finalized invoices.

Core Sales:	The value of core sales invoiced minus the value of core returns invoiced.
Cash Sales:	The bottom line total, "Total Sale", of all cash sale invoices.
Taxable Sales:	The total value of taxable sales on all finalized invoices.
Tax Coll/Sales:	The tax collected on sales equals the accumulated value of tax collected on all finalized invoices.
A/R Receipts:	The value of all entries entered through F2 (<i>Apply Receipts</i>) in point of sale.
Charge Sales:	The bottom line total, "Total Sale", of all charge sale invoices.
# Of Overrides:	The number of price overrides performed on all finalized invoices.
Gross Receipts:	The total of cash sales and A/R receipts combined.
Labor Charges:	The total of all labor charges appearing on finalized invoices. Labor part numbers have a Lab/Misc code of A, B or G in their inventory part number records.
Misc Charges:	The total of all miscellaneous/freight charges appearing on finalized invoices. Miscellaneous/Freight part numbers have a Lab/Misc code of E or H.
GST Collected:	The total of all Canadian GST tax charges appearing on finalized invoices. Part Numbers coded with a Lab/Misc code of K and have the string "GST" within the part number will be automatically added to this field upon invoice finalization.
Current Day:	The accumulation of the daily sales until cleared by the daily sales analysis during normal day end closing procedures.
Month To Date:	The accumulation of the daily sales since the first day of this month. The month to date totals are updated by the daily sales analysis program when a Y is entered at the <i>UPDATE MONTHLY TOTALS (Y/N)?</i> prompt and the appropriate counterman codes are included in the beginning and ending counterman prompts. The daily sales analysis adds the current day totals to the month to date totals and clears the current day totals.