

**Just Glancing** *If you use the Counter System, you know what amazing tools Item Availability, Customer Dashboard, and Day at a Glance are. The question is, are you utilizing their full functionality? Here are some things you may not have known that may benefit your operation.*

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## Item Availability-Menu bar

- Tools> Deliveries & Pickups -- This will show you how many Deliveries and Pickups you have for each day.
- Tools>Show Web Page - If you set up the web link on the item record- this will take you to that website.
- Start new contracts- Tools - Open Contract, Open Reservation, Open Quote, Open IRO, Open IMO
- Inventory - Receive Items, Sales Qty Update, Update count. Keep your counts up to date.
- Inventory - Order Item - If you have the PO Module it creates new PO.
- Reports - Print a Price list.
- Reports - Print an item label.
- Category Availability - See other similar items that are available in that category.

**Action:** Examine some of your most frequently rented items. How will the functions listed above add value to your counter personnel's ability to serve the customer? How many of the functions do you utilize?

## Customer Dashboard:

- Send Multiple contracts to a customer - Filter your columns to show the items to send/ Print. Go to Reports and Print all Contracts.
- Groupings - You can group the listed transactions. The drop down menu just above Contract Status at the bottom lefthand corner.

## Day at a Glance

- Contract lookup - New for 2017 you can now lookup contracts and even write new contracts.
- You can Show, Hide, and Move columns by right clicking on the header of one of the columns.
- We have added 2 new tabs this year. The Review tab that allows you to see contracts that need to be reviewed before billing. We have added the Completed tab which will show you all contracts that have been completed that day.
- You can Check the Automatically Refresh box. This will refresh the screen every 5 minutes.
- Grouping - Allows you to group any tab by Status, Sales Rep, Operation, Customer, Job Number, City, Substatus, Zip, and a number of other fields. Each grouping will show the count of contracts as well as the Total, Paid, and Owed.

**Action:** Use the grouping function to organize your contracts. If you want to see what items are on a certain delivery truck, sort by that grouping!