

client services update



November 2007

Sales Support Portal Now Available

A New Feature of Product Support - Equipment

New in R6V05 SPf, PFW's Sales Support Portal offers a customizable, single-screen dashboard that displays a high-level overview of business interactions between the sales person's customers and the dealership. Based on the Sales person's ID in the Customer Profile, each member of the Sales Team can now view parts, equipment, rental transactions, review call scheduling and history and financial details of each of their customers.

Requirements:

R6V05 Service Pack f (without hyperlinks)

R6V05 Service Pack k (with hyperlinks)

What the "👁️" Means

The view "eye" icon enables the Sales Associate to open associated screens to the data showing on the dashboard.

Sales Support Portal - Reginald Ball

Outstanding A/R		
	Amount	%
Current:	13,151	14.5
31-60:	45,626	50.5
61-90:	21,080	23.3
91-120:	4,341	4.8
Over 120:	6,214	6.9
Total:	90,412	

My Calls			
10/01/2007	to		Go >>
Total Lost Sales: 0			
	All	My	%
My Calls:	4	4	100.0
Customers:	17,914	174	1.0
Customers Contacted:	3	3	100.0
% Contacted:	0.0	1.7	

Next 10 Quotes Expiring		
BASELINE NURSERY	Parts	11/01/2007
D&K TRAILER MAINT	Service	11/02/2007

Pending Equipment Sales	
ARTS FARMS	CA 800

Machines In Shop	
JANE DOE	X
DOUG PROUT	JD 26
CELL- 495-7811	EX EXMARK
WINDEMERE GOLF	JD 2653A
WINDEMERE GOLF	KU 1800
BILL DRIVER	JD JX75
D.A. DEBRUYNE LANDSCAPING	BA EXMARK
R. THOMPSON LANDSCAPE	JD JS60
ARTISAN LANDSCAPING LTD	EA 16

Top 10 Profitable YTD	
ARTISAN LANDSCAPING LTD	58,211
R. THOMPSON LANDSCAPE	9,881
BROWN'S ENTERPRISES	6,948
UPPER THAMES RIVER	5,366
FANSHAWE COLLEGE	5,330
D&K TRAILER MAINT INC	4,296
CLINTAR GROUNDSKEEPING	4,029

Last 5 Calls		
JANE DOE		10/16/2007
Check availability for meeting this week		
ARTISAN LANDSCAPING LTD		10/16/2007
Find the earliest time to evaluate 4610 Tractor		

Tip of the Month

Performing and Storing Backups and System Saves

It is important to perform nightly Backups and regular System Saves, but it is equally important how the media devices are stored.

Backups should be completed nightly using a tape rotation and removed off site.

System Saves should be executed at least every three months, if no new changes have been made on the system, and always performed before and after every

system change such as PTF's and / or new release loads.

Tapes used for Backups and System Saves should be stored at room temperature in dry conditions. Do NOT leave any media in your vehicle for extended periods of time, as extreme temperature conditions can destroy the media and cause problems that will affect the drives themselves when it tries to read the data, possibly resulting in tape or drive replacement.

HOLIDAY SUPPORT HOURS		
24	REGULAR EMERGENCY	8AM - 3:30PM 3:30PM - 8PM
25	REGULAR EMERGENCY	CLOSED CLOSED
26	EMERGENCY	8AM - 11PM
31	REGULAR EMERGENCY	8AM - 3:30PM 3:30PM - 8PM
01	REGULAR EMERGENCY	CLOSED CLOSED

Note: All times are Eastern Standard Time (EST)

For more information on these software features or to order R6V05, contact PFW Client Services at (519) 474-3700, or e-mail support@pfw.com.

Merry Christmas and Happy Holidays.

All the best for 2008.



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