

# PASSWORD

PFW Systems Corporation Newsletter

Fall 2010

**PFW** MobileInspection

## Taking Evaluations to the Field

Properly evaluating used equipment at the dealership is a vital part of managing a successful operation – but what about when the equipment can't come to you?



PFW MobileInspection, a streamlined and mobile version of the Used Equipment Evaluation module, allows sales or service staff to input their portion of an evaluation into a laptop or handheld device while in the field and then synchronize the data back to PFW IntelliDealer.

Created to help improve the efficiency of the sales and used equipment evaluation process in the field while reducing the need to re-key data at the dealership, PFW MobileInspection is available to help your dealership today.

### Remote. Control.

In the past, sales or service staff who needed to inspect equipment in the field would have to print out forms from the Used Equipment Evaluation module, fill out the forms in the field, then key that data into the system upon returning to the dealership. With MobileInspection, staff can be more efficient and use less paper, staying in control even when they are working remotely.

### What You Need to Know!

- Initiation of an inspection to take place in the field is done by checking a “Mobile Inspection” box within the Used Equipment Evaluation module.
- PFW MobileInspection works in tandem with the Used Equipment Evaluation module, so you need to have Used Equipment Evaluation to utilize MobileInspection.
- MobileInspection allows the inspection details, multimedia, equipment features, clarifying comments and general memos to be saved within the application and then synced back up to PFW IntelliDealer’s Used Equipment Evaluation module.

- With a handheld device with digital photo capabilities, you can even add digital photos to the evaluation at the touch of a button! The laptop version can attach pictures from the PC.

### Laptop or Handheld... Wireless or Cellular.

MobileInspection was designed to work with either a laptop computer or handheld device. MobileInspection Laptop Edition is an ideal solution for dealers who have already invested in laptop computers and want to take advantage of their existing hardware. MobileInspection Handheld Edition works with three different mobile devices to suit your business needs.

The sleek yet rugged Motorola MC55 Enterprise Digital Assistant (EDA) series offers two small devices with big business functionality. The Motorola MC5590 EDA features the combined power of a mobile computer, camera, and barcode scanner in one durable package, while the Motorola MC5574 EDA features all the same plus the additional functionality of a mobile phone.

### IN THIS ISSUE

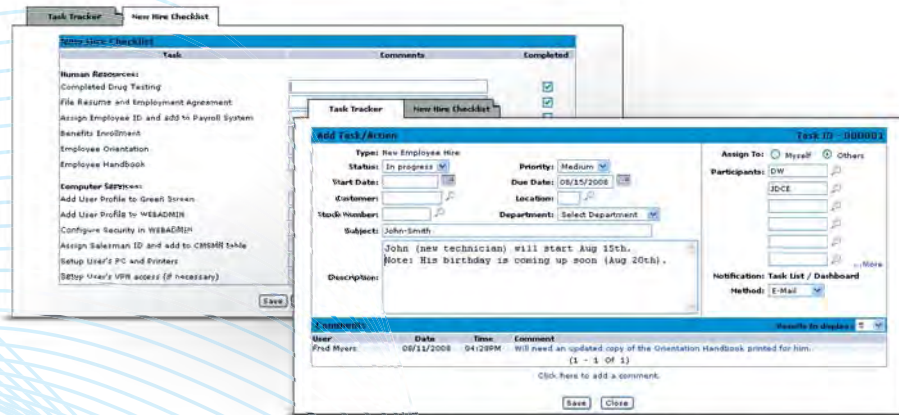
- 1 PFW MobileInspection
- 2 PFW Task Tracker
- 3 The Power of Portals
- 4 The Benefits of Time Tracking
- 5 PFW Rental Supervisor
- 6 Phone Communications
- 7 Customer List
- 7 Recent System Upgrades

Continued on page 6 

# PFW Task Tracker

THE NEW WAY TO MANAGE YOUR PROJECTS & WORKFLOW

Significantly revised and improved last year as part of R6V07, PFW Task Tracker helps dealers manage their projects and workflow processes with ease!



PFW Task Tracker gives you the ability to choose from a wide variety of options when setting up an individual task or group task. Beyond choosing the users involved in the task, you can also choose between workflow and non-workflow tasks – meaning you can decide whether tasks are completed one step at a time by individual team members or all at once by the entire team.

## The Tool of 1,000 Uses

The level of customization inherent in Task Tracker helps manage a wide variety of tasks. Considering it can handle individual tasks, group to-do lists or group tasks with individual step-by-step components, Task Tracker can help with virtually any task performed throughout the dealership, including:

- Management of inventory counts
- Week-end, month-end and year-end reporting
- The interviewing and hiring process
- Step-by-step guide to successful sales
- Customer Relationship Management calls and follow-ups

Once you've created the task by selecting a task type and inputting the corresponding details (such as responsibilities of different

project personnel, automatic e-mail notification settings and timelines), you can use it as a template for future tasks that are similar in nature. No matter what task you want help to manage successfully, the complete history of the task can be tracked and viewed as it happens or referenced in the future, helping to improve both efficiency and accountability in the dealership.

## Security, Convenience and Notification

During group tasks, each step of the task features customizable security access, so each member of the team can only see what they need to see to get the task completed. Individual users can be sent e-mail notifications when the task moves to them and requires their attention. In the event of a slowdown or missed deadline, the creator of the task can even send a reminder notification by e-mail to help keep the process moving. At every step of the way, users can accept or reject their individual portion of a group task, with the option to send it back to a previous user to ensure the task is done right.

It is easily accessible from the Quick Links section of PFW IntelliDealer and features a Multimedia tab that allows you to attach documents, pictures or other media to individual or group tasks. With all these great features and functionality, Task Tracker is ready to help your dealership successfully manage projects and workflow. [PFW](#)

## FROM THE EDITOR

Being able to go wherever business demands while remaining connected to your office, your customers, and your suppliers is essential to operating a successful dealership. PFW has always championed creating flexibility in your business, and that's why this edition of the *PFW Password* is dedicated to mobility.

On our front page you will see PFW MobileInspection, our newest method of allowing dealers to extend the reach of their business system into the field. With the use of handheld technology, MobileInspection allows you to complete used equipment evaluations remotely whenever the situation demands that you venture away from the dealership.

PFW MobileTech, our mobile service solution, is a valuable addition to the already invaluable IntelliTech technician time management module, and is highlighted on Page 4, as Harold Maxwell provides some thoughts on how MobileTech and IntelliTech have helped Booth Machinery operate more efficiently and profitably.

John Andersen, Director of Sales and Business Development at PFW, brings up one of his favorite topics on Page 3, and talks about how portals in PFW IntelliDealer (Management Central, the Customer Portal and the Sales Support Portal) provide critical information at a glance to dealership staff on the go.

Featured on Page 5 is Rental Supervisor, a central place to find all information critical to operating your rental business.

Finally, Task Tracker (Page 2) is an IntelliDealer module that allows dealerships to plan and organize a variety of tasks, while ADP Network Phone offerings (Page 6) allow dealers to communicate more effectively.

Also in this edition, you will see an ad displaying our software on Apple iPhone and iPad technology. Tablets and smart phones are increasingly popular tools, and since PFW IntelliDealer is browser-based, it is one of the only Dealership Management Systems that can be used on any device with an Internet connection.

We hope that this edition of the *PFW Password* newsletter sparks your imagination to think about some of the ways that you can extend your dealership beyond traditional boundaries to provide new services, facilitate new interaction, and start new relationships.

- The Password Team

## PASSWORD

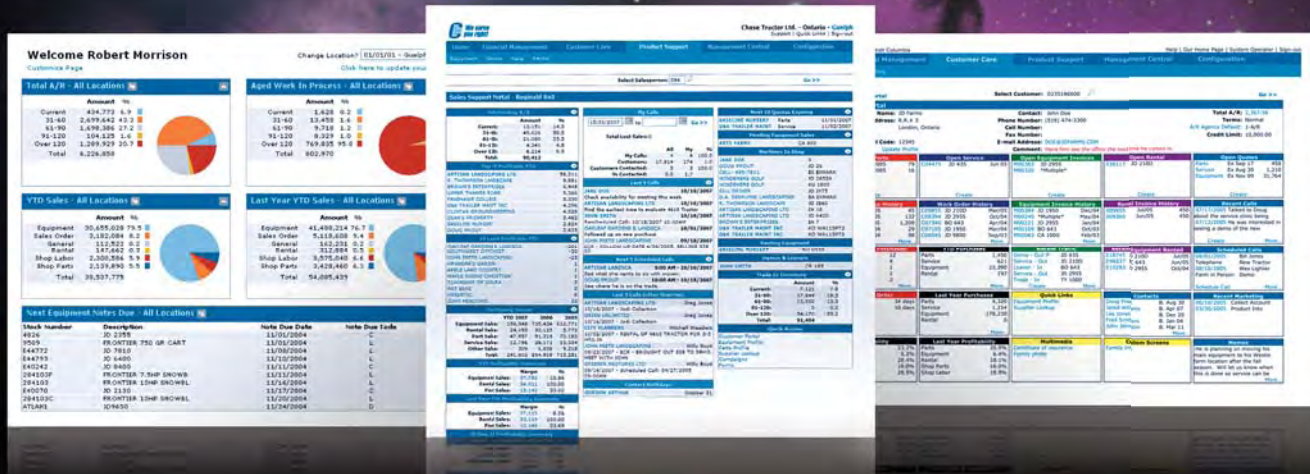
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# The Power of Portals

CONNECTING YOU WITH YOUR CUSTOMERS

BY JOHN ANDERSEN, *Director of Sales and Business Development, PFW*



In the world of science fiction and physics, a portal is a doorway between places or even times – a shortcut between realities. In the real world, a portal is still a shortcut, but a shortcut of a different kind.

Simply put, a portal is a starting point for users. It provides key data from a variety of sources. It helps you improve your efficiency by giving you all the information you need in one place. With PFW, portals act as gateways to the world of information available through the PFW IntelliDealer Dealership Management System.

## Portal Genealogy

**Management Central** Released in 2001, Management Central was PFW IntelliDealer's original portal, providing real-time business analysis of customers, parts, equipment and service as well as sales and financial information – all on one screen. It utilized the same point-and-click technology users were used to using on their home computers and created a simple-to-use, browser-friendly way of accessing valuable data. Quite simply, Management Central pushed information to the people that really needed to see it in the dealership – and it continues to do so.

**Customer Portal** The next portal to be introduced in PFW IntelliDealer was the Customer Portal, which was originally suggested by PFW customer Gregg Rebar, Chief Operating Officer at Atlantic Tractor LLC, a John Deere Dealer with 12 locations

throughout Maryland, Pennsylvania and Delaware. At the 2005 PFW Dealership Management Conference in San Diego, Rebar explained his idea for an application that would give every member of his staff – especially those from different departments or branches – easy, single-screen access to all the information relating to a specific customer.

In early 2006, Customer Portal was introduced, giving dealers all the customer-focused information they needed on one screen, helping them to be more knowledgeable and professional when dealing with both frequent and infrequent customers. Still one of PFW IntelliDealer's most popular features, Customer Portal gives everyone in the enterprise a truly global view of their customers.

**Sales Support Portal** Building on the success of 2006's Customer Portal, PFW released the Sales Support Portal in 2007, taking the customizable, easy-to-navigate single-screen concept of the Customer Portal and applying it to the sales process. Designed to help sales staff gain a better understanding of their customers, Sales Support Portal brings all the information relating to a specific salesperson's customers to the forefront –

all on one screen, at one time. In the end, Sales Support Portal helps keep salespeople focused on their customers by letting them see what really matters to them.

## Keeping You Connected

When you ask who the most important person in the dealership is, you're bound to get different answers, depending on who you ask. That's why PFW has worked so hard to offer a wide range of portals and applications to help make life in the dealership easier and more productive for all. If customer focus is the most important area of your business, you can rely on Customer Portal. If you want to drive sales at your dealership, you can rely on Sales Support Portal. If you want to view all your dealership's key information in an easy-to-read dashboard, you can rely on Management Central.

No matter what area of the dealership you call home, PFW IntelliDealer's portals and applications were designed to quickly and conveniently keep you connected to the information you need most. [PFW](#)

# The Benefits of Time Tracking


A FEW WORDS FROM HAROLD MAXWELL

For the last 21 years, Harold Maxwell has been the General Manager at Booth Machinery, a CASE IH dealership in Yuma, Arizona. Harold has over 28 years of experience in the agricultural industry, and uses this experience to ensure that Booth's customer service, delivered by the Parts and Service departments, is beyond expectation.

Service is a huge part of Booth's focus, accounting for in excess of 10% of their total business. Booth Machinery implemented PFW IntelliTech soon after its release in 2004 and helped to beta-test PFW MobileTech beginning in May, 2008.

Mr. Maxwell took some time to talk with us about how Booth Machinery has used MobileTech and IntelliTech to create efficiencies that save time and money.

**PFW:** How have MobileTech and IntelliTech helped Booth Machinery operate a profitable service department?



**Harold Maxwell:** The profitability and success of a service department relies on two things. First, you need to be able to efficiently capture every second of every day. Second, once that time is captured, you need to be able to accurately bill that time. IntelliTech and MobileTech help us do just that.

**PFW:** What kind of challenges did MobileTech and IntelliTech solve?

**HM:** Traditionally, time had been kept on a time card that the technician punched in and punched out on as needed. The best that could be said about this system was that it made certain that the technician was only paid for hours that he was on the premises. It did not account for how much time was actually spent on the job versus on break, getting coffee, waiting for the next job, or just visiting. A service technician's time is perishable. Once a minute is gone, it's gone forever, so accurate time records are crucial.

**PFW:** How did MobileTech and IntelliTech go about solving these challenges?

**HM:** The first step towards improving this situation was the IntelliTech browser-based time management system. IntelliTech has the ability to accurately measure how much of an eight-hour day is spent in non-revenue-producing activities.

This was a great start, but still left a gap, as the field techs were still on manual time cards that were usually filled out the next day after the work had been completed. MobileTech, a streamlined, wireless version of IntelliTech, lets us track how much time is spent on the job versus travelling, etc., when a technician is in the field.

## The combination of IntelliTech and MobileTech gives us the most accurate measurement of tech time that we have ever had.

It also forced our service management team to do a better job of planning. Technicians can no longer stand around and wait for the next job if they want to get paid. They have to be logged on to a line in order to have time recorded.

**PFW:** How have MobileTech and IntelliTech helped Booth Machinery create efficiencies providing service to customers?

**HM:** Measuring tech performance is a vital part of managing a service department. The standard has been service efficiency, but in the past the lack of accurately-recorded time or ability to get timely reports made this a somewhat suspect number. What is great about the PFW system is that it can measure and factor in all non-revenue-producing time to get a true measurement of service efficiency.

From the technicians' point of view, PFW IntelliDealer can help them understand how long a job is supposed to take and help keep them apprised of their progress and what is going on around them.

PFW IntelliDealer helps us define what repair costs are going to be and helps us avoid surprises.

**PFW:** What other features stand out in PFW IntelliDealer?

**HM:** Alongside MobileTech and IntelliTech, one of the best features that PFW IntelliDealer provides to our dealership is real-time reporting. Managers can be anywhere, any time and be able to quickly and easily see exactly what is going on in the dealership. It acts as a communications and planning tool... with that information on hand, we are able to more efficiently manage our operations.

**PFW:** How does PFW IntelliDealer help keep you competitive in today's dealership environment?

**HM:** Overall, PFW IntelliDealer provides our managers and staff with transparency and openness of information. At Booth Machinery, we believe that the skills and talents of our employees are something that can't be duplicated by our competitors. PFW IntelliDealer gives our frontline people the information they need to properly do their job without having to run to management for that information. This saves us a tremendous amount of time. **PFW**

# PFW Rental Supervisor

HELPING YOU LOOK AFTER YOUR RENTAL BUSINESS

PFW IntelliDealer was designed to help you reduce costs, increase margins and improve customer satisfaction by giving you quick and easy access to the information you need most.

With the PFW Rental Supervisor module, PFW takes this concept and applies it to your rental business. PFW Rental Supervisor acts as a single-screen source to the data you need to efficiently and successfully

manage your rental business. From the PFW Rental Supervisor application, simply click one of the eight tabs across the top of the screen to access the corresponding rental information. [PFW](#)

Here's a quick overview of the information available by clicking each of the tabs:



## C.O.I. Expiration

Identifies customers with expiring certificates, with or without open contracts.



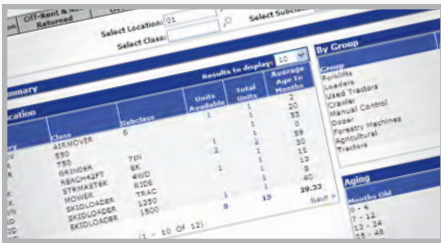
## Off-Rent & Not Returned

Shows which units you should go and retrieve.



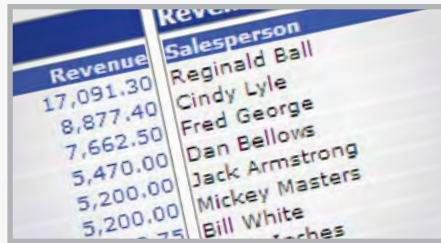
## Units with Rate Overrides

Shows the contracts/units where rates were overridden, either up or down.



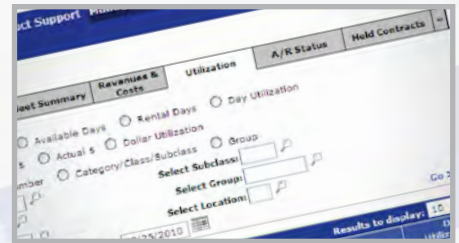
## Fleet Summary

Summarizes your rental fleet by classification, group, average age in months, and hour reading.



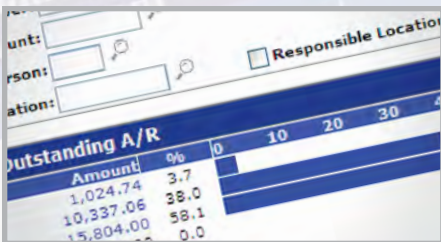
## Revenues & Costs

Shows revenue and maintenance costs by customers, salespeople, groups, and units.



## Utilization

Based on your selection criteria, shows rental utilization and revenue figures by stock number, group, or category/class/subclass.



## A/R Status

Displays Accounts Receivable information for rental invoices.



## Held Contracts

Shows the rental contracts currently on hold.

# Phone Communications

AN ALTERNATIVE TO THE PHONE COMPANY

PFW now offers many different solutions for your dealership's phone communications, whether you want a robust phone system, a hosted phone service, or just to save money utilizing your existing phone system.



## Network Phone Enterprise

Network Phone Enterprise is an easy-to-use, complete phone system, designed for larger dealerships. This robust solution can be scaled to thousands of users, and can provide integration to software applications such as Call Intelligence.



## Network Phone ASP\*

Network Phone ASP is a hosted service that can radically simplify telecommunications for dealerships that don't want the hassle of owning and maintaining a phone system. Take the phone company out of the picture with this complete, simple solution. Local and long distance calling plans are included, and the monthly bill is easy to read and understand.



## Call Connect\*

Call Connect provides dealers with a high-capacity T1 line for phone, data, and Internet connectivity. A fixed fee for virtually unlimited† local and long distance, using your existing phone system, will eliminate guesswork in phone budgeting. You can also eliminate extra, separate circuits for data and Internet, reducing phone company costs.

\* Not available in Canada

† 1500 minutes per phone per month aggregated by site. International calls billed at prevailing rates. Toll-free calls billed at five cents per minute. Excludes Alaska and Hawaii.

Continued from page 1

## Taking Evaluations to the Field

Alternatively, the MC9090 handheld device features a powerful processor to handle all your business applications, a barcode scanner that is known for its accuracy and range, and a pistol grip for quick scanning.

Whether you choose a laptop or handheld solution, MobileInspection can be synced up with PFW IntelliDealer from the field via cellular access. If you want to limit your cellular usage or are in an area without cellular coverage, you can quickly and easily sync the data up to PFW IntelliDealer upon your return to the dealership either wirelessly or with a cradle for handheld units.

With PFW IntelliDealer's Used Equipment Evaluation module and MobileInspection, it doesn't matter whether the equipment comes to you or you go to the equipment, you'll have the tools you need to do the job accurately and efficiently. [PFW](#)

These devices can also be used with PFW MobileTech (our streamlined, wireless version of the IntelliTech time management and information system), Wireless Inventory Control: Equipment and Parts.

# PFW's Customer List Continues to Grow

PFW IS PLEASED TO WELCOME THE FOLLOWING NEW USERS OF PFW INTELLIDEALER

## Arnett New Holland

Head Office: Arnett, Oklahoma  
No. Of Locations: 3  
Main Line: New Holland  
[www.arnettnewholland.com](http://www.arnettnewholland.com)

## Battle River Implements Ltd.

Head Office: Camrose, Alberta  
No. Of Locations: 4  
Main Line: John Deere  
[www.briltd.com](http://www.briltd.com)

## Sancton Equipment Inc.\*

Head Office: Saint John, New Brunswick  
No. Of Locations: 2  
Main Line: Terex  
[www.sancton.com](http://www.sancton.com)

## Triple W Equipment

Head Office: Missoula, Montana  
No. Of Locations: 3  
Main Line: John Deere  
[www.triplewequipment.com](http://www.triplewequipment.com)

## Walsh Equipment, Inc.

Head Office: Prospect, Pennsylvania  
No. Of Locations: 1  
Main Line: JCB  
[www.walshequipmentjcb.com](http://www.walshequipmentjcb.com)

\* **PFW IntelliDealer** ASP

## New Interfaces

PFW stays in close contact with our customers and the industry's top OEMs – including John Deere, Komatsu, Bobcat, Case, New Holland, among others – to maintain and update the largest selection of interfaces offered in the industry.



### John Deere Warranty (WINXML)\*

This interface captures information from the Work Order screen in PFW IntelliDealer and allows you to send it directly to the new John Deere Warranty System without the need to re-key basic warranty data. Data entered into the WINXML interface is validated in real time by John Deere. If the claim successfully meets all of the necessary requirements, it will be submitted directly for processing. Otherwise the claim goes to an intermediary website where the dealer can easily adjust and re-submit the claim.

Visit [www.pfw.com/solutions/vendorcommunications](http://www.pfw.com/solutions/vendorcommunications) to view our complete current list of interfaces – and make sure to check back in the future to see our newest first-to-market additions to the list.

*\*Replaces the JDWIN interface. IntelliDealer only.*



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PFW IntelliDealer's fully-integrated financial, sales, service, rental, marketing and Customer Relationship Management (CRM) modules – as well as its complete business analysis tools – make it the most comprehensive Dealership Management System available on the market today. With accurate, timely data available in all areas of your business as well as the largest selection of OEM interfaces available in the industry, PFW IntelliDealer can help you reduce costs, increase margins and improve customer satisfaction. PFW IntelliDealer is also the only true browser-based system on the market, which means you get access to the critical data you need from virtually anywhere in the world. With the technology, features, choices, communications and reliability you need, PFW IntelliDealer is the engine to power your business.

With over 30 years of experience serving the equipment distribution industry and over 800 dealerships across North America relying on PFW IntelliDealer, PFW isn't simply making promises about the future; we are delivering a tried and tested solution. PFW also delivers on-site installation and training; friendly, experienced customer phone support to accommodate after-hours emergency services; and regional and online training seminars to ensure the exchange of ideas and information among PFW users. PFW IntelliDealer is ready to help you succeed *right now* with our innovative, industry-leading products and services – which we continue to develop to reflect the changing needs of our Dealers.

## Recent System Upgrades

Martin Equipment Ltd.  
Edmonton, Alberta

On-Site

Robert's Farm Equipment Sales, Inc.  
Chesley, Ontario

ASP

Fresno Tractor, Inc.  
Fresno, California

On-Site

Hergott Farm Equipment Ltd.  
Humboldt, Saskatchewan

On-Site

Colusa Tractor Company  
Colusa, California

On-Site

Malone Tractor & Equipment Co.  
Carthage, Mississippi

ASP

Pat Kelly Equipment Co.  
Hazelwood, Missouri

ASP

Tractor and Equipment Company, Inc.  
Birmingham, Alabama

On-Site

Hobbs Farm Implement  
Colt, Arkansas

ASP

Carlson Tractor and Equipment Co.  
Rosemount, Minnesota

ASP

Garden State Bobcat Inc.  
Freehold, New Jersey

On-Site

Please Recycle This Newsletter. This newsletter is recyclable and can be recycled in most community recycling programs.



An Company

# Manage your dealership from anywhere.

IT'S ABOUT MOBILE Stay informed and productive, gather information and communicate with others – in the office, in the field, or wherever your business takes you. With PFW IntelliDealer and your smartphone, (or other web-enabled device), you're instantly connected when you're on the move. It's dealership management, on your terms, on your time. Mobile: It's why we're different. [PFW.com](http://PFW.com)



Secure connection to your dealership network required.

