

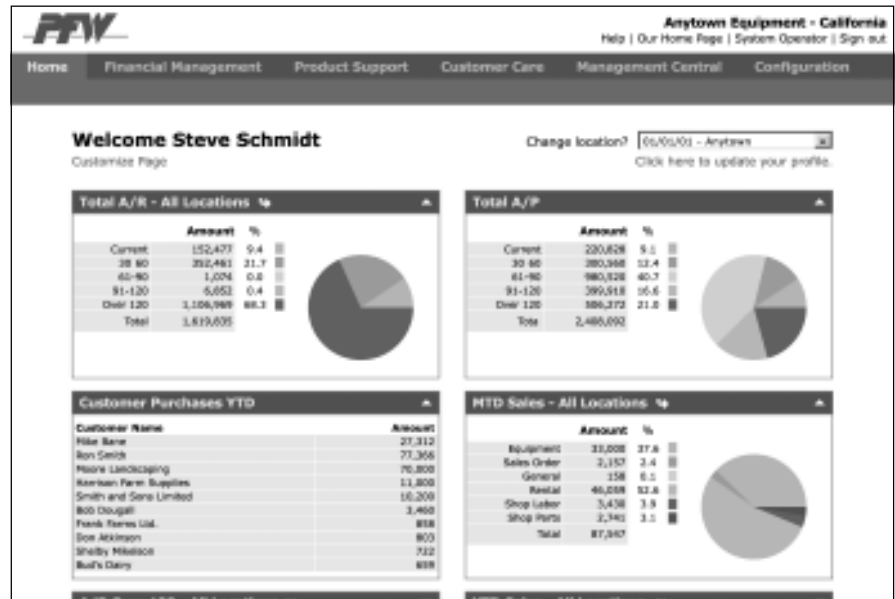
PFW IntelliDealer: Taking the Pulse of Business

BY ANDREW JONES

When Ross Atkinson, PFW's VP of System Architecture and Product Design, is asked about PFW IntelliDealer, the highly significant recent addition to the company's series of evolutionary dealership management products, what is noticed is his instant animation: his eyes light up, his voice increases in volume, his words quicken and, suddenly, the allotted hour has gone by – and it's apparent he's still got plenty to cover! He relates: "When I speak with dealership owners and managers and they realize what kind of power this software gives them, they almost want to give you a hug. They realize that PFW IntelliDealer is something they can't afford to ignore."

One is left with the awareness that PFW IntelliDealer is the product of an acute understanding of what is needed to feel the pulse of the dealership and, consequently, manage it more effectively.

PFW IntelliDealer combines cutting-edge technologies with a development process shaped by PFW's intimate knowledge of the marketplace – and dealers' needs within that marketplace – in order



Users can customize the welcome page to highlight their management concerns through the Executive Summary.

to quickly answer the question "How is my business doing today?" PFW IntelliDealer is a powerful, highly usable and customizable suite of applications – that gives instant, precise, and business-intelligent answers.

PFW IntelliDealer was officially released at the recent PFW Dealership Management Conference in Nashville, Tennessee (see "Return from Nashville" on page 4), and subsequently shown at the 2003 JDUG Conference in St. Louis, Missouri by John Andersen, PFW's VP of Sales. Ross Atkinson describes some of the Conference reaction to PFW IntelliDealer:

"What was heard in Nashville was that PFW IntelliDealer is priced right, as there's no need to re-license or re-buy parts of an existing system."

Joanne Koenig of Koenig Equipment, Inc., located in Ohio, attended the Conference, where she witnessed PFW IntelliDealer's power: "As we are already using Management Central, we were im-

pressed with the interactive and easy-to-use nature of the product. It's the software of the future that will allow us to really drill down – there is so much information to access."

"PFW IntelliDealer is the software of the future that will allow us to really drill down."

Joanne Koenig
Koenig Equipment, Inc.

As mentioned, PFW IntelliDealer is truly evolutionary – to see how it fits this definition, consider its following qualities:

Ease of Use

PFW IntelliDealer has a graphic interface, eliminating the need for the memorization of numbers and codes for menus, screens,

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systems, features and reports. This is a boon to new users and allows for a new degree of interchangeability of roles in the dealership: if an employee is unavailable, the opportunity for someone else to fill that role is now a possibility. Joanne Koenig says: "With our new dealerships, we anticipate training will be much quicker, showing the value of PFW IntelliDealer."

This G/L information screen shows check boxes, lookup icons and a dropdown menu: easy-to-use elements that appear throughout PFW IntelliDealer.

The language and terminologies of the dealership can be integrated and used, as PFW IntelliDealer is highly customizable. Authorized users can choose colors, logos and pictures that reflect a dealership's unique corporate identity. Users see promptable choices, eliminating any question regarding the meaning of each field's function. Also, in order to keep pace with the globalization of economies, PFW IntelliDealer offers the capacity to be

"My service manager says he has more control and a better understanding of his department now than he ever has."

Harold Maxwell
Booth Machinery, Inc.

configured in a language of choice.

PFW IntelliDealer provides easy administration. Configure a user's profile so that only necessary elements are seen and, within those areas, the user receives the appropriate level of access in order to perform daily tasks. This streamlin-

ing is useful in creating a simplified, easy-to-use work environment, allowing employees to meet their responsibilities within the dealership.

Dave Fulton, PFW's Manager of Product Support, says: "It's exciting, because PFW IntelliDealer will definitely lower the learning curve for newer staff. The screens are easy to read, flow well, and are dealership sensitive in that only the fields you need are available, based on the configuration you apply. If, for example, the Purchase Order System is not being used, the PO tab will not show when keying a voucher, and it becomes a much easier process to teach and learn."

The environment used to present PFW IntelliDealer is that of the web browser, familiar to most and containing navigation logic that is comfortable for even the most casual computer user. Harold Maxwell of Booth Machinery, Inc., located in Arizona, says:

"Our service technicians are 'hands-on' types of guys. The graphic interface in PFW IntelliDealer is perfect for them, as well as the accounting staff. The summary displays help us keep our commitments to customers."

He adds, "My service manager says he has more control and a better understanding of his department now than he ever has, and he has over 20 years' experience."

Online help is available throughout PFW IntelliDealer so that questions can be answered on-the-spot, allowing a continuance of an employee's workflow. Also, entry and process screens offer context-sensitive, screen-specific help by way of a question-mark help icon.

The Opportunity to Create a New Starting Point

PFW IntelliDealer is software with a new set of consistencies: standards are set, such as screen design and behaviour, so that users attain a sense of familiarity – both system-wide and with respect to future de-

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FROM THE EDITOR

The Evolution Continues...

In our last issue we told you about our company – by way of its history of innovation and the staff and values that helped create this history – and how our evolution has shaped the products and services you use every day to manage your dealership.

This issue builds on that theme by focussing on a product that is very important to us in our continuation of this evolution, a product that is a reflection of PFW's deep understanding of your needs: something we have attained through a valuable dialogue with you, our customers. That product is PFW IntelliDealer, the latest release in our series of dealership management solutions. By reading this PFW Password, you'll learn more about PFW IntelliDealer, a management system that allows you to access new depths of critical information, when you need it, and in the way you need to see it.

Also included are informative articles on our recent PFW Dealership Management Conference and our regular feature on new customers and recent hardware upgrades.

You might also notice a slightly different look for this issue: we are pleased to unveil our new PFW Password masthead – part of an overall design change we started in the last issue.

With this Spring edition, we feel we're starting 2003 with a PFW Password that will help you keep apprised of all that is happening at PFW – an edition, therefore, you can't afford to miss.



Andrew Jones
Andrew Jones, Editor

PASSWORD

PFW Password is produced by PFW Systems Corporation and is distributed free of charge. Any comments or submissions are welcome, and should be addressed to the editor.

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PFW IntelliDealer

FOCUS: CUSTOM FINANCIAL REPORTING

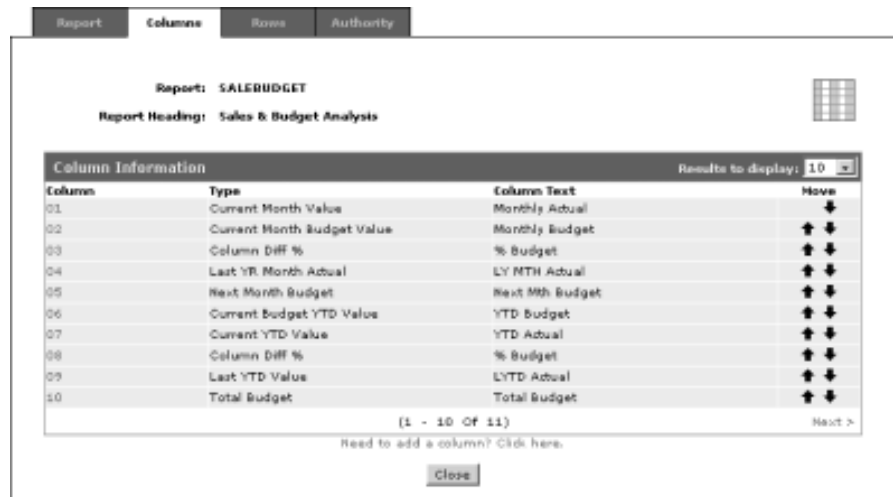
BY ROSS ATKINSON

PFW IntelliDealer is a complete dealership management system with many facets. From its ability to summarize data, to its customizability, to its marketing-campaign capabilities, an in-depth explanation of all these features would require much more space than is available here. Alternatively, particular aspects of PFW IntelliDealer are highlighted here, as well as in future issues.

The first is a feature that is a leap forward and allows a new degree of power regarding the retrieval and presentation of important data – when, where and how it is needed. This facility can be found in the new custom reporting option, Financial Reporting, contained in the Financial Management application of PFW IntelliDealer, as well as through Management Central. With this tool, a user can utilize the same simple interface made familiar by Management Central in order to make financial reporting easier than ever.

Users start by defining the columns to appear on the report: there are numerous choices, including current and last-year period values, current-year budgets, rolling-twelve value, year-to-date values, high-performance budget values, column dollar and percentage differences, and a column-totalling facility.

When utilizing period values, date ranges can be predefined or prompted at run time. Column positioning can also be easily adjusted and changing column references is not required, as Financial Reporting takes care of making these adjustments.



Custom Financial Reporting allows the design of customized financial reports, such as this Sales and Budget Analysis.

The next step is to define the report rows. The types of rows include heading, details lines, totals lines and presentation attributes (e.g., horizontal lines, blank lines, etc.). The row's high-performance budget and percentage change can also be specified. The percentage change function can be used to increase or decrease the calculated value by a given percentage in order to create "what if" scenarios.

Once the rows are defined, accounts must be added to define what makes up the row value under each column. This is done by keying in each account, or a range of accounts. A "profit center lock" function can be utilized which includes the ability to select accounts, for example, whose profit center starts with '3' or ends with '1'. The ability to repeat column headings, show revenue as a positive – instead of a negative – General

Ledger value, see the row value as a percentage of a total line, and remove cents from the values shown are some other included features.

The last step involves identifying who is authorized to run the report. The new security controls in PFW IntelliDealer give authorized accounting staff the ability to build the financial reports, and allow department personnel to run only the customized report they are authorized to run. Results are returned to the browser in a spreadsheet-style presentation.

Please see future editions of the PFW Password for more spotlights on the features of PFW IntelliDealer. Any further questions regarding Financial Reporting in PFW IntelliDealer should be directed to PFW Client Services at (519) 474-3700. [P](#)

Ross Atkinson is VP of System Architecture and Product Design at PFW.

Sales & Budget Analysis										December 2002	
	Monthly Actual	Monthly Budget	% Budget	LY MTH Actual	Next Mth Budget	YTD Budget	YTD Actual	% Budget	LYTD Actual	Total Budget	YTD % to Total Budget
Dallas											
Ag Equip	220,000	200,000	1.10	193,500	200,000	800,000	958,000	1.23	852,000	2,400,000	0.40
CP Equip	86,000	100,000	0.86	74,000	100,000	400,000	410,000	1.03	365,000	1,200,000	1.34
* Total	306,000	300,000	1.02	267,500	300,000	1,200,000	1,368,000	1.14	1,217,000	3,600,000	1.37
Ft. Worth											
Ag Equip	180,000	150,000	1.21	160,000	150,000	600,000	650,000	1.08	575,000	1,800,000	0.36
CP Equip	70,000	70,000	1.00	85,000	70,000	280,000	300,000	1.07	260,000	840,000	0.36
* Totals	250,000	220,000	1.14	245,000	220,000	880,000	950,000	1.08	835,000	2,640,000	0.36
** Final Totals	556,000	520,000	1.07	512,500	520,000	2,080,000	2,328,000	1.12	2,052,000	6,240,000	0.33

The result is spreadsheet-oriented and presents financial information in a dealership-specific way.

Return from Nashville: Pick Up The Beat!

BY JENNA MORTON

With representatives from dealerships all over North America attending four days of business sessions and activities, the 2003 PFW Dealership Management Conference in Nashville, Tennessee was action and information-packed from the beginning.

Held under the glass-domed grandeur of Nashville's Gaylord Opryland Hotel, the Conference provided attendees with the opportunity to learn from, and network with, PFW staff and representatives from other dealerships while enjoying the Music City's renowned Southern hospitality. The Conference also marked the official launch of PFW IntelliDealer and some very significant updates to existing products: software designed, developed, and delivered so that dealers can "pick up the beat" of business.

Thursday, March 13

The first day of sessions began with motivational speaker Billy Riggs discussing "The Magic of Attitude" and how to deliver "magical customer service" experiences to customers at the dealership. By mixing humor with inspiring stories of exceptional customer service, and magic tricks that had people scratching their heads in wonder, Billy left everyone laughing as the morning session concluded.

The much-anticipated afternoon sessions marked the launch of PFW IntelliDealer and focussed on the two applications PFW is releasing as part of R6V01 this spring: Financial Management and Customer Care. After an exciting and question-filled introductory session led by John Andersen, PFW's VP of Sales, attendees broke into smaller groups for a closer look at the individual applications and had the chance to direct more in-depth questions to Dave Fulton, Manager of Product Support; Frank DeDecker, VP of Client Services and Installation; and Ross Atkinson, VP of System Architecture.



At a variety of Conference information sessions, attendees gained valuable ideas and solutions.

Friday, March 14

Sessions given by two of PFW's customers started off the day and gave attendees the opportunity to learn about each dealership's application of and experience with two of PFW's key software products, eServices and Management Central. Discussions between presenter and their audience during and after the sessions ensured a continuous flow of ideas, successes and solutions, and left many with a new perspective and plans for implementing change in their dealership upon their return home.

A key objective of the PFW Dealership Management Conference is this sharing of information and experience between dealerships in the form of dealer presentations which were, by all accounts, a success – and something attendees said needs to continue at future PFW conferences and workshops. With this in mind, PFW would like to offer a special thanks to David McHugh of Ontrac Equipment Services, located in Ontario, and to Harold Maxwell of Booth Machinery, Inc., located in Arizona, for

participating in the Conference as presenters this year.

The PFW IntelliDealer Product Support application (scheduled for release in Summer, 2003) was the target of a morning session, where many attendees took the opportunity to view the up-and-coming software specifications firsthand, and to discuss future direction.

Concurrent sessions throughout the remainder of the morning and afternoon provided attendees with the opportunity to select the sessions that interested them the most. Initial feedback on the new "Track Session" format indicates this was also a positive alteration to the Conference schedule from previous years (interestingly, what was heard was, "BOTH sessions are great, how do I choose?"). From enhancement highlights for eServices and Management Central, to an interactive session on "Ten Underutilized, Timesaving and Moneymaking System Features," (see "Top Ten with Dave Fulton" on page 8) to a session presented by two of Gaylord Entertainment's IT staff members: Brian Smith and Sondra Fitzwater, on the company's use of the IBM iSeries to manage hotels in Texas, Florida, Nashville and Washington, D.C., as well as several large entertainment venues and media interests throughout Tennessee, there was something for everyone.

An opportunity to learn and network.

Fun and Networking, too

From the opening reception at the Crystal Gazebo in the Garden Conservatory atrium and finally to the closing BBQ banquet at Nashville's famous Wildhorse Saloon,



Conference attendees and PFW staff had a great time at the closing banquet held at the Wildhorse Saloon.

attendees and PFW representatives had lots of fun mingling with old acquaintances and making new contacts. And while discussions about business and dealership operations were often overheard between sessions and

during the scheduled events (and maybe even on the dance floor at the Wildhorse Saloon!), there was still opportunity for some sightseeing around Nashville, shopping at the Opry Mills shopping center, or to take in a show at the nearby Grand Ole Opry. Some

attendees even extended their stay beyond the Conference dates to make sure they could take in all the sights and sounds of Nashville and the surrounding area before their return home.

Based on the comments received, the 2003 PFW Dealership Management Conference was enjoyed by all and attendees left Nashville with the tools, ideas, and inspiration needed to help "Pick Up the Beat" of business at their dealerships. To those who attended – and especially to those who didn't – don't miss the next PFW Dealership Management Conference in 2005. P

Jenna Morton is the Marketing Coordinator at PFW.

PFW's Customer List Continues to Grow

PFW is pleased to welcome the following dealerships to the customer list:

Cook Equipment Co.

Having started in the industry with the Ford tractor line in 1957, Cook Equipment Co. joins PFW from DIS (Challenger) with Southern California dealerships in Fullerton, Cerritos and Corona. The Fullerton location is the corporate headquarters and handles New Holland Construction and Ag, along with JCB, for Orange County. Cerritos carries Bobcat, JCB and New Holland Ag for Los Angeles. The new Corona facility opened in January 2003, and carries JCB products for Riverside, San Diego and San Bernardino counties. Cook's number one focus is providing quality service to their customers, and

they are looking forward to a positive long-term partnership with PFW.

S & L Equipment Rental, Inc.

Located in Belvidere, New Jersey, last year S & L Equipment Rental, Inc. celebrated 35 years of supply and service to their valued customers. They have expanded their business structure and their target is the delivery of increased levels of customer support across a wide range of construction equipment tools and products. S & L Equipment Rental, Inc. provides product support, rentals, rental purchases and sales of New Holland Construction and Kobelco equipment.

IBM iSeries

RECENT UPGRADES

Bourland Inc.
Terrell, TX

Caldwell Implement Co.
Burlington, KS

Dinkel Implement Co.
Norfolk, NE

Reed Equipment Co.
Stockton, CA

Flint Equipment Co.
Albany, GA

EARLY ADOPTERS
Save Big!
with PFW IntelliDealer

To recognize your ongoing commitment to the PFW Dealership Management System, we're offering our customers up to 71% off the price of the PFW IntelliDealer Financial Management, Product Support and Customer Care applications as part of our Early Adopter program!

The Early Adopter period ends soon, so don't miss out on these great prices. Contact your PFW Sales Representative for details!

Management Perspectives

PFW IntelliDealer is currently composed of Financial Management, Customer Care and Management Central. Due out later this summer is a fourth application: Product Support will initially consist of Equipment and Service modules, with Parts to be integrated in Spring, 2004, followed by Rental. Each application provides a different focus for management purposes.

Track vendor transactions through Financial Management's Accounts Payable module.

Financial Management

The Financial Management application provides a highly user-friendly environment that is based on simplicity and ease of use. Financial Management and its three key modules, Accounts Receivable, Accounts Payable and General Ledger, ensure that training and retraining of accounting/financial staff is minimized, increasing staff "up" time and, therefore, productivity.

Customer Care

Who are my customers? Where are they located? What are they buying from me? The answers to these questions can be found through business intelligence, a cornerstone of PFW IntelliDealer. CRM (Customer Relationship Management) focusses on automating and improving business processes associated with managing customer relationships in sales, marketing, customer service and support.

Management Central

Management Central is a business intelligence tool designed to assist dealership owners and managers to develop and execute management strategies

With Customer Care, highlight sales opportunities and implement marketing strategies.

based on a complete analysis of their customers, parts, equipment, and service sales, and financial information. Browser-based and fully integrated with the PFW Dealership Management System, Management Central provides users with easy-to-understand, on-demand access to their dealership's real-time data in the following areas: Customer Relationship Management (CRM), Geographic and Business Analysis, Call Analysis, Accounts Receivable, Accounts Payable, General Ledger, Service Management and Scheduling, Parts Profiling, Parts Analysis, Equipment Profile, Group Sales Analysis and Inventory Analysis. In its latest phase, the Management Central Executive Summary is introduced, Customer Profile access is increased, and Service Scheduling is enhanced. Also, Rental Availability and Rental Reports are now present.

Product Support

Composed of Equipment and Service modules, Product Support – due in Summer, 2003 – contains features that enable high-level dealership management capability within a graphical environment that users will find very comfortable. Equipment features are Profile, Quoting, Invoicing, Base and Options, Reports, Traffic, Service Agreement and Invoice History. Service features are Work Order, Supervisor, Technician, Service Scheduling, Flat Rates, Warranty, and Analysis Reports. An example of the Technician feature's functionality is the Service technician display that allows the display and input of assist time, break time and comments.

continued from page 2

velopment. With PFW IntelliDealer, an increased ability to more efficiently develop software is also present. This translates into a quicker implementation of program enhancements and customer changes into the model.

The Opportunity to Create New Applications

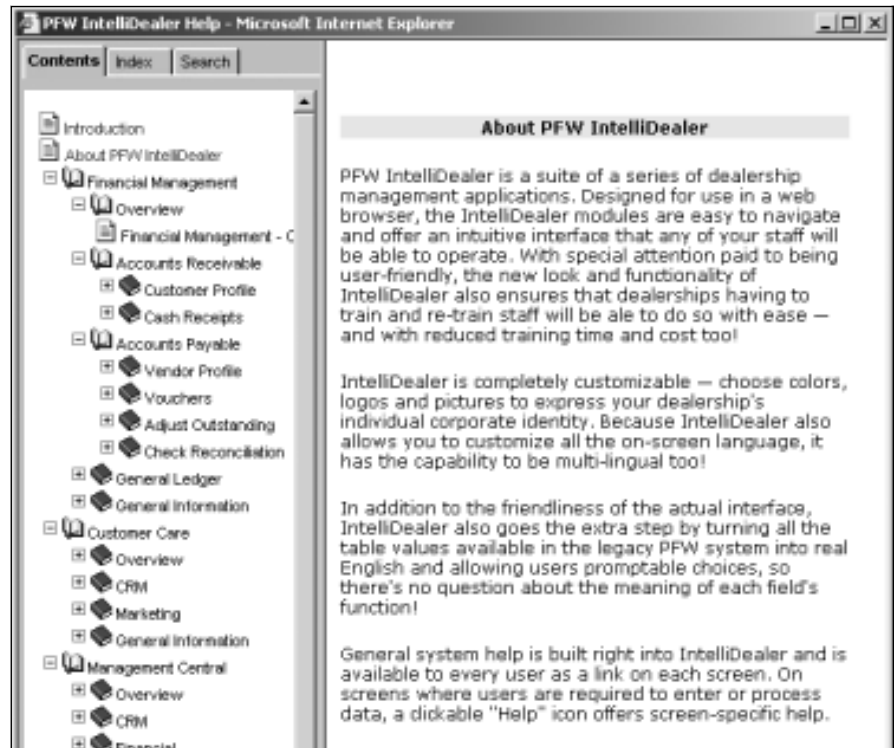
PFW IntelliDealer possesses an intuitive development environment that has allowed the creation of new applications designed to save dealers money and increase revenues. The modular nature of the architecture allows for the creation of bridges as customer and market needs dictate. An example is Customer Care's Campaigns feature that provides an enhanced ability to identify sales opportunities, and market to them directly through the appropriate marketing method of choice.

A New Layer of Data Utilization

With PFW IntelliDealer, dealers can put to work the goldmine of customer data collected over the years. In order to better understand customers' needs, a dealer can break down, classify and summarize this information. PFW IntelliDealer's intuitive nature, drill-down power and graphing capability creates a new way of looking at data and a high degree of analysis power.

Improve Data Quality

Querying a database is a process that can be greatly improved by grooming data:



PFW IntelliDealer provides contextual, screen-specific help designed to answer your questions quickly.

PFW IntelliDealer facilitates this through summarization, and therefore identification, of both redundant data requiring deletion, and unclassified data in need of grouping. The consequent increase in the overall quality of data – and its more logical arrangement – is manifest in the new custom Financial Reports, which facilitates a powerful new reporting capability. For more detail, see Ross Atkinson's feature: "PFW IntelliDealer – Focus: Custom Financial Reporting," on page 3.

PFW IntelliDealer – Experience It

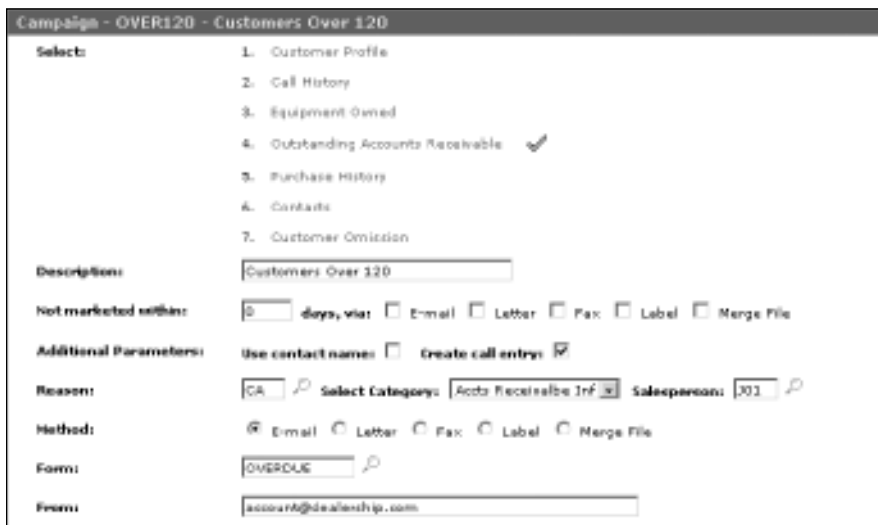
By looking at the shaping philosophy behind PFW IntelliDealer, as well as its thoughtful design and consequent merits, what returns to mind is Ross Atkinson's observation that "[dealership owners and managers] realize that PFW IntelliDealer is something they can't afford to ignore."

"Dealership owners and managers realize that PFW IntelliDealer is something they can't afford to ignore."

Ross Atkinson
PFW Systems Corporation

Described in this article is some of the detail behind this power but, in order to see PFW IntelliDealer's full capacity, please contact PFW in order to arrange a firsthand look: for more information on how to feel the pulse of the dealership with PFW IntelliDealer, contact Debbie Naujokaitis of PFW's Sales Department at (519) 474-3300, ext. 230. [P](#)

Andrew Jones is a Technical/Creative Writer at PFW.



The Customer Care application in PFW IntelliDealer allows for the easy identification of sales opportunities and a consequent selection of an appropriate marketing method.

TOP TEN

with Dave Fulton

The following was taken from the popular presentation "Ten Underutilized, Timesaving and Money-making System Features," made by Dave Fulton, PFW's Manager of Product Support, at the recent 2003 PFW Dealership Management Conference in Nashville, Tennessee. Presented here is the number-one item on Dave's top ten list.

1. APPSTYP (Application Sub Type table configuration)

This feature is designed to attempt to capture all of the holding costs associated with a particular piece of equipment inventory, yet facilitate the following of accounting rules. In order to follow GAAP account rules, certain costs like freight (except inbound) and interest are required to be expensed – not capitalized – yet these costs can be significant to equipment inventory.

In order to get a much better picture of the true holding costs and the costs associated with each piece of equipment, application sub types can be utilized which allow costs to be expensed for accounting purposes, yet be shown as part of the cost of a particular machine. Essentially, each piece of equipment has two costs: one equal to book or NBV, and one equal to "Salesman Cost," which includes "tracked" but not capitalized costs or discounts. Through security, the true cost of a piece of equipment can be shown to authorized users.

By utilizing this feature, there is a significantly better chance of "cost-based" sales representatives recovering more of the true costs associated with holding a piece of equipment.

In addition, if management decides to write inventory down, or if additional purchased discounts are acquired that are unusual and not customary (and don't want to be shared or disclosed), these actions or amounts can be essentially hidden from salesmen if they are using "Salesman Cost," yet can be tracked by stock number via NBV.

One of the benefits of this feature is that it can allow for the mass posting of interest (holding cost) to inventory, and therefore eliminate the tedium associated with posting each interest charge in payables to the appropriate stock number.

Visit the Members section of www.pfw.com for a complete listing of Dave's top ten, or contact PFW Client Services for details on any top ten item.

Code	Description	Current Cost	Sales Cost	EBPS
10	ORIGINAL COST	171,050.00	171,050.00	
1H	MPG'S INCENTIVES	58,157.00-	58,157.00-	
IR	RENTAL COSTING	51,141.73-	51,141.73-	242003
IS	SERVICE	8,943.95	8,943.95	PE989V
021703	HF FREIGHT	.00	8,242.65	051990
120897	HI INTEREST	.00	30,145.83	
120927	Total --->	70,625.22	109,083.70	87.14-
M	WHITE DOWN	.00	.00	
	NBV Total --->	70,625.22	.00	

By using APPSTYP the sales cost as well as the current cost can be shown. Alternatively, each cost can be displayed individually using operator codes.

Cd	Date	Inv #	Cus #	Description	Ret	Acc #
HI	082188	+H840+	+H840+	8.50% INT. FOR JUNE 1	787.75	+H840+
HI	052099	+H840+	+H840+	8.50% INT. FOR MAY 19	779.39	+H840+
HI	040888	+H840+	+H840+	8.50% INT. FOR APRIL	789.88	+H840+
HI	040299	+H840+	+H840+	8.50% INT. FOR MARCH	792.65	+H840+
HI	021588	+H840+	+H840+	8.50% INT. FOR FEB 18	789.88	+H840+
HI	012999	+H840+	+H840+	8.50% INT. FOR JAN 19	292.21	+H840+
				Total HI ----->	30145.83	
HR	013003	R01711	31167	BROADCAST DESIGN RND	3087.00	5002138P
HR	013003	R01711	31167	BROADCAST DESIGN RND	154.35-	5002138P
HR	122602	R01701	31167	BROADCAST DESIGN RND	3087.00	5002138P

Interest charges that are mass posted with this method can be easily tracked by stock number through the equipment history screen.



The PFW Dealership Management System is "designed for dealers by dealers." Incorporated in 1981, PFW offers years of experience developing software for equipment dealerships of all types and sizes. It's ideal for single or multi-store equipment dealers. The PFW System has been developed from the dealership's perspective. Ongoing enhancements grow with today's customer and market needs.

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Not only will we provide on-site installation and training, we also have friendly, experienced customer phone support to accommodate after-hours emergency services. Regional training seminars ensure the exchange of ideas and information among PFW users. With hundreds of installed sites across North America, the PFW Dealership Management System is proven to be a reliable, stable, cost-efficient system. There's no need to look any further for your management system – it's the ultimate dealership management system...period.



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