

# client services update



July 2005

## Tip of the Month

### How do I set up the call scheduling system?

1. Add an entry to table CALLTYPE and CALLPUR of “\*\*” with a description of “Note”.
2. Add an entry to table CALLPUR of “FC” with a description of “Follow Up Call”. If this code is already used, you can assign another value.
3. Add an entry to table CALLPUR of “CC” with a description of “Cancelled Call”. If this code is already used, you can assign another value.
4. Edit the table BRWVAL1 and enter the values as shown in Figure 1.
5. Calls can be scheduled

from any of the numerous locations within PFW IntelliDealer that allow you to enter calls. You will see hyperlinks at the bottom of the screen that allow you to either enter a call, enter a note, or schedule a call. You will

```
Customer Care - CRM
Call Scheduling (Y/N): Y
Default.....Note Type: **
.....Note Purpose: **
.....Note Result: **
.....Follow Up Result: FC
Cancelled Call Result: CC
```

Fig.1

also be prompted to schedule a follow-up call after entering a call into the system. 6. A pop-up window will be displayed allowing you to enter the scheduled call details. 7. Once the scheduled calls are loaded, scheduled calls can be viewed from the following locations:

- There is an Executive Summary view available to list Today's Calls (for you) on your home page
- If you are viewing a customer in Customer Profile, all scheduled calls will be listed at the bottom of the screen
- In Customer Care CRM, there is an option called Call Scheduling which displays scheduled calls in a calendar format

8. When you click on a scheduled call, a window displays the scheduled call information (Fig. 2). You can complete the call, cancel the call or reschedule the call. If you cancel the call, you will be prompted to enter a reason. The system will, in all cases, enter a record in the customer's call profile for every call scheduled, rescheduled, or cancelled.

**Customer Profile**

**Contact:**  
Company Name: Robert Wilson  
Address: 130 Main Street  
Forest, Ontario  
Zip/Postal Code: N0N1J0  
Business Phone Number: (519) 786-4956  
Business E-mail Address:  
Business Fax Number:  
URL:

**Scheduled Call**  
Name: Robert Wilson  
Contact:  
Call Date: 03/15/2005  
Call Time: 10:00am  
Type: TELEPHONE  
Purpose: SERVICE CLINIC  
To Do/Follow Up: See if he is interested in attending the service clinic.  
[Click here if the call has been completed.](#)  
[Click here to cancel this call.](#)  
[Click here to reschedule this call.](#)

Fig.2

*Note: In order to use the Call Scheduling system, you must first own and be licensed for the Customer Care product in IntelliDealer.*

## Webinar Sessions

In May, PFW began hosting webinar training sessions. Webinars are web-based training sessions that allow a group of customers to have an online discussion of a topic that's presented by a PFW employee.

We are currently accepting registrations for our next webinar session, *Salesman Tools I: Call Scheduling & Analysis in IntelliDealer*. This session will be held on Thursday, August 11th from 2 PM to 4 PM ET. The topics that will be covered are: Call Scheduling, Call Analysis, Campaigns, and Lost Sales.

If you have any suggestions for future webinar topics, please contact Dan Kane at [kane@pfw.com](mailto:kane@pfw.com).

## IntelliDealer Workshop

This fall, PFW will be hosting its first ever IntelliDealer only workshop. Tentatively, the topics to be included are: the Used Equipment Evaluation feature, the Parts Order Maintenance feature, customizable screens, and advanced Call Scheduling. There will also be a review of the Parts, Rental and Equipment modules.

We are sure that this is a workshop that you won't want to miss, so keep watching [www.pfw.com](http://www.pfw.com) for more details.

## Holiday Hours

The PFW business offices will be closed for the following holidays. A limited number of support personnel will be available from 8 AM to 5 PM ET. Emergency after-hours support will also be available.

## Civic Holiday

Monday, August 1, 2005

## Labor Day

Monday, September 5, 2005

- Emergency support only

## Thanksgiving Day

Monday, October 10, 2005



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