

client services update



May 2005

Tip of the Month

Using the Area Sales Feature

Area Sales is a feature available in the system to help show a breakdown of the “sales” that have occurred by “area”. This feature can be accessed through Management Central - Financial - General Ledger, Financial Management - General Ledger - Account History, or on the Executive Summary screen. The details displayed through this feature come from the billing runs that process the transactions. Here are some specific details about each section:

Area Sales		Total	%	0	10	20	30	40
Equipment:	159,741.35	36.3						
Parts Invoicing:	91,742.11	20.8						
General:	6,120.06	1.3						
Rental:	1,600.00	0.3						
Shop Labor:	94,935.79	21.6						
Shop Parts:	85,029.35	19.3						
Total:	439,168.66							

[Pie Chart](#)

Equipment

- Includes any charges to equipment sale accounts (application type “S”) billed through Equipment Invoicing or Rental Contract Maintenance
- The total also includes any overallowance amount posted to the unit at the time of sale
- The cost is retrieved from the equipment system

Parts Invoicing

- Includes any charges to part sales accounts (application type “P”) billed through Parts Invoicing (IntelliDealer) or Sales Orders (legacy system)
- A switch in table BRWVAL1 (Factor Disc Into Cst For Profit) determines whether or not any discount amounts are to be added to the cost

General

- Includes any parts billed through Equipment Invoicing or Key Invoices (legacy system)
- Any postings to sale accounts not coded with any application type from any system except Rental Counter and Rental Contract Maintenance (legacy system)

Note: This excludes overallowance sale accounts or discount accounts (with the latest service pack) if the account starts with a sale account first digit.

- Postings keyed through key invoices (legacy system)

Rental

- Includes any charges to rental sales accounts (application type “R”) billed through Rental Counter or Rental Contract Maintenance (legacy system)
- Includes any charges to parts sales accounts (application type “P”) billed through Rental Counter or Rental Contract Maintenance (legacy system)
- Costs will only appear if you are doing a percentage costing at the time of revenue recognition

What’s New in R6V03

Check out the the “What’s New for R6V03” document found in the Members Only section of PFW’s website—www.pfw.com/members—for details on the many new features that have been included in the new release.

R6V03 Installation Special

PFW’s new software package, R6V03, is scheduled for release on May 15, 2005. To make the upgrade as convenient as possible, you can have PFW load the new release for you and perform training on the new features of R6V03. PFW will load the new release for you on a Sunday (remotely), and perform Web training for R6V03 on Monday.

For any questions regarding these services, or to book an appointment, please call Tim McMillan at (519) 474-3700.

New PFW IntelliDealer Website—www.intellidealer.com

Visit www.intellidealer.com to view IntelliDealer product information and engaging online demos. IntelliDealer users can also keep up-to-date with product enhancements or visit the FAQ section to view useful tips on using IntelliDealer.

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.

Victoria Day

Monday, May 23, 2005

Canada Day

Friday, July 1, 2005

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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Shop Labor

- Shows any charges to any sale account that was posted through labor requisitions to the work order regardless of the WIP method being used

Note: If you recognize labor revenue when the work order closes, the system will still show the dollar value of the labor that was posted during the period specified, regardless of whether or not the work order was closed.

- Also includes any work order adjustments to labor
- Costs are dependent on your method of costing—the system allows you to cost labor at a set percentage by sale account or by a cost rate per hour loaded on the employee

Shop Parts

- Shows any charges to any sale account that was posted through parts requisitions to the work order regardless of the WIP method being used

Note: If you recognize parts revenue when the work order closes, the system will still show the dollar value of the parts that were posted during the period specified, regardless of whether or not the work order was closed.

- Also includes any work order adjustments to parts