

# client services update



September 2005

## Tip of the Month

### How Can I Record Equipment Lost Sales?

The ability to record equipment lost sales has never been easier. Using PFW IntelliDealer, you can not only record lost sales but also analyze the results!

The first step is to identify which result code(s) represent equipment lost sales (typically code LS). Using the legacy system tables maintenance, modify table CALLPUR to identify the "L" lost sale indicator (Fig. 1).

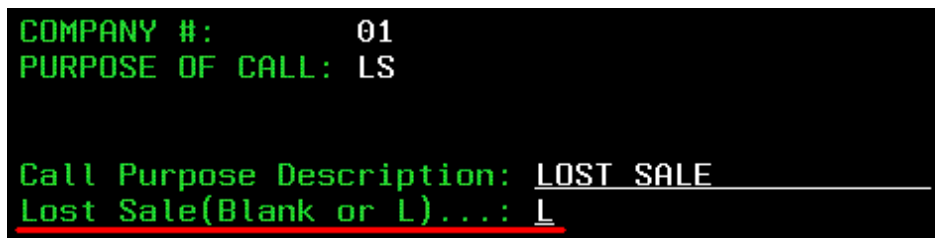


Fig. 1

After saving a call in IntelliDealer that has a result matching one of the lost sales result codes, the system will prompt the user for the additional lost sales information. Enter the make, model and stock number (if applicable) of the unit you were trying to sell. Then enter the competitor, make, model, price (if known) and the reason for the lost sale (Fig. 2).

Note that there are lookup icons available. The values displayed on the lookup windows are values that have previously been keyed and are not table-driven.

Equipment Lost Sale		
Name: Doug Prout	Business Phone Number: (519) 235-2879	Salesperson: MISC. SALESMAN
Make: DEERE	Model: 9588	Stock Number:
Competitor: HOME DEPOT	Competitor Make: AGCO	Competitor Model: AG140
Competitor Price: 0.00	Lost Sale Reason: COLOR	

Fig. 2

As you start to accumulate equipment lost sales information, you can analyze the data collected. Use the Lost Sales option in Management Central Equipment to view summarized lost sales data by make/model and month. You can select the data accordingly and do a period-to-period comparison. You can also drill down into the desired make/model to view details of specific lost sales.

### John Deere Account Realignment

John Deere is planning to realign the N.A. C&CE dealer accounts under the N.A. AG dealer account structure. This change will occur on the weekend of November 26, 2005 and the new accounts will take effect the following Monday. PFW System users that are affected by the realignment will need to make minimal changes in the system to accommodate this update. More details will follow as the deadline approaches.

### Attention Bobcat Dealers

Our Bass II interface is now complete and is in final testing at a small number of PFW dealer sites. PFW is also a business system beta with the new warranty system. The testing is going well and we plan on having this interface complete and available shortly. More details to follow.

### IntelliDealer Workshop

From November 16-18, 2005, PFW is hosting a PFW IntelliDealer workshop which will cover a selection of existing and new features. This workshop will give upper-level staff specific information on a comprehensive list of IntelliDealer features and functions. This knowledge can then be taken back to the dealership and distributed as necessary, in order to fully leverage the management power of IntelliDealer. Session topics include:

- Used Equipment Evaluation
- Parts Order Maintenance
- Advanced Call Scheduling
- Marketing Campaigns
- Rental Counter
- Customized Screens
- Geographic & Business Analysis
- Executive Summary
- System Administration with WebAdmin
- Service: IntelliTech and Supervisor

For more information, contact Laurie Brown at (519) 474-3300, ext. 231, or [lbrown@pfw.com](mailto:lbrown@pfw.com).

### Holiday Hours

The PFW business offices will be closed for the the Canadian Thanksgiving holiday on Monday, October 10, 2005. A limited number of support personnel will be available from 8 AM to 5 PM EDT. Emergency after-hours support will also be available.



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