

<b>Financial Management</b>	<b>Customer Care</b>	<b>Product Support</b>	<b>Management Central</b>
<p><b>MODULE</b></p> <p><b>Accounts Receivable</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Customer Profile               <ul style="list-style-type: none"> <li>↳ Group File Changes</li> <li>↳ Activate/Deactivate Agencies*</li> </ul> </li> <li>• Customer Reports</li> <li>• A/R Outstanding</li> <li>• A/R Reports</li> <li>• Credit Limit Analysis</li> <li>• Cash Receipts               <ul style="list-style-type: none"> <li>↳ A/R History</li> </ul> </li> <li>• Authorization Maintenance</li> <li>• Apply Late Charges</li> <li>• Statements</li> <li>• Month End</li> <li>• Invoice History</li> </ul> <p><b>MODULE</b></p> <p><b>Accounts Payable</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Vendor Profile</li> <li>• A/P Outstanding</li> <li>• Vouchers</li> <li>• Purchase Orders</li> <li>• Adjust Outstanding</li> <li>• Check Run</li> <li>• Month End</li> <li>• Check Reconciliation               <ul style="list-style-type: none"> <li>↳ Check Reversal</li> </ul> </li> <li>• A/P Reports</li> </ul> <p><b>MODULE</b></p> <p><b>General Ledger</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Chart of Accounts</li> <li>• Account History</li> <li>• Area Sales</li> <li>• Financial Reporting               <ul style="list-style-type: none"> <li>↳ G/L Preliminary</li> <li>↳ Rerun Month End Reports</li> <li>↳ Summarized Financials</li> <li>↳ Journal Breakdown</li> <li>↳ Journal List</li> <li>↳ Re-transmit Financials</li> <li>↳ Customized Reports</li> </ul> </li> <li>• Journals</li> <li>• Subledgers</li> <li>• Budgets</li> <li>• Fixed Assets</li> <li>• Close G/L Period</li> <li>• General Invoicing</li> <li>• General Billing Run Preliminary</li> <li>• General Billing Run</li> <li>• Special Billing</li> </ul>	<p><b>MODULE</b></p> <p><b>CRM</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Customer Profile</li> <li>• Customer Portal</li> <li>• Geographic &amp; Business Analysis</li> <li>• Call Scheduling</li> <li>• Call Analysis</li> <li>• Reports</li> </ul> <p><b>MODULE</b></p> <p><b>Marketing</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Campaigns</li> <li>• Forms</li> </ul>	<p><b>MODULE</b></p> <p><b>Equipment</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Equipment Profile</li> <li>• Equipment Quoting</li> <li>• Equipment Invoicing</li> <li>• Customer Portal</li> <li>• Sales Support Portal</li> <li>• Purchase Orders</li> <li>• Used Evaluations</li> <li>• Base &amp; Options</li> <li>• Equipment Reports</li> <li>• Traffic</li> <li>• Service Agreements</li> <li>• Prospect Board</li> <li>• Equipment Billing Run Preliminary</li> <li>• Equipment Billing Run</li> <li>• Invoice History</li> </ul> <p><b>MOBILE EXTENSION</b></p> <ul style="list-style-type: none"> <li>• Wireless Inventory Control – Equipment</li> <li>• MobileInspection</li> </ul> <p><b>MODULE</b></p> <p><b>Service</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Work Orders               <ul style="list-style-type: none"> <li>↳ Work Order Adjustments</li> <li>↳ JDWIN</li> <li>↳ JD Signature</li> <li>↳ Bobcat Warranty</li> <li>↳ MTD Warranty</li> <li>↳ Komatsu Warranty*</li> </ul> </li> <li>• Customer Portal</li> <li>• Supervisor               <ul style="list-style-type: none"> <li>↳ Labor in Progress</li> <li>↳ Work Order Warnings</li> <li>↳ Scan History</li> <li>↳ Work Order Assignment</li> <li>↳ Technician Availability</li> <li>↳ Shop/Bay Availability</li> <li>↳ WIP Labor</li> </ul> </li> <li>• IntelliTech</li> <li>• Work Order Quoting</li> <li>• Job Codes</li> <li>• Time Card Entry</li> <li>• Labor Pricing</li> <li>• Service Agreements</li> <li>• Traffic</li> <li>• Analysis Reports</li> <li>• Work Order Billing Run</li> <li>• Invoice History</li> </ul> <p><b>MOBILE EXTENSION</b></p> <ul style="list-style-type: none"> <li>• MobileTech</li> </ul> <p><b>MODULE</b></p> <p><b>Parts</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Profile</li> <li>• Parts Ordering               <ul style="list-style-type: none"> <li>↳ Orders</li> <li>↳ Order History</li> <li>↳ Order Correction&gt;</li> <li>↳ Pending Order Receipts</li> <li>↳ DTF Parts Receipts</li> <li>↳ OFC Reclass</li> <li>↳ Automatic Stock Ordering</li> <li>↳ Stock Transfer/ Central Inventory</li> <li>↳ Create Stock Order</li> <li>↳ CCN Web</li> <li>↳ CCN Direct Ship Orders</li> <li>↳ ASL Maintenance</li> </ul> </li> <li>• Parts Quoting</li> <li>• Parts Invoicing</li> <li>• Customer Portal</li> <li>• Customer Discounts</li> <li>• Price Matrix</li> <li>• Stock Transfers</li> <li>• Inventory Count               <ul style="list-style-type: none"> <li>↳ Cycle Count</li> </ul> </li> <li>• Surplus Returns</li> <li>• Consignment</li> <li>• Month End</li> <li>• Parts Reports</li> <li>• Utilities</li> <li>• Parts Billing Run</li> <li>• Invoice History</li> </ul> <p><b>MOBILE EXTENSION</b></p> <ul style="list-style-type: none"> <li>• Wireless Inventory Control – Parts</li> </ul> <p><b>MODULE</b></p> <p><b>Rental</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Rental Counter</li> <li>• Customer Portal</li> <li>• Supervisor</li> <li>• Rental Availability</li> <li>• Rental Reports</li> <li>• Traffic</li> <li>• Service Agreements</li> <li>• Rental Billing Run Preliminary</li> <li>• Rental Billing Run</li> <li>• Invoice History</li> </ul>	<p><b>MODULE</b></p> <p><b>CRM</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Customer Profile</li> <li>• Geographic &amp; Business Analysis</li> <li>• Call Analysis</li> <li>• Profitability</li> <li>• Customer Reports</li> </ul> <p><b>MODULE</b></p> <p><b>Financial</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Accounts Receivable</li> <li>• Credit Limit Analysis</li> <li>• Accounts Payable</li> <li>• Account History</li> <li>• Area Sales</li> <li>• Financial Ratios</li> <li>• Financial Reporting</li> <li>• Invoice History</li> </ul> <p><b>MODULE</b></p> <p><b>Parts</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Parts Profile</li> <li>• Parts Analysis</li> <li>• Open Sales Orders</li> <li>• Lost Sales</li> <li>• Parts Reports</li> </ul> <p><b>MODULE</b></p> <p><b>Service</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Open Work Orders</li> <li>• Aged Work In Process</li> <li>• Service Agreements</li> </ul> <p><b>MODULE</b></p> <p><b>Equipment</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Equipment Profile</li> <li>• Group Unit Analysis               <ul style="list-style-type: none"> <li>↳ Sales</li> <li>↳ Purchasers</li> <li>↳ Salespeople</li> <li>↳ Days in Inventory</li> <li>↳ Note Due Expiration</li> <li>↳ Warranty Expiration</li> </ul> </li> <li>• Lost Sales</li> <li>• Equipment Reports</li> <li>• Rental Availability</li> <li>• Rental Reports</li> </ul> <p><b>MODULE</b></p> <p><b>Utilities</b></p> <p><b>FEATURES</b></p> <ul style="list-style-type: none"> <li>• Data Miner</li> </ul>

\* Available soon

v.090309

[Visit IntelliDealer.com for more information.](http://IntelliDealer.com)
[Hidden Gems](#) / [News](#) / [Release Details](#) / [In Testing](#) / [Being Developed](#) / [IntelliDealer Help](#)

MODULE	MODULE	MODULE	MODULE	MODULE
<b>CRM</b>	<b>Equipment</b>	<b>Parts</b>	<b>Rental</b>	<b>Miscellaneous</b>
<b>FEATURES</b>	<b>FEATURES</b>	<b>FEATURES</b>	<b>FEATURES</b>	<b>FEATURES</b>
<ul style="list-style-type: none"> <li>• Profile               <ul style="list-style-type: none"> <li>↳ Classifications</li> <li>↳ Salespeople</li> <li>↳ Categories</li> <li>↳ Territories</li> <li>↳ Province/State Codes</li> </ul> </li> <li>• Taxes &amp; Discounts               <ul style="list-style-type: none"> <li>↳ Location Tax</li> <li>↳ Tax 1</li> <li>↳ Tax 2</li> <li>↳ Tax 3</li> <li>↳ Tax 4</li> <li>↳ Discount*</li> </ul> </li> <li>• Calls*               <ul style="list-style-type: none"> <li>↳ Categories*</li> <li>↳ Types*</li> <li>↳ Purposes*</li> <li>↳ Results*</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Profile               <ul style="list-style-type: none"> <li>↳ Equipment Defaults</li> <li>↳ Equipment Models</li> <li>↳ Group Codes</li> <li>↳ Classifications</li> </ul> </li> <li>• General               <ul style="list-style-type: none"> <li>↳ After Sales Accounts</li> <li>↳ Miscellaneous Charges/Credits</li> <li>↳ Used Evaluations</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Profile*               <ul style="list-style-type: none"> <li>↳ Types*</li> <li>↳ Source of Supply*</li> <li>↳ Classes*</li> </ul> </li> <li>• Costing               <ul style="list-style-type: none"> <li>↳ Cost Code Updates</li> </ul> </li> <li>• General               <ul style="list-style-type: none"> <li>↳ Parts Store Priorities</li> <li>↳ Parts Highlighting*</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Setup               <ul style="list-style-type: none"> <li>↳ Rental Duration</li> <li>↳ Rental Control Setup</li> <li>↳ Rental Reason Codes</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Other               <ul style="list-style-type: none"> <li>↳ Promotion Code</li> <li>↳ Laser Overlay</li> <li>↳ Task Types</li> <li>↳ Configure Printers</li> </ul> </li> </ul>
<b>MODULE</b>		<b>MODULE</b>		<b>MODULE</b>
<b>General Ledger</b>		<b>Service</b>		<b>Utilities</b>
<b>FEATURES</b>		<b>FEATURES</b>		<b>FEATURES</b>
<ul style="list-style-type: none"> <li>• Account Payable               <ul style="list-style-type: none"> <li>↳ Vendor Categories</li> </ul> </li> <li>• G/L Accounts               <ul style="list-style-type: none"> <li>↳ Accounts Profile</li> <li>↳ Profit Centers</li> <li>↳ Group Codes</li> <li>↳ D.O.C. Report</li> </ul> </li> <li>• Purchase Orders*               <ul style="list-style-type: none"> <li>↳ FOB*</li> <li>↳ Priority*</li> <li>↳ Terms*</li> <li>↳ Unit of Measure*</li> <li>↳ Ship Via*</li> </ul> </li> <li>• Employee*               <ul style="list-style-type: none"> <li>↳ Classes*</li> <li>↳ Marital Status*</li> <li>↳ Sex*</li> </ul> </li> <li>• Payroll               <ul style="list-style-type: none"> <li>↳ Direct Deposit</li> </ul> </li> <li>• General               <ul style="list-style-type: none"> <li>↳ Invoice/Quote Messages</li> <li>↳ Agency Invoice Message</li> <li>↳ Daily Sales Budgets</li> <li>↳ User Defined Depreciation</li> </ul> </li> </ul>		<ul style="list-style-type: none"> <li>• Work Orders               <ul style="list-style-type: none"> <li>↳ Location*</li> <li>↳ Down Time Delay Codes</li> <li>↳ Reasons*</li> <li>↳ Types*</li> <li>↳ Shops*</li> <li>↳ Bays*</li> </ul> </li> <li>• General Ledger               <ul style="list-style-type: none"> <li>↳ W/O G/L Accounts</li> <li>↳ W/O Premium Code</li> <li>↳ G/L Defaults</li> </ul> </li> <li>• Agreements &amp; Warranty               <ul style="list-style-type: none"> <li>↳ SAM Programs</li> <li>↳ SAM Schedules</li> </ul> </li> <li>• General               <ul style="list-style-type: none"> <li>↳ Labor Barcode/IntelliTech Setup</li> <li>↳ Job Code Section / Groups</li> </ul> </li> </ul>		<ul style="list-style-type: none"> <li>• Validate Tables</li> <li>• Add A Branch</li> <li>• Server Configuration</li> <li>• Print File Descriptions</li> <li>• Scheduled Jobs*</li> </ul>
		<b>MODULE</b>		<b>MODULE</b>
				<b>Global Settings</b>
				<b>FEATURES</b>
				<ul style="list-style-type: none"> <li>• Messages</li> </ul>

## Quick Links

- Task Tracker
- Messages
- Printer Output
  - ↳ Writers
- PDF Viewer
- Our Homepage

\* Available soon

v.090309

[Visit IntelliDealer.com](http://IntelliDealer.com) for more information.

[Hidden Gems](#) / [News](#) / [Release Details](#) / [In Testing](#) / [Being Developed](#) / [IntelliDealer Help](#)