

**PFW IntelliDealer**

# Service Agreements

Strengthen customer relationships through service agreements

### Key Features

- A simple setup allows for the definition of the programs you wish to sell, and then the assignment of equipment to those programs
- See machine details—including margin, costing, history, base and options breakdown, and open work orders
- Sort your contracts in order to identify those that have expired, and which you should expire – now that the original agreement may have come to a close
- Manage your rental fleet and schedule regular maintenance and safety checkups
- Create open-ended contracts for your own units, optimize the scheduling of your service trucks, and make special recommendations for machines
- Keep track of reserved, billed, and projected profit dollar amounts for each agreement and, accordingly, see profit increases

PFW IntelliDealer Service Agreements is completely integrated and allows dealerships to set up and maintain equipment service agreements for sale, or for internal use.

### Communication with Customers

Service Agreements helps ensure that your sales and service staff maintain regular communication with their customers through the scheduling and performance of maintenance. The system automatically calculates future scheduled job dates, and assists you in arranging and coordinating jobs. As well, through an integration with PFW eServices, customers can access their service contracts, update machine details, schedule service, and send your dealership messages.

### Automation

With Service Agreements, scheduled job dates for each service agreement are automatically calculated during the nightly database reorganization. You can also recalculate service dates in order to force the system to immediately determine new dates for unscheduled service jobs, and update the usage-per-week information.

Sort by:  Contract Number  Stock Number  Name  Expiry Date

Select Contract:

Select Customer:

Select Stock Number:

Select Program: All Programs

Show Expired:  Go >>

Service Agreements								Results to display: 10
Contract Number	Stock Number	Machine Serial Number	Make	Model	Name	Program	Expiry Date	
ASI30382	30382	T0310SE839316	JD	310S	** In Stock **	Asi Inspection	02/01/1999	
ASI40962	40962	DW544HX569474	JD	544H	Viking Construction Co.	Asi Inspection	12/28/1998	
A2900	2900	T0650GW853540	JD	650G	** In Stock **	Asi Inspection	03/31/1999	
A2908	2908	JD #357597 1/08/99	JD	650G		Asi Inspection	--	
A30310	30310	T0310SE835473	JD	310S	Mike Johnson	Asi Inspection	02/18/1999	
A30445	30445	T0310SE843400	JD	310S	Robinson & Owen	Asi Inspection	02/25/1999	
A30450	30450	T0310SE843370	JD	310S	Std Construction	Asi Inspection	02/24/1999	
A30467	30467	T0410EX846114	JD	410E	National Equipment Rental	Asi Inspection	08/31/1999	
A30525	30525	T0310EX850690	JD	310E	Mike Elliott	Asi Inspection	08/18/1999	
A30527	30527	T0310SE851889	JD	310S	Train Mountain, Inc.	Asi Inspection	09/15/1999	

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[Is there an agreement missing from the list? Click here to add.](#)

Receive an overview of your service agreements, and conveniently click into the details of the contract you need to view or maintain.

### GPS Integration

PFW's Global Positioning System (GPS) interfaces allow you to keep track of your equipment inventory that is on the move. PFW IntelliDealer is interfaced with the GPS systems that are located on the machine, and can pick up information from the unit itself for items such as machine hour meter readings, geographic location, and current engine status.

### Centralized Data Organization

When using Service Agreements, take advantage of the system's central source of information and control. This allows you to better service those customers whose work may occur in more than one branch and helps you avoid missed or duplicated service, as well creating a consistency of service and pricing across the dealership.

Service Agreements is completely integrated within PFW IntelliDealer, so work orders and customer accounts, for example, remain up-to-date without having to re-key information. Information regarding the tasks necessary to complete a particular service job is close at hand so that technicians won't miss job steps. This also eliminates their need to continuously reference job descriptions. Additionally, you can drill down to a wealth of contract, equipment and work-order information.

### Add-on and Equipment Sales

Selling service agreements can also mean you'll have an advantage in securing other add-on and equipment sales. As customers return for regular service, a trust relationship with your dealership is built and customer loyalty is increased.

The screenshot displays the 'Contract Maintenance' interface. At the top, there are tabs for 'Contract Details', 'Map Book', and 'Memos'. The main section shows details for a contract named 'Coffman Excavation' with business phone number (503) 656-7000 and salesperson Kevin Antrip. It lists equipment details: Make: JD, Model: 690E, Description: #Th29 Jd Exc., Serial Number: DW690EL546253. Financial and scheduling information includes Contract Number: C001218, Start Date/Hours: 02/01/1998 (4068 hours), Reserved \$: 2579.64, Stock Number: 001218, Expiry Date/Hours: 02/01/2000 (0 hours), Billed \$: 1,144.40, Current Hour Meter: 5330, Usage/Week: 28, Hour Reading Date: 12/07/1998, and Projected \$: 260.96. A 'Calculate dates' checkbox is checked.

Below this is a table titled 'Contract Details' with columns for Status, Scheduled, Job Code, Description, Work Order, and Location. The table shows three rows of scheduled services:

Status	Scheduled	Job Code	Description	Work Order	Location
Completed	5068	12/01/1998	PMS	1000 Hour Periodic Service 3/96	S38061 Welland
Scheduled	5568	02/10/1999	PM4	500 Hour Periodic Service 1/96	S38648 Welland
To be scheduled	2060	06/15/1999	PMS	1000 Hour Periodic Service 3/96	

There are also several rows with the status 'To be scheduled' and empty fields for the other columns. A context menu is visible over the 'To be scheduled' row with options 'Add Work Order' and 'Decline Service'. At the bottom of the table, it says '( 1 - 10 of 10 )' and 'Add >'.

### System Requirements

- Windows® Vista Business, 2000 or XP Pro SP2 Operating System
- Processor and memory size based on Operating System recommendations (or greater)
- Internet Explorer 5+
- Ethernet Ready
- IBM® Power6™ recommended, scaled by number of users
- 8 GB RAM for server or greater, depending on number of users
- VPN access to server via Internet
- 512 Kbps remote store connection, determined by number of devices
- Current PFW system release
- Current IBM OS release
- LANSAS® License

### Request More Information

If you would like more information, please visit [www.pfw.com](http://www.pfw.com) or contact our Sales Team at (519) 474-3300 ext. 230 or [sales@pfw.com](mailto:sales@pfw.com).

Service Agreements allows you to easily and effectively manage service agreements, which keeps you in contact with your customers.