

PFW IntelliDealer

Customer Portal

Make any staff member an expert on the most important part of your dealership: your customers.

The screenshot shows a web-based interface for a customer portal. At the top, there are navigation tabs: Home, Financial Management, Customer Care, Product Support, Management Central, and Configuration. Below this, a 'Select Customer' dropdown is set to '0235186600'. The main content area is titled 'Customer Portal' and contains several sections:

- Customer Information:** Company Name: JD Farms, Contact: John Doe, Phone Number: (519) 474-3300, Cell Number, Fax Number, E-mail Address: DOE@JDFARMS.COM, Total A/R: 2,347.54, Terms: Normal, A/R Agency Default: 1 A/R, Credit Limit: 10,000.00.
- Open Parts, Open Service, Open Equipment Invoicing, Open Rental, Open Quotes:** Grids showing various transactions with dates and amounts.
- Parts Invoicing History, Work Order History, Equipment Invoicing History, Rental Invoicing History, Recent Calls:** Grids showing historical transactions and service calls.
- Recent Parts Purchased, YTD Purchases, Recent Traffic, Recent & Equipment Rentals:** Grids showing recent purchases, traffic, and rentals.
- Parts On Order, Last Year Purchases, Quick Links, Contacts, Recent Marketing:** Grids showing orders, previous year data, quick links, contact lists, and marketing activities.
- Profitability, Last Year Profitability, Multimedia, Custom Screens, Memos:** Grids showing profitability metrics, multimedia links, custom screens, and memos.

Key Features & Benefits

- Make every employee an expert on your customers
- Pop-up can be minimized or maximized so it is always available
- Completely customizable with drag-and-drop information placement
- Auto-populate customer information into new transactions
- Quickly launch marketing initiatives
- Offer a powerful training tool to new employees
- Hyperlinked so you can easily drill down to further information

The Customer Portal consolidates all your key customer information onto a single-screen dashboard for easy access, providing your employees with a launching point for serving existing customers and compiling new customer data. With Customer Portal you will instantly see all the past, current and scheduled future dealings with a customer.

Improve Customer Service

The Customer Portal allows each staff member to be an authority on your customers, by having all key information readily available on a single-screen dashboard. Questions that would have previously been referred to other department personnel can now be answered by anyone.

Not only will staff be able to provide quick and accurate customer service, but with one click, they can drill down and gain in-depth knowledge from the many powerful sections of PFW IntelliDealer.

Differentiate your dealership by providing your customers with superior customer service. With over 25 key points of information at your fingertips, impressing your customers becomes easier than ever.

Improve Dealership Communication

Providing an enterprise-wide view to all staff is the key functionality of the Customer Portal. Regardless of what department a staff member is in, or which dealership location they are at, any employee can see exactly what is happening with a customer.

Equipment Invoice History		
M00384	JD 1950	Dec/04
M00240	*Multiple*	May/04
M00221	JD 2955	Jan/04
M00109	BO 643	Oct/03
M00083	CA 1000	Feb/03
More...		

Open Parts		
206384	07/04/2005	79
206113	06/27/2005	16
Create		

YTD Purchases	
Parts	1,450
Service	621
Equipment	23,390
Rental	197
More...	

Expedite New Sales Transactions

Use the Customer Portal to instantly launch new dealership transactions and have them auto-populated with the customer's information making sales processes much faster. Scheduling and logging calls can also be initiated with a single mouse-click.

Powerful Analysis at a Glance

The Customer Portal gives you an overview of some of the powerful business analysis tools in PFW IntelliDealer. At a glance, staff can see the dollar amount a customer has spent with your dealership year-to-date and how that compares to the previous year, as well as the actual profitability of the customer's transactions.

A complete history of a customer's interaction with your dealership, as well as current interaction and future scheduled interactions are readily available. In-depth details about parts ordering, equipment service, equipment rentals and equipment sales are also easily accessed.

Cutting-Edge Features

The Customer Portal allows you to scan in documents, such as certificates of insurance or tax exemption forms, and link to them in the multimedia tab, so you won't require customers to provide these documents for every transaction.

You can also create custom screens that allow for the input of information to further profile customers, and then provide quick access to these screens via the Customer Portal. This allows you to track any additional information useful to your business.

Additionally, the option to upload photos of your customers and display them on the main screen of the Customer Portal is available.

Developed in Collaboration with Customers

The unique service-oriented design of the Customer Portal was developed by PFW in collaboration with one of our customers. This illustrates that PFW IntelliDealer is truly a system designed by Dealers, for Dealers.

Completely Customizable and Secure

The Customer Portal can be customized to meet the changing needs of your dealership. You are able to pick which sections you want to display, in which order, and in what color. This can all be done in seconds by using a drag-and-drop interface; no programming is required.

Each section of the Customer Portal can have security parameters set based on log-in, giving you the option to choose which members of staff will have access to what information.

*Must subscribe to Customer Care

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 or contact our Sales Team at (519) 474-3300, Option 1, or email sales@pfw.com.