

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

* Available soon

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

Administration

- System
- User Profiles
- Security
- Text Variables
- Field Names
- Image Variables
- Custom Screens
- Utilities

Support

- Help Topics
- System Operator
- Contact PFW
- About PFW
- About IntelliDealer
- PC Information
- Performance Monitor
- PFW Knowledge Database

Quick Links

- Messages
- Printer Output
- PDF Viewer
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