

Dealer Services comes complete with a fully integrated CRM System, to enable you to view customer and prospect correspondence, and includes a fully comprehensive quotation and follow-up system.



# DEALER SERVICES



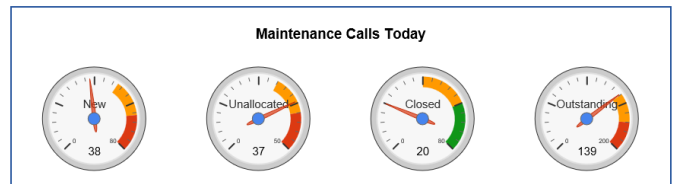
## Contract Records

Each customer can have multiple contracts with differing renewal dates and response times. The contract renewals are reported for manual adjustment prior to being activated monthly. The contract renewal invoices, containing a schedule of items covered and the contract period, are batch posted into either Exchequer, Opera or Sage and then printed or e-mailed.

## Service Manager

Entries made on the service call screen instantly update the service manager's screen, highlighting by colour, contract, non-contract and priority calls. The screen can be filtered by engineer, status, or call basis and shows the total number of calls outstanding. The service manager is able to allocate engineers and sort records into order priority. Call sheets can then be printed or e-mailed to the appropriate engineer or update the call automatically removed from the Call Manager.

## Dealer Dashboards



Company Overview

Description	Count	Value £
New Maint Calls Today	38	£319
Outstanding Maint Calls	139	£13,035
Unallocated	37	£0
Outs For Tomorrow (< IA, B, WC, W3)	9	£884
Red Priority Calls Today	6	£0
Maint Calls Closed Today	20	£1,642
Software Calls Today	8	£192
Quotes Raised Today	8	£23,038
Orders Today	1	£1,130
Lost Orders Today	1	£12,578

Dealer comes complete with various Browser based dashboards displaying the main KPIs, including a Maintenance Overview showing priority calls, companies with more than one call and engineers calls, Hardware Installations reflecting calls to be arranged with their allocated engineers together with various summary dashboards.

Dealer Services can manage a variety of contract types including equipment, software (along with Licenses), subscriptions and any renewable services.



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## Service Calls.

Records and manages all maintenance calls. Records the problem and solution along with parts used and engineer time. The information held on this screen provides the details for recording against contract revenue and for invoicing non-contract calls. Part billing can be made. The summary screen can be sorted by item number to view individual service history, and a report obtained on all service calls and their costs between any dates.

## Telephone Hotline

When telephone support calls are entered the system generates an automatic call reference number and time recording of the call. The system identifies whether the customer or the appropriate software is covered by contract or should be invoiced. The problem's solution is recorded for future reference and retrieval.

## Support Manager

Entries made on the telephone hotline screen instantly update the support manager's screen, highlighting the contract, non-contract and priority calls outstanding. The support team use this screen to identify and prioritise outstanding support calls.



## Dealer Mobile

Giving you access to your crucial information wherever you are without needing to use remote desktops. Providing many of the powerful features of the Dealer Windows applications which hosts the data, Dealer Mobile brings live CRM and Customer Service functionality to your mobile device.

- View all outstanding calls or just those for a selected engineer.
- Drill down to see customer details and map the route to their offices.
- Add and view time entries so head office systems can be up to date in almost real time.
- Collect and record customer signatures which are time and date stamped

