

CustomerTRAX 2.52 & 2.53 Updates

Margin Analysis

Reports

Sales Opp Report now allows multi-selected statuses.

MIM (new & used Equip Report)

Existing Quotes Report: You can now search on status and expired quotes

Target Market: You can now search for a customer based on equipment purchased, market segment, and financials.

Drill Down now allows you to select multiple Record Managers.

Record Manager & JDIS Salesmen Number now automatically sync

CP Equipment Search

You can now search on multiple categories or sub-categories.

Contact Sync

You now have the option to NOT synchronize contacts.

Work Order Search

All work orders (including closed work orders) are now searchable.

All work order detail is now available.

Equipment Notes

If given rights, users can add new notes that will be loaded back in the business system.