CustomerTRAX 3.0 Updates

Account Management

Drill Down Account Lookup

- Drill Down can now handle multiple record managers.
- Able to review record managers from multiple departments.
- Able to record histories, schedule calls, create JDQuotes, and sales opportunities from the reporting screen.

Sales Opportunity Lookup

- Able to search sales opp lookup by category & subcategory.

MIM

- Certain inventory statuses can be changed in CustomerTrax, which will subsequently change in JDIS. I (In Inventory) can be changed to S (Sold). D (Demo) can be changed to S (Sold). S (Sold) can be changed back to I (In Inventory).
- Able to search by serial number.
- Rearranged the item order on MIM search results. New user friendly layout begins with: Stock No, Store, Make, Model, Description, Serial #, Status, N/U, List pricing, & Meter Reading.

Customer Profile

- Able to assign multiple Record Managers from each Department to a single account, with separate classifications and separate automated call reminders for each user/department

Utilities / Define Profiles

- Added ability to build your own profiles with custom fields for each department (parts, service, wholegoods, management, etc.)

Profile Lookup

- Allows you to search your customized profiles.

Automated Alerts (Triggers)

- Able to independently specify which users receive these alerts: Warranty, After sales follow-up, Delivery Date.

Paperless Process

- All inventory & customer information is pulled from JDIS to pre-populate forms. These forms are then electronically passed to the next user until all aspects of the equipment purchase are complete.