

Imagine your Dealership tracking every opportunity and deal with single click visibility to everything that is going on.

Accounts & Call Management

Class	Accounts	Contacts	Prospects	Activities	PastDue	Histories	Notes							
	+	15	+	3	+	48	+	10	+	156	+	24		
A	+	4	+	0	+	1	+	22	+	22	+	42	+	6
B	+	6	+	0	+	9	+	29	+	29	+	127	+	11
C	+	34	+	0	+	70	+	123	+	122	+	461	+	37
D	+	13	+	1	+	9	+	27	+	27	+	70	+	11
TOTAL	+	72	+	4	+	137	+	211	+	210	+	856	+	89

Sales Opportunities & Equipment Brokering

Class	SalesOpps	SOTotal	SOPastDue	SOPastDueTotal				
	+	8	+	\$328,950.00	+	7	+	\$328,950.00
A	+	8	+	\$84,940.00	+	4	+	\$21,500.00
B	+	10	+	\$132,790.00	+	8	+	\$131,000.00
C	+	30	+	\$127,890.00	+	24	+	\$51,890.00
D	+	4	+	\$0.00	+	2	+	\$0.00
TOTAL	+	60	+	\$674,570.00	+	45	+	\$533,340.00

Quotes

Class	Quotes	QuotesTotal	QuotesPastDue	QuotesPastDueTotal				
	+	0	+	\$0.00	+	0	+	\$0.00
A	+	1	+	\$0.00	+	1	+	\$0.00
B	+	2	+	\$37,555.00	+	2	+	\$37,555.00
C	+	2	+	\$40,526.00	+	2	+	\$40,526.00
D	+	0	+	\$0.00	+	0	+	\$0.00
TOTAL	+	5	+	\$78,081.00	+	5	+	\$78,081.00

Sales Transactions

Class	FarmPlan	Memo	Other1	Other2	PowerPlan	Rental	Sales	Service	WholeGoods									
	+	\$564.53	+	(\$176.18)	+	\$208.61	+	\$0.00	+	\$0.00	+	\$750.00	+	\$95,862.09	+	\$1,036.85	+	\$86,286.82
A	+	(\$6,382.11)	+	\$4,387.93	+	\$53.01	+	\$0.00	+	\$0.00	+	\$13,424.00	+	\$820,805.78	+	\$22,027.27	+	\$753,636.00
B	+	\$362.04	+	\$680.83	+	\$563.35	+	\$0.00	+	\$0.00	+	\$450.00	+	\$225,219.56	+	\$2,106.26	+	\$202,939.00
C	+	\$13,060.79	+	\$144,956.93	+	\$7,581.82	+	\$0.00	+	\$0.00	+	\$9,420.00	+	\$1,220,530.16	+	\$19,277.00	+	\$987,862.34
D	+	\$802.04	+	\$16,240.91	+	\$0.00	+	\$0.00	+	\$0.00	+	\$0.00	+	\$163,541.96	+	\$6,276.65	+	\$136,009.00
TOTAL	+	\$8,407.29	+	\$166,090.42	+	\$8,406.79	+	\$0.00	+	\$0.00	+	\$24,044.00	+	\$2,525,959.55	+	\$50,724.03	+	\$2,166,733.16

Details From Clicking + Sign Above.

Accounts Detail											
CustomerNo	ContactNo	Company	ContactName	Class	Phone	CallFrequency	PartsPrior	PartsYtd	RentalPrior	RentalYtd	ServicePrior
712467	0		Tom Rasch		+1 (503) 6576123		0	0	0	0	0
703925	0	Camrock Excavation	Scott Pellecer		+1 (503) 6650560		0	0	0	0	0
704146	0	Cascade Dirtworks	MIKE HALL		+1 (425) 2314788		0	0	0	0	0
701789	0	Circle S Landscape Supply			+1 (360) 2255845		\$971.60	0	0	0	\$143.25

Export To Excel Append To Lookup Replace Lookup