

The Dashboard gives you everything you need in a single easy to use screen.....

Dashboard Management Alerts Calendar Deals JDAM Reports

Customer Search: Search All New View Details MIM Search Alert Counts: 1

Change page: < 1 2 >

Date	Status	Links	Company	Full Name	Description	Cl	Call Freq
11/27/2008 12:00:00 AM	QuoteDue	Account JDQuote	Palm Beach County Purchasing	Frank	Quote: Aarsvoid frt snowblower	A	Weekly
12/19/2008 12:00:00 AM	QuoteDue	Account JDQuote	Palm Beach County Purchasing	Frank	Quote:	A	Weekly
1/7/2009 9:49:00 AM	Due	Account		Frank King	Account has not been contacted within Call Frequency period	A	Weekly
1/8/2009 12:00:00 AM	ActivityDue	Account C R		Adams	Activity		Weekly

- ✓AUTOMATED ALERTS
 - ✓WARRANTY EXPIRATION
 - ✓DELIVERY DATES
 - ✓AFTER SALE FOLLOW-UP

✓SALES OPPORTUNITIES

✓WORK ORDER ALERTS

- ✓ASSIGNED ACCOUNTS
 - ✓CALL FREQUENCY ALERTS
 - ✓NO CONTACT ALERTS

✓QUOTES

ACCOUNT & MANAGEMENT ALERTS

INVENTORY SEARCH

✓EASY CUSTOMER SEARCH, SEARCH BY NAME, ACCOUNT NUMBER, CITY, ETC...

- History/Sales Call
- Note
- Schedule Activity/Sales Call
- Sales Opportunity
- Attachment
- JDQuote2 (Create)
- JDQuote2 (Assoc. Existing)
- New Prospect
- WorkSheet

ADD INFORMATION QUICKLY AND EASILY. ONE BUTTON GIVES YOU THE FOLLOWING OPTIONS...

- Profile
- Customer Equipment
- Market Segment
- Business System Notes
- Customer Snapshot

VIEW ALL DETAILS PERTAINING TO AN ACCOUNT IN A SINGLE CLICK