



PowerPro DMS – News & Views

Welcome to the February 2019 PowerPro DMS Newsletter!

Recently, PowerPro DMS v4189 was released into production. This latest version of PowerPro brings more features, more functionality, and more stability to the product. Words cannot express how excited we are with PowerPro DMS! It continues to function beautifully in both large and small shops. Thank you very much for your loyalty and the help you have provided in making PowerPro DMS such a great tool!

*** Quick Tips ***

Did you know you can use the Repair Order screen as a Project Management tool? I do this all the time.

When I need to track a task from start to finish, and I track a lot of tasks in this manner, I simply open up a service ticket, document what needs to be done, and also document the steps as they are completed.

I enter as much detail as I need in order to track the task to completion. I even enter dates of when steps are performed.

I typically open each task against a customer called SCTI, and I then append a description to the name, like SCTI – New Report.

You can open the RO Ticket against yourself or a customer. Enter a description of the project or job in the Tasks & Notes, and also document the completed steps under Tasks and Notes.

Once all tasks are finished, mark the RO as Complete.

To mark the RO as Invoiced, right-click on the words Invoice Number in the upper right of the RO Form and click save.

Steven W. Pitts
Owner of SCTI
Creator of PowerPro

HIGHLIGHTS & FEATURES

• Automated Shutdown

A new feature has been incorporated into PowerPro that will automatically close the program early Sunday morning between the hours of 2:00AM and 3:00AM. This will affect both Onsite and Cloud clients. The purpose is to facilitate various maintenance jobs that need to run off-hours while everyone is logged out.

• Business Rules

Did you know that PowerPro allows various business rules to be setup for things such as, Only Accept Cash from Certain Customers, Display a Reminder Prompt for Email, or to Donate to a Charity, etc...

• Automated Emails

PowerPro can be configured to automatically send out emails to your customers when their Special Order Items arrive as well as when the Repairs on their Unit are complete! Call to inquire about this CRM Service Offering.

• PriceFile Manager Utility

This Supplemental Utility continues to mature and evolve. Currently, many tasks are automated via this utility such as PriceFile Updates, Database Backups, System Health Monitoring, CRM Emails, PDS Reporting, Scheduled Reports, etc...

UP TO SPEED

Did you know you can now easily add your Major Unit Inventory (Serialized Items) at the time of sale, or when entering an F&I Deal? Often, people struggle to get their serialized items entered in a timely manner. We still recommend taking the time to enter all your serialized inventory into PowerPro. However, if you need to sell an item that is not currently loaded, this is now very simple. Another great feature added into PowerPro DMS to help you work more efficiently!

TIP OF THE MONTH

Did you know you can setup Follow-up Reminders within PowerPro DMS? From the Customer screen, activate Tab 3 – Notes, or Tab 5 – Marketing. Once there, you will see Sales Rep and Next Follow-up options. Select the Sales Rep and desired Follow-up Date.

Note: Click the Next Follow-up Date: text to quickly add a Follow-up Entry into the Customer Notes where you can update the reason for the follow-up! Remember that notes are searchable!

WE'RE HERE TO HELP

Call if you need help with PowerPro DMS, or if you want to inquire about the features mentioned in this newsletter. Talk to an expert!

Solutions for the 21st Century