

DEALER DRIVEN SOFTWARE NEWS

New Product Information

Marketing Project Management (MPM)



Marketing Project Management is a project management productivity tool, designed specifically around the needs of a Cat Dealer Marketing Manager. It provides the tools to manage complex projects with multiple tasks including scheduling resources and budgeting to keep your team working efficiently.

We understand that Marketing in a Caterpillar Dealership means multiple projects, many suppliers, and a mix of advertising, shows and event planning and execution, CRM initiatives and a host of other creative projects. This module is simple, efficient to use, and provides the type of clarity to multi-faceted marketing departments that is required to keep on schedule and on budget.

The release of v1 is planned for the end of August 2008... for pricing and details, please contact Linda Nikkel at nikkel@canamsolutionsinc.com

AR Reloaded v2

AR Reloaded

Home AR Schedule Analyse Special Reports

Look for Customer No that contains Search Collectors

You're here: Dashboard

Aging Report by Store

Bad Debt = 1/3 of AR 91-120 days past due plus 2/3 of AR 121-180 days past due plus 100% of AR over 181 days past due

Branch	Cash	Total AR	0-30	31-60	61-90	91-120	121-180	Over 180	Bad Debt Allowance
114	-28,212.88	1,129,185.42	757,462.16	54,341.78	110,986.98	8,570.94	50,562.95	174,473.49	211,372.44 (18.72%)
165	-113,544.08	1,916,802.10	831,085.08	330,788.25	275,175.98	170,190.80	236,304.80	186,801.27	401,068.07 (20.92%)
167	-44,199.73	1,232,920.24	957,690.00	259,896.92	24,617.92	14,309.34	5,225.96	15,379.83	23,633.58 (1.92%)
169	-23,541.99	4,958,856.06	4,608,952.73	106,027.73	102,570.97	36,700.49	100,642.43	27,503.70	106,632.15 (2.15%)
Total \$	-209,498.68	9,237,763.82	7,155,189.97	751,054.68	513,351.85	230,771.57	392,736.14	404,158.29	742,906.24 (8.04%)
As %			77.46%	8.13%	5.56%	2.50%	4.25%	4.38%	

DSO by Store

Branch	April 2008	April 2007
114	36	36
165	41	35
167	55	46
169	45	61

Credit Risk
Credit risk data goes here!

Amount Collected
Money collected goes here!

Follow up Calls
Follow up calls go here!

Our current AR Module has had a major revision developed to provide the collectors with more tools and information, along with the view to customer receivables that they currently have...

- V2 includes a collection workflow to allows each collector more visibility and a systematic way to approach their accounts
- Bring forward all data information from Survey System and e-Business Portal
- Allow collectors easy access to work order details and customer information through links to Customer Search
- Additional reporting views

This module will be available in September 2008.

More New Product Information on page 2 ...

Dealer User Group Conference 2008

Thanks to all who participated in our User Group meeting June 2-4 in Toronto. We covered a lot of material and topics with the group, reviewed some dealer best practices, as well as new product introductions.



We have received many responses to our Survey and will be taking each comment and idea into consideration for our next year's conference. We are listening to you to make this a meaningful conference for both new dealers and those that have been with us for a longer time.

Check back soon – we are planning our 2009 Conference now and will have the preliminary details posted on our website shortly.

For details on the conference materials, visit our website at <http://www.canamsolutionsinc.com>

Dealer Support



There are new methods to getting support for your licensed applications.

1. Calling the support line (905) 712-3232
2. email support@canamsolutionsinc.com
3. Posting in our Dealer Community site from our public website www.canamsolutionsinc.com (for more information see the Dealer Community section on page 2.)

New Product Information

RPO Tracker

Contract #	Stock #	Customer	# of Outstanding WO Invoices	Total Amt of Outstanding WO Invoices	Model	Serial #	Ship Date (MMDD/YYYY)	Agreement Age in Months
R02571	MT72896	3277260 - WILLIAM DAY CONSTRUCTION	2	\$1,579.99	730	081M01740	12/27/2007	5
R02722	T20700109	7342245 - PIONEER CONSTRUCTION INC	2	\$2,573.90	MCG	1637J0095M	1/16/2008	4
R03150	MT74750	3277260 - WILLIAM DAY CONSTRUCTION			345CL	0R1W02344	4/11/2008	1
R03164	MT79500	7342245 - PIONEER CONSTRUCTION INC			DSKLG	0YY100404	4/16/2008	1
R03202	MT74550	1939440 - BONECHERE EXCAVATING INC	1	\$1,847.46	330DL	0M1W02095	4/21/2008	1
R03207	MT84200	7342245 - PIONEER CONSTRUCTION INC	1	\$1,266.00	990m	0JH003448	4/23/2008	1

Purpose of RPO Tracker – where’s the pain

- Presently, rental expenses are not visible and difficult to calculate
- Conversions are time consuming and entrenched in an archaic system, or lack of one
- No capability within DBS to track rental repairs on RPO machines
- Poor reporting tools for asset management
- Lack of visibility of the entire process end to end

RPO Tracker was designed to be the one-stop shop for RPO Conversion information. Its goal is to drive regular and ongoing review of all repairs on RPO machines, and designate responsibility of those repairs to either the customer or the rental unit.

This system will be available for the dealer community in the fall of 2008.

Customer Issue Management

Issue No.	Customer Name	Subject	Entered By	Assigned To	Status	Priority	Type	Date Opened	Last Update Date	Days Open
3	Alice Liu				Open	Unknown	Slip	Nov 15, 2007		250
12	Alice Liu				Open	High	Service	Nov 23, 2007		192
89	Alice Liu				Open	Medium	Personnel	Mar 19, 2008		75
94	Alice Liu				Unknown	Unknown	Personnel	May 27, 2008		6

This module is designed to record all customer issues, track them through a work flow to resolution, accumulate information on their resolution and activities along the way to resolving them, and report and trend on issue frequency, type and resolution performance by the dealership team.

All interactions / activities on an issue are tracked on a single screen where it is easy to see the issue, who’s working on it, what activities have taken place, how long it is taking to resolve, and its current status. The system interacts with Sales Link, as a place to provide visibility to the sales force on their customers’ issues, and will also be linked to Customer Survey Management, wherein issues may be identified in the course of calling the customer.

Conferences Attended by Canam

NADITA 2008

Canam Solutions attended and participated both as a vendor and as a presenter in this year’s North American Dealer IT Association conference in Orlando in May. The main conference theme was discussion and presentations around the future of DBS and possible replacement strategies with alternate ERP systems.



Dave Woodburn presented Canam’s products and services to the group and how they are architected to support multiple or alternate ‘back end’ systems. For a copy of his presentation, visit the [Dealer Community](#) on our website. (see below for more information on Dealer Community)

LACD IT Conference 2008

Canam Solutions will be attending and participating both as a vendor and as a presenter in this year’s Latin America IT Conference which will be held in August in Miami. The message will be the same as the NADITA conference – see details above.

Dealer Community Online

Have a question about your current software? Want to know about a particular module before making a purchase? Need a manual to train your dealership?

The Dealer Community has it all!



The Dealer Community offers forums to share information with the CAT dealer community, Downloads for user manuals, power point presentation and videos on demos and products.

The community is secure and only those who are granted access will be able to see the information.

To see more, click on the ‘Request Secure Access’ link located below the Dealer Community login screen or email Mariel at dytuco@canamsolutionsinc.com and ask for access to the Dealer Community.



Is your CAT dealership **DRIVEN** to succeed?
Canam provides business solutions that are specific to your
Caterpillar world and driven by the dealer community.

Did you know that they also provide professional services such as
website development and maintenance, dealer business consulting,
custom software development and more?

Contact Linda Nikkel at (905) 712-3840 ext 211 or
sales@canamsolutionsinc.com to discuss how Canam Solutions
can help your dealership drive to success.