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SUCCESSFUL STRATEGIES FOR DEALERS

SPECIAL REPORT: CUTTING-EDGE DEALER MANAGEMENT SOFTWARE

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Moving Beyond the Green Screen

As technology levels the playing field, operating a multi-store mega-dealership or a one- or two-store operation is becoming irrelevant when it comes to business management software and living up to customer expectations.

*By Dave Kanicki,
Executive Editor*

If the goal of farm equipment dealers is to meet or exceed customer expectations, there are new business management tools out there that can move them well beyond where many are today, regardless of the dealership's size.

"The fundamentals of what farm equipment dealers do hasn't really changed much in the last 30 years. They sell and service farm equipment," says John Andersen, vice president of PFW Systems Corp., a developer of business management systems for dealers in the equipment distribution industry.

"What's really setting the pace today are what customers expect from their retail experience, which has changed significantly from what it was just 5 years ago. From Wal-Mart to your local GM dealer, the retail industry at large has changed," he says.

Providing customer service that keeps them coming back while

improving the efficiency and profitability of the dealership is the aim of the new business management systems (BMS) in use and under development today.

"The biggest change in dealers' software in the last 5 years is that it's not being written only for the day-to-day functions of the dealership, but to improve efficiencies of the business. What dealers are telling us is

“Systems are developed based on what end users expect from experience with other industries....”

they need ways to sell parts more efficiently; ways to continue the sale after the initial transaction is completed," says Andersen.

"We're developing systems aimed at what end users are coming to expect from a dealership based on their experience with other industries."

Anne Salemo, president of Charter Software, adds, "Dealers say they need to move beyond computer systems that only process things. They need to go beyond transactions and they're demanding management tools."

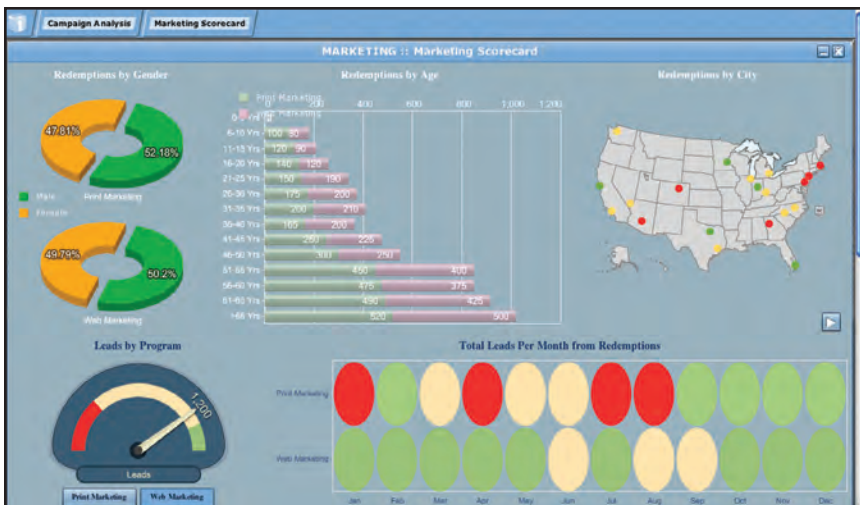
And while a handful of early adopters are already pointing and clicking their way toward full-fledged customer relations management (CRM), point-of-sale tools and the mobility of the "virtual dealership," others have barely moved beyond the "green screens" of their legacy systems.

It doesn't have to be this way, say the software developers that work with dealerships every day. "Technology has leveled the playing field for businesses of all shapes and sizes," Andersen says.

Technology and computer systems available today are giving smaller dealers access to technology that previously only the big dealerships could have. "They now have access to IT talent that only the big guys could afford," he adds.

The technology is already there





Courtesy of iDashboards

Dashboarding provides a way to present data graphically that gives managers an on-screen snapshot of key business indicators.

and many dealers have already taken the first, big step. They're moving beyond the green screen.

Beyond the Green Screen

Green screens refer to computer terminals that display green (or in some cases, amber) characters on a dark background. These systems featured fixed-character formats that were widely used with mainframes and mini-computer systems. Nearly all legacy systems utilized this static format, but in large part, green screens have given way to Windows, Mac or other graphical user interfaces — or GUIs.

Salemo says that the development and use of Windows GUI is the most significant change in dealer equipment software in the past 5 years.

A GUI is a graphical — rather than purely text — application program that provides a way to look at and interact with information on the World Wide Web. It has the look, feel and much of the functionality of Windows. They were developed as an interim step in moving customers to a true Windows-based business management system without incurring all of the costs of a true Windows application. To accomplish the transition, most developers layered on a front-end graphic interface with point-and-click capabilities to existing green-

screen legacy systems.

“The majority of the business systems are finally migrating over to Windows via a GUI,” says Salemo. “We started in 1999, but it’s really been the last 5 years when most business systems went to a Windows

“Dealers want more sophisticated reports that can be sliced and diced . . .”

front end. The point-and-click environment is much more familiar to the users than having a green screen. It’s easier to train employees because it’s Windows based.

“It also allows us to do things we couldn’t do in the character-based environment, like building integration with web applications that extend out to the customer,” she adds.

“Most software packages have been built over many years and to recreate these in an entirely new environment is a monumental task. So, the use of GUIs set the stage for the bigger move to a true Windows operating system,” says Randy McIntyre, president of Dealer Information Systems, a software provider specializing in dealership applications.

In addition to its functional benefits, McIntyre says another significant aspect to the evolution was the advantage for dealerships trying to attract bright, young people to the dealership. “Most people today are used to PCs and Windows and don’t want to look at some green screen, character-based system.

“It demonstrates to current and future employees that the business is up to date and investing in the tools that allow them to do a better job. The graphical front end allows dealers to move inexpensively without retraining because it utilizes the same legacy software but with a navigable screen.”

For many dealers, GUIs represented their first, big move toward a true business management system that simplified and expanded data entry as well as the analysis and reporting functions of the system. In the past, when a special report or data was needed, most legacy systems were only capable of producing “canned” information that required time-consuming manipulation to produce a usable report.

GUIs laid the foundation for true data integration as well as cutting-edge CRM systems that are being demanded by today’s fast-paced, customer-driven dealerships.

Real Management Tools

While the legacy systems being replaced today worked well for what they were, what they lacked was a relational database that was capable of integrating management and customer data.

What dealers want, according to Salemo, are more sophisticated reports and information that can be sliced and diced in any number of ways or that’s scaled down to make it useful in real-time.

“We’re seeing a lot more dealer personnel that are becoming much more Windows savvy and experienced in databases, like Excel,” she says. “They’re looking for a lot more func-



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tionality from their systems, for example, to export and email information outside of their business systems.”

One of the technologies that is giving dealers more access to meaningful data is called “drill down,” which provides them with flexible filtering capabilities to decipher where the data they’re looking at came from.

“Drill down is becoming a big want for dealers,” says Salemo. “With this capability, managers can look at a number on a report, click on it and see what makes up that number.”

Another development, called “dashboarding,” provides a way to present the data graphically — via bar graphs, pie charts or in other illustrative ways — giving managers an on-screen snapshot of key business indicators.

McIntyre says to think of a computer dashboard like the gauges on the dashboard of a car. “You’ve got

your speedometer, odometer, clock, fuel gauge or other instruments to give you a picture at any given moment. If your fuel gauge is pointing to ‘E,’ you know you need gas. Computer dashboards function in much the same way.”

“With a ‘push system,’ you’re seeing data you should be looking at every day without searching for it...”

Using a relational database, newer BMS software can pull data from anywhere in the business system — ranging from unit sales, receivables to parts orders — and graphically illustrate key indicators on-screen without the need for the user to delve into var-

ious reports to find the information.

Whereas past and current business systems utilized a flat database that organized data into several files that needed to be merged in order to produce a complete, integrated report, relational databases tie it all together.

“It’s like one big file cabinet where all the data is indexed,” says McIntyre. “Pull a single file and all the data related to that individual account or activity comes with it as single file. With the relational database, you can drill right straight into the information and keep going. You can’t do that with a flat database.”

According to McIntyre, construction, lift-truck and some of the leading ag dealers are now beginning to demand these data mining tools.

Next Step: ‘Push Data’

Whereas “drill down” indicates the user needs to look for the data he needs, Andersen believes the next step for dealer software is to literally “push” data to the user rather than have them explore for it.

“We don’t want to rely on the user having the wherewithal to drill down and get information. We want to be able to take information and force it to them as soon as they log on to a screen,” he says.

For example, when a service manager logs onto the system, a series of dashboards could appear that graphically illustrate things like work-in-process, how many work orders are open, how many dollars in parts he’s waiting for and the average day’s length of open work orders.

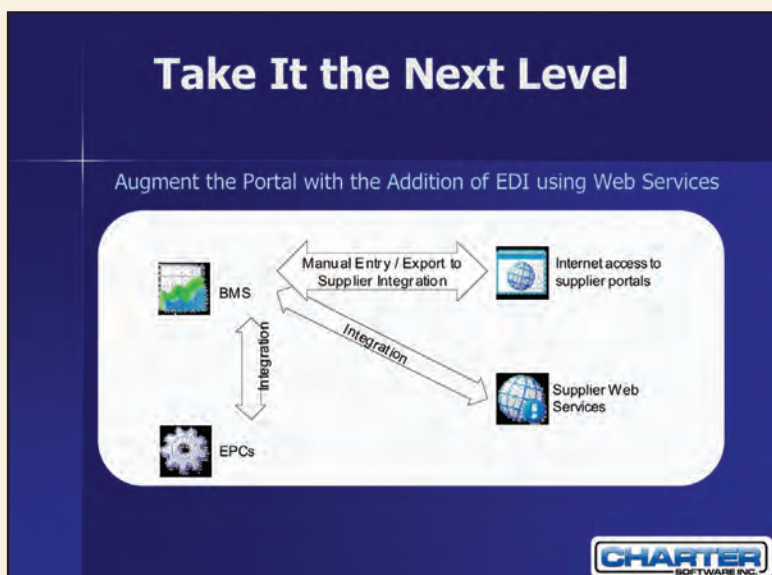
“But he doesn’t have to explore for it with a ‘push’ system,” Andersen explains. “He’s seeing the information he should be looking at every day. If it’s a bad scenario, it’s highlighted in red so he has no choice but to deal with it.

“In doing this, we’re allowing the customer to manage by exception. If everything on his screen is green and his dashboard looks good, he can go

Point-to-Point Integration Quickly Links Dealers and Suppliers

Electronic data interchange (EDI) gives dealers and suppliers the ability to transfer data directly between each other without requiring the dealers to go to a web site to complete transactions, such as parts orders, surplus returns, warranty and part registration or parts pricing and promotional programs.

“It creates more timely transactions for both the dealer and supplier as well as reducing the number of errors that can occur within those transactions because it doesn’t require any intervention by the user,” says Anne Salemo, president of Charter Software.



and be a subject-matter expert and not deal with a lot of paper and other reports," says Andersen.

"As the dealer-principal, I want all kinds of numbers pushed to me, but I also want information pushed to my service managers and techs, as well as my branch managers."

Point-to-Point Integration

With the foundations of the next generation of business systems and management tools firmly established — and in some cases already in use in other industries and retail environments — software developers say they're ready for dealers to get on board.

Salemo sees new "point-to-point" integration between dealer and supplier as being one of the biggest recent breakthroughs and a definite trend for the future.

"Both the suppliers and software companies recognized that this type of integration creates more timely transactions for the supplier as well as reduce the number of errors that can occur within those transactions because it doesn't require intervention by the user, in this case the dealer. This is one of the most significant changes in the last 5 years," Salemo says.

In other words, point-to-point integration simplifies and reduces the "paperwork" and time-consuming tasks of submitting warranty claims, ordering parts and registering product registrations.

"It doesn't require the user to go to a web site to finish a transaction. The dealer's business system sends the transaction directly to the manufacturer from within the business system and the manufacturer responds immediately. This is huge for the dealer," she says.

"Manufacturers are beginning to recognize that their dealers are spending a lot of time on their Intranet keying in transactions. This is taking them away from what they need to be doing, which is running the business and selling equipment. Not all of the

Connectivity & Dashboards: Tying It All Together

To illustrate how connected dealers are becoming, John Andersen, vice president of PFW, tells about a group of dealer-principals that were awarded a trip to Japan by their major supplier.

Being acquainted with four of the dealers, he relates how three of them, through their cell phones, had access to their daily management dashboards. At a glimpse, they were able to review their accounts receivable, accounts payable, the prior day's sales activities in each department and notes payable on their floor-plans.

The fourth dealer didn't have access to a management dashboard. "He wasn't home two weeks and he got it," Andersen says. "He said he had never been so embarrassed to say he had to wait until he got home to figure out what was going on in his business while the other dealers half-way around the world were having critical information pushed to them."

manufacturers are doing this yet, but it is definitely the trend."

Point-of-Sale Hardware

Cozetta Finley of Basic Software Systems says that the use of point-of-sale hardware devices, including credit cards, bar code scanners and receipt printers will see increasing use by dealers in the near-term. "We introduced

service is on the road, they'll have a remote tool that allows them to create a work order, invoice or sales quote on the spot.

"By the time the service tech leaves the customer, they'll already be billed. When they return to the store, they can synchronize with the business system, or if they have wireless capability, it's already closed and entered in the receivable account. What that means to the dealer is that billing is executed far faster, improving cash flow," McIntyre says.

In the virtual dealership, salespeople on the move will know who their customers are and the last time they talked to them. They will be able to quickly ascertain what equipment is available, and what work orders have been issued on a piece of equipment. They'll also be able to sell and trade out in the field.

"If you're connected, the capability is there now," McIntyre says.

The next thing — and this is the hard part for software companies — is how to define what is a laptop function vs. what could be on a PDA-type phone, like a Blackberry or an iPhone.

"Some data presents itself well on a PDA and some doesn't. We've been playing around with this and know that unit searches can certainly be done on a smart phone. But can you trade equipment on it? This is where you get into a lot of typing and information about the equipment. "We haven't found that sweet spot yet," McIntyre admits, "but we visualize it

"In the 'virtual dealership,' salespeople will be able to sell and trade in the field..."

these capabilities in 2001 and today a majority of our BMS sales include point-of-sale hardware devices."

She adds that the new generation of business software will include signature capturing at point-of-sale.

The 'Virtual Dealership'

What McIntyre sees as the biggest development down the road is improved mobility that will lead to the "virtual dealership," where salespeople and service techs work in the field with total access to the data they need to perform their tasks remotely. This type of tool is already under development, he says.

"The ag market will expect it over the next few years and the lift-truck and construction markets are expecting it sooner."

The way he sees it, when sales or

not too far down the road.”

McIntyre also foresees the development of complete remote service tool that ties service dispatch to GPS within the next 3 to 5 years.

“This is huge in the lift-truck market. Most of their service is done in the field. They need to know what service truck has what repair orders,” he says. “It then automatically schedules them based on proximity of the service call and via GPS.

“Just think of the savings in fuel costs, alone. The way it’s done now just isn’t efficient in terms of the tech’s time and fuel costs.”

When it comes to remote diagnostics, McIntyre says that this type of service is already out there with a GPS signal tied into the equipment’s hour meter.

But, he adds, it can be taken a step further, like GM’s Onstar system that’s tied into the engine to monitor pressure readings and perform diagnostic checks. It’s not utilized to a great degree yet because of the cost, but as the price goes down he sees these types of systems growing in use with ag equipment as it is already in the lift-truck market.

“Because such a large part of the lift-truck market involves rentals, dealers monitor things like a sudden jarring action, which could indicate a unit has crashed. They want to know about it right away,” he says.

Leveling the Playing Field

Having worked in and around the ag equipment market for the past 20 years, Andersen says he’s well aware that talk of advanced technology involving computer hardware, software and IT support can be intimidating to the smaller, even the medium-sized dealership. But, he says, they shouldn’t be.

“Shared solutions, called ASPs (application solution providers) are available today that take the risk and much of the work out of using a full-fledged business management system. This will be the single biggest change that dealers will see in the

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next 2-3 years when it comes to smaller dealers being able to utilize the same technology as the big boys,” he says.

Instead of the dealer buying a server and a software package, with an ASP all he needs to pay is a fixed monthly rate per user. This includes access to a server and the software. Essentially, the dealership shares the cost among multiple users. And it won’t require an onsite IT expert.

Andersen estimates that PFW’s sales are currently running about 50/50 between dealers that purchase

“Rural users are now the fastest growing group for Internet technology and information access...”

a server for use at their location compared with those utilizing a hosted ASP solution.

“If it’s four users, then they only pay for four users every month. It’s the way you’ll see things go for what we call the small- to medium-sized dealers — those with one to four locations,” Andersen says.

“It enables the small dealers to look like big dealers, to do everything a big dealer does, and to have access to technology and expertise that they may not otherwise be able to afford.”

In 2 years, Andersen estimates that 70% of PFW’s customers will be utilizing ASPs.

Growing Web Influence

When it comes to online systems and access to information, rural users are now the fastest growing group for Internet technology,

according to Andersen.

“These folks need to check commodity pricing and look at planting schedules. They use computers and Internet technology to work out crop yields, make purchases and sell grain and livestock. They are very comfortable using the technology,” he explains, emphasizing the need for dealers to establish a stronger web presence.

“Without a doubt, the web is where other markets are already heading and where the ag market will be heading in the near future,” says McIntyre. “Aggressive dealerships are offering more services via the web. More will start selling parts over the web and more and more communications between the customer and dealer will be done through the web.”

Andersen says he’s noticed trepidation on the part of some dealers who feel that Internet access hinders their ability to deal with the customer directly.

“Ask yourself, when is the last time you were actually inside of your bank? Usually, a visit to the bank these days involves the need for some special service.

“Customers want and are demanding Internet access, especially for simple transaction and information needs,” Andersen says.

“What it really does for the dealership is make it a little more customer-friendly and allows its staff to spend more quality time with the customers that need a special service or in-depth product information.”

“I try to assure the dealers I talk to that a strong web presence doesn’t take away any of their expertise or mystique,” Andersen says. “Especially when all a customer wants to know is if you have what he’s looking for or not.” **FE**

Selecting New Software? Avoid a Six-Figure Mistake



A systematic approach to acquiring a new business management system creates confidence that you've made the right choice.

*By Steve Epner,
Brown Smith Wallace
Consulting Group*

It is easy to ignore your computer system — until something goes wrong. For most of us, computers are something in a back room that provide the data we want, when we want it.

As we become more sophisticated, we expect more from our systems. As the next generation of owners and managers come into the business, they will demand more as well. They have grown up with automation and have much higher expectations. These expectations, combined with tight inventories, tight money and pressure on all aspects of a dealer's business often lead to the belief that a new computer system is required.

Dealers want and need systems that help them make more money. With diverse product lines, new options and requirements for early ordering, increasing profits from well-run service operations, and other opportunities to improve business, updated application systems

may make sense. They can make it easier to take advantage of the money-saving options available to dealers.

Return on Investment

It is often difficult for a dealer to see the ROI from a computer purchase/license. It is much easier to understand the value of a service truck, additional shelving or more

tem can provide, there are measurements that will help justify or validate its purchase. For example, a better inventory management system may provide the ability to reduce inventory levels. For every percentage drop in the value of inventory, it is easy to measure how many dollars are added to the bottom line.

Systems that are able to forecast and analyze customer ordering pat-

“Systems that are able to forecast and analyze customer ordering patterns have been known to reduce inventory levels by 5% to 50%...”

terns have been known to reduce inventory levels by 5% to 50%. More importantly, it can be done while improving customer service levels.

efficient assembly tools. To begin with, read the sidebar on page 28 entitled “How Much to Spend.” This will give you a better perspective for understanding the value of a new application package.

For many of the functions a sys-

tem can provide, there are measurements that will help justify or validate its purchase. For example, a better inventory management system may provide the ability to reduce inventory levels. For every percentage drop in the value of inventory, it is easy to measure how many dollars are added to the bottom line.

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terns have been known to reduce inventory levels by 5% to 50%. More importantly, it can be done while improving customer service levels.

Within the warehouse, allowing the computer to determine where items are to be stored can reduce



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Maximizing Your New System's Potential

You already know the basics, here are a few cost-recovering applications lying in your system and waiting to be used:

- Service contract management
- Service dispatch and scheduling
- Equipment rentals
- Floor planning controls
- Customer history records
- Methods to stay in touch with customers
- Forecasting
- Customer portal (so your customers can track orders, receivables, repairs, etc., using a web site tied to your application system)
- Integration (computer to computer) between the purchase order system and the supplier's order entry system
- Integration (computer to computer) between the order entry system and the customer's purchase order system

space requirements. Companies have eliminated plans to expand physical space with better management of how the current space is used.

CRM (customer relationship management) functions may increase the success rates for sales. Better information on sales and costs can increase gross margin percentages without any loss of customer satisfaction. Implementing customer report cards can draw attention to low margin or expensive customers and assist the company in improving profitability.

Products that can be sold without local support might benefit from

will provide real bottom-line returns. Make sure to examine all of these possibilities before making trade-offs between the many investment opportunities that are available to dealers today.

Avoiding a Six-Figure Mistake

So what does a dealer have to do? The process is not difficult, but it does require commitment. It can be rigorous or simple, but if not done correctly, the end result can be disastrous. Following are a few steps that can help you avoid a six-figure mistake.

First, keep in mind that selecting a

“Customizing only makes sense if you have a proprietary process that gives you a competitive advantage in the marketplace...”

Internet-based sales functions that can be used to open new geographic marketplaces. Product and supplier report cards can help focus efforts on the most profitable areas of the business and identify commodities or services that should be eliminated.

It is important to consider all of these factors when initiating a selection project. There are hidden opportunities to improve the business that

business system is a decision about your future, and the future is not static. Top management must be committed to the process and the selection decision must be completed within 6 months. Implementation should start immediately with a goal of being operational within three to six months after acquisition. Longer projects no longer work as the opportunities, requirements and economy

inevitably change.

The computer and associated business software are management tools that work only if they support the long-range goals and objectives of the organization. In many companies, corporate goals are only vaguely defined and often not written down. Consider using this project as an excuse to develop a much-needed strategic vision of where you want to be and how the dealership will grow.

At a minimum, be able to answer the following questions for yourself and potential vendors:

- What do we want to be known for?
- Who are our customers?
- What makes us better or different?
- What do we need to do to maintain or improve our position in our market?
- What do we know about what our competitors are doing?

A ‘Clean’ Start

Installing a new business management system is also an opportunity to clean up your processes. A favorite saying among computer geeks is: “If you automate garbage, all you get is faster garbage.” Address the way you operate with an open mind. Take advantage of new capabilities and techniques. Dealers who spend large sums of money customizing programs to make them operate, “just like we’ve always done it” are wasting money, setting themselves up for failure and missing out on best practices.

Customizing only makes sense if you have a proprietary process that gives you a competitive advantage in the marketplace. In that case, make sure the money you spend will not be used to give every other dealer the same advantage. If you choose a customized application, negotiate to keep those applications confidential and for your use only.

Consider performing a “Process Review” to identify and eliminate nonessential activities from the work being done. For every activity, ask yourself: “What value does this add for my ultimate customer?” If the answer is none, eliminate it as quick-

ly as possible. This is not something you want to carry into the future.

The Selection Team

A most critical step is to assemble a team to help with the selection. This is not only important to reduce the burden on any one person, it is also necessary to make sure you get the input you need from around the company.

Select trusted employees from every part of the dealership. They know what's needed to get the work done. They're the ones who will live with whatever system is implemented and they will do a much better job if they played a role in choosing it.

The responsibility for problem resolution cannot be delegated. Whenever there is a disagreement on the answer to a key question, questions of priority or decisions related to finances or personnel, direct input and resolution from top management must be available in a timely manner.

One of the most important bits of advice we can give is to celebrate your successes as you go along. Let the staff know that you appreciate the extra work the project involves. Publicly thank them for meeting deadlines and doing a good job. Use these public announcements as a way to keep the whole company informed. A no-surprise environment helps the project work smoothly.

System Requirements

Successful selection requires that you be able to describe the most important functions for your future. This list allows you to compare alternatives in order to make a good business decision. For most dealers, an informal request for information (RFI) combined with "scripted demos" will provide the greatest potential for a successful selection process.

A solid requirements list and a coordinated demonstration plan will force the system vendors to concentrate on what you need, not what's in their best interest to sell. It is critical that you control the conversation and

Setting Up Your Dealership for Success

A few false steps can be disastrous when choosing a new computer system. Follow this simple guide to keep your selection process on the right path.

1. Set up a team that includes representatives from all areas of the company. Make sure everyone can feel they have input in the selection process.
2. Let the team set all primary and intermediary target dates. Communicate the goals and objectives while providing leadership, but avoid dictating to the group. If the team has sufficient input in the process, they will generally do everything possible to meet realistic targets.
3. Provide top-management support to clear roadblocks. There will always be conflicts due to limited resources and different priorities in an organization. Hard decisions will have to be made in a timely manner. Eliminate obstacles as quickly as possible.
4. Top management must stay involved and committed. Call and attend steering committee meetings and show interest in the process.
5. Manage expectations. Keep your staff informed and up-to-date. Tell your vendors and customers what you are doing and warn them when any stage of the process may affect them.
6. Take advantage of this opportunity to build and improve on the relationships with all of your business partners. This is the perfect opportunity for both your sales force and purchasing departments to forge closer ties with customers and suppliers.
7. When negotiating with the selected vendors, do not set up an adversarial relationship. This company will be very important to your project's success and must become a long-term partner for the dealership.
8. While cost is an important part of the decision, it should not be a deciding factor. Find the right solution — functions, features, capabilities — first. The objective is to find the best software for you, not the least expensive. If you don't believe this, ask any company that bought new software more than once in the last 5 years.

keep the process focused on your needs and wants for the future.

Start the process by asking yourself the following questions:

- What are the most difficult things for us to do?
- What do our best competitors do that we want to do?
- What are we known for doing better than anyone else?
- What new things do we want to do?
- What seems to waste the most time?
- What can we do to be an easier dealer for manufacturers to work with?
- What can we do to be an easier dealer for customers to work with?

The answers to these questions will give you a list of required system capabilities. For each answer, provide as much detail as possible. It will help your vendors determine if they can support your needs. (See sidebar "Maximizing Your New System's Potential" on page 26 for functional ideas to help you think of new things you may want to do with your business manage-

ment system.)

You can use this project to really examine the opportunities to increase your integration with trading partners. Call suppliers and ask about APIs (application program interfaces) that allow third-party systems to fully integrate with their proprietary systems. This can be a much more effective solution than buying different applications to work with each manufacturer.

Creating the RFI

Creating the RFI is as simple as:

- Describing your business: This can usually be done in as little as 1 to 3 pages — make sure to include the size of your operation and volume of transactions that are processed monthly.
- Providing information on the timing of your project: When you need a response; how long you will need to review proposals; when you can schedule demonstrations; and when you think you will make a decision.

How Much to Spend

Budgeting for a new computer system is always difficult. It is not like buying new shelving for the warehouse, floor planning new equipment or adding a service truck. While you do not want to overspend, it is equally dangerous to spend too little.

After receiving your new system, the hardware will be worth very little on the open market and the software will be ineligible for resale. Its only value then is as an operating tool for the dealership.

Consider any new system as an operating expense, just like salaries. Calculate the cost over a 5-year period. For example, a \$150,000 system (hardware and software) will cost under \$3,000 per month (based on a fair market buyout for the hardware and interest rates early in 2008). This is less than the fully loaded cost of a clerk (salary, benefits and overhead allocation).

If the system will allow you to grow and provide additional information without the need to hire a new person for the five years, it can be easily justified. Any additional gains would be extra benefits for the organization.

When doing the final calculation of what you can afford, start by calculating what it would cost you to hire the personnel to do the same level of work. You may be surprised at how much automation you can really afford.

- Creating a list of system requirements.

This document is then sent to potential vendors. It allows them to quickly decide if you are a good fit for their products. Be careful, in tight economic times every opportunity can be forced to fit. If they believe they can help you, then they will complete the response as requested.

Finding Vendors

Deciding who to send the RFI to can be daunting. Remember, you will have to review all of the responses. Too many vendors will overwhelm you. On the other hand, you do not

from another vertical market.

You can use the list of vendors at software4distributors.com for companies who are experts in wholesale distribution. The site is a free resource and provides tools to help with selecting software candidates for consideration. (*A listing of potential suppliers is also provided in this Special Report. Please see "Guide to Selecting Management Systems Software" on pages 36-40.*)

When you are ready, send each a copy of your RFI. Give them about 2 weeks to respond. Ask them to be brief and to include the following:

- A discussion of your specific needs

“Installing a new business management system is also an opportunity to clean up your processes...”

want to leave out a vendor who might provide the best solution. A compromise is needed.

Start by talking to other dealers. Find out what they are using. Then ask similar dealers in other industries what they use. There may be a competitive advantage in finding someone who understands equipment dealers and has best practices you can apply to farm equipment retailing

and describe how they will accomplish each.

- A price range for a company of your size.
- A one-page summary about their business, background and knowledge.
- A one-page discussion of their financial position and strength of the company.
- Description of a typical implemen-

tation (time, cost and support).

- A list of at least three references with similar sized businesses, preferably equipment dealers.

The goal is to reduce the field of suppliers to three or, at the most, four vendors. More than this will be too confusing and will not add sufficient value to be worth the extra time. For most dealers the fourth vendor is their current supplier. Unless you are having a great deal of difficulty with them, there is a possibility they can respond to your requirements for the lowest overall cost and with the least disruption of your operation.

The First Pass

Review the response from each vendor as it arrives, and quickly eliminate any that do not respond to your specific requirements. While price should not be a determining factor up front, you can eliminate any alternative that is way out of range.

Use the team to help read and react to each viable response. In most cases, the vendors will self-select and you should not have many that are clearly inappropriate. If you do, just eliminate them.

Have your team rank the responses and give them the task of reducing the field to no more than 4 alternatives. This may take some effort, but it will be worth the investment. If this step is done correctly, every remaining vendor will be capable of supporting your needs.

The final decision will be made from the group of winners. Your team cannot be wrong.

Scripted Demonstrations

Once a short list is established, it is time to work toward a final decision. The most important task is to see a demonstration of the software you would be using. This is critical. You do not want to leave it to chance that you will see everything of importance.

In order to make sure that each important function is shown, you need to establish a list of what you want to see and in what order. The
(Continued on page 30)

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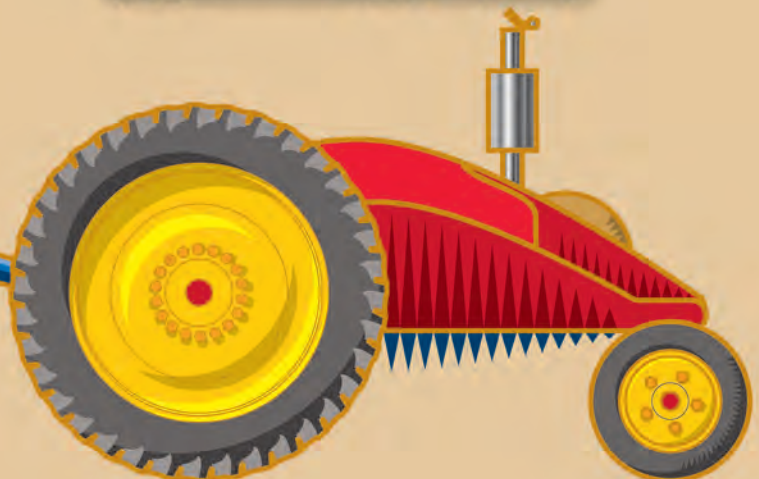
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(Continued from page 28)

'Guide to Selecting Dealership Management Systems Software'

To help farm equipment dealers locate firms providing dealership management systems, a listing of the capabilities of 10 of the top developers of dealer-specific business management software can be found in Part 4 on pages 36-40 of this special report.

The listings also show the system requirements, functional highlights, unique solutions offered by the software, new developments offered in their latest versions and, in most cases, an entry price point.

In many cases, the software developers have also provided references and contacts of dealerships they have worked with.

proper order will make it easier to follow the demonstration.

For example, we suggest following an order from the identification of a prospect — if you are going to integrate a “Customer Relationship Manager” — through the sales cycle. See how an order is taken, what reports are generated, how equipment is ordered or relieved from inventory, what happens on delivery, any follow up reporting and the back office transactions that support the process.

Do the same thing for any service components of the business: rentals, repairs, etc. See how the system will work in your business. Schedule the demo in such a way that each area of the business can see the parts that affect them. Only the project leader should sit through the whole thing.

With today's technology, demonstrations no longer have to be in person. Various web-based products allow demonstrations to be viewed interactively. Most will allow the user to take control and actually try the system. If a vendor wants to come to your location, that's fine. The same rules apply.

The last thing you need to do to be ready is create a scoring sheet for each person who will watch a part of the demonstration. For each detail

that they believe is important to their success, there should be room to evaluate how well the demonstration meets their expectations, whether the application looked easy to use, and how well they think it will work in your environment.

Always allow room for questions and concerns. Consider each comment as a possible follow up question for all vendors. At each demonstration, you will learn something new. Use this to refine your analysis and drive toward the application that will best meet your needs.

Making the Decision

Frequently, there is more than one good answer. Picking the best one can be difficult. Now it is time to do some reference checking. Have a couple members of the team from different areas in the business call a counterpart in at least two of the reference sites.

Keep the conversations short as you do not want to interfere with the reference's ability to do their job. Understand that if you ask, “how do

implantation team?”

Take all of the information and let the team decide. Who do they think will provide the greatest potential for success? That vendor then becomes the primary candidate in consideration. It is now their contract to lose. Do not let the second place vendor go until the negotiations are final.

Negotiating the Final Deal

This is it, the final step before implementation. Be careful of setting up an adversarial relationship. Remember that the vendor will become the most important member of your team in terms of getting the greatest value from the system.

Where possible, use an outsider to help with the toughest points. It can be a lawyer or someone knowledgeable in computer contracts. At the end of the day, most of the issues have a financial component. If you want maintenance charges to be delayed until startup, then that will affect the amount of discount you can receive.

Work on all of the issues at the same time so the vendors can deter-

“Avoid an adversarial relationship. Your supplier will become the most important member of your team in getting the greatest value from the system...”

you like the system?” that you will get the company line. No one will give you a bad reference to call. Instead, ask the reference the following two questions to get the most valuable information possible:

- We are ready to buy the XYZ system and want to know if there are any hints you can give me or things you would have done differently to make implementation and startup easier

- Can you recommend any persons we should ask for as part of our

mine the cost of each point. It will be easier for them to give you final pricing. Once you make a deal, stop looking back. Get the team excited and move forward. Get the new system in place and let it help you to do better in the future.

Steve Epner is founder and president of the Brown Smith Wallace Consulting Group, which specializes in assisting clients with the integration of strategic business planning, information systems and tactical requirements.



Dealers See ROI with the Right Software System



To improve profitability, an effective business management system needs to take the focus off the back-end of the business and put it back on the customer.

*By Ken Wysocky,
Contributing Writer*

In the years BC (Before Computers), ordering parts made Brian Carpenter feel less like a farm equipment dealer and more like a card dealer — albeit one playing with one very large deck of cards.

“We had thousands of 5- by 7-inch cards in drawers, one card for each part,” recalls the general manager of Champlain Valley Equipment, a family-owned dealership in Middlebury, Vt., that handles New Holland, Case IH and Kubota farm equipment.

“When we’d sell the last one of a particular part, we’d put a metal tab on the card. Whenever we’d order parts, we’d have to go through the cards to find the ones with tabs.

“When you have 10,000 part numbers, that’s a lot of drawers full of cards. And to make it worse, sometimes the tabs would fall off, or someone would forget to put one on. To try and come up with what and how much

to order was really time consuming.”

These days, Carpenter — who owns the dealership with his father, Russell — deals with keystrokes, not cards. A business management software package from Basic Software Systems (BSS) makes short work of previously complicated tasks, such as point-of-sale parts invoicing, parts

orders, Carpenter adds, noting the time the dealership once needed 10 parts but accidentally ordered 1,000.

“Overall, we probably manage 50,000 part numbers in the time it used to take to manage 10,000 numbers — maybe even less,” notes Carpenter, whose company also runs a dealership in St. Albans, Vt. “Our

“Automation removes a lot of obstacles to growth...”

*— John Rudderham,
Huron Tractor Ltd.*



ordering and parts management.

“Whenever we go below a minimum stock quantity for a part, the software automatically spits out a proposed order,” Carpenter explains. “Then you just ‘scrub’ it — double-check it for accuracy — and submit it. We’re continuously ordering fast-moving parts.”

Moreover, the software is much more accurate than hand-keyed

parts department has become a better profit center.”

Carpenter’s experience vividly underscores how sophisticated business management software can improve dealer productivity and profitability. In the last several decades, business software has shouldered aside index-card files and their ilk, just as tractors rendered horse-drawn plows obsolete at the turn of the century.

“If you don’t turn something 3-4 times a year, you don’t want to stock it any more. All that information is right here at a glance.”

— Irvie Loudermilk, Murfreesboro Kubota



These days, software does just about everything except perform oil changes in the repair shop. Among other things, they can manage parts inventory, orders and invoices more efficiently; provide clearer analysis of profit-and-loss statements and balance sheets; track the time technicians spend on repair jobs; and deftly monitor customers’ buying habits. They even provide customers with on-line access to their dealership accounts from home.

Payoff is Profitability

While selecting the right software package can be time consuming and arduous, it’s worth it in the long run to invest in a business information system, dealers say.

“Automation removes a lot of obstacles to growth,” says John Rudderham, vice president of parts and sales/information systems at Huron Tractor Ltd., a John Deere dealer with six stores in southwestern Ontario. “It makes growth easier because it allows you to focus staff on customers, not on the back end of the business.

“It’s also cheaper than doing things manually,” he adds, noting that Huron’s business management software from PFW Systems does the work of about 20 people. “It saves labor at a time when labor is in short supply.”

Irvie Loudermilk, general manager of Murfreesboro Kubota in Murfreesboro, Tenn., says dealers without business software are flying blind. The dealership, which also operates Russell Mason Tractor in Winchester, Yearwood Equipment Co. in Fayetteville and Warren County Kubota LLC in McMinnville,

relies on DealerWin software package from Charter Software Inc., a 32-bit Windows-based system tailored specifically for dealerships.

“If a dealer doesn’t invest in a system, he has no way of knowing what’s in stock, what’s going out and how much money he’s making on it,” Loudermilk says. “For example, when you buy a piece of equipment, that’s not the only cost of doing business. Along with the cost of the equipment, there’s the cost of freight, the cost of set-up, and the cost of filling it with oil, hydraulic fluids and fuel. Those are the things a software system helps you keep up with.”

Too often, Loudermilk asserts, dealers think they’re making money when, in fact, they’re not. And the bigger the dealership, the better the chances of making a mistake.

Meeting Different Needs

Continual software upgrades and refinements enable dealers to manage their businesses in ways they couldn’t just several years ago. A good example is Murfreesboro Kubota.

“We always wanted the capability to track serialized equipment,” explains Loudermilk. “With this software, after a piece of equipment is sold and its serial number is entered in the system, the purchase is locked in. No serial number can be used twice. It keeps everyone honest. Without it, a salesperson could sell the same tractor twice and pocket \$20,000 and you’d never know it.”

The software also archives complete customer histories, which provide details about their buying habits over the years.

“You just type in the serial number

and all the information pops up,” Loudermilk says. “It saves us 30 minutes of digging around. Just like with everyone else, time is money.”

Moreover, the software alerts managers if the percentage markup on a part is lower than it should be, which recaptures otherwise-lost profits. It also provides insight into inventory-management details, such as how many units of a particular part were sold by month or by year.

“About 80% of the parts we sell come from 20% of the numbers in our world,” Loudermilk points out. “If you don’t turn something 3-4 times a year, you don’t want to stock it any more. All that information is right here at a glance.”

Minimal Paper Trail

Huron started out with a parts management and invoice module, then added capabilities such as customer profiles, accounts payable and receivable, and a ledger sheet.

“The life of our products is 20 to 30 years,” Rudderham notes. “So tracking a machine’s parts history and a customer’s buying habits — and the sheer intensity of the aftermarket — requires unique software.”

Two newer functions illustrate the gee-whiz factor software systems offer: electronic signature and invoice retention and customer on-line access to purchasing information.

The electronic signature retention has drastically reduced paper consumption at Huron Tractor, which processes 100,000 over-the-counter invoices a year and 20,000 work orders in its service department. Instead of using duplicate forms (one for accounting and one for customers), the system captures cus-

“Our parts guy who works with the mechanics isn’t pulling out his hair nearly as much as he used to.”

— Brad Kruger, Young’s Equipment



tomers’ signatures electronically at the service counter and then associates it with that invoice.

“The system prints out an invoice with an electronic signature on it for the customer, and we get rid of 100,000 documents a year,” he says. “Once you’re able to capture invoices, only the customer needs a (hard) copy. Everything else is stored digitally here for 99 months.”

With the on-line access component, a customer can sit at a kitchen table with a laptop computer and, with one keystroke, retrieve years of invoices.

“Our entire business system is effectively a Web server for our customers,” Rudderham says. “A customer with high-speed Internet access can bring up all transactions and sort them based on dates, parts, machines and invoice numbers.”

This resource is especially valuable for customers who can’t remember what parts they ordered a year ago and what they paid for them, or who can’t reconcile a bill because, for instance, a hired hand forgot to turn in an invoice.

“Now he can find the missing invoice and print it out,” Rudderham says. “Before, the customer had to go through a lot of work to correct a billing error.”

Rudderham says customer use of the new technology is expanding exponentially, though not without growing pains. Customers lose passwords and need training, and others haven’t yet embraced personal computers as a management tool, or have no high-speed Internet access, he says.

Detailed Labor Analysis

Thanks to a software system from Dealer Information Systems (DIS),

management at Young’s Equipment Inc. in Regina, Saskatchewan, can more easily analyze service technicians’ efficiency. They also can better explain the cost of repairs to customers that dispute a bill, says Brad Kruger of the company’s information technology support department.

“The system provides us with segregated work orders, which show the individual parts that were used on repair jobs and the amount of time the mechanic spent installing each one,” Kruger notes. “Before, all the parts and time were lumped together. So if a customer disputed a bill, we

had to go through the whole list of part numbers in order to verify each one was charged out.

“It definitely makes a big difference,” he adds. “Our parts guy who works with the mechanics isn’t pulling out his hair nearly as much as he used to.”

Technicians create the segregated orders. They use individual identification numbers to sign in and out of each portion of a repair job at Young’s, which sells a variety of products at five stores in southern Saskatchewan, including Kubota and John Deere equipment.

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“When it comes to rationalizing equipment lines, I can see which ones are profitable and which ones aren’t. This has taken us from a 1% bottom-line margin to an average of 3%.”

— Brian Carpenter, Champlain Valley Equipment



Research Required

What would these four dealers advise colleagues who are considering upgrading or changing their business management software systems? Do your homework, they say unanimously.

“The majority of dealers now use only a handful of suppliers in the business management software industry,” says Champlain Valley’s Carpenter. “You just have to feel comfortable with the vendor and be sure they provide the best aftermarket service.”

Carpenter suggests using a leading major supplier, because most of the major manufacturers also use those systems.

“Talk to other dealers, too,” he says. “Go and see what they use and what you like and dislike about it, then see if you can live with the dislikes. Every system has its downsides.”

Carpenter also urges dealers to consider whether a system can expand as a dealership’s needs change. In addition, he says the Internet is a great resource for finding out what customers say about whatever vendors are under consideration.

“Every dealership has to assess its needs and requirements,” says Al Hajewich, Young’s Equipment’s chief financial officer. “For instance, our DIS system would be overkill for a smaller business.”

At Murfreesboro Kubota, Loudermilk says dealers should ask if the new software could seamlessly integrate existing company data.

“You’ve got accounts payable, accounts receivable customer addresses, vendor lists — it’s a night-

“The time is immediately recorded on the work order, instead of someone manually adding up a stack of time tickets later,” Kruger says. “You can tell how much time was spent on each repair ... which makes it easier to explain the bill to customers who complain about labor charges.”

Another timesaver is the software’s Keystone component, which enables managers to transfer financial reports into an Excel spreadsheet, eliminating the tedious and time consuming — not to mention possibly inaccurate — task of hand-keying data into a spreadsheet, Kruger adds.

At Champlain Valley, the BSS system allows Carpenter to keep separate balance sheets for each of his two stores, and merge them with one keystroke. That enables him to analyze how the individual stores are faring, as well as determine how various equipment lines perform.

“When it comes to rationalizing the equipment lines, I can see which ones are profitable and which ones aren’t — which ones have turns and which ones don’t,” he explains. “This has taken us from a 1% bottom-line margin to an average 3% bottom line. When you can do that, you know you’re managing your assets better.”

Same Destination, Different Roads

The roads dealers take to arrive at a software solution that best fits their businesses vary wildly. Take Huron Tractor, for instance. The company started out in the early 1980s with an IBM System 34 and IBM software. But the software didn’t work well

because it wasn’t customized for implement dealers, Rudderham says.

So Huron hired three programmers and developed its own custom software over a 5-year period. The software was so successful that its developers later split off and formed their own company: PFW Systems.

Murfreesboro Kubota’s Loudermilk looked at three or four different software packages during a couple of months before selecting Charter.

“We know what we do,” he observes. “It was just a matter of finding a system that fits us.”

Loudermilk liked how Charter personnel walked him through the package and answered all his questions thoroughly.

“No one passed the buck,” he says. “When I had questions, they had answers. I like that, because I’m a very direct person.

“With our old system, we were always caught in the middle when we had problems. One would say the hardware is at fault, and the other would say it’s the software. I felt like a ping-pong ball.”

For others, like Carpenter at Champlain Valley, familiarity was a key factor.

“At the time, Basic Software provided software for personal computer networks, which I was comfortable with,” he recalls. “So we went with Basic’s Windows-based system. It cost less money at the time, and New Holland was already using it at dealer-development stores. Plus, the financial statement format was very similar to what New Holland used for training classes, so that also made it easier.”

“Every dealership needs to assess its specific requirements. Our system would be overkill for a smaller business.”

— Al Hajewich, Young's Equipment



mare if all that data can't be input into the new package,” he points out.

Loudermilk also suggests feeling out vendors by talking to them and asking the right questions.

“You'll find out right quick which ones are wishy-washy,” he says. “In the end, it's all about people.”

Huron's Rudderham urges dealers to be sure they have a sound computer network to support whatever software they're considering.

“You can have the best system out there, but if the network is unreliable, it's very frustrating,” he says.

He also emphasizes the importance of training and says dealers will find that employees are less resistant to change if they see how it benefits them.

“You can't assume you can train employees by osmosis — put it in front of them and let it soak in,” he says. “The organization needs to untrain employees, then retrain them with enthusiasm and excitement. Don't assume that the vendor is going to be the trainer. You need a champion in your organization who's going to put the blade down and push.”

Always Room for Improvement

While the four dealers are pleased with their current management software, they still have wish lists of additional capabilities.

“We'd love to have a fully integrated non-parts purchase order system with electronic approval,” says Rudderham. “That's one area of the company that's been a little loosey-goosey, with everyone having their own P.O. book.”

Says Carpenter: “We're not managing the wholegoods to its fullest extent. We're not utilizing the information for our sales force the way

we'd like to. It's not that the system is incapable; we're just not there yet.”

Ultimately, Carpenter would like to see salesmen be able to obtain costs and retail prices for goods on a laptop computer while with a customer, and print out a quote right there. Or call up a photo of a piece of used equipment for a customer to review.

“That way, you're giving the customer the information he needs right there, instead of having to take time to get back to him,” he explains. “Travel time in this business is critical. If you go to a farm and don't have all the right information, then you

have to go back again later.”

Also, if a farmer changes his mind about a piece of equipment in mid-conversation and wants to examine something else, salesmen would have the information on their computers, which would greatly increase customer satisfaction, he says.

“The more information they can take with them, the more prepared they are to quote a price and close a sale,” Carpenter notes.

Even without that capability, though, one thing is for sure: Carpenter's software sure beats shuffling through a mega-deck of cards. **FE**



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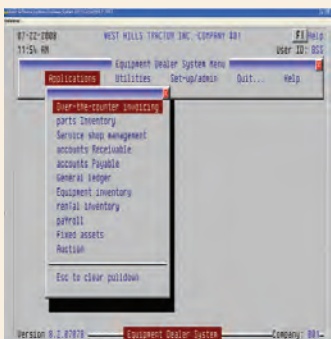
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Guide to Selecting System Software

Here's a roundup of the latest business management software designed for dealers in the equipment distribution industry.



BASIC SOFTWARE SYSTEMS, TEXARKANA, TEXAS

Basic Software Systems was established in 1979. Beginning in a local Ford dealership, the business system was custom tailored for the agriculture industry. Over the years, the newly integrated features of the software brought about complete transformation for the dealership.

Brand Name: Basic Software Systems Business Management Solution

Introduced to Market: 1979

Number of Farm Equipment Dealer Installations: Approx. 250

Software's Unique Solution(s): Basic Software Systems Business Management Solution provides total and complete integration within a dealership and from store to store. All software modules and manufacturer interfaces interact with each other, eliminating double entries and resulting in higher productivity.

Functional Highlights: High-level security within the software enables department managers to easily protect sensitive dealership information. New users learn the daily utilization of the software easily and quickly. Downloading manufacturer price books online allows for accurate pricing every single time a part is sold. Data collector scanners allow for quicker and more accurate physical inventory processing and easier selling of equipment.

Operating System(s): Runs on Windows XP Pro, Windows 2003 and Windows Vista

Database Manager or File System: Proprietary

New Developments: Enhanced bank reconciliation, new payroll module to include Canada, complete system moving to Microsoft.NET 2008 technology.

Entry Price Point: \$10,740 (includes data conversion, monthly support, full system, off-site training, single-store license and 4 users).

Dealer References: Champlain Valley Equipment, Middlebury, Vt., 802-388-4967; KanEquip Inc. Wamego, Kan., 785-456-2041

Website: www.basic-software.com **Email:** sales@basic-software.com

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C-SYSTEMS SOFTWARE INC., ARLINGTON, TEXAS

c-Systems Software has been in business since 1982, providing turnkey business management systems for dealers and distributors in the agricultural, industrial, power equipment and power-sports markets. Most of our employees have been with the company for more than 10 years, highlighting a stable and dependable workforce that provides the highest quality programming and support services.

Brand Name: c-Systems Enterprise

Introduced to Market: 1982

Number of Farm Equipment Dealer Installations: We support approximately 1,093 current dealers, but do not attempt to categorize them by their product mix.

Software's Unique Solution(s): The software package is a tailored suite of programs and reports geared toward the industry-specific needs of the dealership. Provides integration of the software with manufacturer's websites, manufacturer and supplier pricing, special order tracking, shop work order tracking and time management.

Functional Highlights: The system incorporates inventory control with automatic analysis and adjustment of inventory stocking levels to ensure proper inventory turns. The graphical user interface provides an efficient, easy-to-read information display in a real-time environment that can be tailored to the user's needs.

Operating System(s): SCO Unix, Red Hat Linux, Microsoft XP Pro and Microsoft Server 2003 (and later MS Server products)

Database Manager or File System: Proprietary

New Developments: One of the most recent developments is the addition of the Shop Monitor screen (shown), which allows for much better control over the work-in-process on the repair side of the dealership.

Entry Price Point: The most basic system starts at \$4,495, which includes a session of on-site training (continental US).

Dealer References: Robertson Implement Ltd.: Pam 306-773-4948; Southland Engine Co. Inc., Lynn Pesson 337-984-4640

Website: csystemssoftware.com **Email:** sales@csystemssoftware.com

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IMPORTANT SAFETY NOTICE!

GRAY MARKET TRACTORS, EXCAVATORS, WHEEL LOADERS and CARRIERS

What is a "Gray Market Product?" A simple definition is a trademarked product originally designed and manufactured for use in a foreign market that is imported for resale in the United States without the consent of the owner of the trademark. In this instance, used Yanmar[®]-brand tractors, excavators, wheel loaders and carriers originally designed and manufactured by Yanmar Diesel Engine Co., Ltd. ["Yanmar"] for exclusive use in Japan, are being imported into the United States and sold to U.S. consumers by third parties without Yanmar's consent or authorization.

The Yanmar[®]-brand tractors, excavators, wheel loaders and carriers designed for exclusive use in Japan do not meet U.S. safety standards in several respects. They also have other important differences from Yanmar[®]-brand tractors, excavators, wheel loaders and carriers designed and manufactured for the U.S. market and distributed through authorized channels. Some of these differences can affect the safe operation of the equipment. The purpose of this notice is to warn dealers, potential purchasers and owners and operators of "gray market" Yanmar[®]-brand tractors, excavators, wheel loaders and carriers of these safety-related differences. In addition, we have recently learned that tractors which Yanmar manufactured for exclusive use in Japan bearing "Zen-Noh" labels are being sold by third parties in the United States who have no affiliation with Yanmar. These gray market "Zen-Noh" tractors, originally manufactured by Yanmar, involve the same safety issues as gray market Yanmar[®]-brand tractors, so the following warnings apply with equal force to gray market "Zen-Noh" tractors originally manufactured by Yanmar.

The most important safety-related differences between "gray market" Yanmar[®]-brand tractors, excavators, wheel loaders and carriers and those that were designed for the U.S. market and distributed through authorized channels are as follows:

TRACTORS

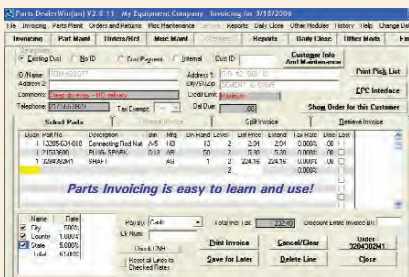
- Rollover Protective Structures (ROPS) and a seatbelt, certified to U.S. standards, which are recommended or required for tractors in the U.S. market, are not available for gray market tractors. A tractor without ROPS and a seatbelt will, under many circumstances, afford the operator less protection in a rollover accident than a tractor with certified ROPS and a fastened seatbelt.
- Power Take-Off (PTO) master shields and guards, required on tractors for the U.S. market, are not normally installed on gray market tractors. These devices are intended to protect from injury due to inadvertent contact with the rotating PTO shaft.
- Gray market tractors generally do not have an over-running clutch on the PTO whereas tractors designed for the U.S. market generally do. When a gray market tractor without such feature is used with a large rotary implement, it is possible for the tractor to continue moving even when the brakes are applied. Such implements are common in the U.S., but not in Japan.
- Some gray market tractors are not equipped with a safety start switch. This safety feature is designed to prevent the tractor from starting in gear and potentially striking or running over an operator who misuses the tractor by starting it from the ground instead of from the operators seat as per Yanmar's instructions.
- Pulling on the throttle of a gray market tractor will cause it to accelerate whereas pulling on the throttle of a tractor designed for the U.S. market will cause it to decelerate. This difference can have potential safety consequences for an unsuspecting operator.
- Gray market tractors have multiple PTO speeds for operating implements whereas tractors designed for the U.S. market generally have one PTO speed, namely, 540 revolutions per minute (rpm). If a gray market tractor is used with an implement designed for the U.S. market, the implement can be operated at revolution speeds in excess of its 540 rpm design speed, potentially leading to catastrophic failure of the implement and associated injury.
- Operators manuals for gray market tractors were written in the Japanese language and are not available from Yanmar in the English language.
- Warning decals for gray market tractors were written in the Japanese language and are not available from Yanmar in the English language.

EXCAVATORS, WHEEL LOADERS and CARRIERS

- Most Yanmar[®]-brand excavators, wheel loaders and carriers designed for the U.S. market have Rollover Protective Structures/Falling Object Protective Structures ("ROPS/FOPS") and a seatbelt installed as standard equipment, whereas gray market models do not.
- Most Yanmar[®]-brand excavators, wheel loaders and carriers designed for the U.S. market have travel alarms installed as standard equipment which sound to warn bystanders when the machine travels in forward or reverse, but gray market models do not.
- Operators manuals for gray market excavators, wheel loaders and carriers were written in the Japanese language and are not available from Yanmar in the English language.
- Warning decals for gray market excavators, wheel loaders and carriers were written in the Japanese language and are not available from Yanmar in the English language.

As a result of these safety issues and in order to protect the "Yanmar" trademark and reputation, Yanmar does not support gray market Yanmar[®]-brand tractors, excavators, wheel loaders and carriers and will not knowingly supply replacement parts for gray market units. There is also no warranty from Yanmar for these used units which are present in the U.S. without Yanmar's consent or authorization.

If you have any questions regarding gray market Yanmar[®]-brand tractors, excavators, wheel loaders or carriers, please contact Yanmar America Corporation, 951 Corporate Grove Drive, Buffalo Grove, Illinois 60089.



CHARTER SOFTWARE INC., LITTLETON, COLORADO

Charter is a provider of affordable, Windows-based business management software designed to help equipment dealerships increase profitability. It works directly with major manufacturers/suppliers to provide integration with their software and systems.

Brand Name: DealerWin

Introduced to Market: DOS-based version, 1984, Windows-based, 1999

Number of Farm Equipment Dealer Installations: 560 (locations not users)

Software's Unique Solution(s): Our system is a Windows-based software that offers "point and click" functionality, making it easy to train new employees as there are no keystroke sequences for them to remember. It runs completely on personal computers, so it is more affordable to sup-

port and administrate. No special hardware is required.

Functional Highlights: DealerWin's deluxe bundle comes standard with parts invoicing and management, service management, whole goods, customer profile, Rental and Warranty modules being optional. All reports are exportable to other common applications. Regularly updated EPC/e-commerce system interfaces with major suppliers increase efficiency and provide equipment dealers with streamlined business management tools that reduce errors and duplication of effort.

Operating System(s): Windows XP or newer, including Vista Business 32-Bit

Database Manager or File System: Microsoft Jet

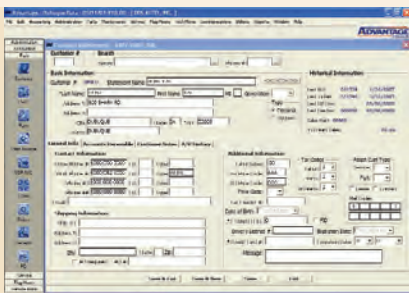
New Developments: We recently added the CNH Credit Card, Kubota K-PAD, and CCN Web interfaces. We are preparing to release a new interface for Case New Holland dealers which will allow integration with the Internet version of PAL/SP2.

Entry Price Point: DW Express \$2,995

Dealer References: Murfreesboro Kubota. Warren County Kubota. Please contact Ann Carter at 615-890-1200

Website: chartersoftware.com **Email:** solutions@chartersoftware.com

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DUBUQUE DATA SERVICES, DUBUQUE, IOWA

Founded in 1972, Dubuque Data has been providing dealerships, throughout the United States with high-powered alternatives in dealership management systems (DMS).

Brand Name: Advantage Solution

Introduced to Market: Original, mid-1980s. The Advantage solution introduced 2005.

Number of Farm Equipment Dealer Installations: Approx. 50

Software's Unique Solution(s): With multi-site capability, Dubuque Data's Advantage gives you one customer record and boosts your dealership productivity by streamlining access to your business information. Further multi-site features include: multi-site parts ordering, transfers of parts and equipment, consolidated accounts payable and accounts receivable, and shared service unit history.

Accounting, and F&I. Other applications that integrate with Advantage are: Electronic Time Clock, Appointment Scheduling, Cash Receipts, SNAP-SHOT (Lifetime Profitability Managerial Tool), and CRM (Showroom Control). Simplicity of the Windows environment enhances employee training, ease of use and increases productivity.

Operating System(s): Unix

Database Manager or File System: Vision file system & SQL

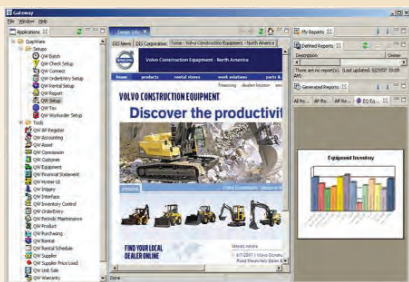
New Developments: GUI screens and the entire front-end product have developed a stable solution for any size dealership.

Entry Price Point: We offer competitive pricing to fit your dealership size.

Dealer References: Rabe International-Fairmont, MN; David Baxter 507-235-3358 or rabeintl@frontiernet.net.

Website: ddslive.com **Email:** sales@ddslive.com

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DIS CORP., BELLINGHAM, WASHINGTON

DIS is the largest independent provider of dealership business computer systems to the machinery dealership industry.

Brand Name: DIS400/Keystone

Introduced to Market: DIS/400 1990, DIS Keystone (Windows version) 1999

Number of Farm Equipment Dealer Installations: 1,400+

Software's Unique Solution(s): DIS continues to lead our industry, offering complete dealership business systems on a variety of computer platforms, including Microsoft Windows Server, Unix, AS/400, AIX, and Linux.

Functional Highlights: DIS offers integration with dozens of equipment manufacturer's parts catalogs and ordering systems, as well as parts price updates from about 300 manufacturers.

Additional capabilities include: Retail POS (Barcoding, Cash Drawer, Electronic Signature Capture, Receipt Slip Printing, real time Credit Card Processing), Laser Forms Printing (B&W or Color), Document Archiving, Mobile Sales CRM, Electronic Service Time Clock.

Operating System(s): Microsoft Windows Server, IBM OS/400, Linux, SCO Unix and IBM AIX Unix

Database Manager or File System: IBM System i, and IBM System p

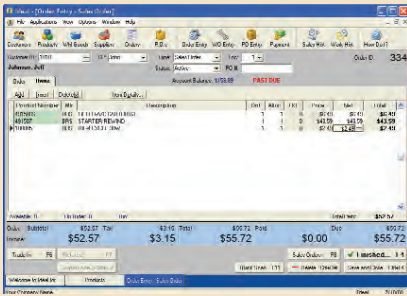
New Developments: DIS EasyFile Integrated Document Management was released in late 2007. DIS EasyFile makes your original paper documents instantly accessible anywhere in your dealership network, and are integrated right into the DIS Dealership business system.

Entry Price Point: \$3,000 for PC based system. \$17,000 for fully integrated DIS Keystone.

Dealer References: Please call DIS for customer references.

Website: dis-corp.com **Email:** dis@discorp.com

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IDEAL COMPUTER SYSTEMS INC., CEDAR RAPIDS, IOWA

Ideal for Windows is a reliable, time-saving, and user-friendly business management system designed to help you grow your business and free up time to do the things you enjoy. Backed by world class training, support and consulting for over 22 years.

Brand Name: Ideal 6.2 for Windows

Introduced to Market: 1985

Number of Farm Equipment Dealer Installations: 159 locations

Software's Unique Solution(s): Ideal is an invaluable tool that will maximize efficiency in all areas of your business. Just a few features include inventory control, shop management, powerful

reports and integrated accounting modules.

Functional Highlights: Point of sale (POS) with detailed customer information. Inventory control features that allow you to quickly and easily manage your entire inventory and reduce costs. Detailed shop management features that track detailed information about each work order. The ability to track detailed information about each serialized/wholegood item.

Operating System(s): Windows

Database Manager or File System: Firebird

New Developments: The point of sale module has been recently enhanced to be even more thorough and save even more time. We have a newly-revamped Accounts Payable module and new additions to our Product look-up screen.

Entry Price Point: \$3,995 for a single-user system

Dealer References: Pounds Motor Company, Winter Garden, Florida; Michael Pounds, Operations Manager, 407-656-1352

Website: idealcomputersystems.com **Email:** see website

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KILAND'S OFFICE SYSTEMS INC., FARGO, N. DAKOTA

Kiland's Office Systems, Inc. is a software innovation firm that has been in business since 1950. We started selling accounting systems to implement dealers in 1978. In 1982 we created the Kiland Business Management System, which is a full business management system for a farm equipment or construction equipment dealerships.

Brand Name: Ktracks

Introduced to Market: 2003

Number of Farm

Equipment Dealer Installations: 97 locations

Software's Unique Solution(s): KBMS is a complete business system that integrates all of the data of the business right to the financial statement. We allow for unlimited stores and departments. We can share financial data between stores or separate by store or partial stores. We have a full complement of vendor communications.

Functional Highlights: KBMS is a total paperless system, this means that one copy of a laser invoice is printed and given to the customer. By using signature pads the invoice with the signature is stored electronically. All journals and key reports are archived, they do not need to be printed but can be. Invoices can be automatically printed and collated with statements.

Operating System(s): Linux

Database Manager or File System: ASHELL

New Developments: Trade-in evaluation system that allows the salesman to enter the information on a prospective trade. The sales manager can then evaluate the trade electronically and the salesman can make the quote immediately.

Entry Price Point: 5 user licenses, one week on-site training, conversion of parts and customer files, server installation: \$13,700

Dealer References: Heggen Equipment, Inc., Watford City ND; Clayton Monsen, 701-842-3636.

Website: kilands.com **Email:** sales@kilands.com

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MARK SYSTEM INC., RENO, NEVADA

Mark Systems Inc. has been in business since 1983 when we developed a 911 dispatch coordination system that the nation's emergency agencies are still using today. In 2003 we finished major development on AGILIS, our equipment dealership business management system. We pride ourselves on learning from dealers, working with them toward best practices and processes, and building those into AGILIS.

Brand Name: AGILIS

Introduced to Market: 2004

Number of Farm Equipment Dealer Installations: 7 locations

Software's Unique Solution(s): AGILIS is designed for equipment dealerships and contains all operations and accounting functions, plus many special innovations. Many functions are

designed by savvy operations and accounting managers in major-brand dealerships.

Functional Highlights: Users can manage to key indicators, drill down to details, and view financial statements real time. Our security access, need-to-know and version management systems are unique and grant powerful levels of management control.

Operating System(s): Windows 2003 or 2008, Server Windows XP or Vista

Database Manager or File System: SQL Server or MySQL by Sun Microsystems

New Developments: Planned enhancements include rental rates analysis that account for actual ownership and operating costs, as well as streamlined rentals interface with sales, work order and POS modules. They will include six-week cash flow forecasting, zero-based and unit-based budgeting and variance analysis.

Entry Price Point: AGILIS is priced on a per-workstation basis.

Dealer References: None provided

Website: marksystems.com **Email:** plivolsi@marksystems.com

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PFW SYSTEMS CORP., LONDON, ONTARIO

PFW has been serving the equipment distribution industry for nearly 30 years and has the only true browser-based solution on the market today. We have never abandoned our core system. Rather than starting from scratch and dealing with the inevitable disruptions and growing pains, PFW has built our industry-leading PFW IntelliDealer Dealership Management System upon the solid foundation of our core system to give our customers a system they can rely on.

Brand Name: PFW IntelliDealer

Introduced to Market: 2001

Number of Farm Equipment Dealer Installations: 334

Software's Unique Solution(s): PFW IntelliDealer provides fully integrated financial, sales, service, rental, marketing and Customer Relationship Management (CRM) modules. IntelliDealer integrates as a complete business analysis tool.

Functional Highlights: Easy-to-use dashboards like the Sales Support Portal and the Customer Portal to specialized features like eServices, IntelliTech and MobileTech. Wireless Inventory Control applications as well as the power of rental-specific software.

Operating System(s): i5/OS

Database Manager or File System: DB2

New Developments: Updated yearly based on input from dealers. One of this years key updates is MobileTech, which is a Windows-based application designed to accurately and electronically record time for technicians in the field.

Entry Price Point: The price is scaled to the size of the dealership and the number of users.

Dealer References: None provided

Website: pfwsystems.com **Email:** sales@pfw.com

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WINDWARD SOFTWARE INC., PENTICTON, CANADA

Windward has been in the business since 1984 and our client base includes businesses throughout the world. We are specialists in inventory control, point of sale, invoicing and accounting systems for the retail and customer services industry. Using a series of soft switches, Windward's System Five adapts to the way you need to do business. We do not believe that a company should have to change its business practices to suit a software package.

Brand Name: Windward System Five

Introduced to Market: 1984

Number of Farm Equipment Dealer Installations: 20+ locations

Software's Unique Solution(s): Windward System Five is an integrated solution containing functionality for point of sale, inventory control, accounting and CRM. The system also features integration with Partsmart, unit tracking, service reminders and support for environmental taxes.

Functional Highlights: Unit Tracking, broad range of inventory manageable such as: size matrix for clothing, sell by weight, sell by area, sell by length (rope, barbed wire, etc). Other highlights include integration with leasing and parts suppliers service reminders, inventory control, accounting and CRM.

Operating System(s): Windows 2000, Windows XP, Windows Vista, Windows Server 2000, Windows Server 2003

Database Manager or File System: Pervasive SQL Database

New Developments: Integrated ecommerce, advanced inventory control, national accounts, enhanced LeaseQuest integration.

Entry Price Point: A one-workstation license, training, implementation assistance, 3-month technical support, \$2,830

Dealer References: None provided

Website: wws5.com **Email:** sales@wws5.com

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