



# Customer Relationship Management at Your Fingertips!

Instantly access key performance metrics on each of your customers including:

- ▶ Sales
- ▶ Returns
- ▶ Receivables
- ▶ Credits
- ▶ Fill Rate
- ▶ Purchases
- ▶ Lost Sales
- ▶ Notes

**Customer Information** (Map)

ABC Auto Parts  
123 Quincy St.  
Watertown, MA 77832  
Phone: (636) 753-0099 Fax: (000)000-0000  
Account # 14650

**Contact**

Contact	Phone	Ext
Bill Purcell	(636) 753-0100	

**Receivables Aging**

2,434

(Click on bar to display invoices)

**Credit Information**

\$5,000 (Credit)  
\$2,565 (Owed)  
\$2,435 (Avail)

**Customer Sales & Returns**  
YTD Sales Up 8.75%

Legend: Qwik-Order, Total, Returns, 2008, Plan

(Click on bar to display Sales and Credit percentages)

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- ▶ Easily create Customer Notes for each customer to print on Pick Tickets, Invoices and Statements including Reminders that integrate with your Outlook Calendar!

**Customer Notes**

Customer 6638

Created By: CAROLYN WATTS  
Subject: CHECKING ORDERS  
Print on: Tickets  Invoices  Statements

Remind Me: 1/31/09 (Optional)

Notes: PERRY IS TO CHECK ALL ORDERS AND BE CAREFUL ON THE SPARK PLUGS. THERE ARE TO BE NO SUBSTITUTES.

\* = Required Field

**Update** **BACK**

**Customer Notes**

Customer 6638 Auto Express

Actions	Created By	Create Date	Note	Expire Date	Print On
<a href="#">Edit</a> <a href="#">Delete</a>	CAROLYN WATTS	01/26/2009	PERRY IS TO CHECK ALL ORDERS AND BE CAREFUL ON THE SPARK PLUGS. THEIR ARE TO BE NO SUBSTITUTES		Tk Inv Stmt
<a href="#">Edit</a> <a href="#">Delete</a>	CAROLYN WATTS	01/14/2009	ALL PRODUCTS MUST HAVE BAR CODES		Tk Inv Stmt

**+ ADD** **BACK**

Want to know more about how DX-CRM can help you and your employees manage more effectively and profitably? Please call or email us now.

**888-985-2500 x 214**



www.dms-systems.com