

Module overview | Dealer Portal

# Power new possibilities for your equipment business with A365 Dealer Portal



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**annata**  
Powering possibilities



## Dealer portal challenges faced by equipment businesses



Responsive support



Real-time inventory visibility



Data accuracy & synchronization



On-the-go network coordination



User-friendly interface



Dynamic pricing management



Mobile accessibility



# Redefining Dealership Excellence for Equipment Businesses with A365

Designed to elevate your equipment dealership operations, the A365 Dealer Portal ensures that every interaction across your dealer network is seamless, efficient, and impactful. With advanced features tailored for equipment dealership management, this module empowers dealers to deliver outstanding customer experiences while optimizing internal operations.









From enhancing collaboration between dealers and OEMs to providing a centralized platform for order management, inventory tracking, and customer engagement, the A365 Dealer Portal addresses every critical aspect of equipment dealership workflows. This leads to improved operational efficiency, stronger customer relationships, and greater visibility across the dealership network.

Built on the powerful foundations of **Microsoft Dynamics 365, Azure, Power Platform, Copilot,** and **Dataverse**, the A365 Dealer Portal offers seamless integration, advanced security, and intuitive self-service options. With AI-driven insights and Annata's deep expertise in the equipment industry, the portal simplifies complex dealership processes and supports smarter decision-making at every level.

What sets the A365 Dealer Portal apart is its ability to boost productivity while enhancing customer satisfaction. By streamlining processes, improving communication, and providing real-time data access, the A365 Dealer Portal transforms equipment dealership management into a strategic growth driver—delivering lasting value for both dealers and customers.

<h2>01</h2> <p>Strengthen dealer relationships with effective portal management</p>	<h2>02</h2> <p>Control portal access and usage for efficient dealer operations</p>	<h2>03</h2> <p>Maintain quality standards across the portal network</p>	<h2>04</h2> <p>Manage compliance with industry regulations and dealer agreements</p>
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## A365 Dealer Portal Capabilities

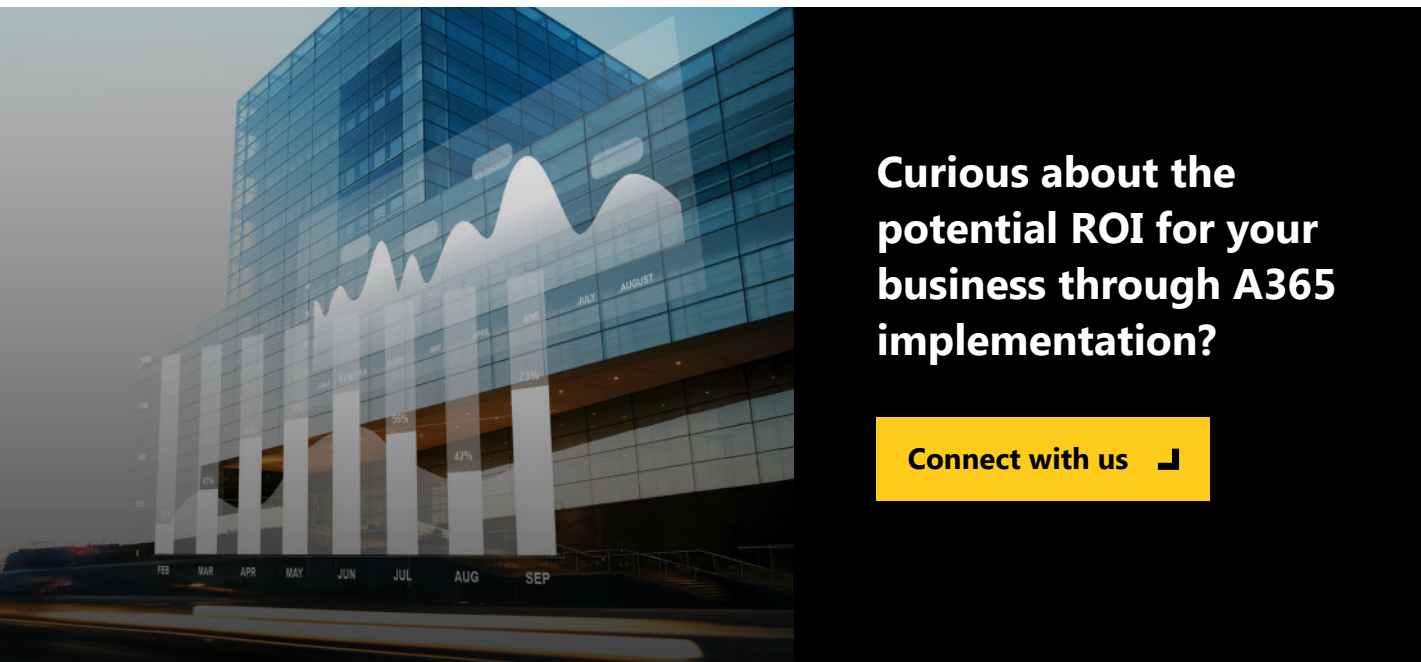
 <p>Equipment orders</p>	 <p>Dealer profiles</p>	 <p>Parts orders</p>	 <p>Scheduled service</p>
 <p>Case management</p>	 <p>Cost control</p>	 <p>Dealership quality &amp; compliance</p>	 <p>Warranty claims management</p>

# Experience a significant **ROI with A365**

After implementing A365, our customers have enjoyed streamlined efficiency through automation, optimized workflows, and insightful analytics, facilitating informed decisions. This transformation has significantly positively impacted their financial performance.

## Example

- **\$2.5B** - Existing generated revenues
- **3,500** - Existing Full-Time Employee (FTE) workforce
- **8-9x** - Projected ROI
- **1 year** - Projected payback period
- **\$8M to \$10M** - Projected total annual net impact



**Disclaimer:** The projected ROI and financial impact figures provided are based on preliminary assessments and estimates for illustrative purposes only. Actual results may vary and are subject to various factors such as market conditions, business strategies, implementation timelines, and other variables.



# A365 Dealer Portal Key Features



01

## Centralized Dealer Management

**Unified Account and Role Management:** Configure dealer accounts, roles, and permissions from a single interface to streamline operations.

**Dealer Profiles and Access Control:** Manage comprehensive dealer profiles and customize access for specific user roles, ensuring seamless dealer operations.

03

## Warranty and Claims Processing

**Warranty Claim Creation and Management:** Simplify claim submission, tracking, and resolution to improve customer satisfaction.

**Service Campaigns and Recalls:** Handle warranty-related recalls and service campaigns seamlessly through the portal.

**Document Management for Warranty Evidence:** Attach and manage warranty documents like evidence, approvals, and invoices directly within claims.

05

## Reporting and Insights

**Market Insights and Forecasting:** Detailed data to help dealers make informed decisions about inventory, pricing, and customer demands.

**Integration with Microsoft Power BI:** Leverage advanced reporting tools for actionable insights.

07

## Mobile-Friendly and Scalable Solution

**Mobile Accessibility:** Equip dealers with the ability to access the portal on-the-go for real-time updates and tasks.

**Scalability and Flexibility:** Accommodate new dealers, products, and services as the network grows, ensuring long-term usability.

02

## Inventory and Order Management

**Real-Time Inventory Visibility:** Enable dealers to view live updates on equipment and parts availability across multiple locations.

**Equipment Orders and Status Tracking :** Efficiently process and track equipment orders, ensuring timely fulfillment.

**Backorder Management:** Track pending orders with full visibility into fulfillment timelines, helping dealers manage customer expectations.

04

## Enhanced Communication and Collaboration

**Centralized Communication Hub:** Foster stronger collaboration between dealers and manufacturers with streamlined communication tools.

**Feedback and Suggestions Module:** Allow dealers to submit feedback and feature requests, ensuring continuous improvement in portal functionality.

**Language and Localization Options:** Support multiple languages for global dealer networks, enhancing usability and accessibility.

06

## Simplified Financial Processes

**Parts and Equipment Invoices:** Generate and manage invoices seamlessly for improved financial control and accuracy.

**Dynamic Pricing Management:** Tailor pricing strategies to suit market demands and maintain competitiveness.

**Integrated Financial Processes:** Synchronize with Annata 365 Finance & Operations for comprehensive financial visibility and control.

# A365 Dealer Portal Benefits



## 01 Enhanced Dealer Collaboration

Improve communication and coordination between dealers and manufacturers for stronger relationships.

## 02 Improved Operational Efficiency

Reduce administrative burdens by automating repetitive tasks and streamlining order and claim processes.

## 03 Real-Time Decision-Making

Provide dealers with up-to-date information to make informed decisions quickly and effectively.

## 04 Increased Dealer Satisfaction

Deliver an intuitive, user-friendly portal experience tailored to the specific needs of equipment dealers.

## 05 Compliance and Security

Ensure adherence to industry regulations and secure data management with role-based access controls.

## 06 Cost-Effective Operations

Lower IT and maintenance costs through built-in automation and integration features.

## 07 Intelligent Insights with AI-driven data

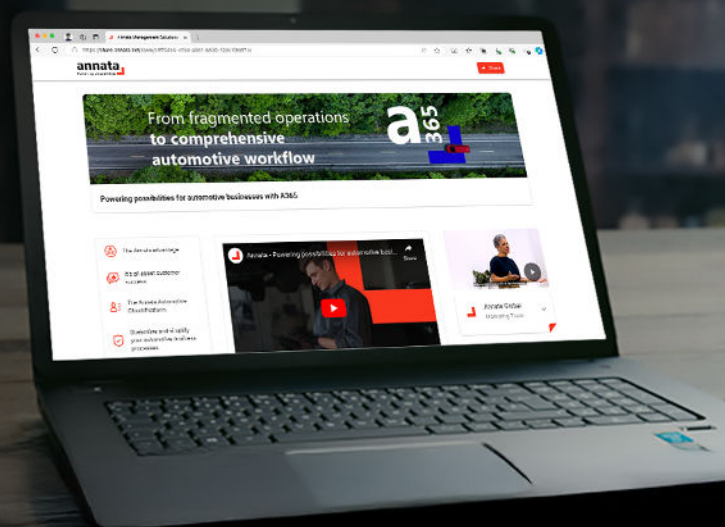
Powered by Microsoft Copilot, A365 helps deliver predictive analytics and enhanced process automation, ensuring more efficient and informed decision-making across dealership operations.

## Discover the A365 Digital Experience Center: Your business transformation starts here

Explore | Learn | Transform

In the A365 Digital Experience Center, you'll get an exclusive, interactive demo to see how A365's game-changing functionalities can simplify your operations and drive real business results.

Visit A365 Digital Experience Center 





# Power your possibilities with full digitalization

Ready to scrap those legacy systems and say hello to a cloud solution that never grows old? At Annata, we bring modern business applications to the automotive, trucks & buses, and equipment industries, helping businesses meet current challenges and seize new market opportunities.

See how A365 can help your business stay agile, compliant, and ahead of the competition. Reach out to us at [marketing@annata.net](mailto:marketing@annata.net).



For more information, visit us at [annata.net](https://annata.net)

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