

Customer Relationship Management (CRM) Module Quick Reference

The CRM Module enables the management of all interactions between your organization and current, as well as potential, customers.

1. Overview

- a. *Opportunity Manager* Enables the management of sales opportunities.
- b. Account Manager Enables the management of customer accounts.
- c. *Contact Manager* Enables the management of contacts.
- d. *Campaign Manager* Enables the management of sales campaigns.
- e. Aircraft Manager Enables the management of aircraft.
- f. *Aircraft Forecast* Enables forecasting of scopes having a particular scope code(s) that are assigned to aircraft of a particular model(s).
- g. Literature Manager Enables the management of literature items developed for sales purposes.
- h. *Communication Manager* Enables the management of communication developed for sales purposes.
- i. Case Manager Enables the management of customer issues.
- j. Scheduler Enables the management of your schedule and employed resources.



2. Setup

a. Administration Tables – From the **Main Menu** toolbar, left-click **CRM**. The CRM toolbar will appear. Leftclick **Administration** and select **Table List by Code**.





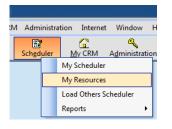
The matrix below identifies which sections use each table.

Table	Opportunity Manager	Account Manager	Contact Manager	Campaign Manager	Aircraft Manager	Aircraft Forecasting	Literature Manager	Communication Manager	Case Manager	Scheduler
Relationship Code										
Demographic Code										
Opportunity Type Code	Х									
Opportunity Interest Areas	Х									
Opportunity Status	Х									
Opportunity Priority	Х									
Opportunity Lead Source	Х									
Opportunity Sales Team	Х									
Opportunity Stage	Х									
Opportunity Next Step	Х									
Opportunity Lost Reason	Х									
Open Activity Type Code	Х								Х	
Open Activity Status	Х								х	
Open Activity Priority	Х								Х	
Literature Type Code							Х			
Literature Media Type Code							Х			
Case Type Code									Х	
Case Reason									Х	
Case Status									х	
Case Priority									х	
Case Origin									Х	
Case Customer Satisfaction									Х	
Campaign Type Code				х						
Campaign Status				х						
Currency		Х*								
Discount Code										
Communication Type								Х		
Date Type			х							
Address Type			Х							
Interest / Preference Type			Х							
Airport Code			Х*							
Aircraft Relationship Type		Х	Х							
Contact Relationship Type			Х							
Contact Type			Х							
Contact-Account Relationship Type			Х							
Account Relationship Type		Х								
Account-Contact Relationship Type		Х								
	Х									

* Not Unique to CRM Module



b. Scheduler Resources – From the CRM toolbar, left-click the Scheduler button and left-click My Resources.



i. The Scheduler Resources search window will appear.

ø	Scheduler Resources			
Γ	Start With :			
			Max Sea	rch Result Lines : 50 🚔
C				
	Resource Name	Resource Color	User	Active
	Testing	clPurple		Yes
	MFG	clMaroon	001	Yes

- ii. Left-click the **Add** button.
- iii. The CRM Scheduler Resources window will appear.

CRM Scheduler Resources	
🚅 🔌 🍜 🖌 🗙 🔰 Scheduler Resources	🍤 🙊
Resource Name :	
Resource Color : Color not select	

- 1. **Resource Name** field Enter the resource name.
- 2. Resource Color field Select the color that the resource should appear on the scheduler.
- 3. Active flag Ensure flag is marked as "checked" to identify the resource is currently active.
- iv. Left-click the green arrow in the CRM Scheduler Resources window toolbar to save the record.



3. Opportunity Manager

Enables the management of sales opportunities, related information (including interests, open activities, and information regarding opportunity loss), associated interactions (including sales quotes, component work orders, maintenance work orders and aircraft).

a. From the CRM toolbar, left-click the **Opportunities** button and left-click **Opportunity Management**.

Opportunities	Accounts	Cam <u>p</u> aign	<u>E</u> Ai <u>r</u> c
	Opportunit	ty Management	
	Reports		•

b. The **Opportunity Manager** search window will appear.

	Start With :								
								Max Sear	ch Result Lines : 50
C	Drag a column hea	ader here to	group by that (column					
I	Opportunity No.	Owner	Account No.	Account Name	Туре	Team	Probability	Close Date	Expected Revenue
Þ	000013	001	AIRJAM	Air Jamaica	02	001	50	5/3/2012 10:13:42 AM	100000
T	000011	001	ABC	ABC AIRLINES, LLC	01	002	90	3/31/2010 4:27:07 PM	1000000
T	000007	001	PENT	PARTS SUPPLY SERVIC	02	001	0	7/14/2009 11:44:20 AM	50000
T	000006	002	7165	AIRCRAFT FASTENERS			0	1/4/2005 7:07:37 PM	0
T	000002	001	ABC	ABC AIRLINES, LLC	01	002	90	8/17/2004 10:39:28 AM	9000
T	000001	001	AAA	AAA Airlines Corporation	02	002	90		3000

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The **Opportunity Manager** window will appear.

🕖 Opportunity Ma	nager No. For :			
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	🕻 📰 🌉 Gener	al		ی 😭
Opportunity Owner :	005 ··· Anna Wright	Quoted Total :		
🔓 Opportunity ID :	000017	Status :	Open	
Subject :		Priority :		
Type :		Next Step :		
Primary Contact :		Stage :		
Account Name :		Probability (%) :		0.00
Lead Source :			Estimated Product Delivery Date	
Sales Team :				•
Expected Revenue :	0.00			
Opened Date :	11/13/2013 4:32:43 PM -	Gross Profit (%) :		0.00
Close Date :		Discount % :		0.00
	Aircraft Information		Lost Information	
	Aircraft ID : Aircraft Model :		Reason :	
	Aircraft Serial :		Competitor : ····	
	Aircraft Tail/Reg No :		Contact :	
	Company / Division	n / Departmei	nt	¥
XVX	Note	5		🍤 📚
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「学会」語くつ				🍤 📚
	Lost Det			♥
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営気感イン	Associated Main Contact Ai			🔊 😵
** ** / *				*
学会を入り	Competi	เบาร		* €

- i. General section
 - 1. Displays general information about each opportunity.
 - 2. Enables classification of each opportunity.
 - 3. Enables link to a particular aircraft.
 - 4. Enables classification of loss information.
- ii. **Company / Division / Department** section Enables identification of the company, division, and department with which the opportunity is associated.

Company / Division / Department	*
Company: 1 Parts and Maintenance Corporation	
Division :	
Department :	



iii. **Notes** section – Enables general notes to be recorded about the opportunity; a change history of those notes is also included.

🔍 🗸 🛪 ½	Notes	*
		Drag a column header here to group by that
		Note's History Changed By
		<no data="" display="" to=""></no>

iv. Interests section – Enables recording details of the interests of the customer.

🚅 🔪 ङ 🗸 🗙		Interests	🐄 😒
Drag a column header here to group b	y that column		
Interest Code	Description	Note	
		<no data="" display="" to=""></no>	

v. Open Activities section – Enables recording of pending activities related to the opportunity.

📴 🔍 ङ 🗸 🗙		Open Activities		🍤 😤
Drag a column header here to	group by that column			
Subject	Туре	Status	Priority	
		<no data="" display="" to=""></no>		
				E

vi. Lost Details section - Enables notes to be recorded about the details of the opportunity if it was lost.

Lost Details	*		
	*		
		Ε	
	-		
4			



vii. Associated Quotes section – Enables link to particular sales quotes associated with the selected customer.

😫 🔍 🍯 🗸 🛪	ξ		Associated Quotes			🍵 🎓
Drag a column heade	er here to group by that column					
Quote No.	Doc Type	Entered	Quoted	Due By	Currency Document Total	Curren
			<no data="" display="" to=""></no>			
4						

viii. Associated Work Orders section - Enables link to particular component work orders associated with the selected customer.

📑 🔧 ङ 🗸 >	×	A	ssociated Work Order	s		"∎
Drag a column head	der here to group by that column					
W/0 No.	W/0 Type	Part Number	Qty Ordered	Currency Document Total	Currencyl Document Total(Cor W/O Status	Doc
			<no data="" display="" to=""></no>			
4						•

ix. Associated Maintenance-XL section - Enables link to particular maintenance work orders associated with the selected customer.

\$ <\ ≦ √ X			Associated Maintenance-XL				
Drag a column header	r here to group by that column						
WO Mnt No.	Doc Type	Description	Scope Code	Scope Name	Planned Start Planned Complete E Actual Start Date		
			<no data="" display="" to=""></no>				
•		m				Þ	

x. Contact Aircrafts section – Displays aircraft associated with the selected customer.

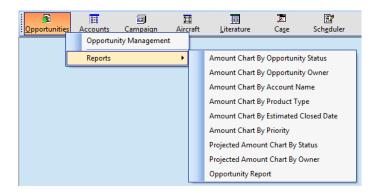
	Contact Aircrafts								
Drag a column header here to group by that column									
Aircraft ID	Model	Serial no.	Description	Aircraft Type	Note				
			<no data="" display="" to=""></no>						



xi. Competitors section – Enables recording a list of possible competitors for the opportunity.

😫 🔍 🍜 🗸 🗙	Competitors		🐤 🛸
Drag a column header here to group by that column			
Competitor ID Competitor Contact Name	Contact Code	Note	
	<no data="" display="" to=""></no>		

e. Reports - From the CRM toolbar, left-click the Opportunities button and left-click Reports.





4. Account Manager

Enables the management of customer accounts (displays much of the information from the Customer Record), associated interactions (including opportunities, cases, communications, call tracking and emails) and relationships (to other accounts, contacts, aircraft and aircraft billing).

a. From the CRM toolbar, left-click the Accounts button and left-click Accounts.

s <u>A</u> ccou	nts	Campaign Accounts	D Aircraft	
		Contact M Contact M	-	•

b. The Customers List search window will appear.

Search On : Customet Co Start With :	ntact Mist	•••			Acco	unt Rat Int Prio Reg	rpe: Al ing: Al rity: Al ion: Al ory: Al	 	Searc	ch Result Lines : 5	AII AII AII AII OOO
Mana	Account #.	Sub	Cust/Vend	Туре	Region	Rating	Priority	Approved	Hold	Cage Code	ILS
Name	Account #.										
Name 3 - R SALES	7158	1	; 	DIST	WST			Yes	No		
	7158	1	; 	DIST	WST			Yes Yes	No No		+
3 - R SALES	7158	1	Customer Customer	DIST 011	WST MW	002	RG		110	1VN02	
3 - R SALES AAA Airlines Corporation	7158 AAA ABC	1	Customer Customer			002	RG	Yes	No	1VN02	
3 - R SALES AAA Airlines Corporation ABC AIRLINES, LLC	7158 AAA ABC	1 1 1	Customer Customer Customer Customer			002	RG	Yes Yes	No No	1VN02	
3 - R SALES AAA Airlines Corporation ABC AIRLINES, LLC ABC AIRLINES-MAINTENANCE DIVIS	7158 AAA ABC ABC	1 1 1	Customer Customer Customer Customer	011		002	RG	Yes Yes Yes	No No No	1VN02	
3 - R SALES AAA Airlines Corporation ABC AIRLINES, LLC ABC AIRLINES-MAINTENANCE DIVIS ADAMS ELECTRONICS, INC.	7158 AAA ABC ABC 222	1 1 1	Customer Customer Customer Customer Customer	011		002	RG	Yes Yes Yes Yes	No No No No	1VN02	
3 - R SALES AAA Airlines Corporation ABC AIRLINES, LLC ABC AIRLINES, MAINTENANCE DIVIS ADAMS ELECTRONICS, INC. AERO SUPPORT, INC. OF FLORIDA	7158 AAA ABC ABC 222 7336	1 1 1	Customer Customer Customer Customer Customer Customer Customer	011		002	RG	Yes Yes Yes Yes Yes	No No No No	1VN02	
3 - R SALES AAA Airlines Corporation ABC AIRLINES, LLC ABC AIRLINES-MAINTENANCE DIVIS ADAMS ELECTRONICS, INC. AERO SUPPORT, INC. OF FLORIDA Air Jamaica	7158 AAA ABC ABC 222 7336 AIRJAM	1 1 1	Customer Customer Customer Customer Customer Customer Customer	011			RG	Yes Yes Yes Yes Yes Yes	No No No No No	1VN02	
3 - R SALES AAA Airlines Corporation ABC AIRLINES, LLC ABC AIRLINES-MAINTENANCE DIVIS ADAMS ELECTRONICS, INC. AERO SUPPORT, INC. OF FLORIDA Air Jamaica AIRBORNE AIRCRAFT FASTENERS	7158 AAA ABC ABC 222 7336 AIRJAM 0040	1 1 1	Customer Customer Customer Customer Customer Customer Customer Customer Customer	011			RG	Yes Yes Yes Yes Yes Yes Yes	No No No No No No	1VN02	

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The **Customer** window will appear.

j≊ N ≅ ✓ X @ General	*
Account No. : Account Type :	
Address Phones Name : Area Code : Tell :	Ext. :
Address 1 : Area Code : Tel2 :	
	Ext. :
Address 2: Area Code : Fax1 :	
Address 3: Fax2:	
City: State: Area Code:Cell:	
County: Dunty: Http://	
Region :	
Defaults	
Status and Quality	
Financials	
See Call Tracking	*
😴 Communication	
Aircraft Billing Relationships	
S N S ✓ X Aircraft CRM Relationships	* * *
S	🍤
S ≤ ✓ × Contact Relationships	🐤
Cases	
Cases Cases Copportunities Notes	
Notes	*
Emails	

i. General section - Displays general information about the customer

ii. Defaults section

Defaults	
Sell Through Company :	
1 Div.: Dept :	
Customer To Remit Payments To :	
Account Priority :	
Account Rating:	

- 1. Enables identification of the default company, division, and department that is assigned to documents associated with the customer.
- 2. Enables identification of the default Remit To address.
- 3. Enables identification of the customer priority and rating.



iii. Status and Quality section

	Status and Quality	
Status		
Approval Information (approved by)	Hold Information (hold by)	
Account Approved	Account On Hold	
Yes O No No	e OYes ⊙No	Note
Quality		
ISO - Certification Level :	New Survey Sent On :	
Certified By (Agency):	New Survey Received :	
Certification No. :	Last Survey :	
Certification Expired On :	Next Survey :	

- 1. Displays customer approval and hold information
- 2. Displays customer quality information
- iv. Financials section Displays customer financial information including default salesmen and credit limit.

	Financials	^
Account Financials Terms : 001 NET 30	TaxID#: 879798877	
Customer Currency[\$] : USD USA DOLLAR	Resale Cert. : 1557676	
Salesmen Accounts	Credit Card :	
1. 001 Margaret Fagan 15 %	Calc Disc By Discount By	41
2. 0%	Credit Limit (\$): 5,000,00 ○ % • Doc	
3. 0%		
4. 0%	Min. Line (5):	
5. 0%	Min. Order (\$): 0.00 Code	
		_

v. Call Tracking section – Displays all calls related to the selected customer.

🚅 🔍	Call Tracking								
Drag a column heade	r here to group by that column								
Contact Name	Entered By	Entered Date	Referred To	Call Back On	Completed By	Completed On			
	Margaret Fagan	10/27/2001 2:49:11 AM	Margaret Fagan	10/27/2001 2:49:11 AM					
	Margaret Fagan	12/14/2001 12:37:02 PM	Margaret Fagan	12/14/2001 12:37:02 PM					
	Margaret Fagan	4/11/2002 1:46:39 PM	Margaret Fagan	4/14/2002 1:46:39 PM					
	Margaret Fagan	9/23/2002 3:22:11 PM	Margaret Fagan	9/23/2002 3:22:11 PM					
Anna White	Margaret Fagan	5/29/2003 2:01:02 PM	Cruz Haire	6/5/2003 2:01:02 PM					
Mike Jones	Margaret Fagan	8/15/2006 10:09:48 AM	Cruz Haire	8/15/2006 10:09:48 AM					
	Margaret Fagan	1/24/2007 12:59:31 PM	Margaret Fagan	1/24/2007 12:59:31 PM	Margaret Fagan	1/24/2007			
	Margaret Fagan	10/21/2009 4:19:23 PM	Vincent Johnston	10/23/2009 4:19:23 PM					
			the second second						

vi. **Communication** section – Displays all communications related to the selected customer.

Communication										
Drag a column header here to group by that column										
Communication Subject	Contact	Sent On	Delivery Type	Address	Company	Division	Department			
			<no data="" display="" to=""></no>							



vii. **Aircraft Billing Relationships** section – Displays any aircraft with which the selected customer is associated on the aircraft record.

Drag a colu	Aircraft Billing Relationships									
Aircraft ID	Model	Serial no.	Description	Туре	Contact	Note				
				<no data="" display="" to=""></no>			Е			

viii. **Aircraft CRM Relationships** section – Enables link to particular aircraft that are not identified on the aircraft record.

📑 🔍 🛒 🗸	×		Aircraft Cl	RM Relationships			\$		
Drag a column he	Drag a column header here to group by that column								
Aircraft ID	Relationship	Model	Serial No.	Description	Aircraft Type	Note			
			<no< td=""><td>data to display></td><td></td><td></td><td></td></no<>	data to display>					
1									

ix. Account Relationships section – Enables link to other customer accounts and the ability to identify the type of relationship between the two.

📑 🖉	Ç√ X			A	ccount Relations	ships					•
Drag a colu	ımn header here to grou	p by that colur									
Name	Account #.	Sub	Relationship Type	Address	City	Country	State	Region	Airport Code	Note	
					chie dete te diseleu						
					<no data="" display<="" td="" to=""><td>></td><td></td><td></td><td></td><td></td><td></td></no>	>					
											=

x. Contact Relationships section – Enables link to contacts and the ability to identify the type relationship.

월 < ≝ ✓ X C	iontact Relationships	
Drag a column header here to group by that column		
Name Relationship Type	Note	
	<no data="" display="" to=""></no>	
		1



xi. Cases section – Displays all cases related to the selected customer.

Cases									
Drag a column header here to group by that column									
Case No.	Owner	Туре	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product
				<no d<="" td=""><td>ata to display></td><td></td><td></td><td></td><td></td></no>	ata to display>				

xii. **Opportunities** section - Displays all opportunities related to the selected customer.

2			Opportunities				
Drag a column header here to group by that column							
Opportunity ID	Status	Subject	Owner Name	Account Name	Туре	Type Descrip	
			<no data="" display="" to=""></no>				
•						•	

xiii. **Notes** section – Enables general notes to be recorded about the customer; a change history of those notes is also included.

💐 🗸 🛪 <u>98</u>	Notes	*
		Drag a column header here to group by that column
		Note's History Changed By
		<no data="" display="" to=""></no>

xiv. Emails section – Displays emails related to the selected customer.

				Emails		
From : 5/15/2013 💌	To: 11/15/2013	• •				
Sent To/Received Date/Time	Subject		Folder	To/ From	CC	
				<no data="" display="" to=""></no>		H H



5. Contact Manager

Enables the management of contacts, related information (including addresses, special dates and preferences), associated interactions (including opportunities, call tracking and emails) and relationships (to accounts, other contacts and aircraft).

a. From the CRM toolbar, left-click the **Accounts** button and left-click **Contact Management**.



b. The **Contacts** search window will appear.

Start With : Customer Type : All Customer Type : All Customer Rating : All Customer Rating : All Customer Priority : All Customer Priority : All Customer Region : All Customer Region : All Customer : All Max Search Result Lines : 50 Drag a column header here to group by that column						
Code		Last Name	First Name	Title	Country	Telephone
004	Ms.	BAKER	GINA	CPA	UNITED STATES	
003	Mr.	Stevens	Nora	MANAGER/ENGINES	UNITED STATES	435-9898
003	Mr.		BOB		UNITED STATES	
003	Mrs	Bush	Julie	A/R	USA	
003	Mr.	La shaich Del Abdull	Daud Mohamad Eben Mo	Chif of financial ec	USA	12345678901234567
	Mr.	BAKER	JIM	CARGO MANAGER	USA	
002		Jones	Mike	Sales	USA	
002	Mr.	Ahmad Nassralla Mustal	Mohamad Abdul Hakim Alla	Customer ralations		
	PHT.		niki		USA	
002	MIT.			VP	USA	455-57878
002 002	Mr.		Mike	VP	004	
002 002 002		Jones	Mike MIKE	PRESIDENT	03A	

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The **Contact** window will appear.

Contact:		- • ×
😫 🔍 🚝 🗸 🗙 😃	Contact Name	*
Salutation : First Name :	:	
Middle Name :	:	
Last Name :	:	
Code :	: 000000097 Contact Type :	
Linked Account :		Primary Account
Assistant Name :	: Area Code : Phone :	
Title :		
	Company / Division / Department	
www.www.www.www.www.www.www.www.www.ww	Addresses	*
Wei A Wei	Special Dates	* *
\$ \ S ∨ X	Aircrafts	*
学》 E V X	Contact Relationships	12 12 12 12 12 12 12 12 12 12 12 12 12 1
学 N E V X	Account Relationships	2
\$ \ E ✓ X	Contact Preferences	2
<u> </u>	Notes	•
2	Opportunities	
	Call Tracking	*
	Emails	

- i. Contact Name section Displays general information about the contact.
- ii. **Company / Division / Department** section Enables identification of the company, division, and department with which the contact is associated.

Company / Division / Department	
Company: 1 Parts and Maintenance Corporation	
Division :	
Department :	

iii. Addresses section – Enables identification of multiple addresses associated with the contact.

😫 🔍 Ĕ	√ X		Addresses		*
Drag a colun	nn header here to group by th	at column			
Primary	Туре	City	State	Country	
			<no data="" display="" to=""></no>		



iv. **Special Dates** section – Enables identification of dates associated with the contact that should be remembered.

\$ <\ ≝ ✓ ×	Special Dates	
Drag a column header here to group by that column		
уре	Date	
	<no data="" display="" to=""></no>	

v. Aircrafts section – Enables link to particular aircraft with which the contact is associated.

Set Set Aircrafts							\$	
Drag a column header here to group by that column								
Aircraft ID	Relationship	Model	Serial No.	Description	Aircraft Type	Note		
			<no c<="" td=""><td>data to display></td><td></td><td></td><td></td></no>	data to display>				

vi. **Contact Relationships** section – Enables link to other contacts and the ability to identify the type relationship.

😫 🔍 🎬 🗸 X		Contact Relationships	*
Drag a column header here to group	by that column		
Name	Relationship Type	Note	
		<no data="" display="" to=""></no>	

vii. Account Relationships section – Enables link to customers and the ability to identify the type relationship.

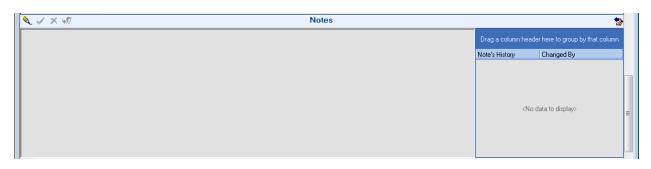
🔁 🔍 🖻	1 X				Account Relations	ips					•
Drag a colu	mn header here to group	by that column									
Name	Account #.	Subc	Relationship Type	Address	City	Country	State	Region	Airport Code	Note	
					<no data="" display="" to=""></no>						E



viii. Contact Preferences section – Enables recording interests and/or preferences of the contact.

😫 🔍 🍯 🗸 🗙	Со	ontact Preferences	⇒
Drag a column header here to group by	hat column		
Interest / Preference Type	Note		
		<no data="" display="" to=""></no>	

ix. **Notes** section – Enables general notes to be recorded about the contact; a change history of those notes is also included.



x. **Opportunities** section - Displays all opportunities related to the selected contact.

2 Opportunities								
Drag a column header here to group by that column								
Opportunity ID	Status	Subject	Owner Name	Account Name	Туре	Type Descrip		
			<no data="" display="" to=""></no>					
•						Þ		

xi. Call Tracking section – Displays all calls related to the selected contact.

Account No.	Entered By	Entered Date	Referred To	Call Back On	Completed By	Completed On	
	Margaret Fagan	3/19/2001 2:51:49 PM	Margaret Fagan	3/20/2001 2:51:49 PM			
	Margaret Fagan	6/20/2001 2:21:40 PM	Margaret Fagan	6/20/2001 2:21:40 PM			
	Margaret Fagan	9/6/2001 11:27:16 AM	Margaret Fagan	9/6/2001 11:27:16 AM			
	Margaret Fagan	12/15/2001 10:58:42 AM	Margaret Fagan	12/15/2001 10:58:42 AM			



xii. Emails section – Displays emails related to the selected contact.



e. Call Tracking - From the CRM toolbar, left-click the **Accounts** button, select **Contact Management** (the one on the bottom) and left-click either **Calls Referred To Me** or **Calls Referred To Others**.

Accounts	Campaign	☐ Ai <u>r</u> craft	Lit	erature	, <mark>E</mark> Ca <u>s</u> e	Sch <u>e</u> duler
	Accounts Contact Ma	anagement				
	Contact Management				s Referred To s Referred To	



6. Campaign Manager

Enables the management of sales campaigns (i.e. for the sale of a particular product or line of products, to increase customer base, to increase sales base to current customers), associated interactions (including opportunities, cases, literature and communication) and relationships (to accounts).

a. From the CRM toolbar, left-click the Campaign button and left-click Campaign.

Cam <u>p</u> aign	☐ Ai <u>r</u> craft	Litera
	Campaign	
	Reports	•

b. The Campaign Management search window will appear.

	Campaign Manage	ment			l	
	Start With :		•••			
					Max Search Re	sult Lines : 50 📑
D	rag a column header h	iere to aroup by	that column			
	Budget	Туре	Campaign ID	Type Name	Status	Company Div
	1000000		SL-2000	Personal visit	001	1
h	250000		AC-001	Personal visit	001	1
ľ	100000	001	COMPONENTS	Monthly Campaign	001	1
ſ	10000	001	XL-2000	Monthly Campaign	001	1 1.2

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The Campaign Management window will appear.

\$ 🔍 🍜 🖌 🗙 😃	General	🐤
Campaign ID : 000002		
Budget :		0.0
Type : •••		
Status :		
	Company / Division / Department	
	Description	
X / X 92	Notes	
▲◇ 厚 ✓ ×	Associated Cases	
2 × 5 × 7	Literature	
★ ○ ○ × 品	Enrolled Accounts	
2	Opportunities	_
n z	Communications	

- i. General section Displays general information about the campaign.
- ii. **Company / Division / Department** section Enables identification of the company, division, and department with which the campaign is associated.

	Company / Division / Department	*
Company : 1	Parts and Maintenance Corporation	
Division :		
Department :		

iii. **Description** section – Enables general information to be recorded about the nature of the campaign.

Description	*	
	^	
	Ŧ	
	F	

iv. **Notes** section – Enables general notes to be recorded about the campaign; a change history of those notes is also included.

<u> </u>	Notes			🍃 🛸
		Drag a column h	eader here to group by that co	olumn
		Note's History	Changed By	
		<	No data to display>	



v. Associated Cases section – Enables link to cases related to the campaign.

😫 🔨 ङ	/ X									
Drag a column	header here to group	p by that column								
Case No.	Owner	Туре	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product	
				<no da<="" td=""><td>ata to display></td><td></td><td></td><td></td><td></td><td></td></no>	ata to display>					

vi. Literature section – Enables link to literature related to the campaign.

📴 🔍 🍯 🗸	X 9	Literature	ا 😭 😒
Drag a column hea	der here to group by that column		
Literature	Туре		M. File N. M. Date
		<no data="" display="" to=""></no>	E

vii. Enrolled Accounts section – Enables link to customers targeted by the campaign.

😫 🔪 🍯 🗸 🗙 🛼		Enrolled Accou	nts	ی 😭
Drag a column header here to gro	up by that column			
Account No.	Sub Code	Account Name	Contact	
		<no data="" displa<="" td="" to=""><td>»</td><td></td></no>	»	

viii. **Opportunities** section – Displays all opportunities related to the selected campaign.

2			Opportunities			۲
Drag a column he	eader here to group by that column					-
Opportunity ID	Status	Subject	Owner Name	Account Name	Туре	Type Descrip
			<no data="" display="" to=""></no>			E
•						۱. F



ix. Communications section – Displays all communications related to the selected campaign.

K 2		Communications	۲
Drag a column header here to gr	roup by that column		
Communication ID	Subject		
		<no data="" display="" to=""></no>	E

e. Reports - From the CRM toolbar, left-click the **Campaign** button and left-click **Reports**.

Campaign	☐ Ai <u>r</u> craft	<u>L</u> it	eratu	, Te re Ca <u>s</u> e	[Sch <u>s</u>
	Campaign				
	Reports	•		Campaign Report	



7. Aircraft Manager

Enables the management of aircraft, associated interactions (including opportunities, cases, component work orders and maintenance work orders) and relationships (to accounts and contacts).

a. From the CRM toolbar, left-click the Aircraft button and left-click Aircraft List.

E Ai <u>r</u> craft	Literature	, 🗾 Case
	Aircraft List	ľ
	Aircraft Fore	cast

b. The Aircraft search window will appear.

Search C	Dn : A/C UNIT	ENG COMP	Scope Cards Ext	Owner: A Owner Contact: A Leased To: A Operator: A	1	ult Lines : [AII AII AII AII
Drag a colu	mn header here to	group by that colu	mn				
A/C ID	Model No	MFG	Serial No	Description	Tail No	Base	Statu
001	002	08903	22169	BOEING 757 / DELTA	12128786	001	Oper
100	CE500	08903	12345	Cessna JET	T2345		Oper
1000	F50	DASSAULT	48	Falcon F50 Business Jet	C-FBVF	0001	Oper
123	001	08903	2172	747-200-CARGO	00989787		Oper
200-3	001	08903	22173	DHL CARGO	559989898		Oper-
200-4	001	08903	22174	727-200 DHL CARGO	666545×F		Oper
200-5	001	08903	22177	757-200 DHL CARGO	666434×V		Oper
200-6	001	08903	22178	757-200 DHL CARGO	G-99898		Oper
200-7	001	08903	22179	757-200SF CARGO ONLY	4L65656		Oper
200-8	001	08903	22180	757-200 DHL CARGO	6665T5T5-T		Oper
4×100	767	08903	22171	Boeing 767 Passanger Jet	N45895	002	Oper
500	206L	BELL	799554	Bell 206 Helicopter	N23846		Oper
200	001	00000	22101	DUIL CARCO	FEACAC		0

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The Aircraft window will appear.

4	Aircraft ID	
Aircraft ID : 1000	Aircraft Model : F50 Falcon 50	
Aircraft Serial : 48	Description : Falcon F50 Business Jet	
Tail / Reg No. : C-FBVF		
2 🔍 🖾 🗸 🗙 👘	Account Relationships	🍤 :
Aircraft Serial : 48 Description : Falcon F50 Business Jet Tail / Reg No. : C-FBVF	🍗 🔁	
Aircraft ID Aircraft ID Aircraft ID Aircraft ID Aircraft ID Aircraft Serial: 48 Description: Falcon F50 Business Jet ail / Reg No.: C-FBVF Contact Relationships Contact Relationships Opportunities Cases Work Orders (Maintenance-X / Squawk)		
	Aircraft ID OOO Aircraft Model: F50 Falcon 50 B8 Description: Falcon F50 Business Jet FBVF Account Relationships Contact Relationships Opportunities Cases Work Orders (Maintenance-X / Squawk)	

- i. Aircraft ID section Displays general information about the aircraft.
- ii. Account Relationships section Enables link to customers and the ability to identify the type relationship.

😫 🔍 🖻	5 / X			Accour	t Relationship	S					۱
Drag a colu	ımn header here to group l	by that column									
Vame	Account #.	Subc	Relationship Type	Address	City	Country	State	Region	Airport Code	Note	
				<no< td=""><td>data to display></td><td></td><td></td><td></td><td></td><td></td><td></td></no<>	data to display>						

iii. **Contact Relationships** section – Enables link to contacts and the ability to identify the type relationship.

😅 🔍 🍜 🗸 🗙	Contact Relations	hips	**
Drag a column header here to group by that o	solumn		E
Name	Relationship Type	Note	
	<no data="" display="" to=""></no>		



iv. **Opportunities** section – Displays all opportunities related to the selected aircraft.

2			Opportunities			\$
Drag a column header l	nere to group by that column					
Opportunity ID	Status	Subject	Owner Name	Account Name	Туре	Type Descr
			<no data="" display="" to=""></no>			
٠						

v. Cases section – Displays all cases related to the aircraft.

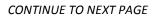
Drag a column	n header here to group	by that column			ases					:
Case No.	Owner	Туре	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product	
				<no da<="" td=""><td>ata to display></td><td></td><td></td><td></td><td></td><td></td></no>	ata to display>					

vi. Work Orders (Maintenance-X / Squawk) section – Displays all component work orders associated with the aircraft.

	Work Orders (Maintenance-X / Squawk)							
Drag a column heade	er here to group by that column							
W/0 No.	W/O Type	Part Number	Qty Ordered	W/O Status	Doc Status Serial No	Ordered	Due	
			<no data="" display="" to=""></no>					

vii. Maintenance-XL Work Orders section – Displays all maintenance work orders associated with the aircraft.

		Ma	aintenance XL Work	Orders			۸
Drag a column header	here to group by that column						
W0 Mnt No.	Doc Type	Description	Doc Status	Scope Code	Scope Name	W0 Status	Planned Start Planned Complete
000159	Actual	A Check	Open	A	A CHECK		Jan-12-2009 Feb-13-2009
•		III					۱.





8. Aircraft Forecast

Enables forecasting of scopes having a particular scope code(s) that are assigned to aircraft of a particular model(s).

a. From the CRM toolbar, left-click the Aircraft button and left-click Aircraft Forecast.



b. The Aircraft Forecast search window will appear.

ø	Aircraft	t Forecast						
	Start V	Vith :			•••			
								Max Search Result Lines : 50
l	Forecasi	As of	Туре	Execute	Company	Division	Departme	
+		11/12/2013	By Aircraft		1			
+		11/15/2013	By Aircraft		1			
	000001	10/7/2004	By Aircraft	Yes	1			
	📑 Ac	id						📧 📯 🗸 OK 🗶 Cancel

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The Aircraft Forecast window will appear.

🕖 Aircraft Forecast	: No. 000004				
😫 🔍 🍠 🗸 🤉	< 🛤		General		🍤 🛸
Forecast ID : 000004	4 As Of : 11/15/2013	Forecast By Aircrafts	C Engines	🔿 Units	C Components
Aircrafts					Scopes
Add Aircraft .	, , , , , , , , , , , , , , , , , , , ,	F	lemove Aircraft		Add Scope(s) Remove Scope
Group Code	Description		Aircraft Code	Description	Group Code Description Sc I
			A300	Airbus 300	10(
		Co	mpany / Division / Depa Forecast Aircrafts Res		■ (])) * *
			Forecast Scopes Res	ults	♦

- i. **General** section Enables setup of the forecast by choosing the type of forecast and applicable aircraft models and/or scope codes.
- ii. **Company / Division / Department** section Enables identification of the company, division, and department with which the aircraft is associated.

	Company / Division / Department	۶
Company :	Parts and Maintenance Corporation	
Division :		
Department :		

iii. **Forecast Aircrafts Results** section – Displays all aircraft for which the forecast applies and applicable maintenance is due as of the forecast date.

			Forece	ast Aircrafts Result				*
Drag a column he	ader here to group by that	column						
Aircraft ID.	Model	Mfg.	Serial No.	Description	Tail No.	Base	Status	
			ત	No data to display>				Е



iv. Forecast Scopes Results section – Displays all scopes due meeting the forecast criteria and for the aircraft selected in the Forecast Aircrafts Results section.

rag a column nead	er here to group by that column						
ope No.	Scope Code	Description	Zone	Last Done	Next Due	Or	
			<no data="" disp<="" td="" to=""><td>lay></td><td></td><td></td><td></td></no>	lay>			



9. Literature Manager

Enables the management of literature items developed for sales purposes and associated interactions (communications).

a. From the CRM toolbar, left-click the Literature button and left-click Literature.



b. The Literature search window will appear.

,	Literature							• X
	Start With :							
							Max Search Result Lin	es : 50 🌲
1	Literature ID	Type Code	M. Type Code	M. File Name	M. Size	M. Attribute	M. Path	M. Date
	000016	002	001	Addendum to Fokk	39936	-h	C:\Documents and	12/14/200
	000013	003	PDF	card1.pdf	90564	·h	C:\card1.pdf	7/6/2004 8
1	000011	002	MPP	000287.mpp	92160	-h	C:\Documents and	7/6/2004 1
	1							

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The Literature window will appear.

: 🔍 ङ 🗸 🗶 📓 👘		General	
iterature			
iterature ID : 000003	Type: ····		
ledia			
Full Path :			
			-
Content :	Load Media	Open Media	
File Name :			
Type: ····	M	edia Date :	•
Attribute :	N	ledia Size :	
9		Communication	
		Description	

- i. General section Displays general information about the literature item.
- ii. **Communications** section Displays all communications related to the literature item.

\$		Communication	*
Drag a column header here to g	group by that column		
Communication ID	Subject		
001	See attached		
			E

iii. **Description** section – Enables general information to be recorded about the literature item.



e. Reports - From the CRM toolbar, left-click the Literature button and left-click Reports.





10. Communication Manager

Enables the management of communication developed for sales purposes, associated interactions (literature) and the delivery of the communications.

a. From the CRM toolbar, left-click the Literature button and left-click Communications.



b. The **Communication** search window will appear.

Start	Vith :								
							Max	k Search Result I	ines : 5
Drag a co	olumn header here to group	bu that column							
			T	D (14	0				
No. 001	Owner Cruz Haire	Subject See attached	Type 001	Derault L	Company	Division	Departme		
000006	Margaret Fagan	see below	001	E-Mail	1				
0000005	Anna Wright	300 00/000	001	Mail	1			-	
000003	Margaret Fagan				1				
000002	Margaret Fagan				1				
000001	Margaret Fagan				1				
000001					1]	
000001					1			1	
000001					1			1	
000001			I		1	1		1	
000001					1			1	
					1	1		1	
					1	1		1	
000001					1	1		1	
000001						1		1	
						1		1	

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The Literature window will appear.

😫 🔍 🍱 🗸 🛪 🥴		General	
Communication ID : 000005	Type :	Default Delivery : Mail	
Subject :			
		Message	
		Company / Division / Department	
😫 🔍 🍜 🗸 🗙 👘		Literatures	🐤
😫 🔍 ङ 🗸 🗙 👘		Account Communication Deliveries	*
戦の戦くメ		Contact Communication Deliveries	*

- i. General section Displays general information about the communication.
- ii. Message section Displays the message that will accompany the communication.

Message	*	
	^	
	~	
4	P	

iii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the communication is associated.

	Company / Division / Department	۲
Company :	1 Parts and Maintenance Corporation	
Division :		E
Department :		

iv. Literatures section – Displays all literature items related to the communication.

😫 🔍 🍯 🗸 >	<	Literatures	ی اور
Drag a column head	er here to group by that column		
Literature	Туре		M. File N∉ M. Date
		<no data="" display="" to=""></no>	



v. Account Communication Deliveries section – Displays information related to delivery of this communication to customers.

😫 🔍 🖉 🗸	×			Account Com	munication	Deliveries			🍤 🖉
Drag a column he	ader here to group by that c	olumn							
Account	Contact	Source	Sent On	Delivery Type	E-Mail	Country C Area Cod Fax No.	Company	Division	Department
				<no.< td=""><td>data to display></td><td></td><td></td><td></td><td></td></no.<>	data to display>				
				(140	uata to uispiayz				

vi. **Contact Relationships** section – Displays information related to delivery of this communication to contacts.

S ≤ ✓ ×	Contac	ct Communication Deliv	eries		🍤 🙊	
Drag a column header here to group by that column						
Name	Sent On	Delivery Type	E-Mail	Country Code Area Code Fax No.	:	1
		<no data="" display="" to=""></no>				



11. Case Manager

Enables the management of customer issues, related information (including account and contact information and open activities) and associated interactions (including literature, communication and emails).

a. From the CRM toolbar, left-click the **Case** button and left-click **Case Management**.



b. The Case Management search window will appear.

	Start Wit	h :					P	Customer : artnumber :	All			All
							W/	H Location :				All
								Owner:				All
								Status :				All
										Max Search	Result Line	s: 50 -
	Case No.	Case Status	Owner	Owner Name	Account	Account Name	Туре	Type Name				
		Case Status	Owner	Owner Name	Account							
	000029	Open	mike		PENT	PARTS SUPPLY		COMPLAINT				
	000029 000022	Open Open	GMM		ABC	ABC AIRLINES, L	003	EXCHANGE				
•	000029 000022 000021	Open Open Open	GMM ҮММ		ABC 7158	ABC AIRLINES, L 3 - R SALES	003 005	EXCHANGE CUSTOMER	SERVICE			
	000029 000022 000021 000005	Open Open Open Open	GMM YMM GMM		ABC 7158 PENT	ABC AIRLINES, L 3 - R SALES PARTS SUPPLY	003 005	EXCHANGE	SERVICE			
	000029 000022 000021	Open Open Open Open	GMM ҮММ		ABC 7158 PENT	ABC AIRLINES, L 3 - R SALES	003 005	EXCHANGE CUSTOMER	SERVICE			
	000029 000022 000021 000005	Open Open Open Open	GMM YMM GMM		ABC 7158 PENT	ABC AIRLINES, L 3 - R SALES PARTS SUPPLY	003 005	EXCHANGE CUSTOMER	SERVICE			

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.



d. The Case Management window will appear.

🖉 Case Management No. For :		
😰 🔍 🍜 🗸 🛪 🔉 🏂 🕒 🔛 🕼	General	Close Re-open b 🏠
Case Owner : 005 ···· Anna Wright Case ID : 000030	Case Status Open	
Customer Reference :	Status : ····	
Account Name :	Priority : ····	
Contact Name :	Warehouse Location :	
Type : ····	Customer Satisfaction :	
Case Reason :	Product :	
Subject :	Date/Time Closed :	
RMA Number :	Closed By :	
Case Origin :	Date/Time Opened : 11/15/2013 3:33:59 PM	
Our Ref# :	Created On : 11/15/2013 3:33:59 F By : Anna Wright	
Your Ref# :	Last Modified On : By :	
Project :	Referred On : Referred To :	
Contract :		
	Company / Division / Department	*
	Description	*
B < B < X	Open Activities	🐤 🖲
S < S < X	Literature	🔁 🕷
N V X V	Communications Notes	*
N. V A W	Email	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
5	Belated Emails	8
	Additional Company and Contact Information	
N J X	Internal Notes	5 🐑
· · · · ·		iii 🖉 👻

- i. General section Displays general information about the case.
- ii. **Company / Division / Department** section Enables identification of the company, division, and department with which the case is associated.

	Company / Division / Department	*
Company :	2 ACME Engine	
Division :		
Department :		

iii. **Description** section – Enables general information to be recorded about the case.

	Description	*
failed		

iv. **Open Activities** section – Enables recording of pending activities related to the case.

😫 🔍 🖾 🗸 🗙		Open Activities		• ♦
Drag a column header here to gro	oup by that column			=
Subject	Туре	Status	Priority	
		<no data="" display="" to=""></no>		



v. Literature section – Displays all literature items related to the case.

😫 🔍 ङ 🗸 🛪	ς	Literature	🛸 🕾
Drag a column heade	er here to group by that column		
Literature	Туре		M. File N. M. Date
		<no data="" display="" to=""></no>	

vi. **Communications** section – Displays all communications related to the case.

		Communications	*			
Drag a column header here to group	Drag a column header here to group by that column					
Communication ID	Subject					
		<no data="" display="" to=""></no>	E	ш		

vii. **Notes** section – Enables general notes to be recorded about the case; a change history of those notes is also included.

🔍 🗸 🗶 😡	Notes		•
Complained about parts		Drag a column hea	ler here to group by that column
		Note's History	Changed By
		6/9/2010 15:27	001

viii. Emails section – Displays emails related to the case.

				Email			≽	
From : 5/15/2013 🗨	To: 11/15/2013	• •	Move		Account Email :			
Sent To/Received Date/Time	Subject		Folder	To/ From		CC	^	
							=	
							-	



ix. Related Emails section – Displays emails related to the case.

		R	elated Emails		*
Link Other Emails From : 5/15/2013 To :	11/15/2013 v Search	Key:		Load	
Drag a column header here to group by that	column				
Sent To/ Received Date/Time	Subject	Folder	To/ From	CC	
		دا	No data to display»		

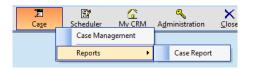
x. Additional Company and Contact Information section – Displays information related to the customer account and contact identified in the general section of the case.

Additional Company and Contact Information			
Contact	Account Info		
Name :	Name :		
Tel:	Address :		
Fax:	Address2 :		
Cell :	Address3 :		
	City :		

xi. **Internal Notes** section – Enables general notes to be recorded about the case; a change history of those notes is also included. These notes are not printed on the case report.

🔍 🗸 :	Internal Notes		*	*
		Drag a column he	ader here to group by that colum	in
		Note's History	Changed By	
		4>	lo data to display>	

e. Reports - From the CRM toolbar, left-click the Case button and left-click Reports.





12. Scheduler

Enables the management of your schedule and employed resources.

a. From the CRM toolbar, left-click the **Scheduler** button and left-click **My Scheduler**.



b. The Scheduler window will appear. Events may be added and may be assigned to resources.

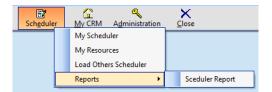
Scheduler of Anna Wrig Eile <u>View</u> Events O		Chila	
Layout features	puons Resources	Friday, November 15	1
Layout reatures		i nday, tovenber 15	 November 2013
🚺 Day View	Local		S M T W T F S 44 27 28 29 30 31 1 2
5 Work Week View	8 🐨		45 3 4 5 6 7 8 9
7 Week	0		*6 10 11 12 13 14 15 16
Month			47 17 18 19 20 21 22 23 48 24 25 26 27 28 29 30
	9.00		18 24 25 26 27 28 29 30
😼 Time Grid View			December 2013
🛄 Year View	10 00		SMTWTFS
			49 1 2 3 4 5 6 7
	11		50 8 9 10 11 12 13 14
	11		⁵¹ 15 16 17 18 19 20 2 ⁵² 22 23 24 25 26 27 28
			1 29 30 31
	12 pm		1
			January 2014
	1 00	E E E E E E E E E E E E E E E E E E E	SMTWTFS
			1 1 2 3 4
	.		² 5 6 7 8 9 10 1 ³ 12 13 14 15 16 17 18
	2		19 20 21 22 23 24 25
	i		s 26 27 28 29 30 31
	3 00		
			February 2014
Layout features	4 00		SMTWTFS
Synchronization	H		5 62345678
Export			7 9 10 11 12 13 14 15
	_ 5.00		a 16 17 18 19 20 21 22
Additional Features			9 23 24 25 26 27 28 1
X	6 00		10 2 3 4 5 6 7 8

c. Loading other users schedulers – From the CRM toolbar, left-click the **Scheduler** button and left-click **Load Others Scheduler**





d. Reports - From the CRM toolbar, left-click the Scheduler button and left-click Reports.





13. My CRM

Enables the user the ability to easily access documents that are directly related to the user.

a. From the CRM toolbar, left-click the My CRM button and left-click My Screen.



b. The My Screen window will appear.

🍠 My Screen	- • 💌			
Filter W/O and MNT by Sales Person : Me as Sales Person 1				
Calls <u>D</u> ue O <u>p</u> en Calls				
My Camp <u>a</u> igns	My Quotes			
My Opportunities	Му <u>W</u> /О			
My Ca <u>s</u> es	My <u>M</u> NT			
Close				

- i. **Filter W/O and MNT by Sales Person** field Identifies the field within component and maintenance work orders that the user should be identified in order for the WO or MNT to appear in the search window when the **My W/O** or **My MNT** buttons are selected.
- ii. Calls Due button Left-click to view the calls that have been referred to the user.
- iii. **Open Calls** button Left-click to view the calls that were created by the user.
- iv. My Campaigns button Left-click to view campaigns created by the user.
- v. My Opportunities button Left-click to view opportunities where the user is identified as owner.
- vi. My Cases button– Left-click to view cases where the user is identified as owner.
- vii. My Quotes button Left-click to view sales quotes prepared by the user.
- viii. **My W/O** button Left-click to view component work orders where the user is identified as the sales person identified in the **Filter W/O and MNT by Sales Person** field.
- ix. **My MNT** button Left-click to view maintenance work orders where the user is identified as the sales person identified in the **Filter W/O and MNT by Sales Person** field.

END OF DOCUMENT