

Customer Relationship Management (CRM) Module Quick Reference

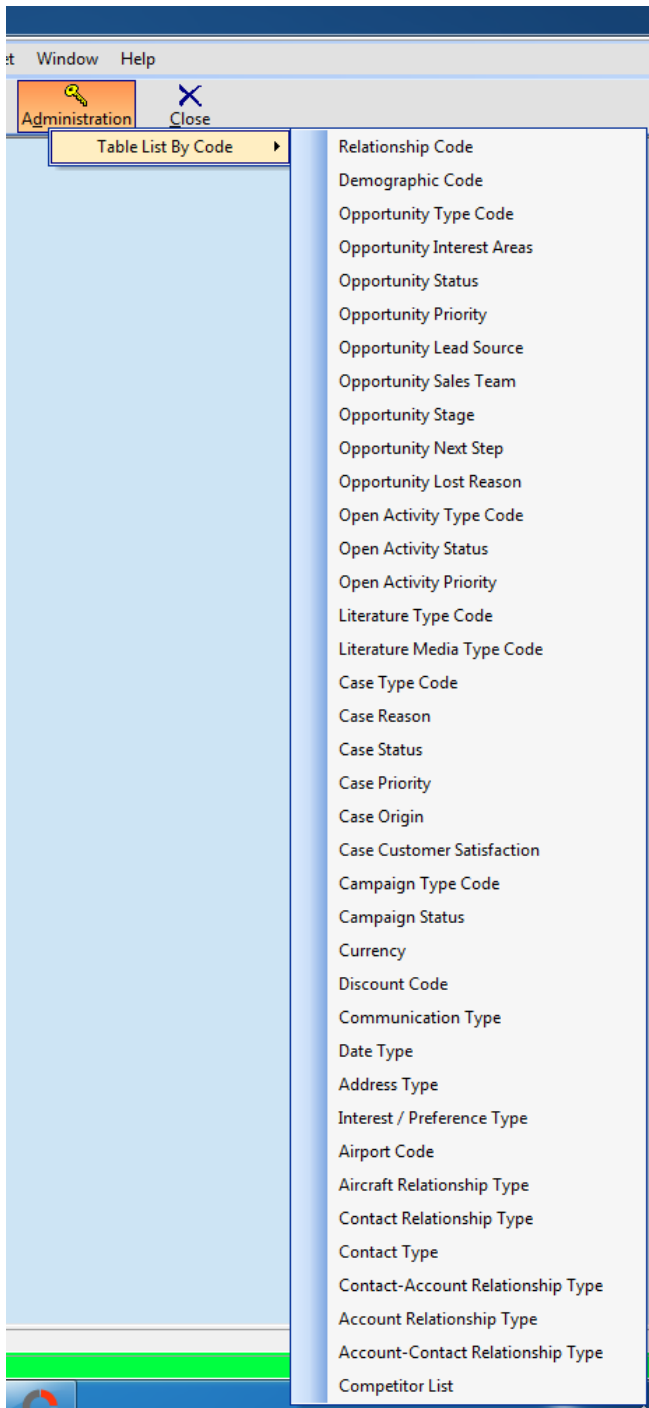
The CRM Module enables the management of all interactions between your organization and current, as well as potential, customers.

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. Left-click **Administration** and select **Table List by Code**.

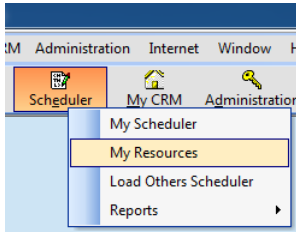


The matrix below identifies which sections use each table.

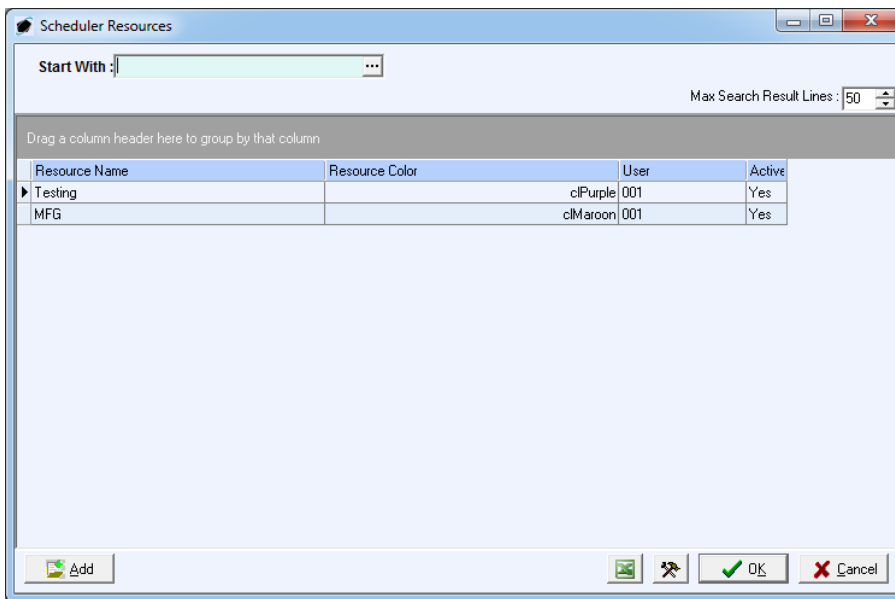
Table	Opportunity Manager	Account Manager	Contact Manager	Campaign Manager	Aircraft Manager	Aircraft Forecasting	Literature Manager	Communication Manager	Case Manager	Scheduler
Relationship Code										
Demographic Code										
Opportunity Type Code	X									
Opportunity Interest Areas	X							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

* Not Unique to CRM Module

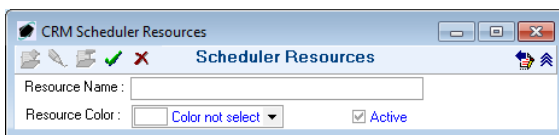
- b. Scheduler Resources – From the CRM toolbar, left-click the **Scheduler** button and left-click **My Resources**.



- i. The **Scheduler Resources** search window will appear.



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

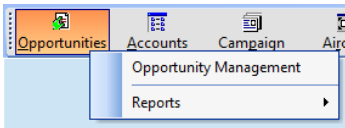


1. **Resource Name** field – Enter the resource name.
 2. **Resource Color** field – Select the color that the resource should appear on the scheduler.
 3. **Active flag** – Ensure flag is marked as “checked” to identify the resource is currently active.
- iv. Left-click the green arrow in the **CRM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

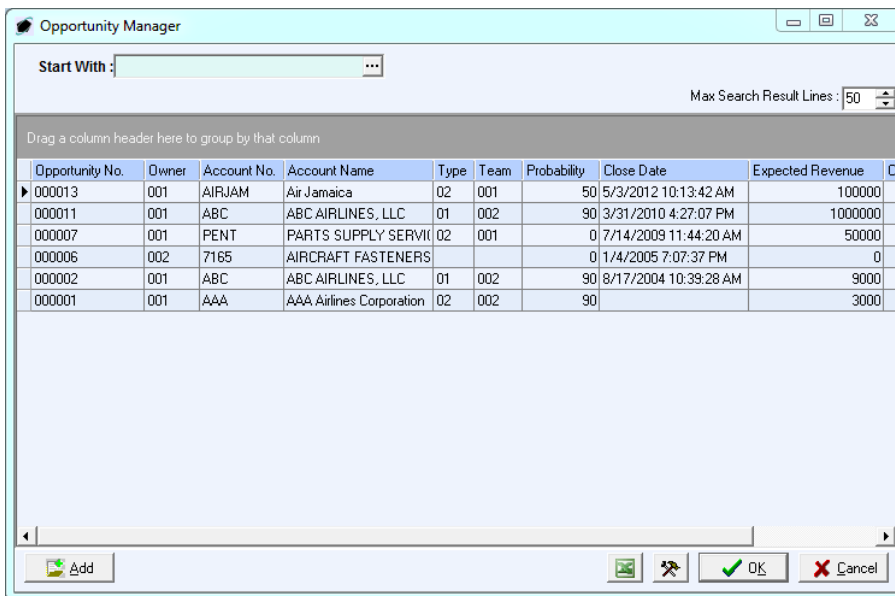
3. Opportunity Manager

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**.



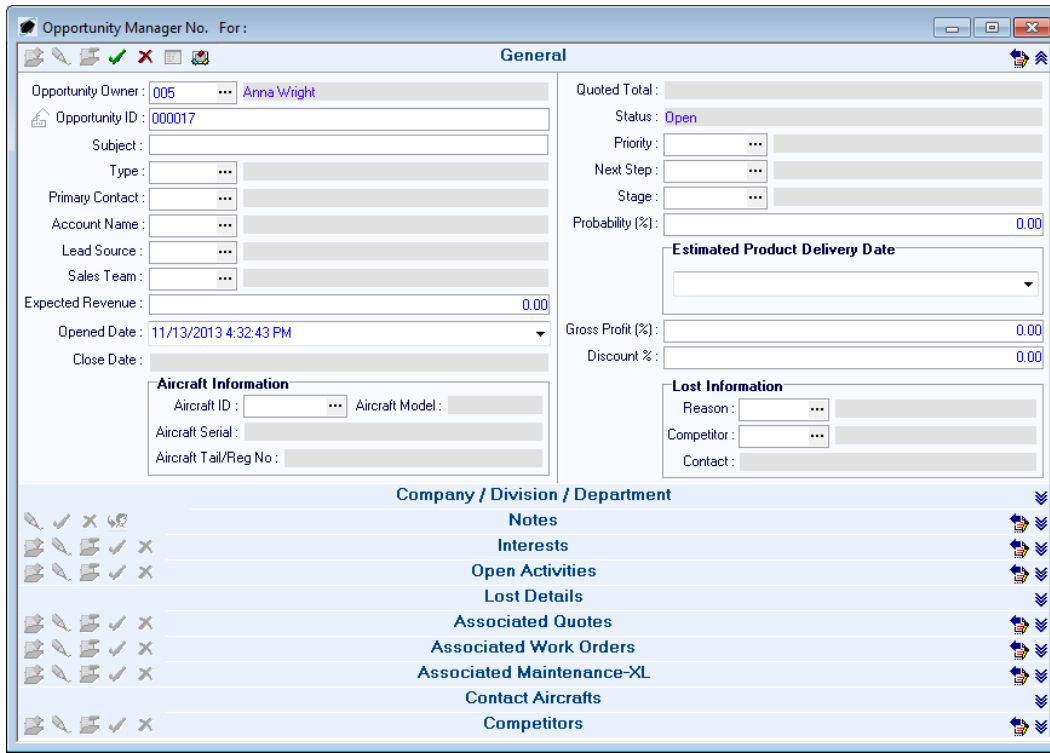
- b. The **Opportunity Manager** search window will appear.



- 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.

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



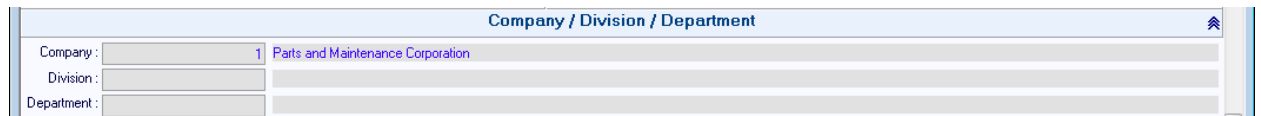
The screenshot shows the 'Opportunity Manager' window with the following fields and sections:

- General Section:**
 - Opportunity Owner: 005 Anna Wright
 - Opportunity ID: 000017
 - Subject: [Empty]
 - Type: [Empty]
 - Primary Contact: [Empty]
 - Account Name: [Empty]
 - Lead Source: [Empty]
 - Sales Team: [Empty]
 - Expected Revenue: 0.00
 - Opened Date: 11/13/2013 4:32:43 PM
 - Close Date: [Empty]
 - Aircraft Information:**
 - Aircraft ID: [Empty]
 - Aircraft Model: [Empty]
 - Aircraft Serial: [Empty]
 - Aircraft Tail/Reg No: [Empty]
 - Quoted Total: [Empty]
 - Status: Open
 - Priority: [Empty]
 - Next Step: [Empty]
 - Stage: [Empty]
 - Probability (%): 0.00
 - Estimated Product Delivery Date:** [Empty]
 - Gross Profit (%): 0.00
 - Discount %: 0.00
 - Lost Information:**
 - Reason: [Empty]
 - Competitor: [Empty]
 - Contact: [Empty]
- Company / Division / Department Section:**
 - Notes
 - Interests
 - Open Activities
 - Lost Details
 - Associated Quotes
 - Associated Work Orders
 - Associated Maintenance-XL
 - Contact Aircrafts
 - Competitors

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.

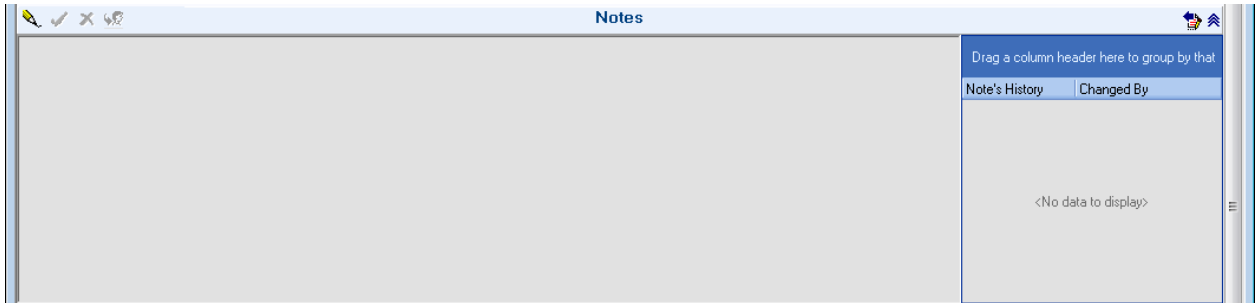


The screenshot shows the 'Company / Division / Department' section with the following fields:

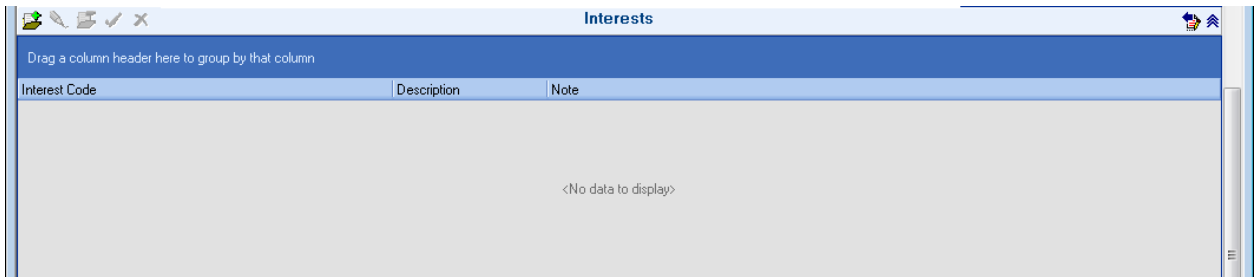
- Company: 1 Parts and Maintenance Corporation
- Division: [Empty]
- Department: [Empty]

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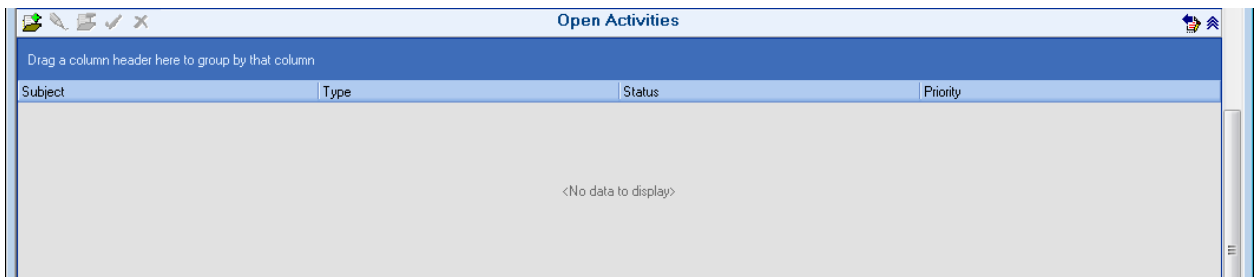
- iii. **Notes** section – Enables general notes to be recorded about the opportunity; a change history of those notes is also included.



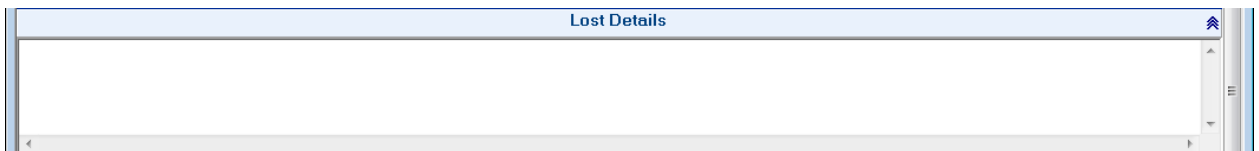
- iv. **Interests** section – Enables recording details of the interests of the customer.



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

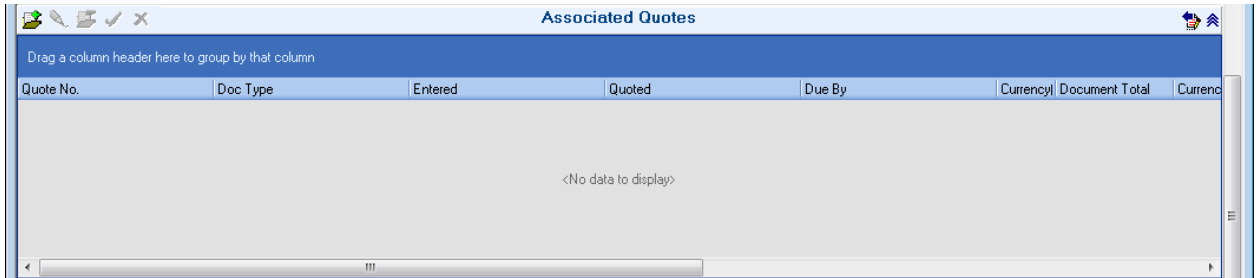


- vi. **Lost Details** section - Enables notes to be recorded about the details of the opportunity if it was lost.



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

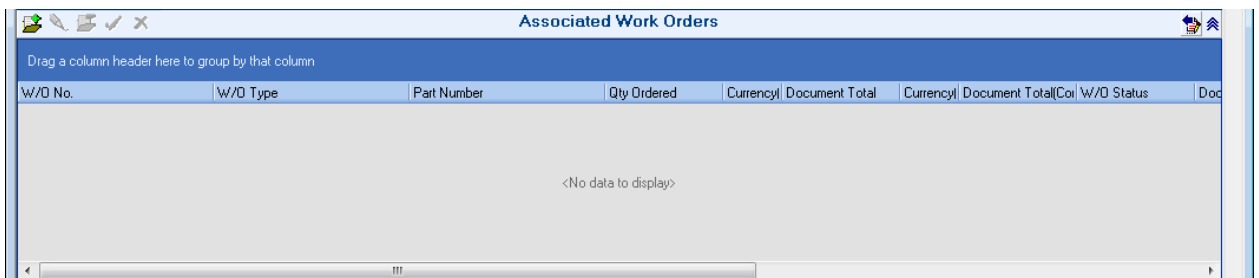


Associated Quotes

Drag a column header here to group by that column

Quote No.	Doc Type	Entered	Quoted	Due By	Currency	Document Total	Currenc
<No data to display>							

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

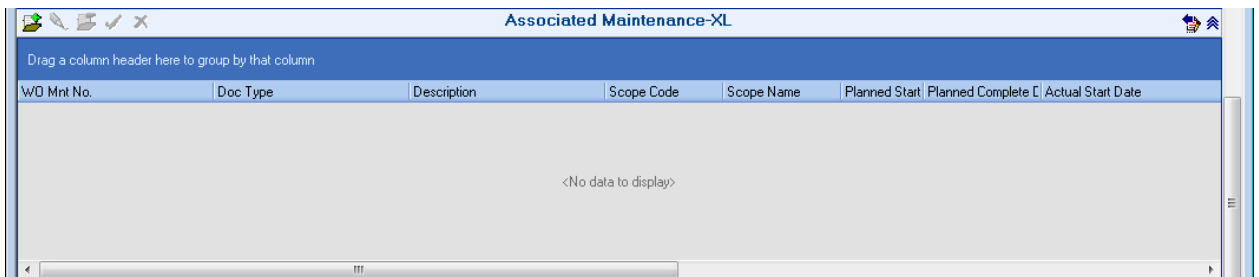


Associated Work Orders

Drag a column header here to group by that column

W/D No.	W/D Type	Part Number	Qty Ordered	Currency	Document Total	Currency	Document Total	Co	W/D Status	Doc
<No data to display>										

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



Associated Maintenance-XL

Drag a column header here to group by that column

W/D Mnt No.	Doc Type	Description	Scope Code	Scope Name	Planned Start	Planned Complete	Actual Start Date
<No data to display>							

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

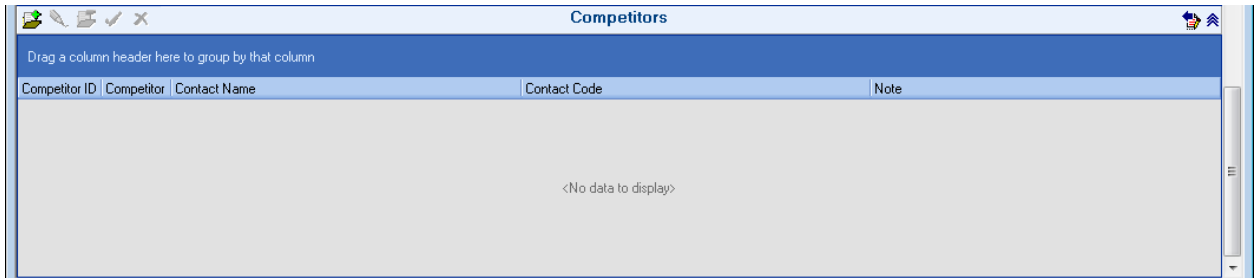


Contact Aircrafts

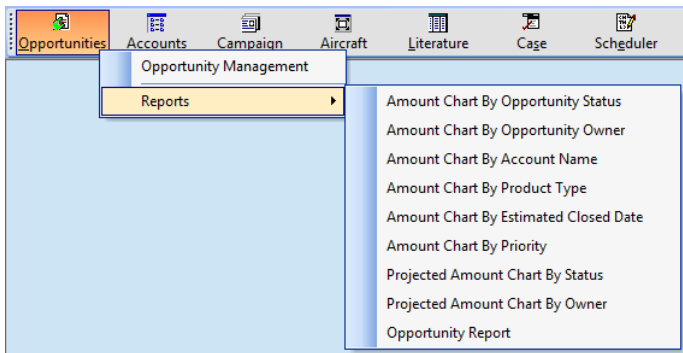
Drag a column header here to group by that column

Aircraft ID	Model	Serial no.	Description	Aircraft Type	Note
<No data to display>					

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



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

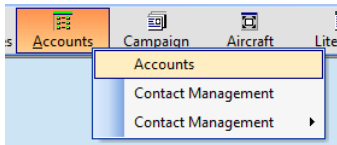


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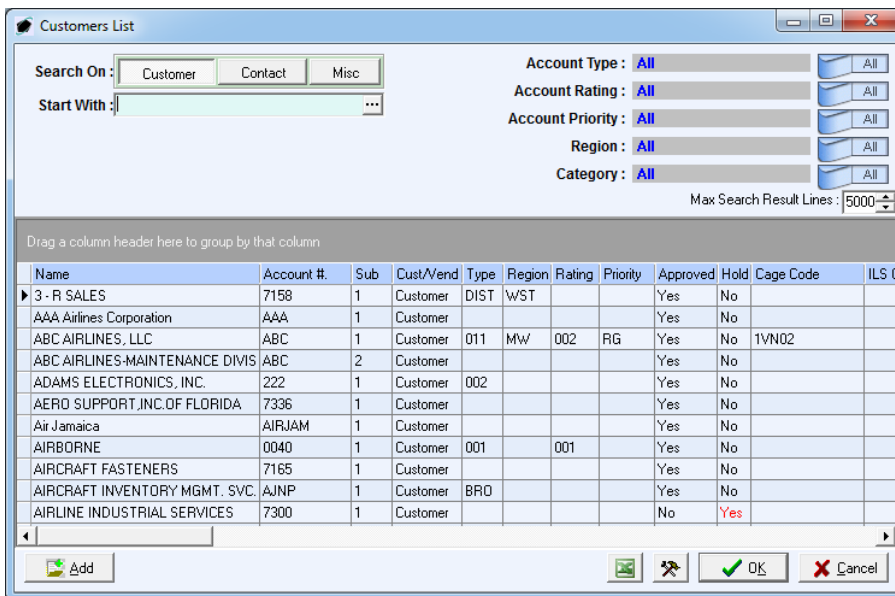
4. Account Manager

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**.



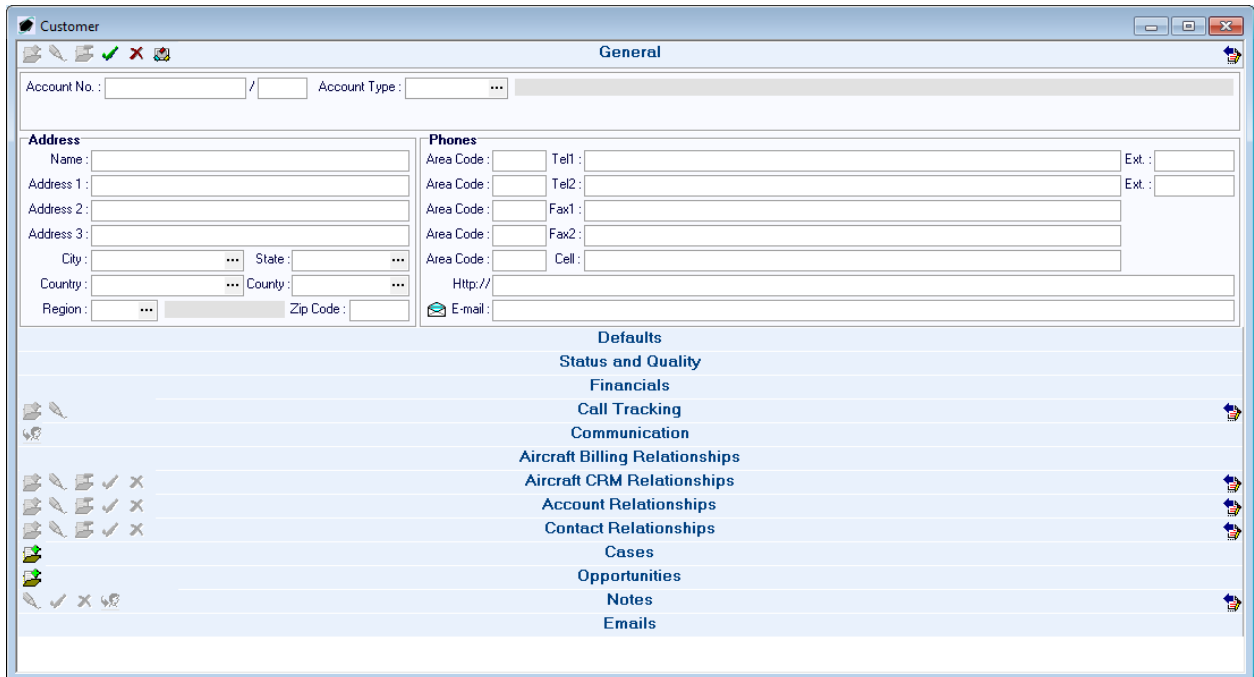
- b. The **Customers List** search window will appear.



- 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.

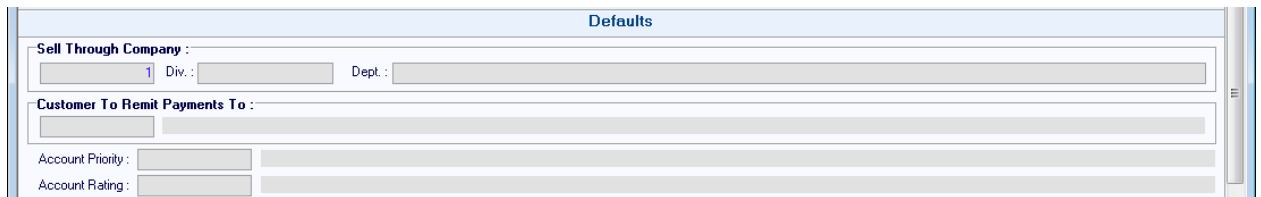
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d. The **Customer** window will appear.



The screenshot shows a window titled "Customer" with a "General" tab. The "General" section includes fields for "Account No.", "Account Type", "Address" (Name, Address 1, 2, 3, City, State, Country, County, Region, Zip Code), and "Phones" (Area Code, Tel1, Ext., Tel2, Ext., Fax1, Fax2, Cell, Http://, E-mail). Below the "General" section is a "Defaults" section with a tree view containing: Status and Quality, Financials, Call Tracking, Communication, Aircraft Billing Relationships, Aircraft CRM Relationships, Account Relationships, Contact Relationships, Cases, Opportunities, Notes, and Emails.

- i. **General** section – Displays general information about the customer
- ii. **Defaults** section

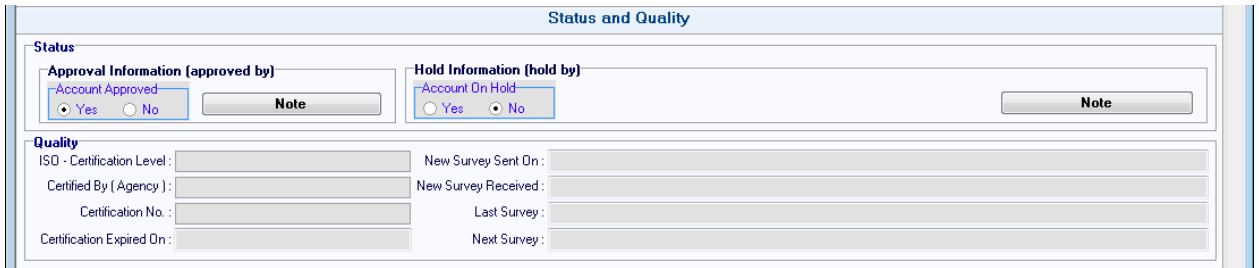


The screenshot shows the "Defaults" section of the Customer window. It includes fields for "Sell Through Company" (with a dropdown menu), "Div.", and "Dept.". Below this is a section for "Customer To Remit Payments To" with a dropdown menu. At the bottom, there are fields for "Account Priority" and "Account 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.

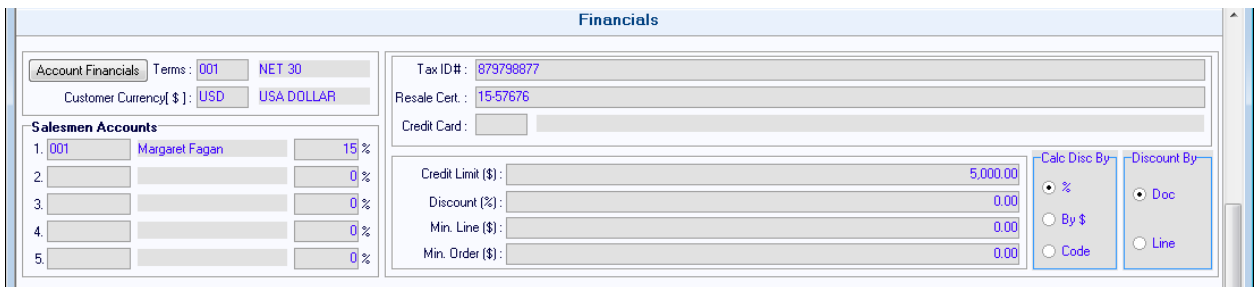
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iii. **Status and Quality** section



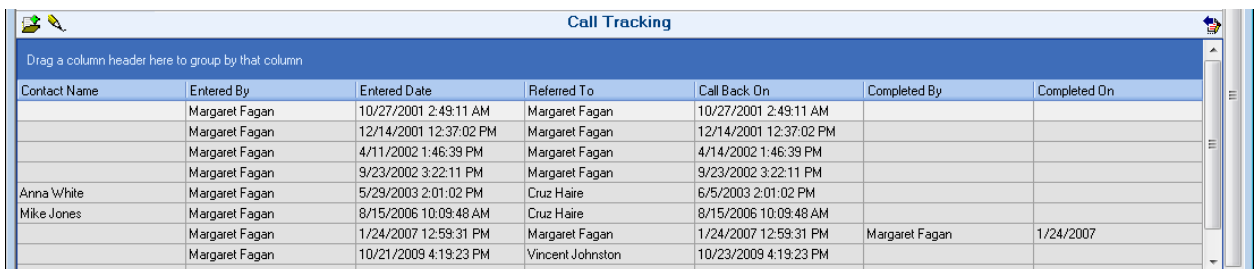
1. Displays customer approval and hold information
2. Displays customer quality information

iv. **Financials** section – Displays customer financial information including default salesmen and credit limit.



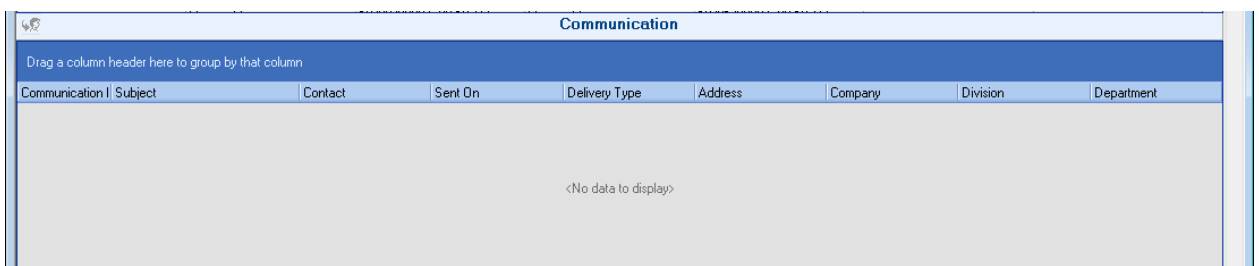
ID	Salesman Name	Commission %
1. 001	Margaret Fagan	15 %
2.		0 %
3.		0 %
4.		0 %
5.		0 %

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



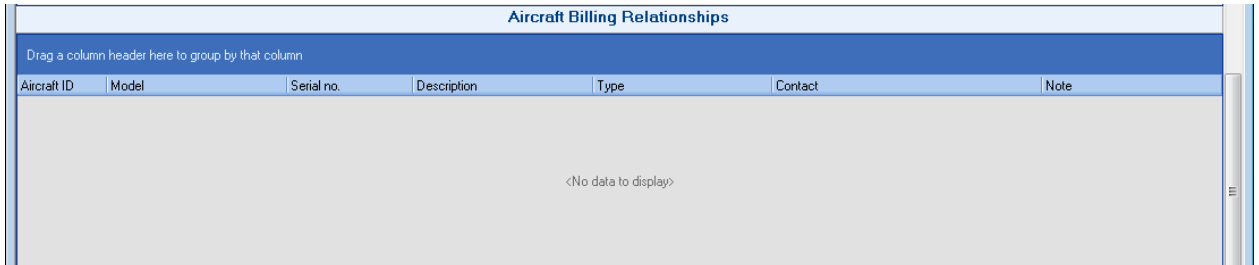
Contact Name	Entered By	Entered Date	Referred To	Call Back On	Completed By	Completed On
	Margaret Fagan	10/27/2001 2:49:11 AM	Margaret Fagan	10/27/2001 2:49:11 AM		
	Margaret Fagan	12/14/2001 12:37:02 PM	Margaret Fagan	12/14/2001 12:37:02 PM		
	Margaret Fagan	4/11/2002 1:46:39 PM	Margaret Fagan	4/14/2002 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		

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



Communication	Subject	Contact	Sent On	Delivery Type	Address	Company	Division	Department
<No data to display>								

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



The screenshot shows a window titled "Aircraft Billing Relationships". It features a table with the following columns: Aircraft ID, Model, Serial no., Description, Type, Contact, and Note. The table is currently empty, displaying the text "<No data to display>".

Aircraft ID	Model	Serial no.	Description	Type	Contact	Note
<No data to display>						

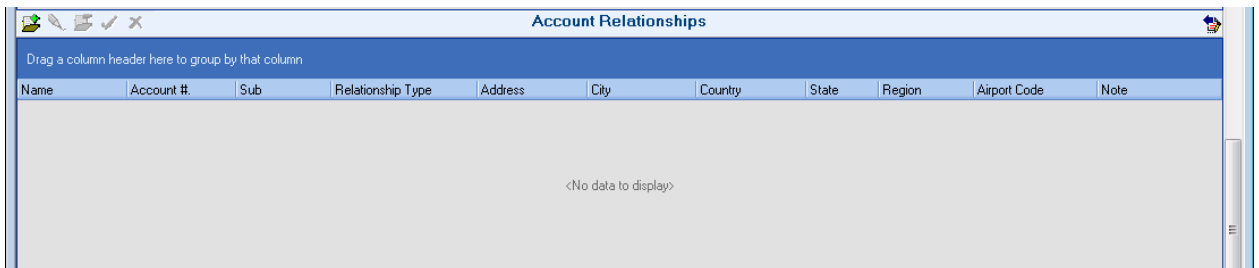
- viii. **Aircraft CRM Relationships** section – Enables link to particular aircraft that are not identified on the aircraft record.



The screenshot shows a window titled "Aircraft CRM Relationships". It features a table with the following columns: Aircraft ID, Relationship, Model, Serial No., Description, Aircraft Type, and Note. The table is currently empty, displaying the text "<No data to display>".

Aircraft ID	Relationship	Model	Serial No.	Description	Aircraft Type	Note
<No data to display>						

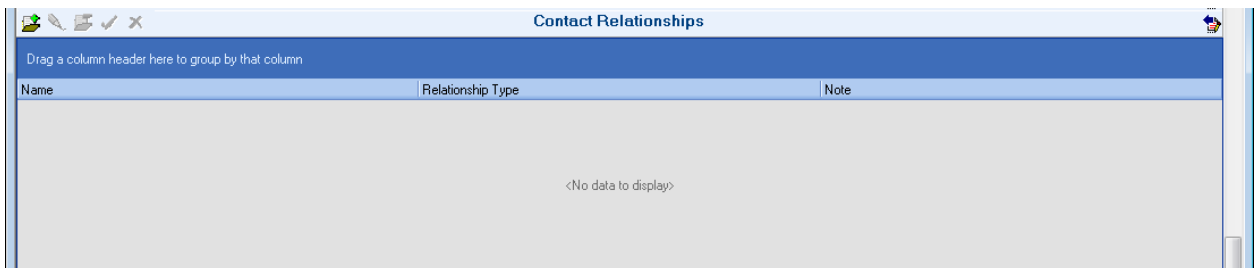
- ix. **Account Relationships** section – Enables link to other customer accounts and the ability to identify the type of relationship between the two.



The screenshot shows a window titled "Account Relationships". It features a table with the following columns: Name, Account #., Sub, Relationship Type, Address, City, Country, State, Region, Airport Code, and Note. The table is currently empty, displaying the text "<No data to display>".

Name	Account #.	Sub	Relationship Type	Address	City	Country	State	Region	Airport Code	Note
<No data to display>										

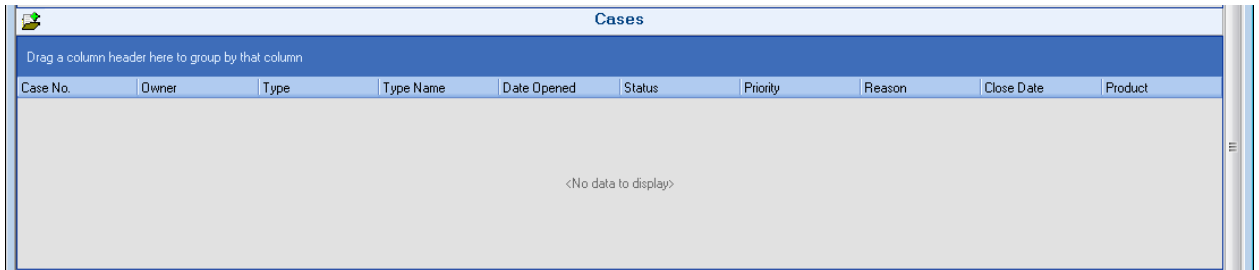
- x. **Contact Relationships** section – Enables link to contacts and the ability to identify the type relationship.



The screenshot shows a window titled "Contact Relationships". It features a table with the following columns: Name, Relationship Type, and Note. The table is currently empty, displaying the text "<No data to display>".

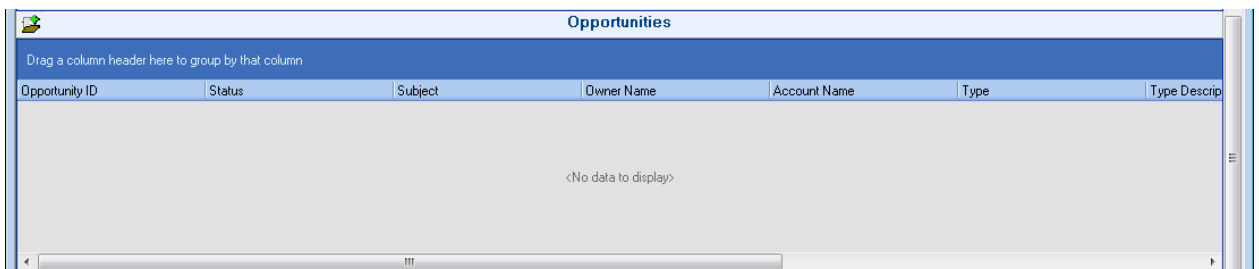
Name	Relationship Type	Note
<No data to display>		

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



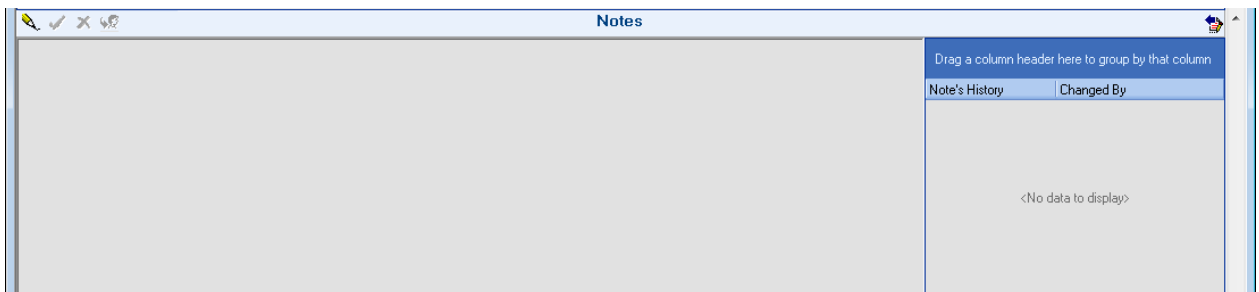
Case No.	Owner	Type	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product
<No data to display>									

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



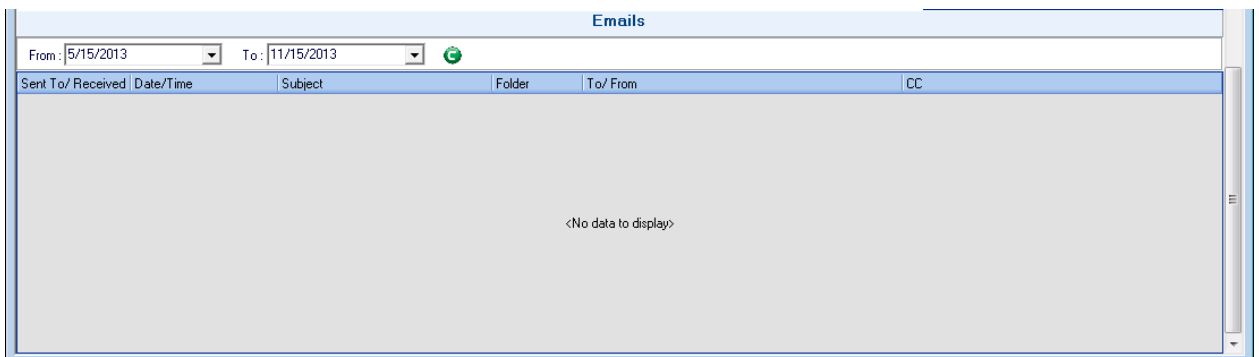
Opportunity ID	Status	Subject	Owner Name	Account Name	Type	Type Description
<No data to display>						

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



Note's History	Changed By
<No data to display>	

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

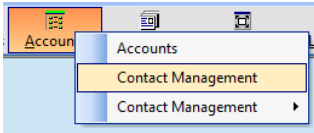


Sent To/ Received	Date/Time	Subject	Folder	To/ From	CC
<No data to display>					

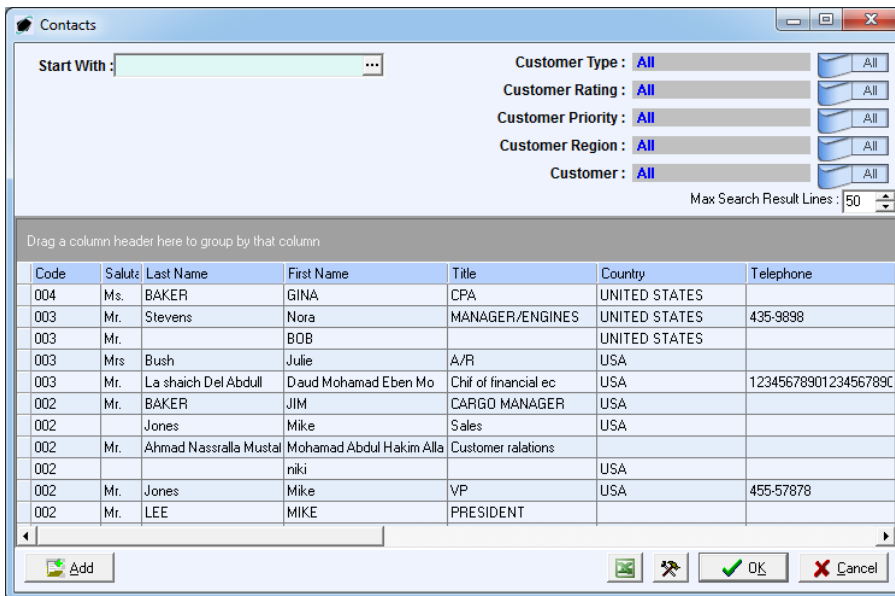
5. Contact Manager

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**.



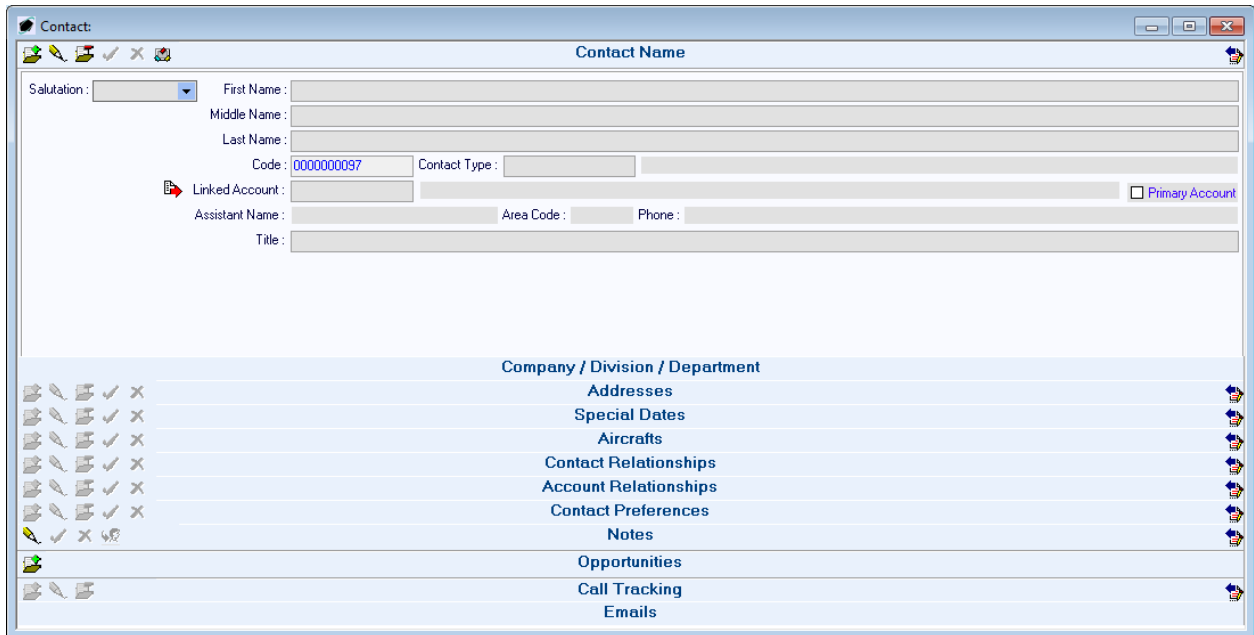
- b. The **Contacts** search window will appear.



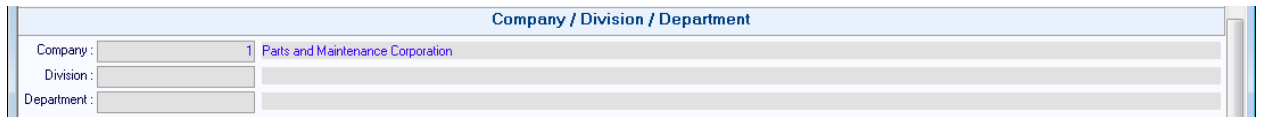
- c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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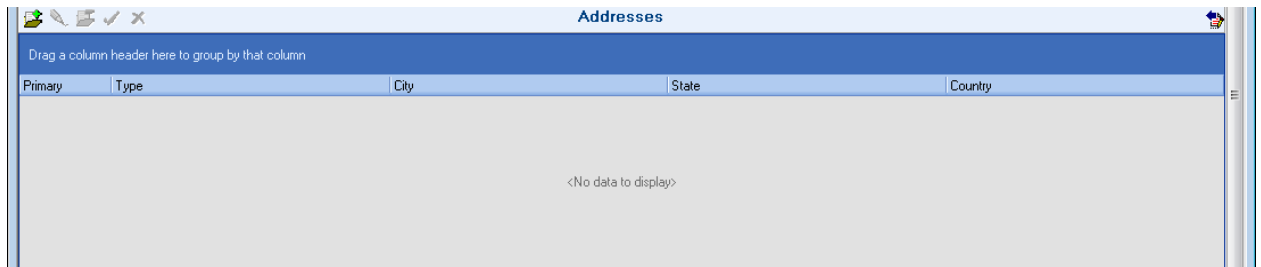
d. The **Contact** window will appear.



- 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.

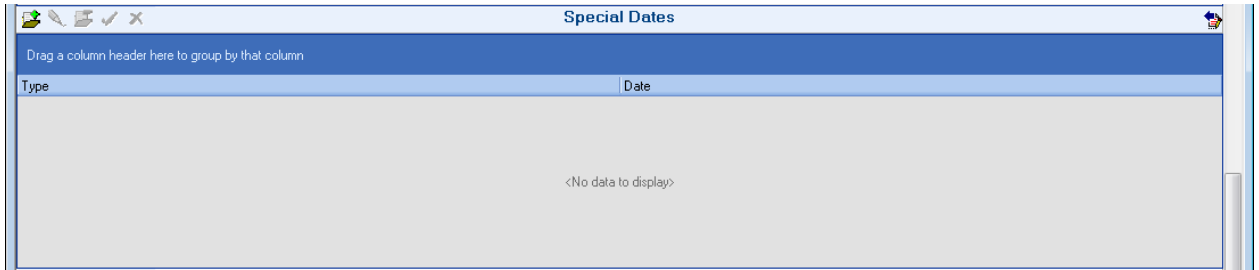


- iii. **Addresses** section – Enables identification of multiple addresses associated with the contact.



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- 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	
Type	Date
<No data to display>	

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



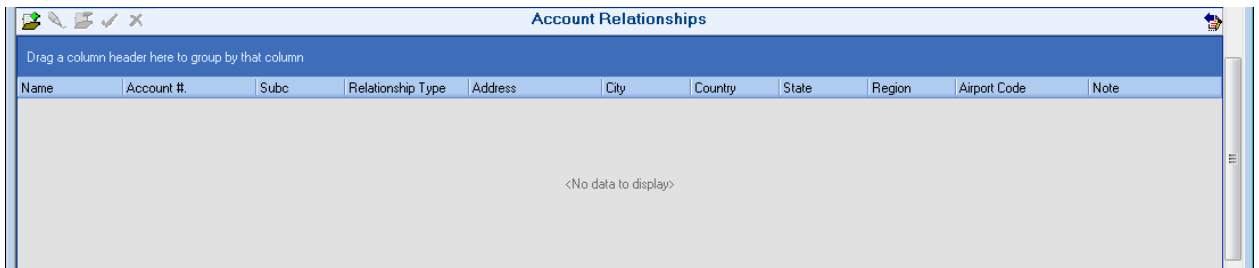
Aircrafts						
Drag a column header here to group by that column						
Aircraft ID	Relationship	Model	Serial No.	Description	Aircraft Type	Note
<No data to display>						

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



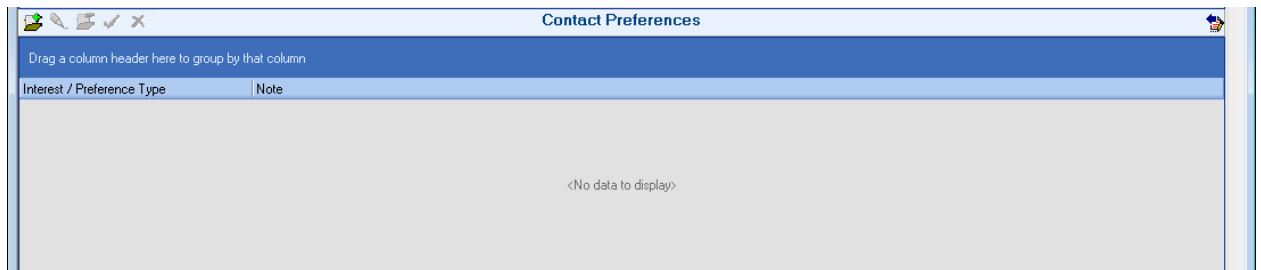
Contact Relationships		
Drag a column header here to group by that column		
Name	Relationship Type	Note
<No data to display>		

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

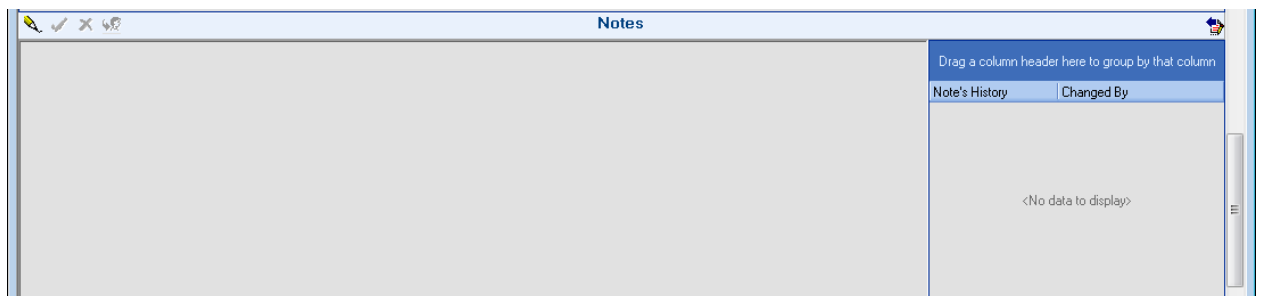


Account Relationships										
Drag a column header here to group by that column										
Name	Account #.	Subc	Relationship Type	Address	City	Country	State	Region	Airport Code	Note
<No data to display>										

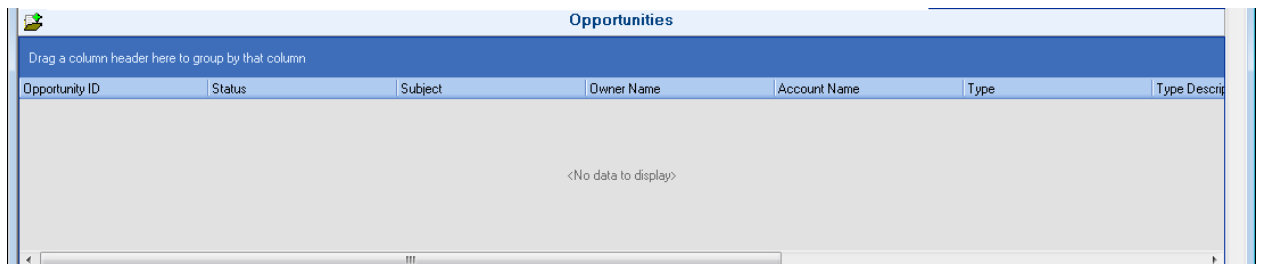
- viii. **Contact Preferences** section – Enables recording interests and/or preferences of the contact.



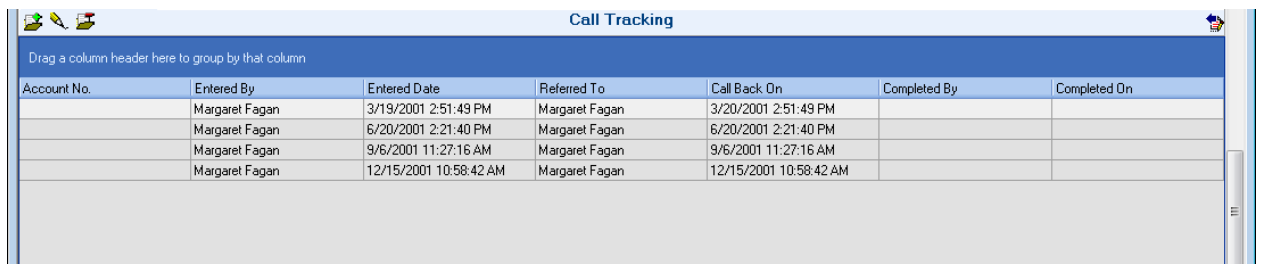
- ix. **Notes** section – Enables general notes to be recorded about the contact; a change history of those notes is also included.



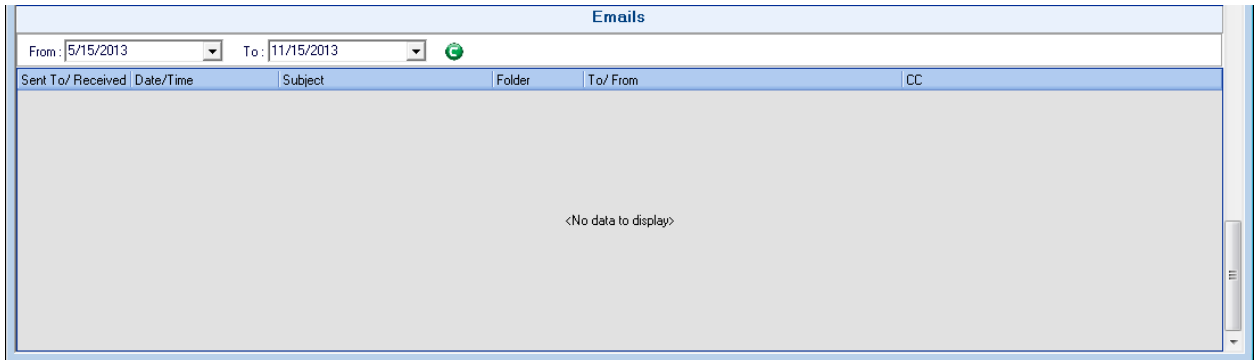
- x. **Opportunities** section - Displays all opportunities related to the selected contact.



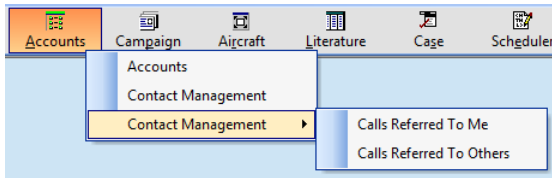
- xi. **Call Tracking** section – Displays all calls related to the selected contact.



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**.

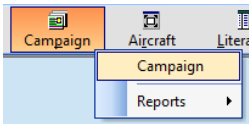


CONTINUE TO NEXT PAGE

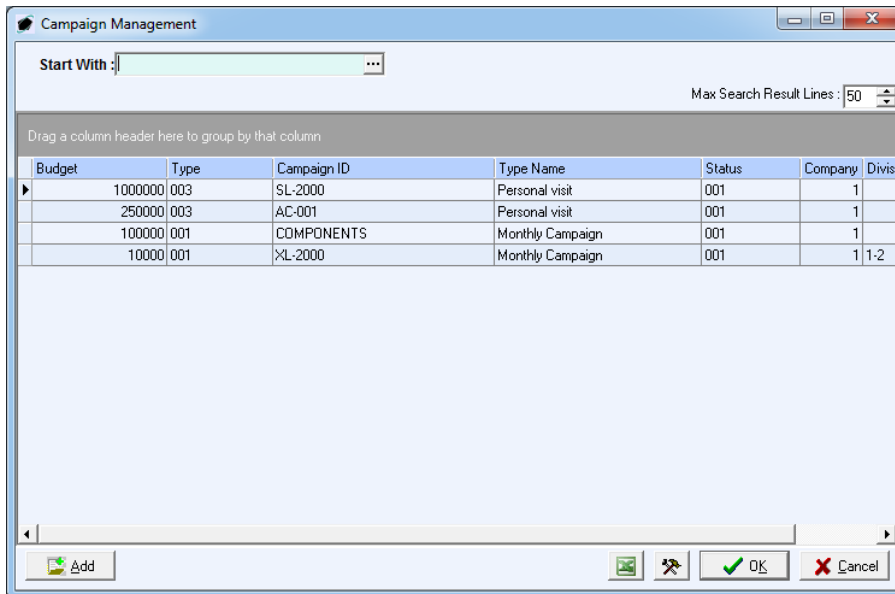
6. Campaign Manager

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**.



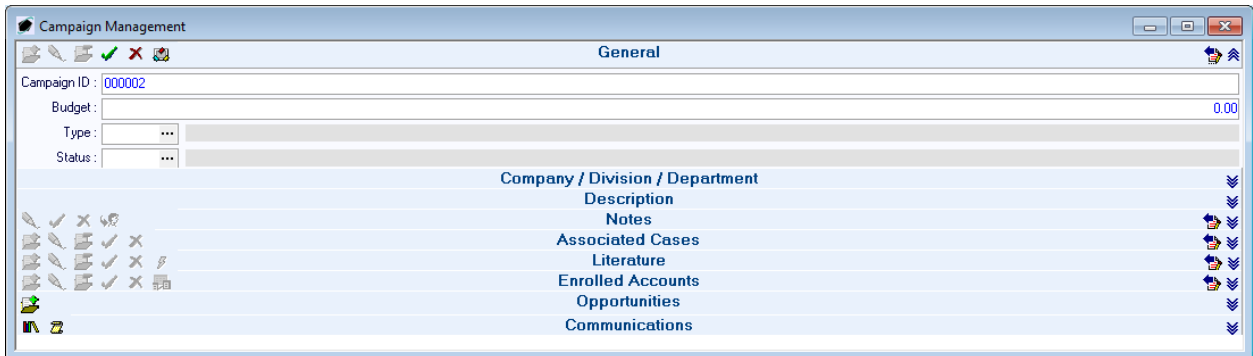
- b. The **Campaign Management** search window will appear.



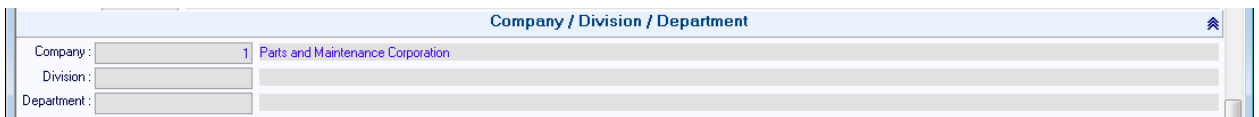
- c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

CONTINUE TO NEXT PAGE

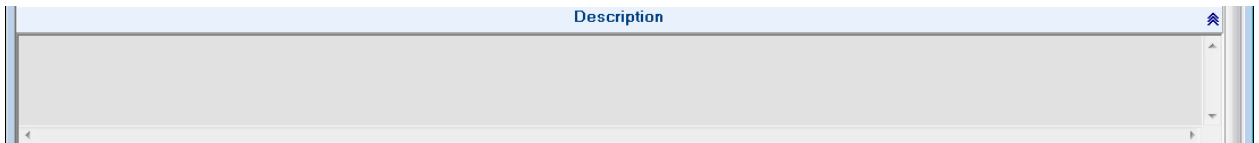
d. The **Campaign Management** window will appear.



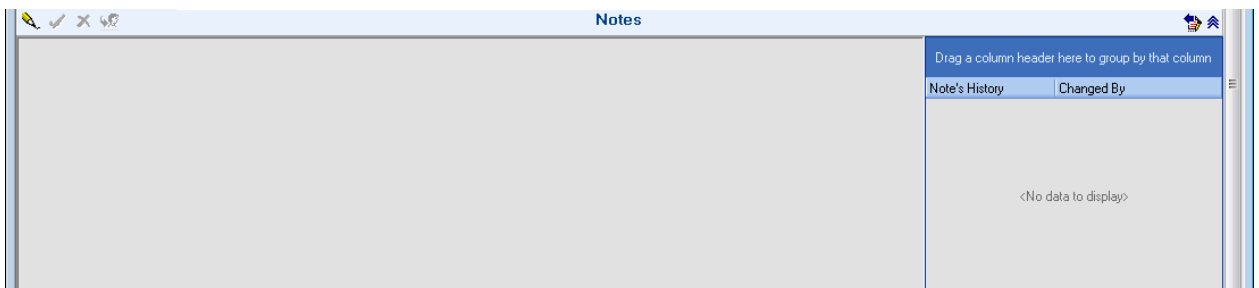
- i. **General** section – Displays general information about the campaign.
- ii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the campaign is associated.



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

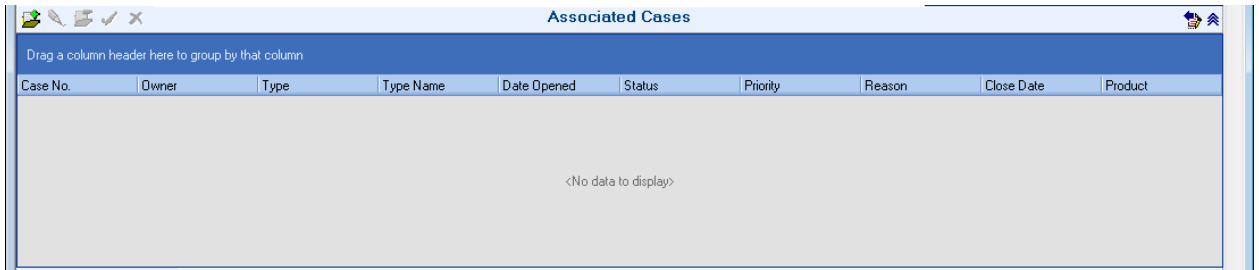


iv. **Notes** section – Enables general notes to be recorded about the campaign; a change history of those notes is also included.



CONTINUE TO NEXT PAGE

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



Associated Cases

Drag a column header here to group by that column

Case No.	Owner	Type	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product
<No data to display>									

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

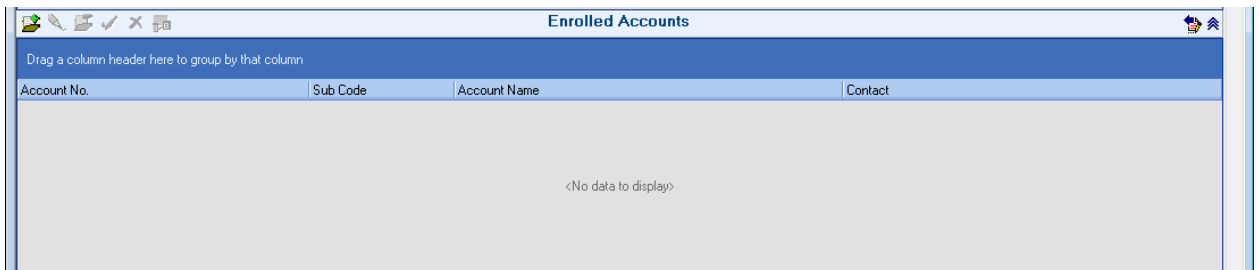


Literature

Drag a column header here to group by that column

Literature	Type	M. File N.	M. Date
<No data to display>			

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

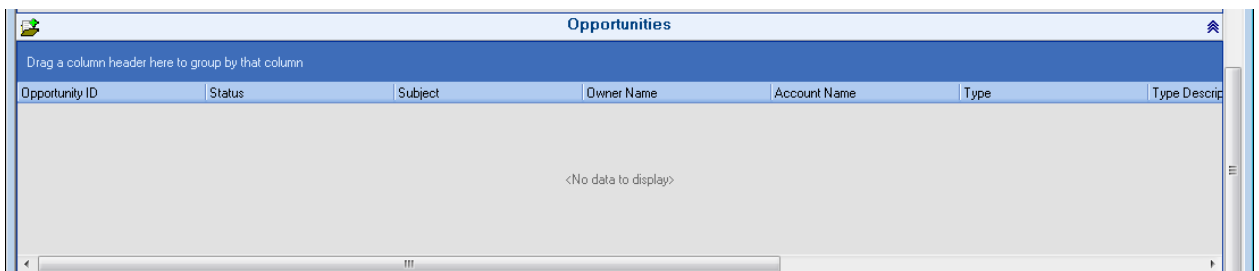


Enrolled Accounts

Drag a column header here to group by that column

Account No.	Sub Code	Account Name	Contact
<No data to display>			

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



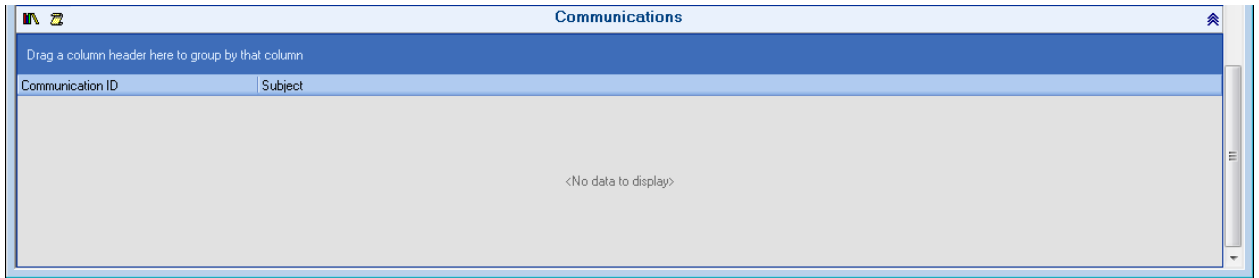
Opportunities

Drag a column header here to group by that column

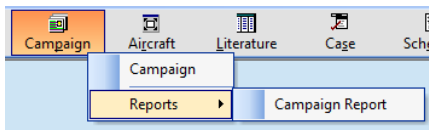
Opportunity ID	Status	Subject	Owner Name	Account Name	Type	Type Descrip
<No data to display>						

CONTINUE TO NEXT PAGE

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



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

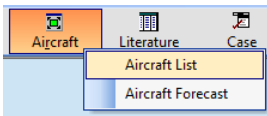


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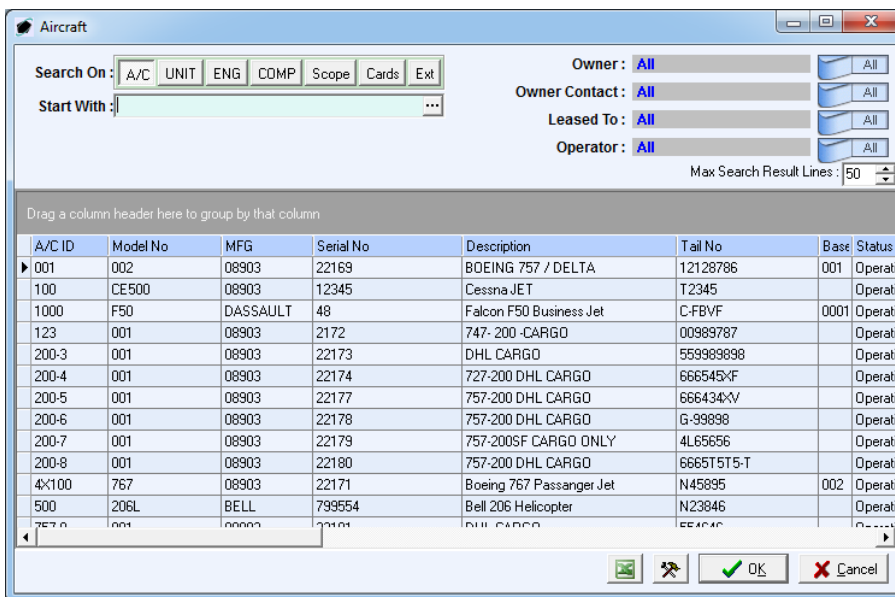
7. Aircraft Manager

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**.



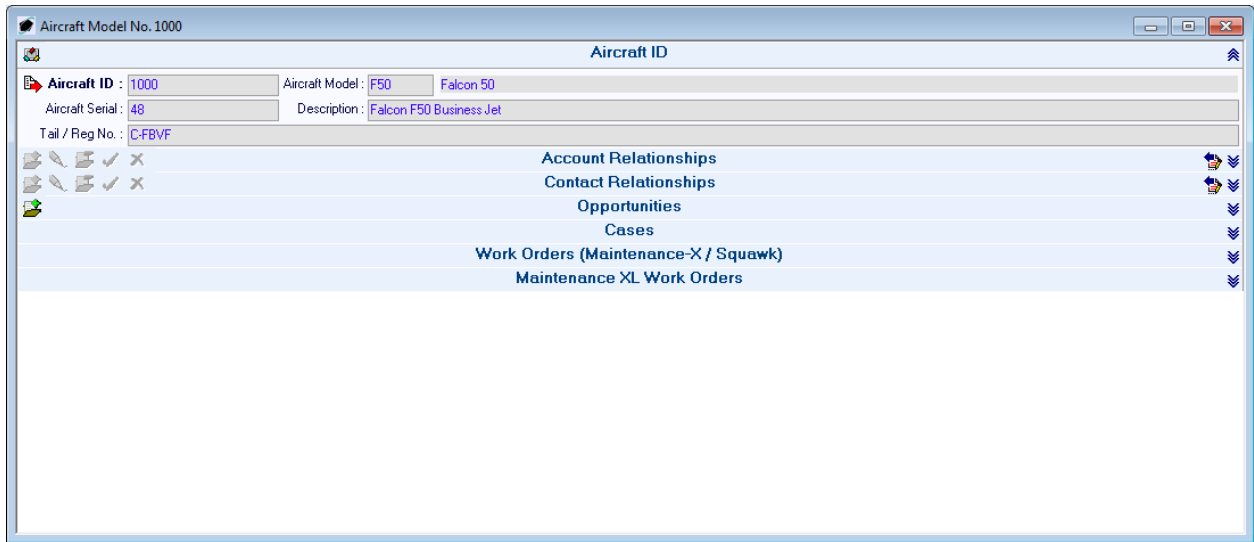
- b. The **Aircraft** search window will appear.



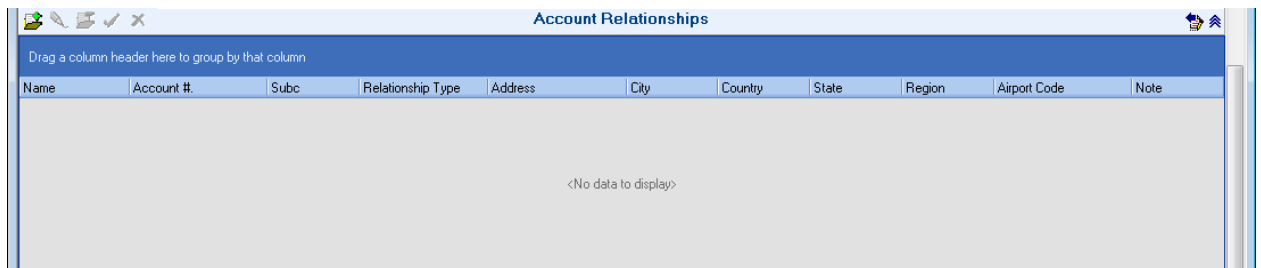
- c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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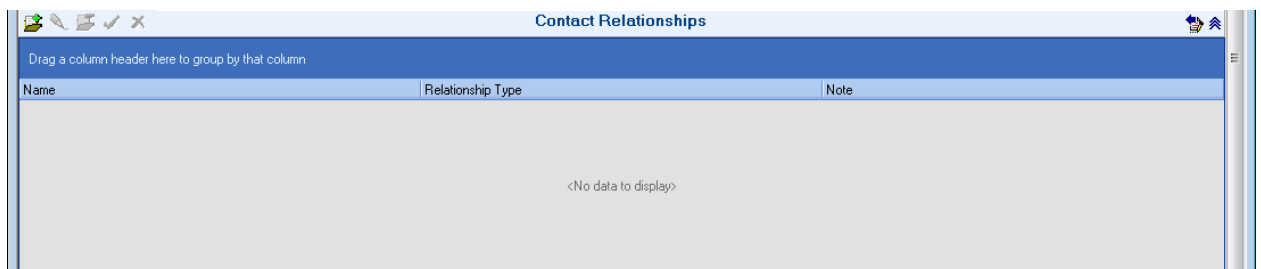
d. The **Aircraft** window will appear.



- 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.

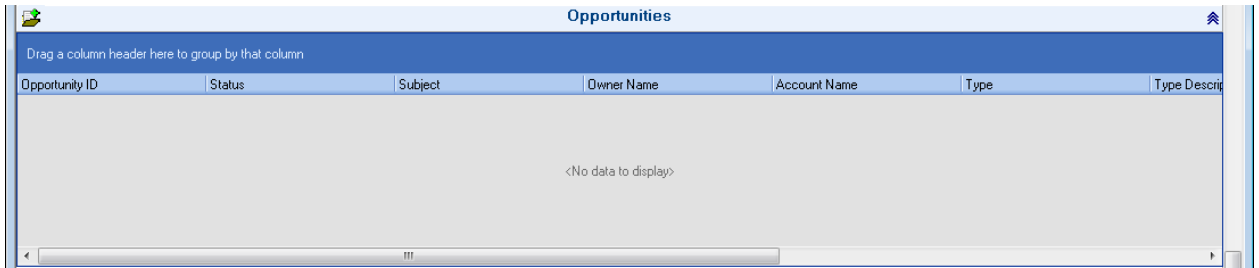


- iii. **Contact Relationships** section – Enables link to contacts and the ability to identify the type relationship.



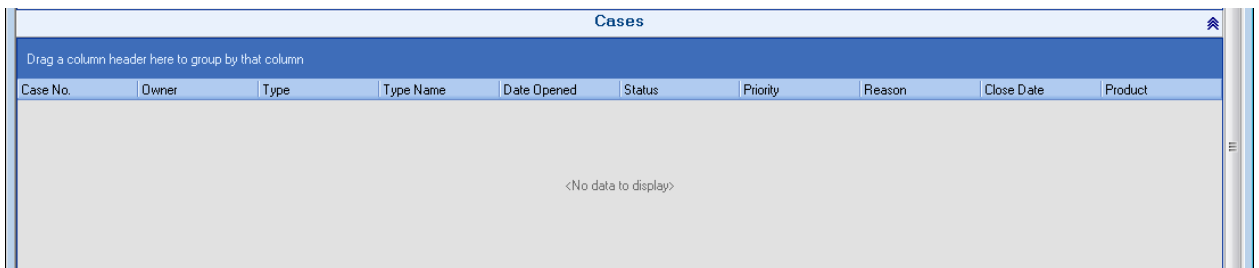
CONTINUE TO NEXT PAGE

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



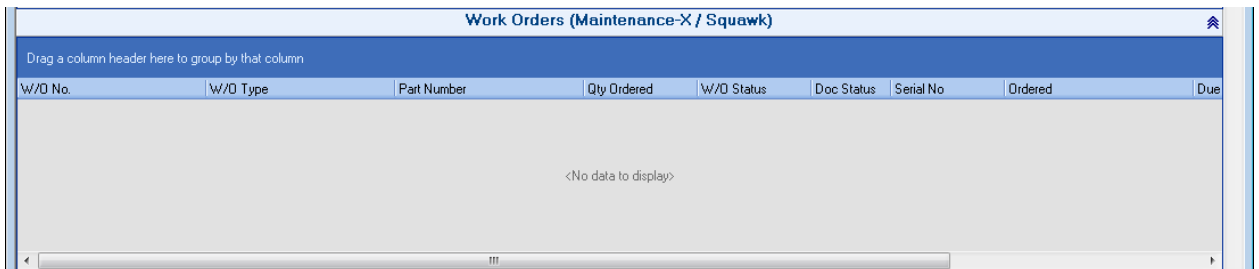
Opportunity ID	Status	Subject	Owner Name	Account Name	Type	Type Description
<No data to display>						

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



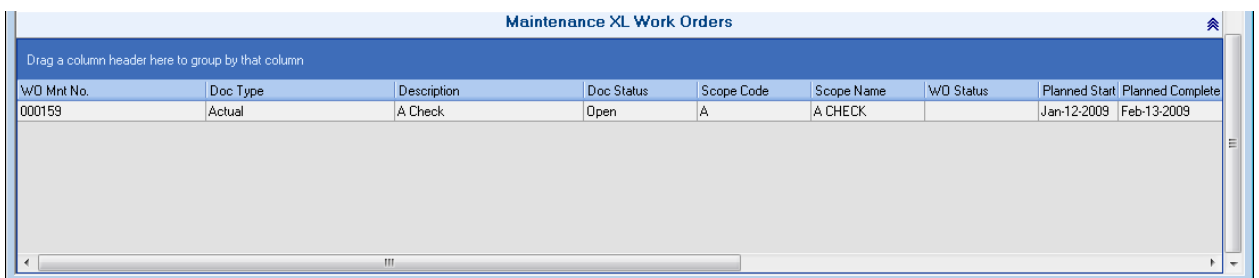
Case No.	Owner	Type	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product
<No data to display>									

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



W/O No.	W/O Type	Part Number	Qty Ordered	W/O Status	Doc Status	Serial No	Ordered	Due Date
<No data to display>								

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



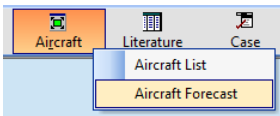
W/O Mnt No.	Doc Type	Description	Doc Status	Scope Code	Scope Name	W/O Status	Planned Start	Planned Complete
000159	Actual	A Check	Open	A	A CHECK		Jan-12-2009	Feb-13-2009

CONTINUE TO NEXT PAGE

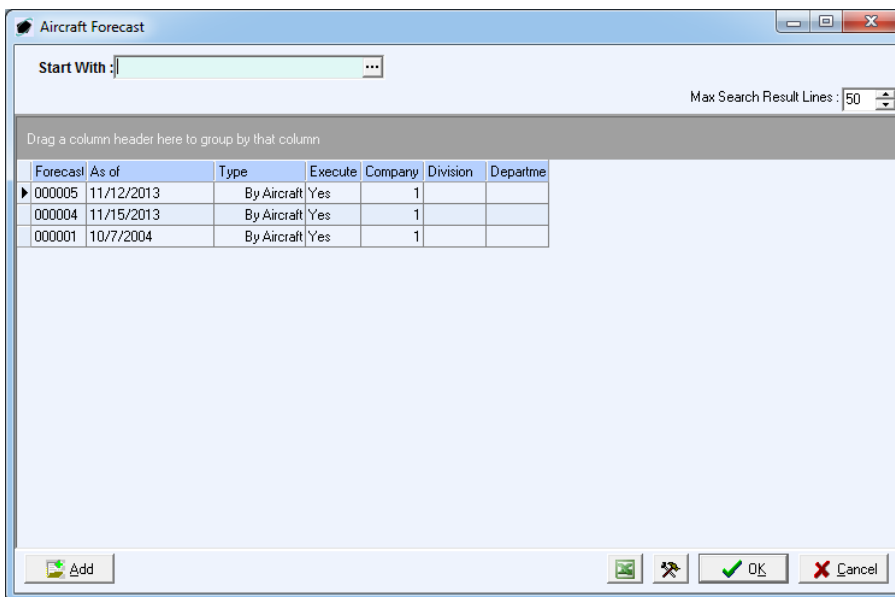
8. Aircraft Forecast

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**.



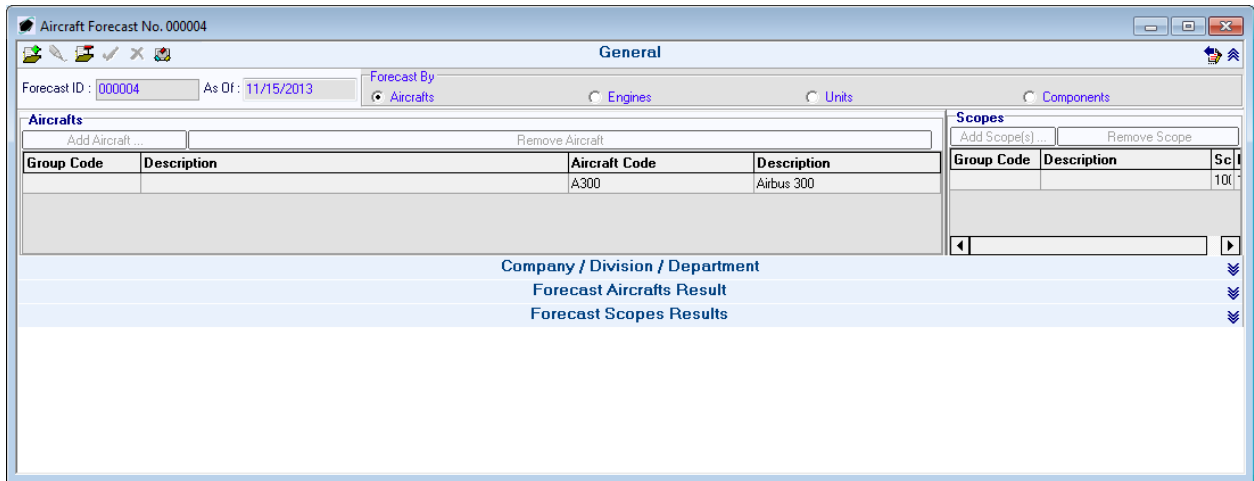
- b. The **Aircraft Forecast** search window will appear.



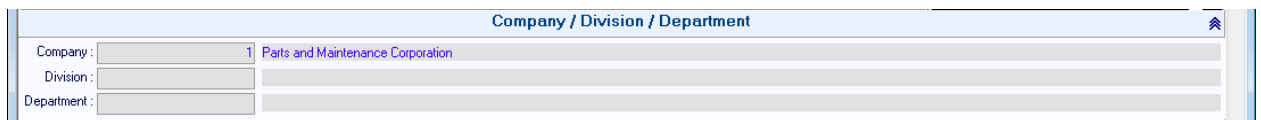
- c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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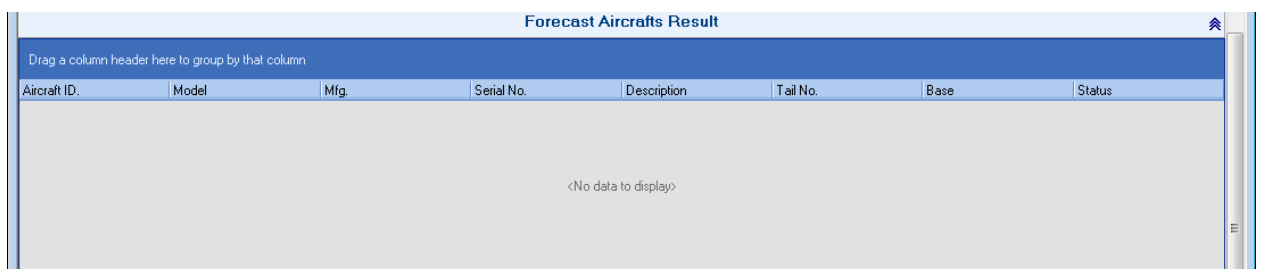
d. The **Aircraft Forecast** window will appear.



- 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.

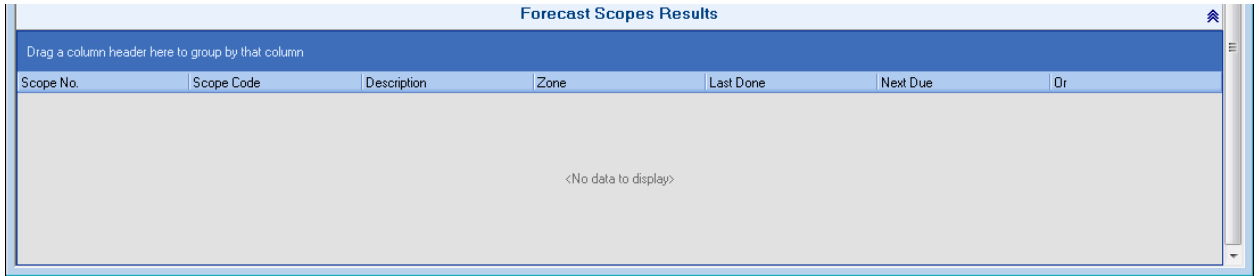


- iii. **Forecast Aircrafts Results** section – Displays all aircraft for which the forecast applies and applicable maintenance is due as of the forecast date.



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



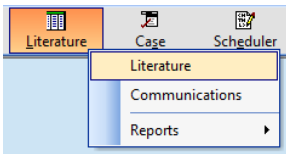
Forecast Scopes Results						
Drag a column header here to group by that column						
Scope No.	Scope Code	Description	Zone	Last Done	Next Due	Or
<No data to display>						

CONTINUE TO NEXT PAGE

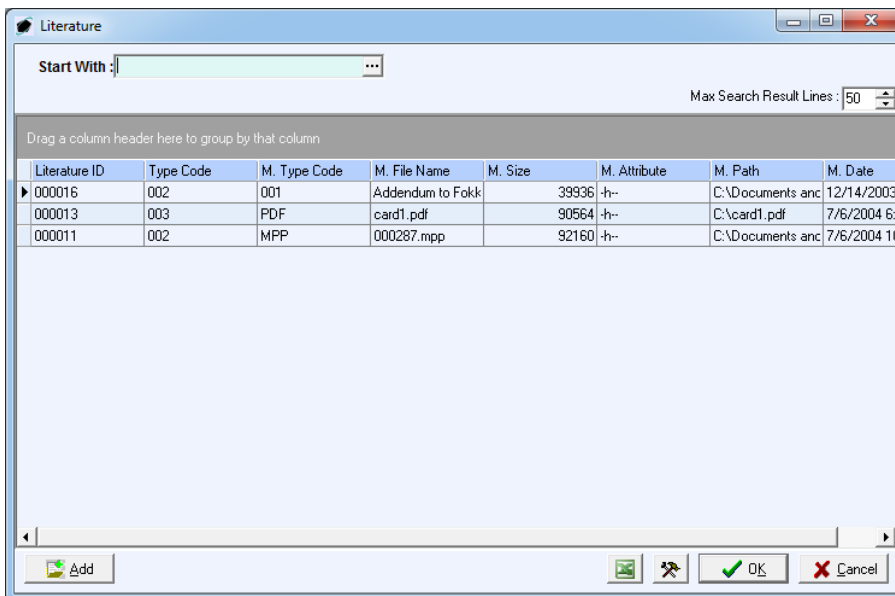
9. Literature Manager

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**.



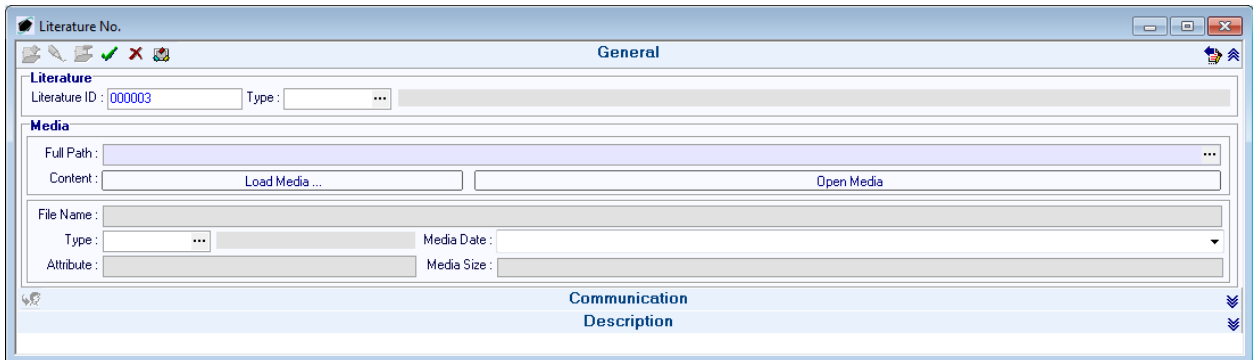
- b. The **Literature** search window will appear.



- 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.

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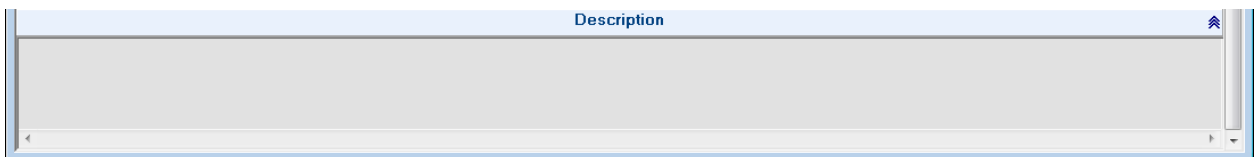
d. The **Literature** window will appear.



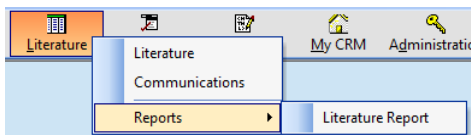
- i. **General** section - Displays general information about the literature item.
- ii. **Communications** section – Displays all communications related to the literature item.



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**.

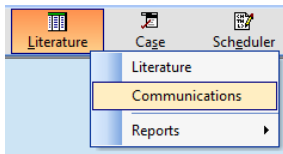


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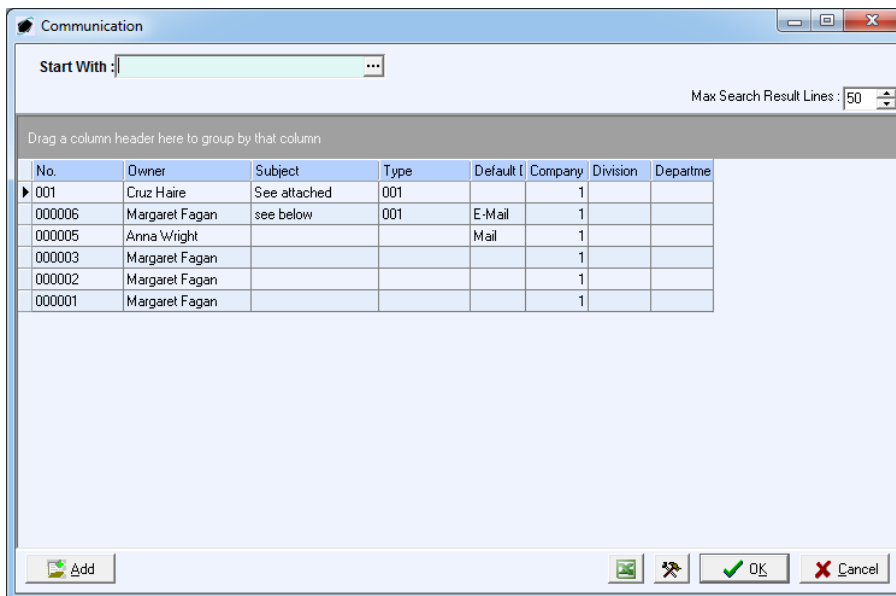
10. Communication Manager

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.



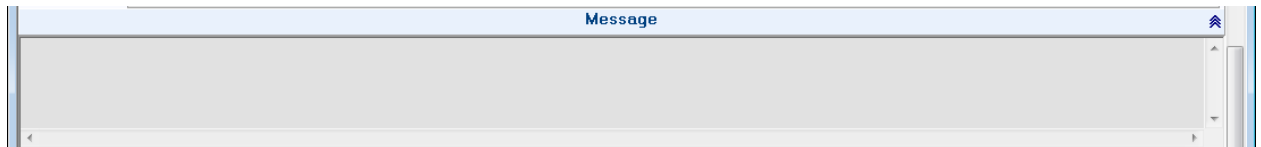
- c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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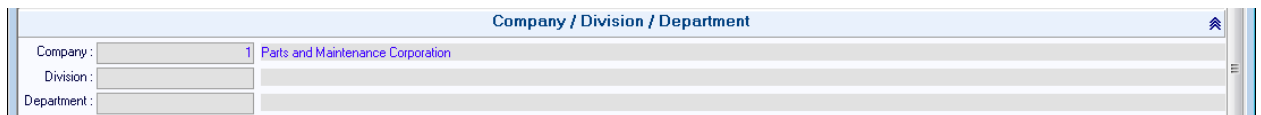
d. The **Literature** window will appear.



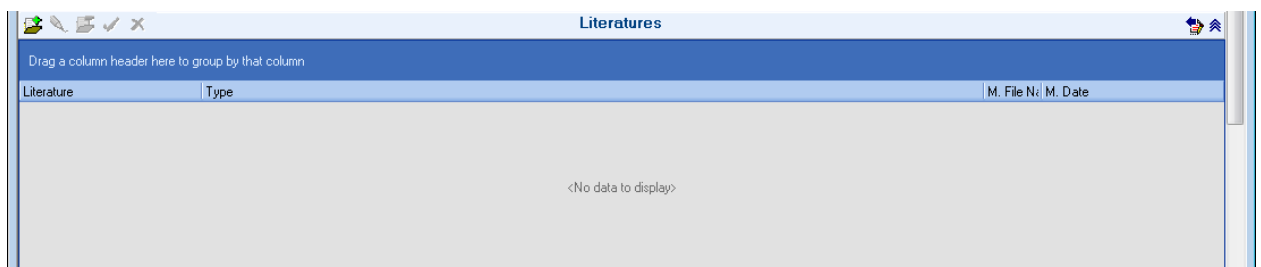
- i. **General** section - Displays general information about the communication.
- ii. **Message** section – Displays the message that will accompany the communication.



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

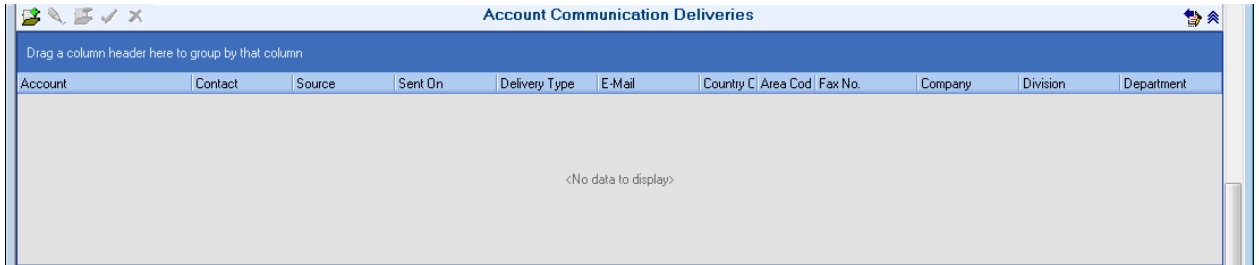


- iv. **Literatures** section – Displays all literature items related to the communication.



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



Account Communication Deliveries

Drag a column header here to group by that column

Account	Contact	Source	Sent On	Delivery Type	E-Mail	Country C	Area Cod	Fax No.	Company	Division	Department
<No data to display>											

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



Contact Communication Deliveries

Drag a column header here to group by that column

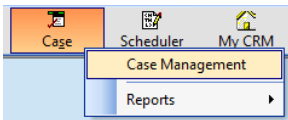
Name	Sent On	Delivery Type	E-Mail	Country Code	Area Code	Fax No.
<No data to display>						

CONTINUE TO NEXT PAGE

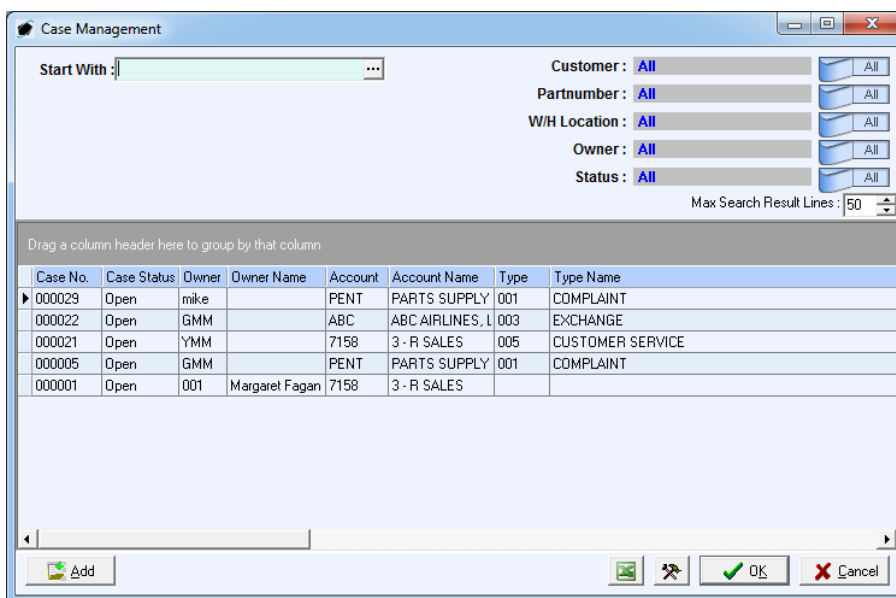
11. Case Manager

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.



Case Management

Start With: []

Customer: All [All]

Partnumber: All [All]

W/H Location: All [All]

Owner: All [All]

Status: All [All]

Max Search Result Lines: 50

Drag a column header here to group by that column

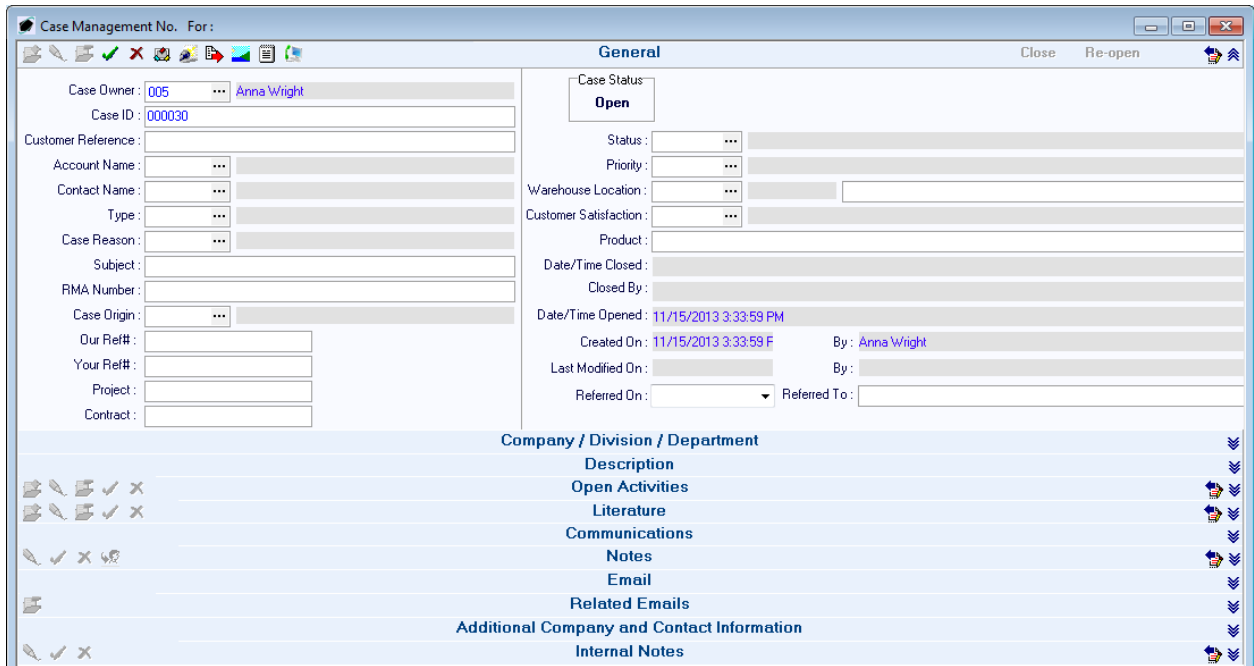
Case No.	Case Status	Owner	Owner Name	Account	Account Name	Type	Type Name
000029	Open	mike		PENT	PARTS SUPPLY	001	COMPLAINT
000022	Open	GMM		ABC	ABC AIRLINES, L	003	EXCHANGE
000021	Open	YMM		7158	3 - R SALES	005	CUSTOMER SERVICE
000005	Open	GMM		PENT	PARTS SUPPLY	001	COMPLAINT
000001	Open	001	Margaret Fagan	7158	3 - R SALES		

Add [OK] [Cancel]

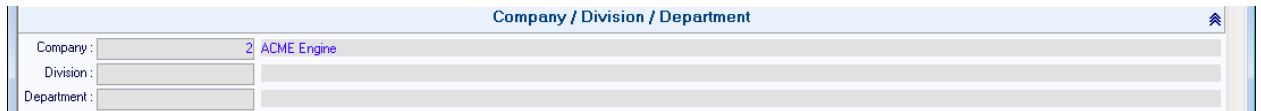
- c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

CONTINUE TO NEXT PAGE

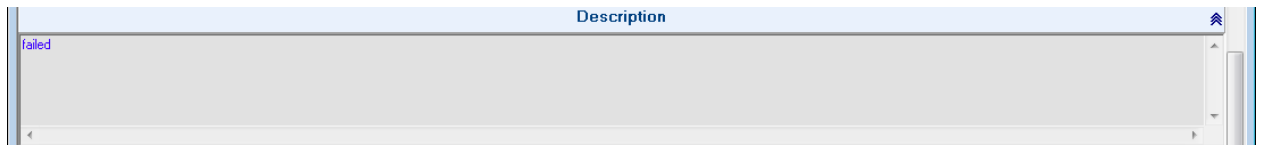
d. The **Case Management** window will appear.



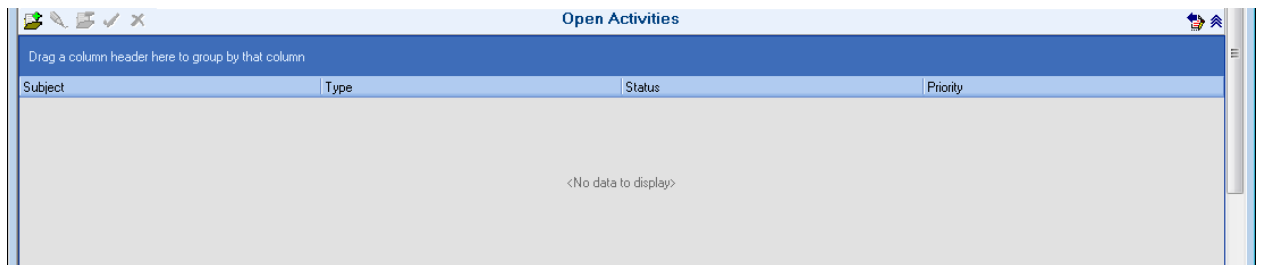
- i. General section – Displays general information about the case.
- ii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the case is associated.



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



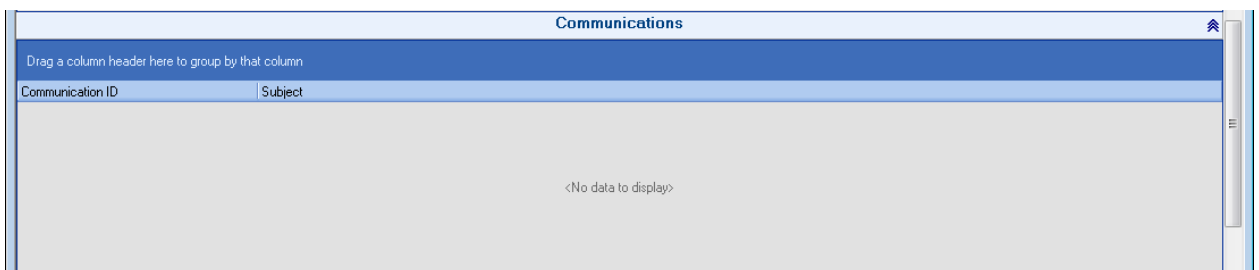
- iv. **Open Activities** section – Enables recording of pending activities related to the case.



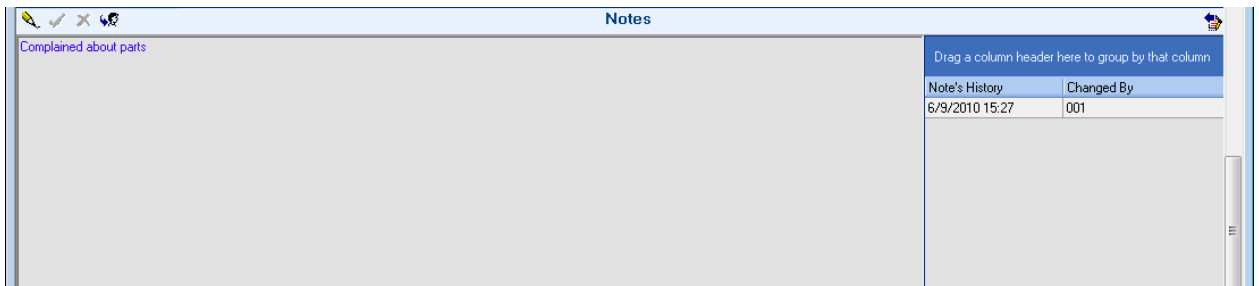
- v. **Literature** section – Displays all literature items related to the case.



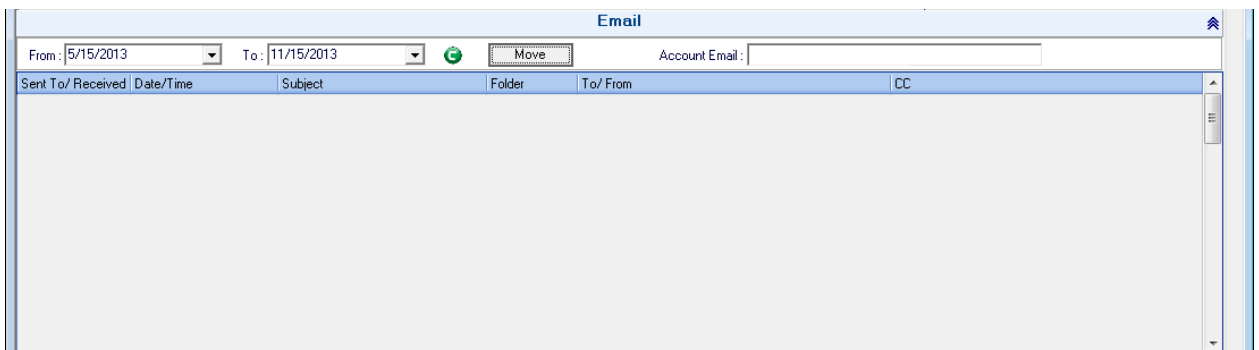
- vi. **Communications** section – Displays all communications related to the case.



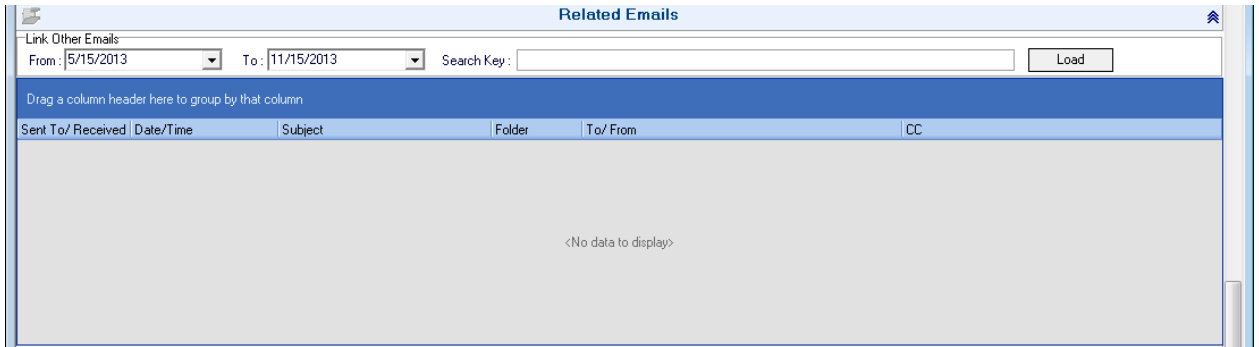
- vii. **Notes** section – Enables general notes to be recorded about the case; a change history of those notes is also included.



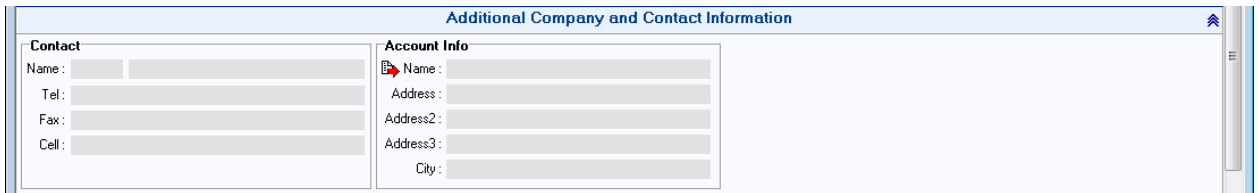
- viii. **Emails** section – Displays emails related to the case.



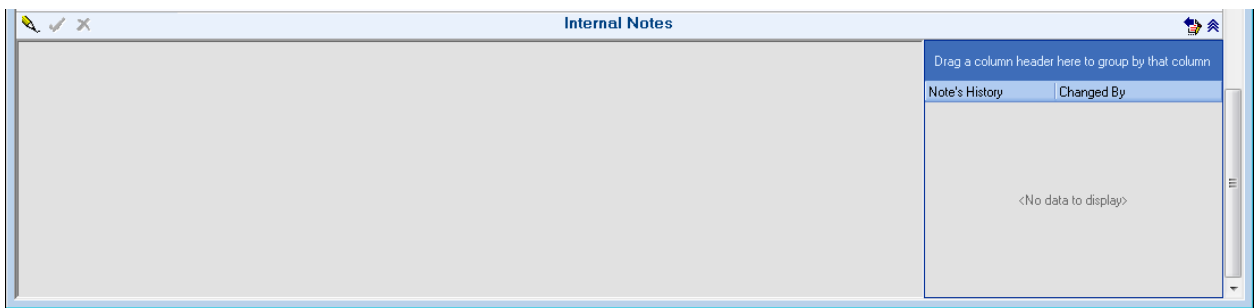
ix. **Related Emails** section – Displays emails related to the case.



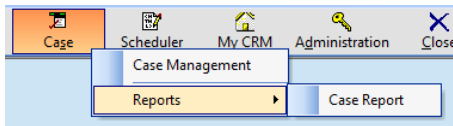
x. **Additional Company and Contact Information** section – Displays information related to the customer account and contact identified in the general section of the case.



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.



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

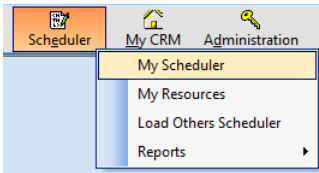


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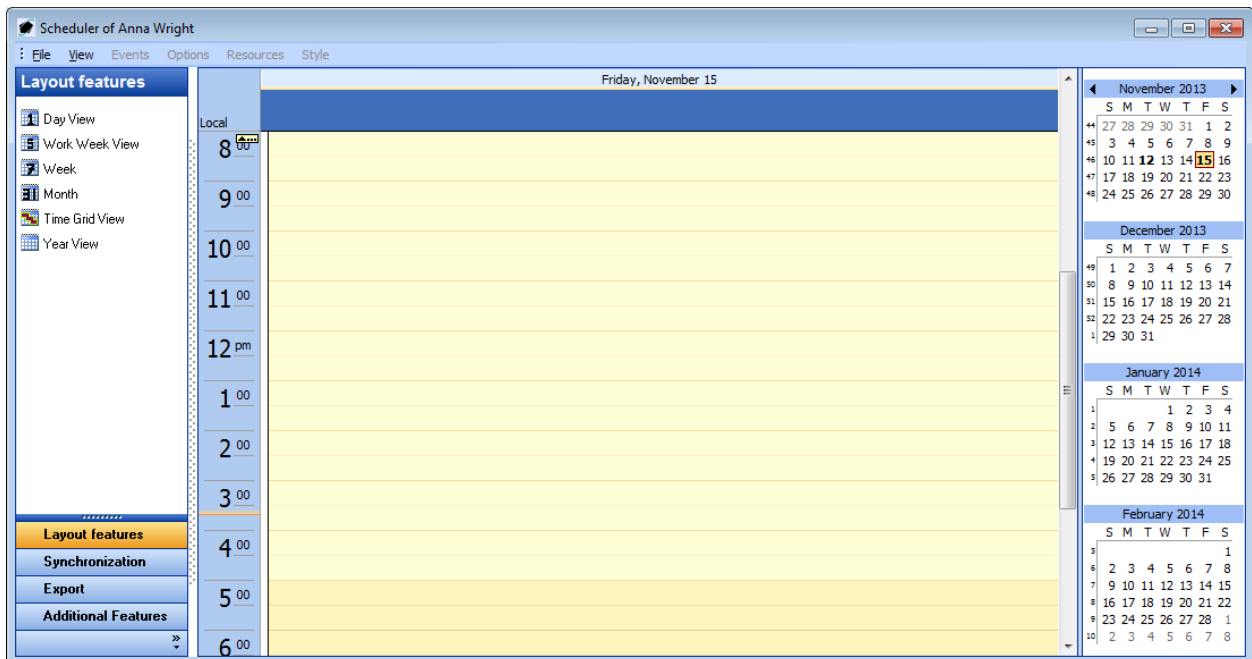
12. Scheduler

Enables the management of your schedule and employed resources.

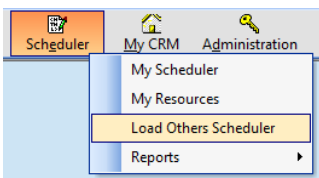
- a. From the CRM toolbar, left-click the **Scheduler** button and left-click **My Scheduler**.



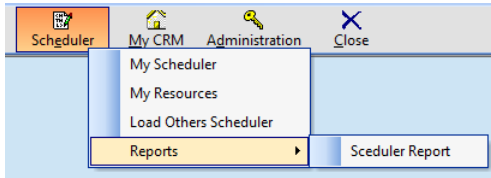
- b. The **Scheduler** window will appear. Events may be added and may be assigned to resources.



- 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**.

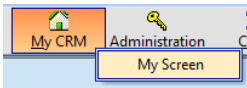


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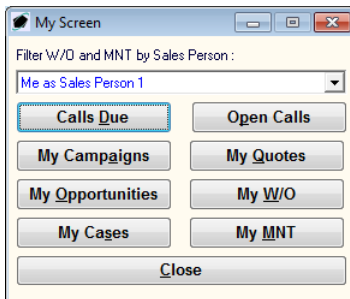
13. My CRM

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.



- 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.

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