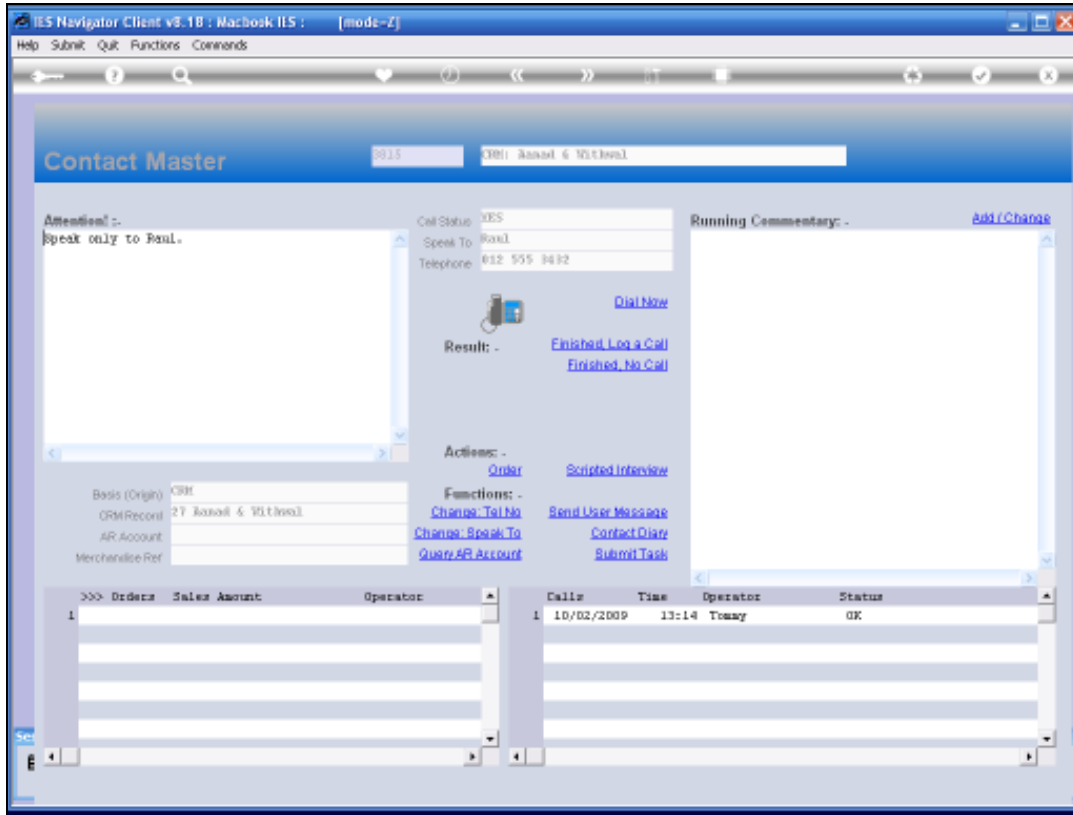


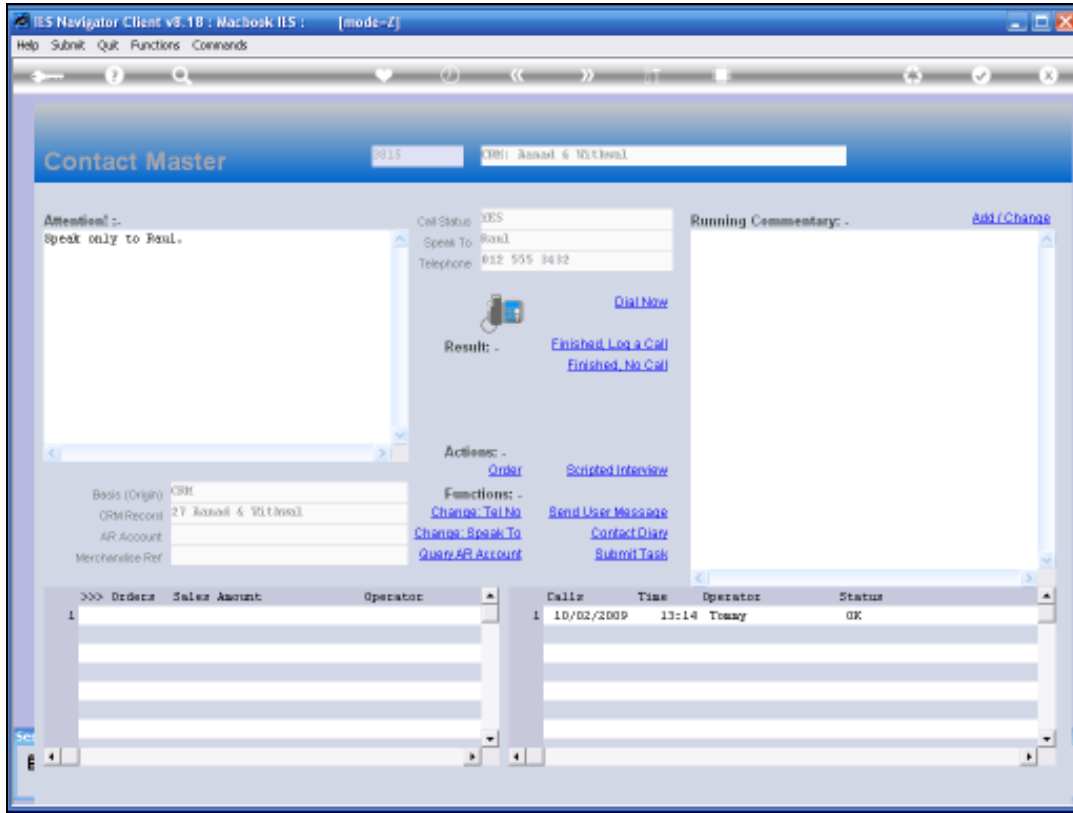
Slide 1

Slide notes: Customer Relationship Management is called CRM, and there are a number of CRM functions available on the AP master screen. The 1st option we look at is for Contact Management.

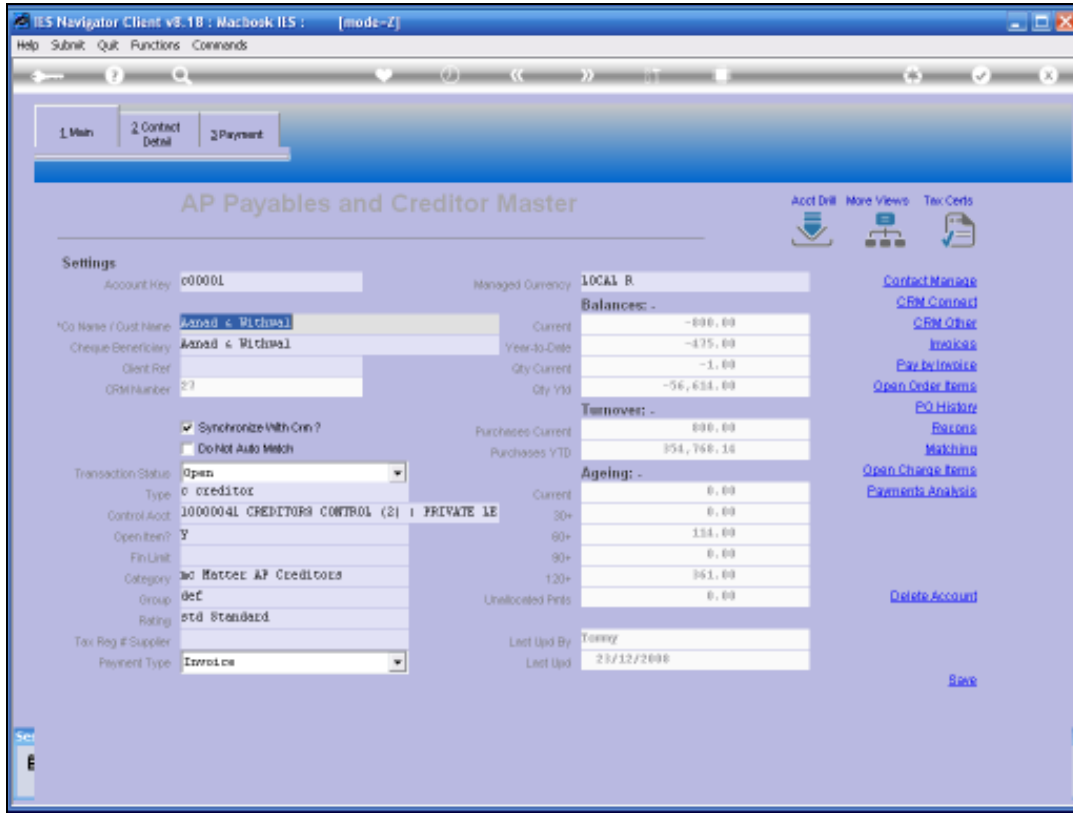


Slide 2

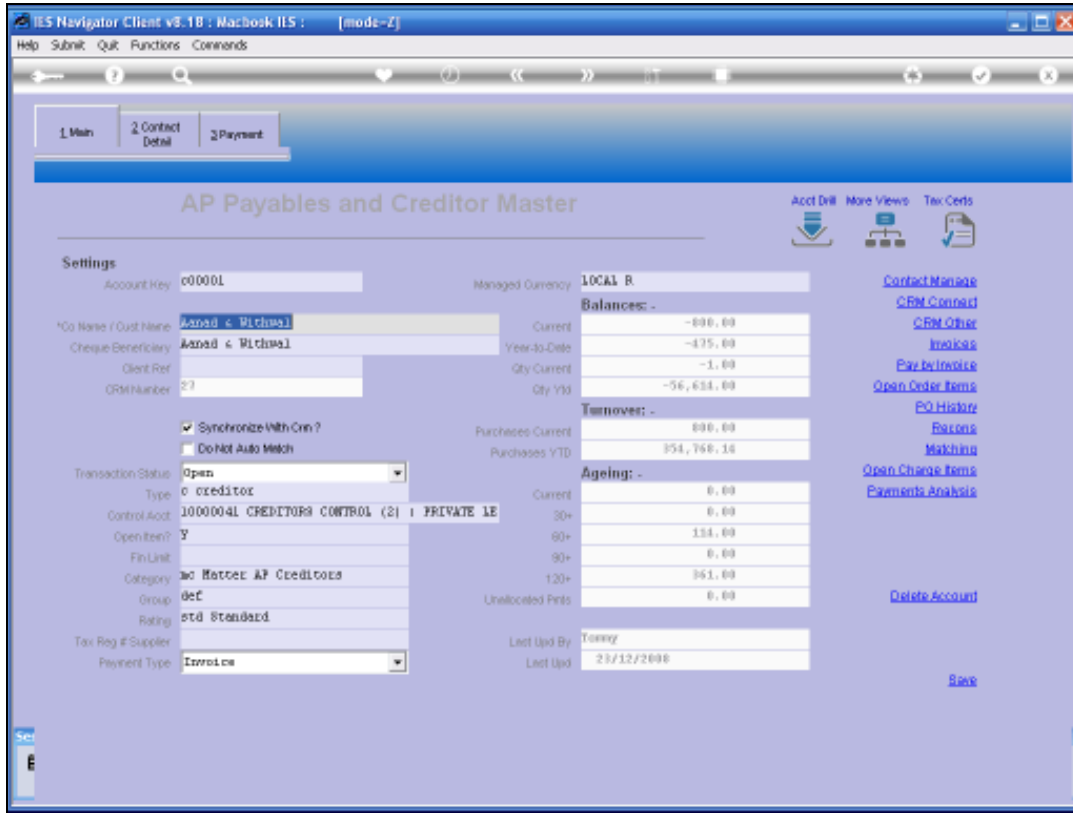
Slide notes: When we enter this Function, we can call the Supplier, take notes, and perform various contact management functions.



Slide 3
Slide notes:

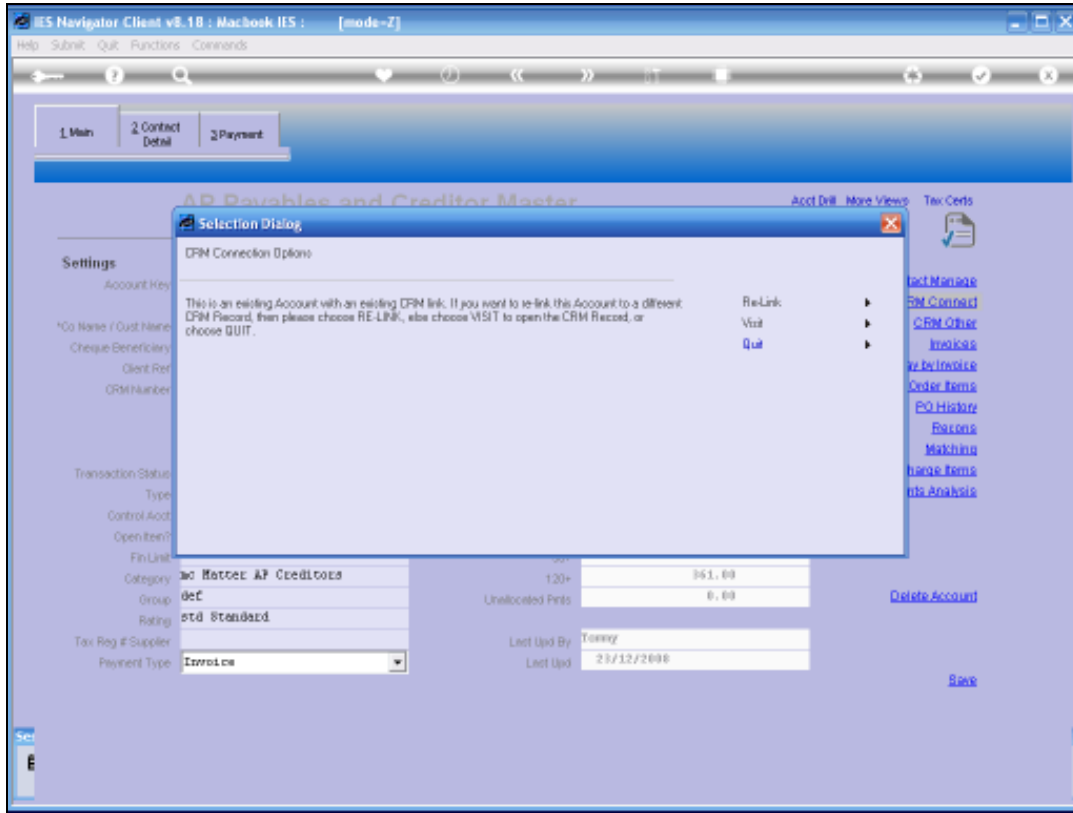


Slide 4
Slide notes:



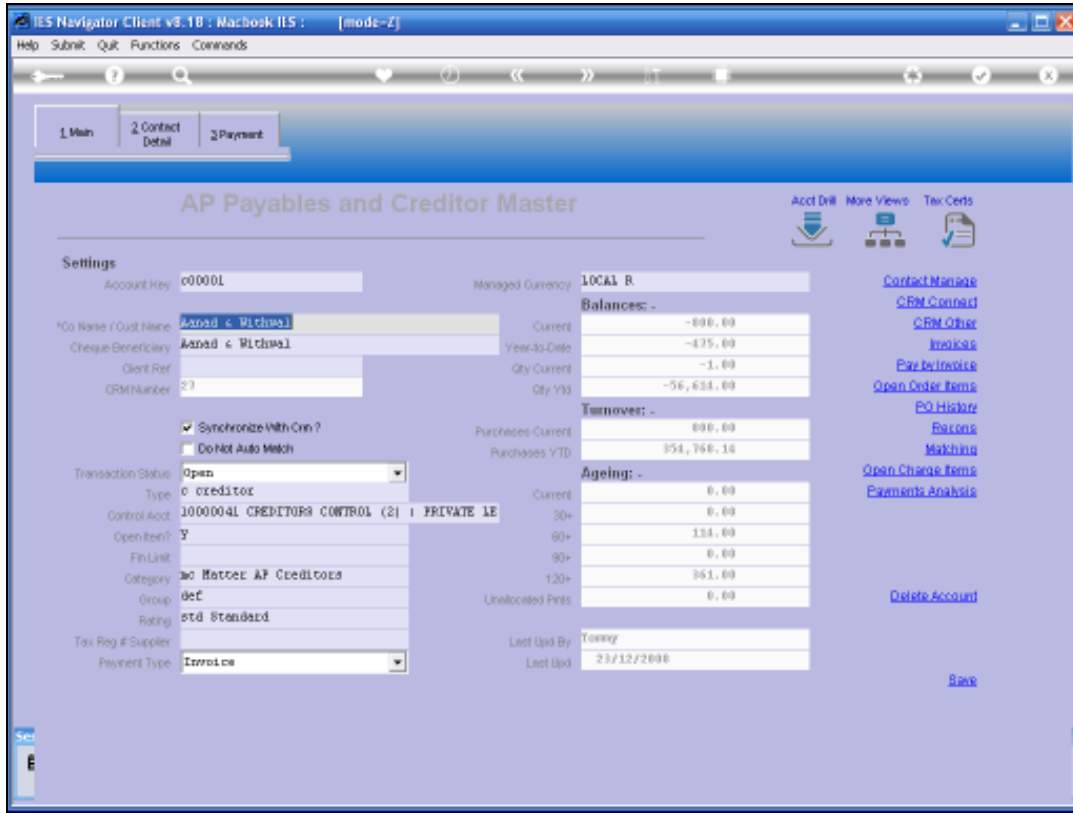
Slide 5

Slide notes: The CRM Connect function will reveal a number of options.



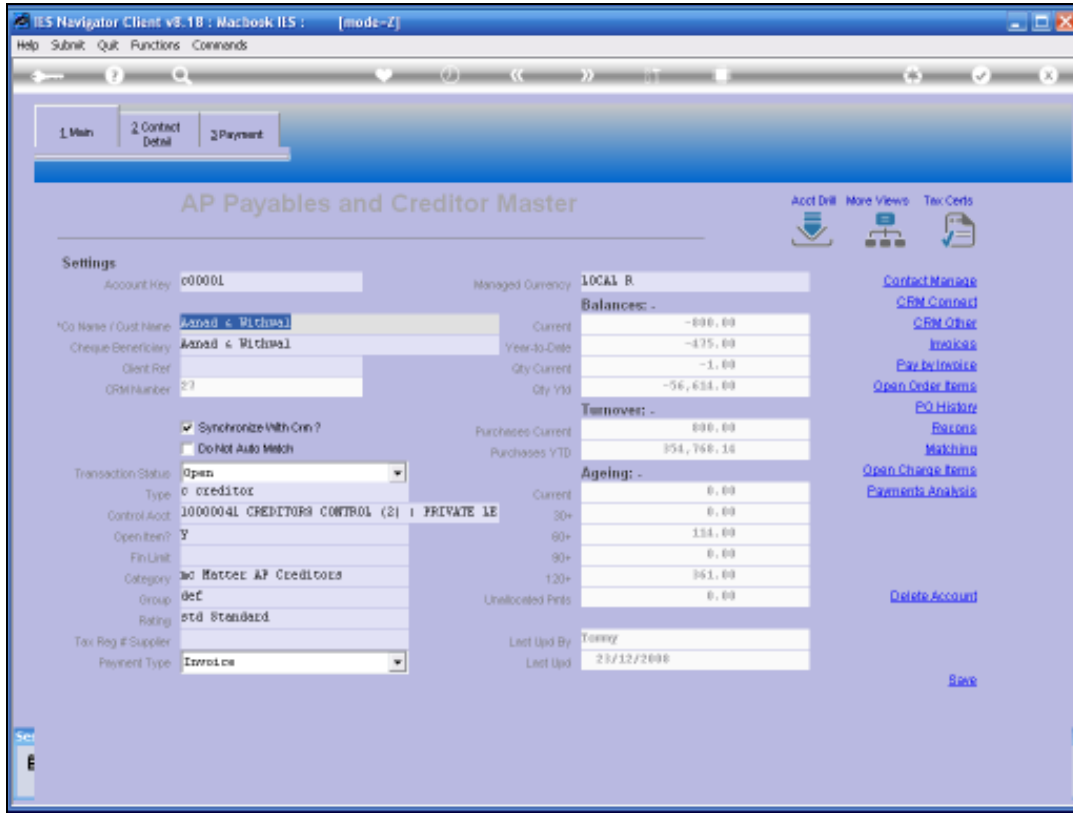
Slide 6

Slide notes: Since there is already a connected CRM record for this Account, we have an option to re-link to a different CRM, or simply to open the CRM Master record for this Account.

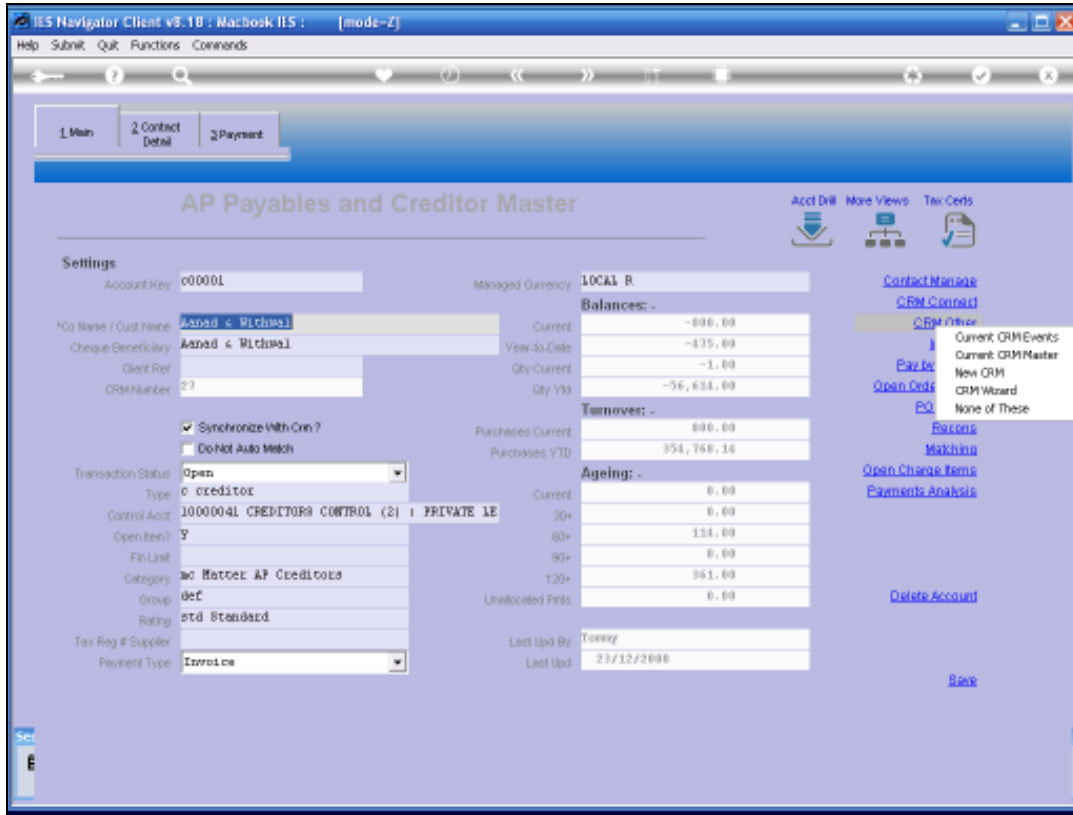


Slide 7

Slide notes: Note the CRM Account Number that is already indicated for this AP Account.

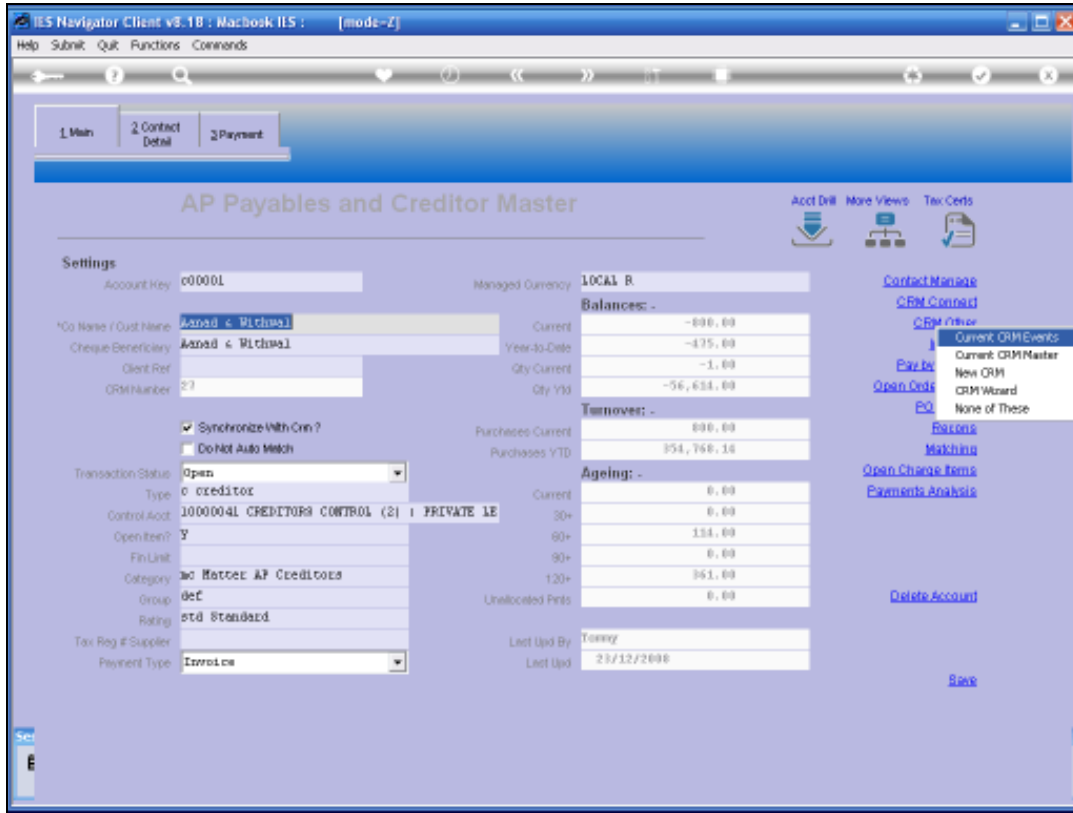


Slide 8
Slide notes:

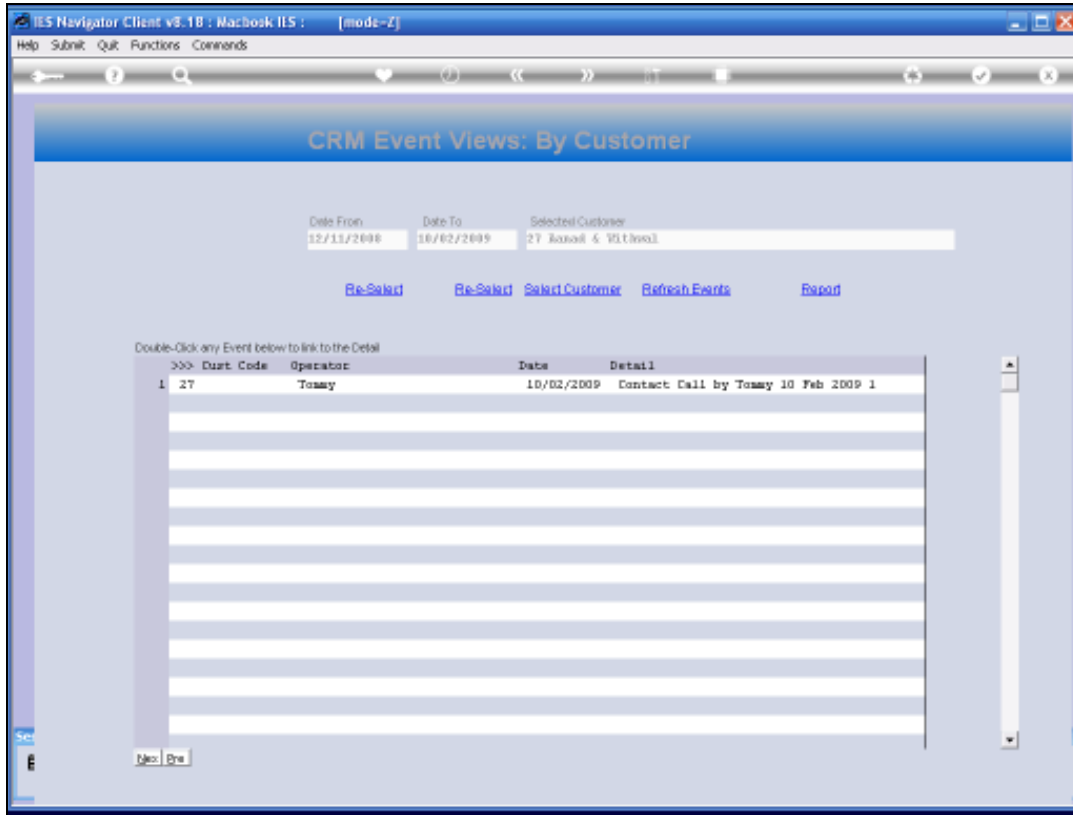


Slide 9

Slide notes: At the "CRM Other" function, we have also a number of functions. We look first at the CRM Events.

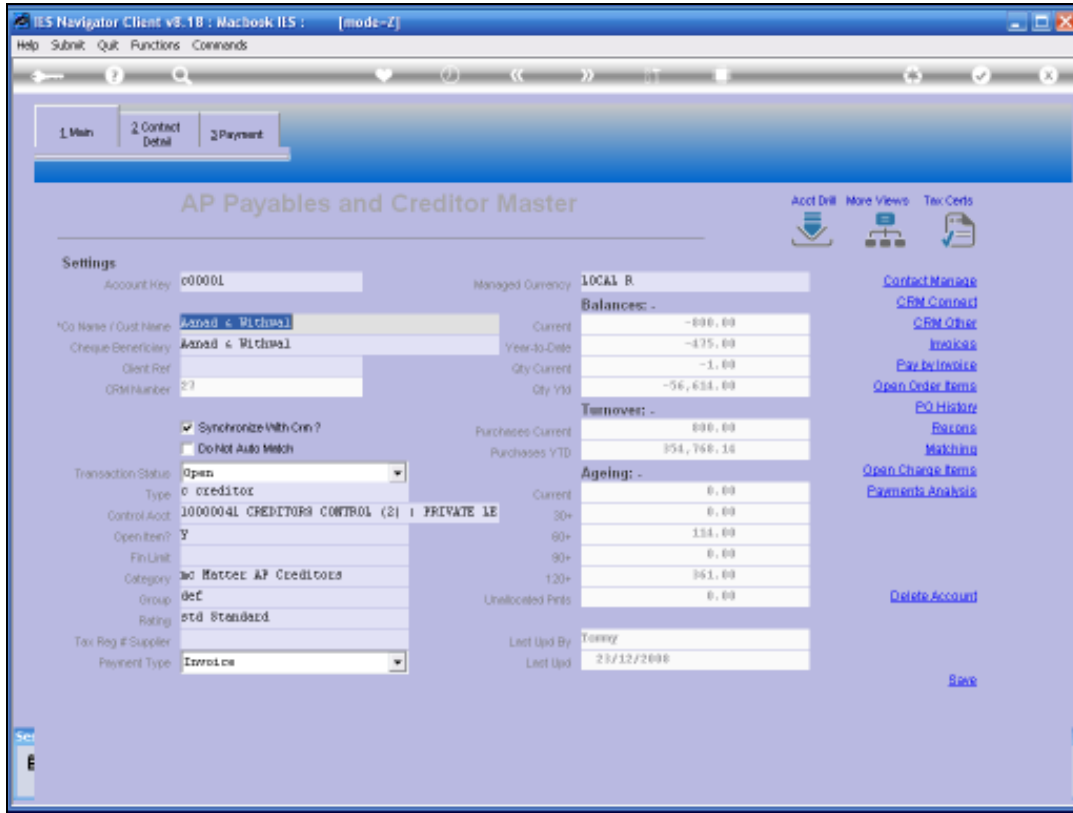


Slide 10
Slide notes:



Slide 11

Slide notes: Among other possible events that may be listed, we will also see any Contact Management calls that have been logged.

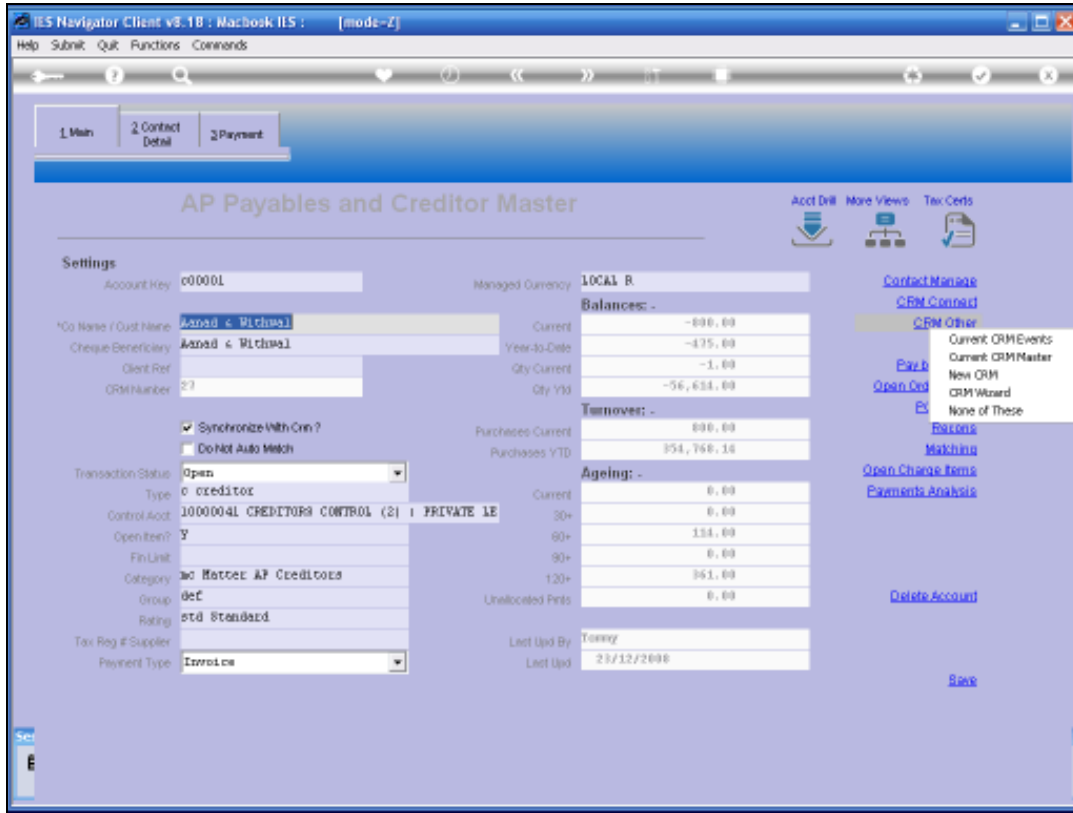


Slide 12
Slide notes:

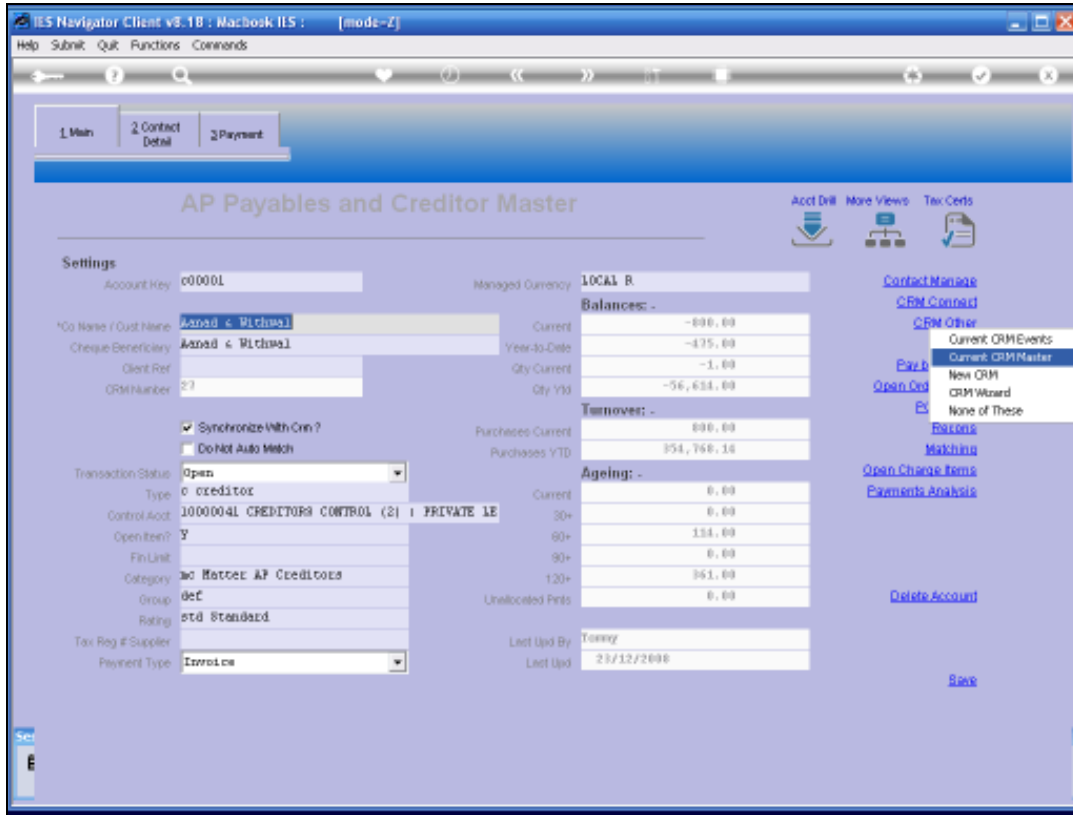
The screenshot displays the 'AP Payables and Creditor Master' interface in the IES Navigator Client. The window title is 'IES Navigator Client v8.10 : Macbook IES : [mode-Z]'. The interface includes a menu bar (Help, Submit, Quit, Functions, Commands), a breadcrumb trail (1 Main > 2 Contact Detail > 3 Payment), and a toolbar with icons for 'Acct Drill', 'More Views', and 'Tax Certs'. The main content area is divided into several sections:

- Settings:** Fields for Account Key (c0000L), Managed Currency (LOCAL B), *Co Name / Cust Name (Aasad & Richard), Cheque Beneficiary (Aasad & Richard), Client Ref, CRM Number (27), Synchronize With Crm? (checked), Do Not Auto Match, Transaction Status (Open), Type (creditor), Control Acct (1000004L CREDITORS CONTROL (2) | PRIVATE LE), Open Item? (Y), Fin List, Category (ac Matter AP Creditors), Group (def), Rating (std Standard), Tax Reg # Supplier, and Payment Type (Invoice).
- Summary Tables:**
 - Balances:** Current (-800.00), Year-to-Date (-475.00), Qty Current (-1.00), Qty YTD (-56,634.00).
 - Turnover:** Purchases Current (800.00), Purchases YTD (354,768.14).
 - Ageing:** Current (0.00), 30+ (0.00), 60+ (154.00), 90+ (0.00), 120+ (361.00), Unallocated Pmts (0.00).
- Metadata:** Last Upd By (Tony), Last Upd (23/12/2008).
- Actions:** Contact Manage, CRM Contact, CRM Other, Invoices, Pay by Invoice, Open Order Items, PO History, Returns, Making, Open Change Items, Payments Analysis, Delete Account, Save.

Slide 13
Slide notes:

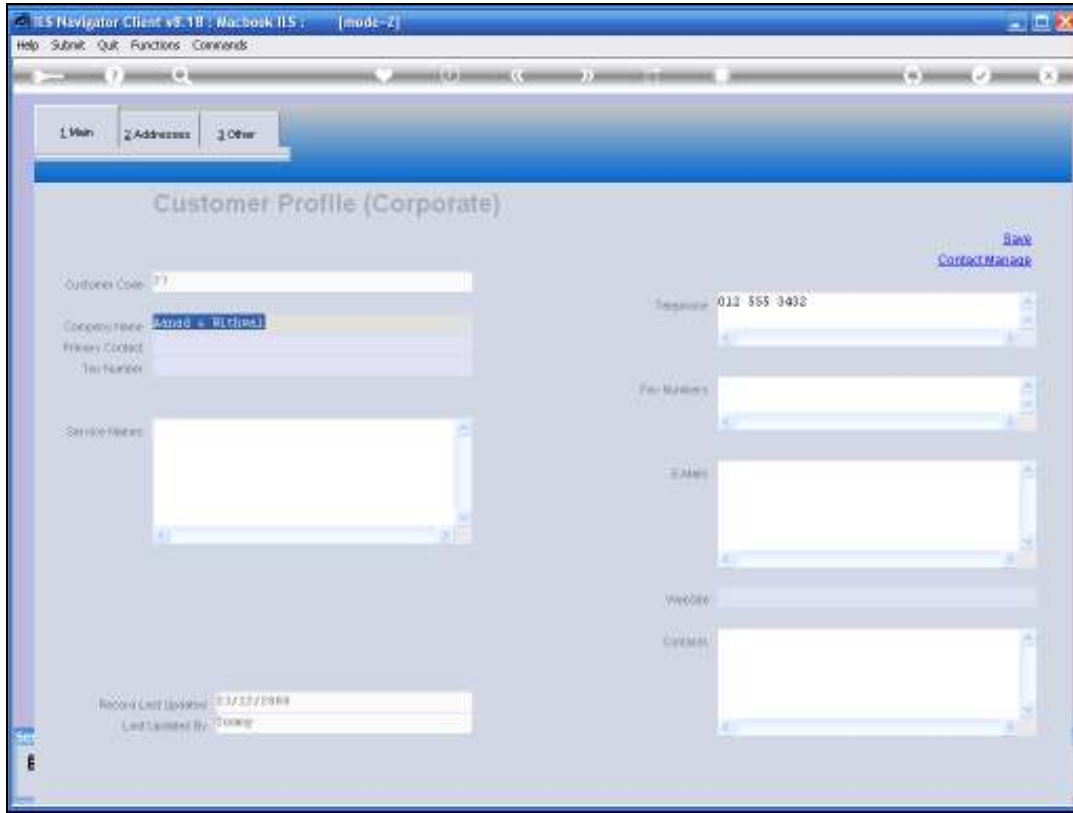


Slide 14
Slide notes:

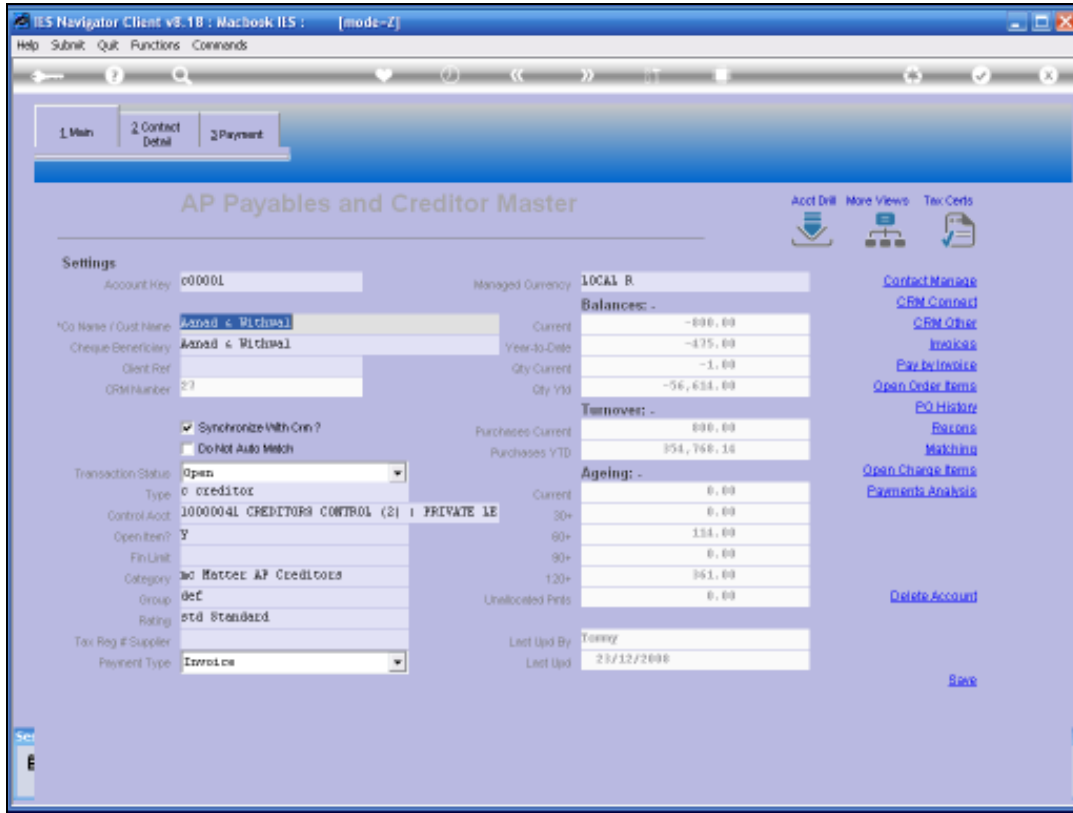


Slide 15

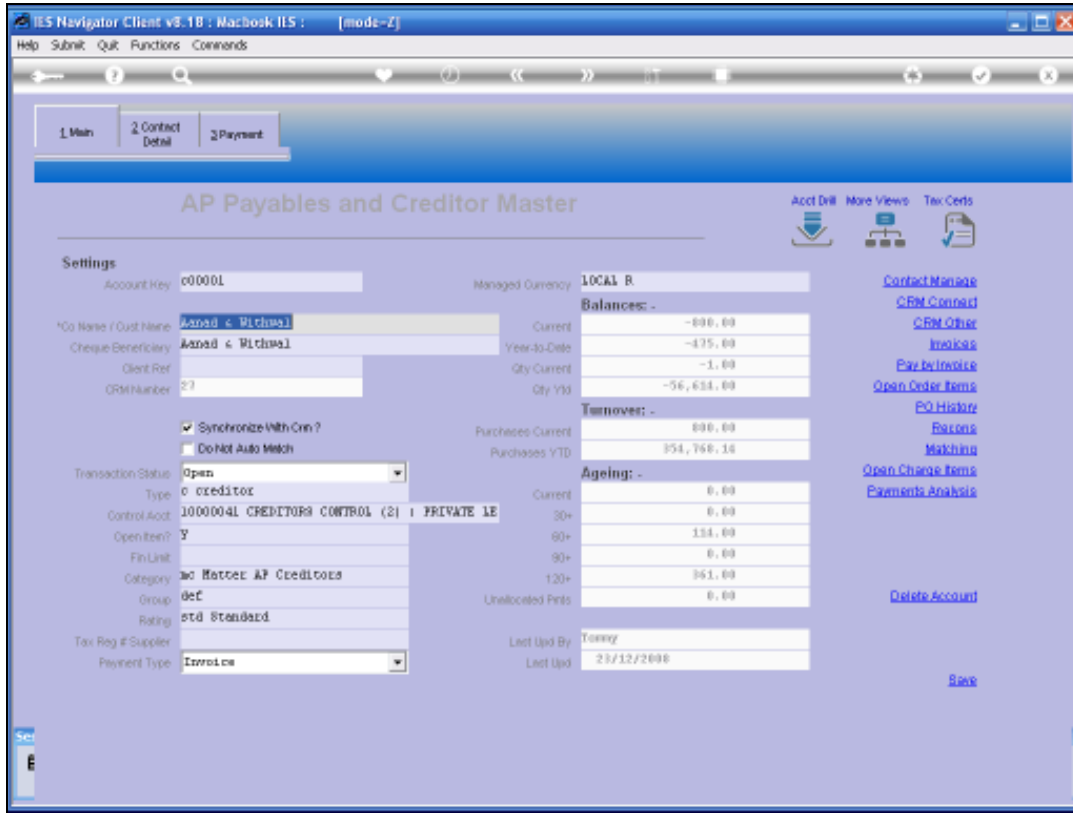
Slide notes: The "CRM Master" option will open the CRM Master record, and with the necessary access, we may perform file maintenance actions on the CRM record.



Slide 16
Slide notes:



Slide 17
Slide notes:



Slide 18

Slide notes: So we can directly access related CRM functions from the AP master screen.