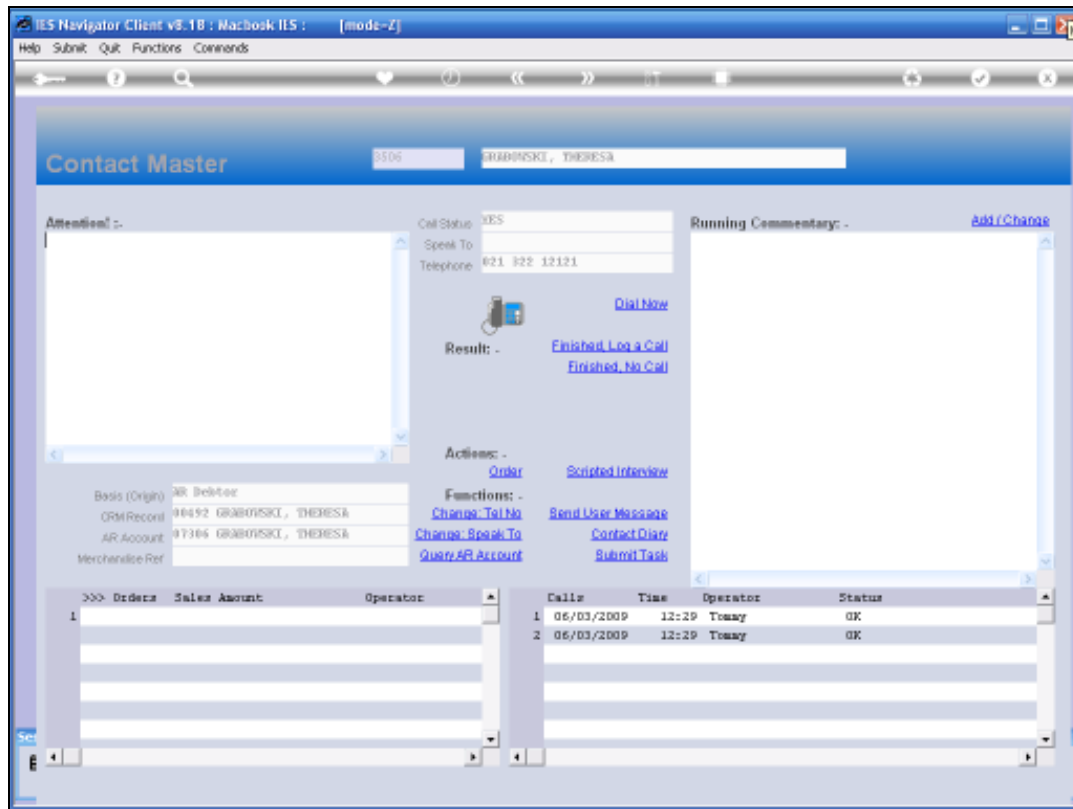


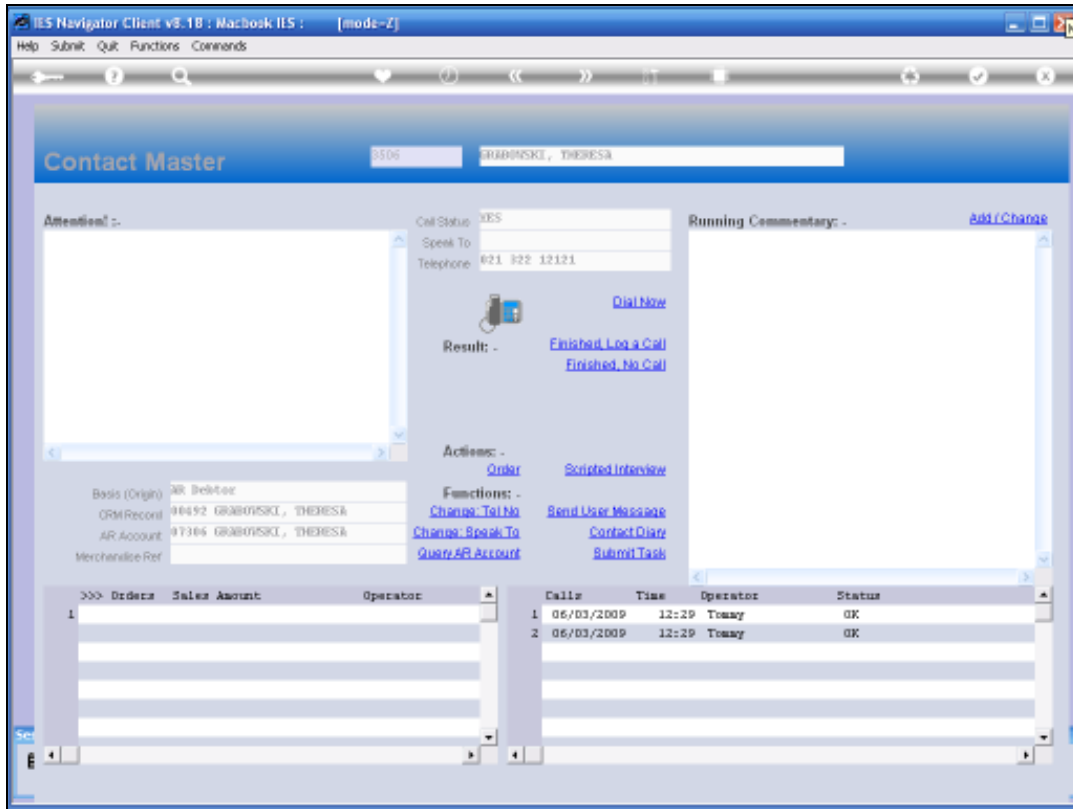
Slide 1

Slide notes: In this tutorial we will look at the available Customer Relationship Management functions on the AR Debtor master screen.

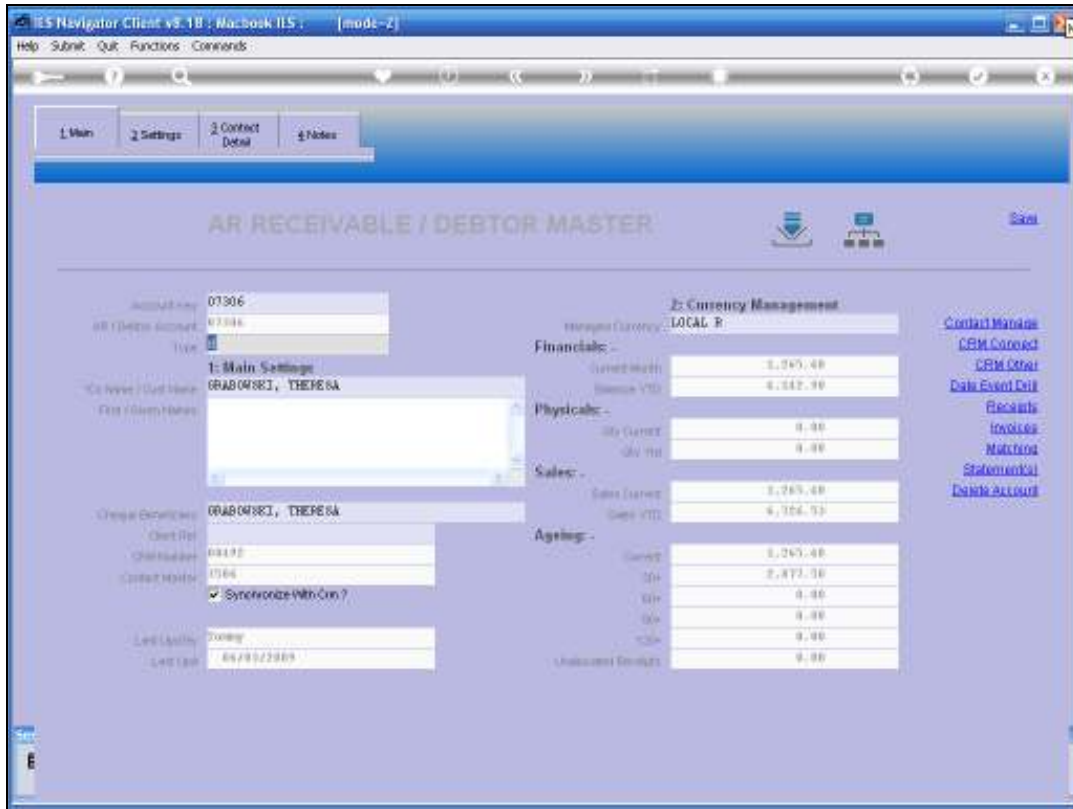


## Slide 2

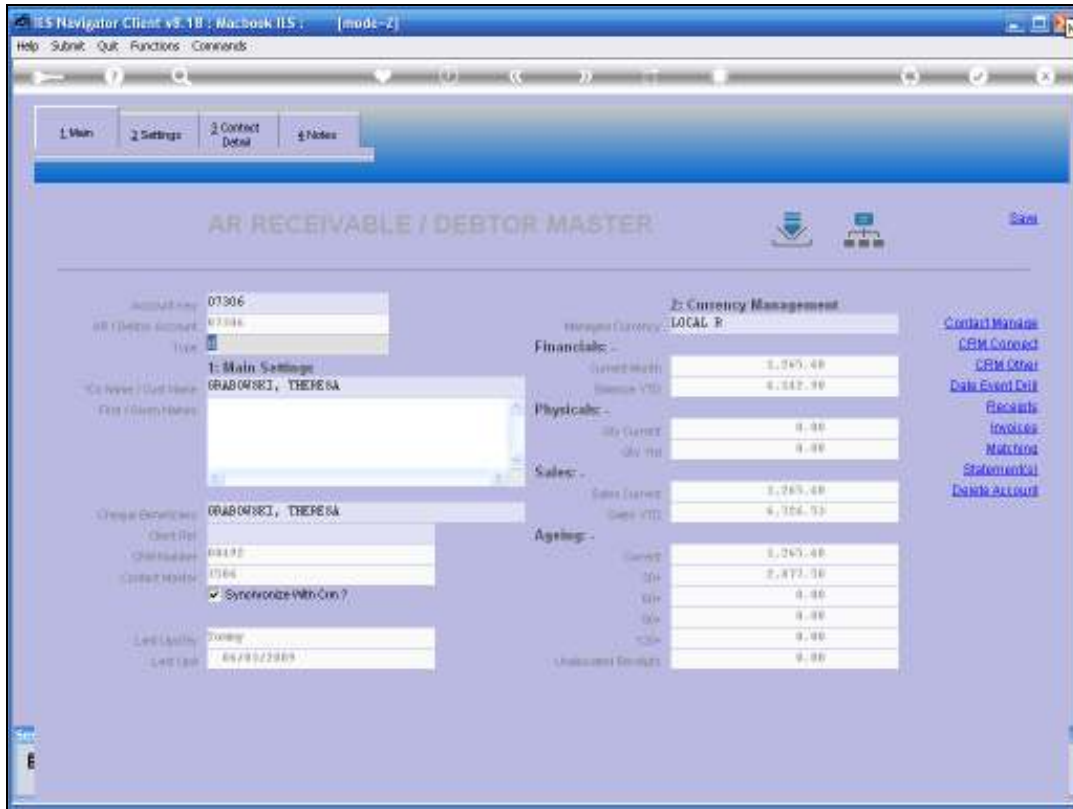
Slide notes: Contact Management is the 1st option we consider. With this option, we can call the Customer and keep track of what was discussed.



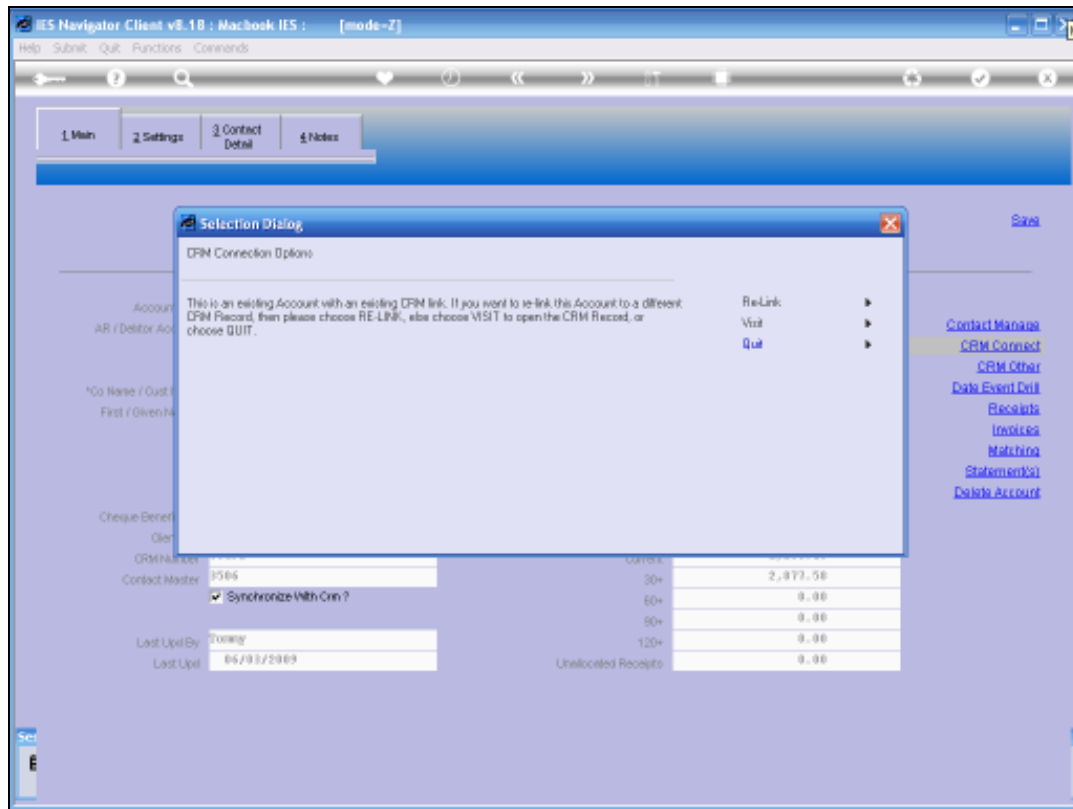
Slide 3  
Slide notes:



Slide 4  
Slide notes:

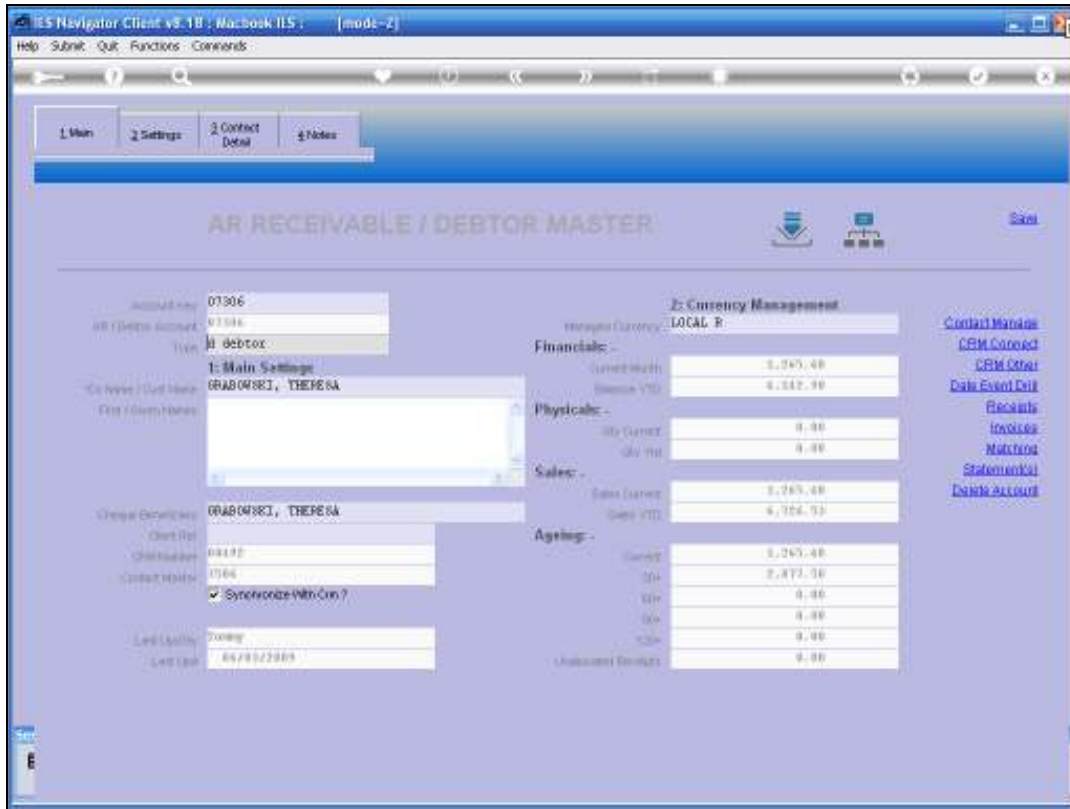


Slide 5  
Slide notes:

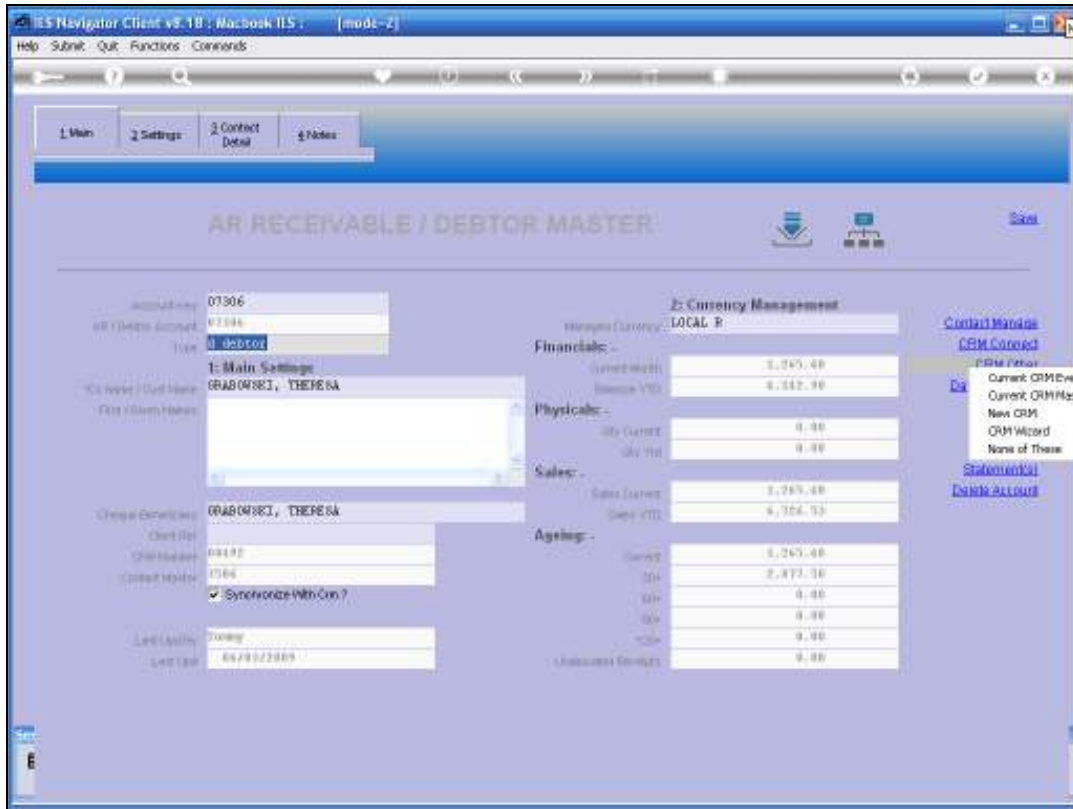


## Slide 6

Slide notes: The CRM Connect option will allow us to link a CRM record if there is none on the account yet, and if there is already a connection to CRM, as in this case, then we can re-link to another CRM record, or even visit the CRM record.

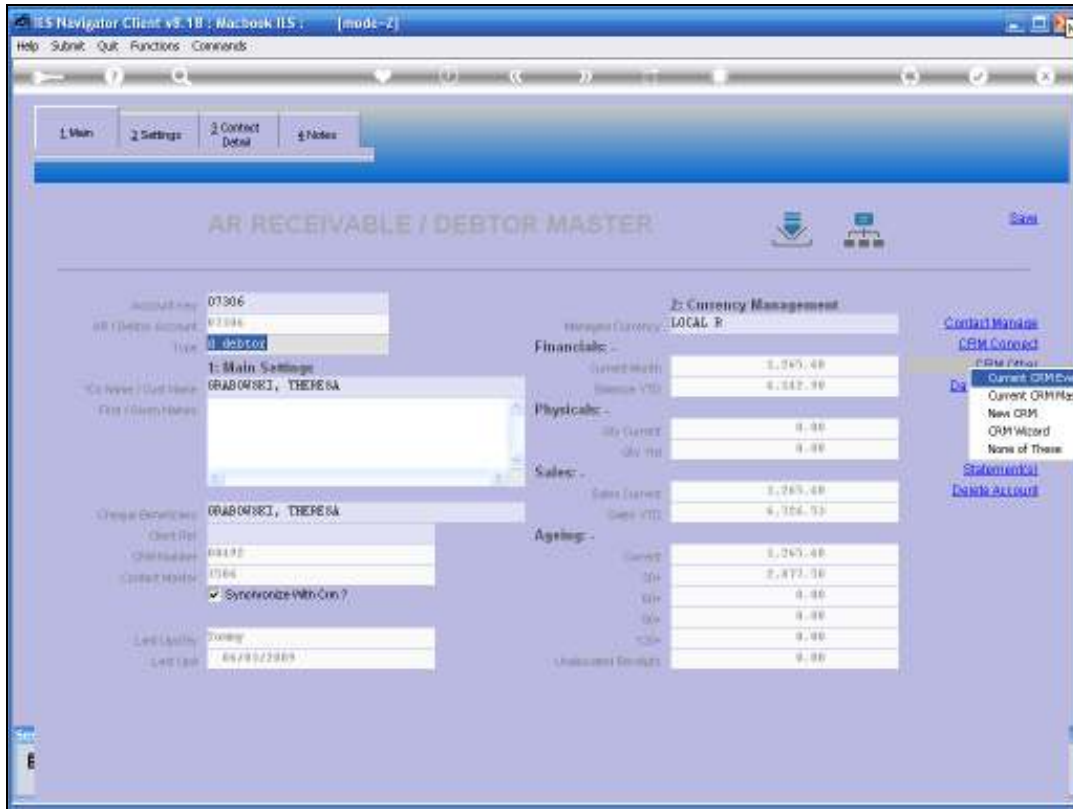


Slide 7  
Slide notes:

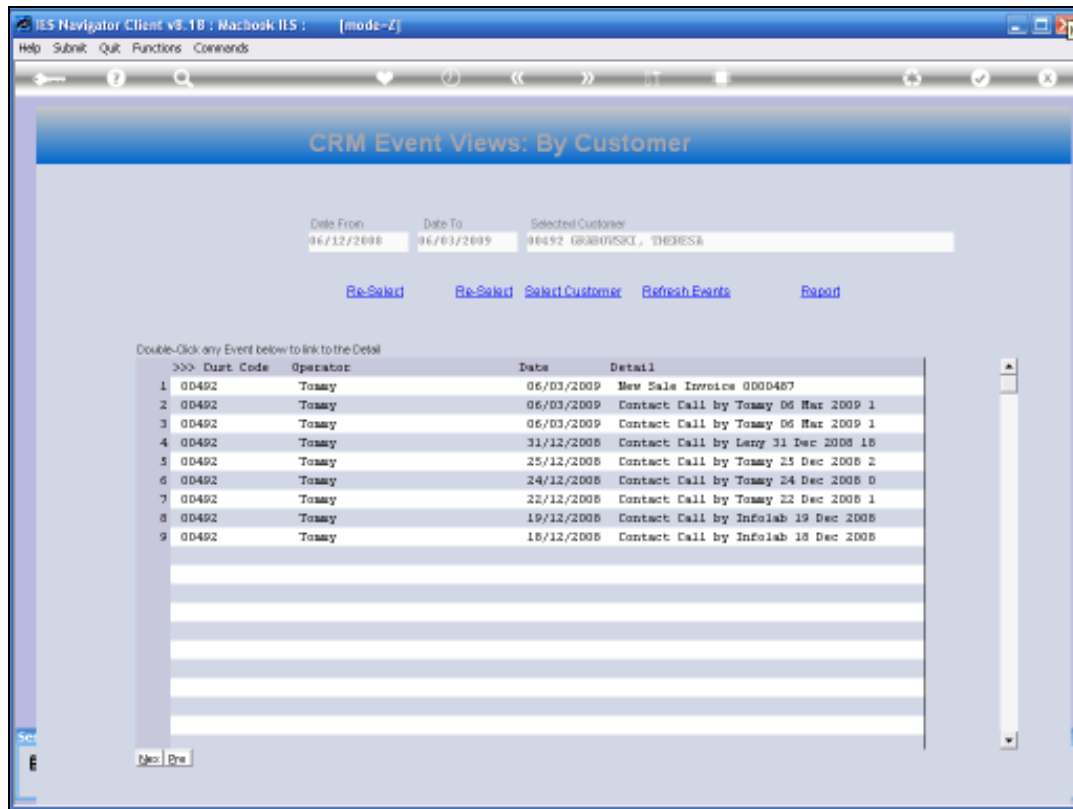


Slide 8

Slide notes: The CRM OTHER function will offer options to open the main CRM Wizard, create a new CRM record, open the currently linked CRM record, or to enter the current CRM Events log.



Slide 9  
Slide notes:



IES Navigator Client v8.1B : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

### CRM Event Views: By Customer

Date From: 06/12/2008 Date To: 06/03/2009 Selected Customer: 90492 GRABOWSKI, TERESA

[Re-Select](#) [Re-Select](#) [Select Customer](#) [Refresh Events](#) [Report](#)

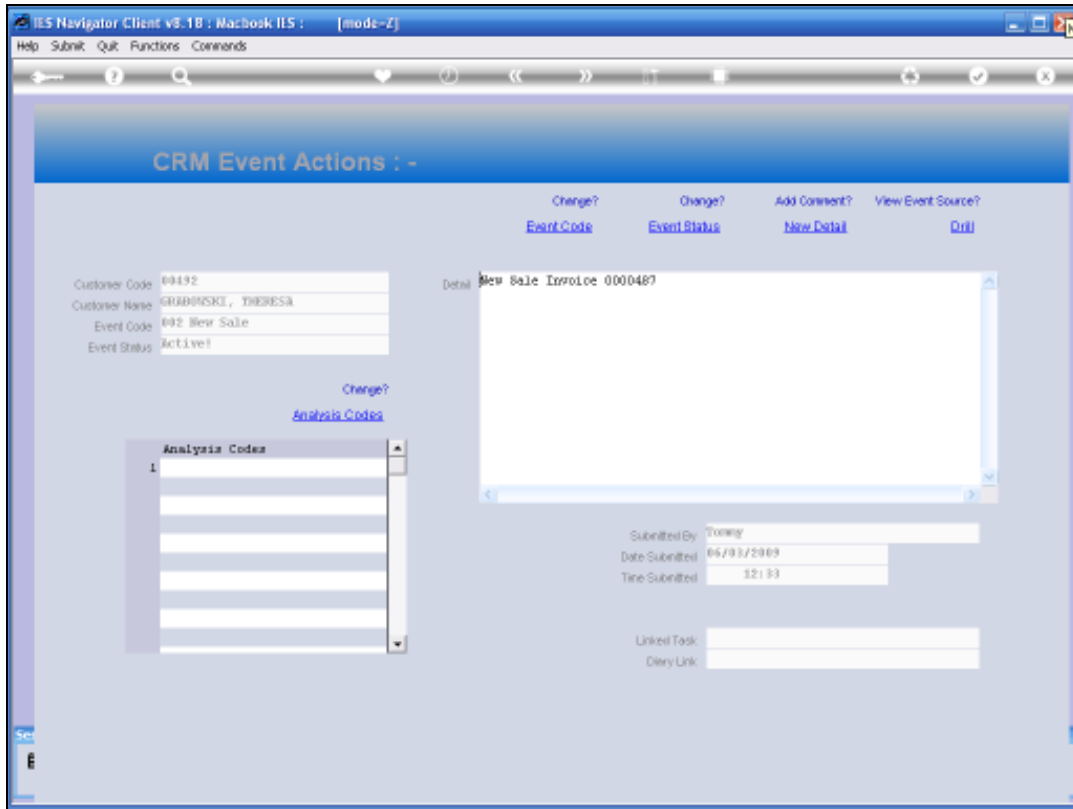
Double-Click any Event below to link to the Detail

	>>>	Cust Code	Operator	Date	Detail
1		00492	Tosmy	06/03/2009	New Sale Invoice 0000487
2		00492	Tosmy	06/03/2009	Contact Call by Tosmy 06 Mar 2009 1
3		00492	Tosmy	06/03/2009	Contact Call by Tosmy 06 Mar 2009 1
4		00492	Tosmy	31/12/2008	Contact Call by Leroy 31 Dec 2008 18
5		00492	Tosmy	25/12/2008	Contact Call by Tosmy 25 Dec 2008 2
6		00492	Tosmy	24/12/2008	Contact Call by Tosmy 24 Dec 2008 0
7		00492	Tosmy	22/12/2008	Contact Call by Tosmy 22 Dec 2008 1
8		00492	Tosmy	19/12/2008	Contact Call by Infolab 19 Dec 2008
9		00492	Tosmy	18/12/2008	Contact Call by Infolab 18 Dec 2008

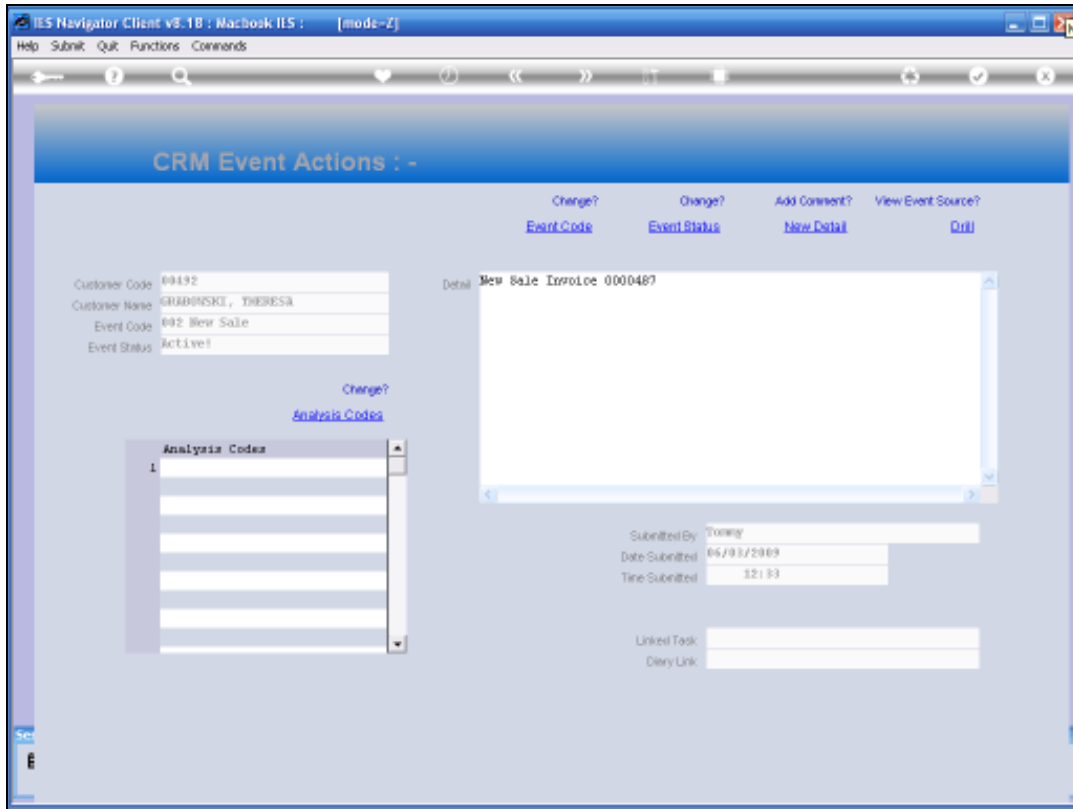
Mac OS X

## Slide 10

Slide notes: On the CRM Events log, we have a history of CRM events logged for this Customer. That will include Sales, Calls and other events. We can drill into any of these events for more detail.



Slide 11  
Slide notes:



Slide 12

Slide notes: In the case of a Sale or Order event, we can drill further into the actual Sales event, i.e. the Invoice.

**RETAIL INVOICE DRILL**

Rate Book: None      Currency: LOCAL R  
Transaction Period: Feb 2009 (P 9T)      Trans Date: 06/03/2009  
Operator: Tommy      Sys Ret #: 1594345041A  
Cash Account: 10000076 CUSTOMER SALES CASH RECEIPTS (1)  
Deal Status: Sale [Invoice # 0000407 ]

ex Catalog      Origination: 01 Main Store

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1 3000412	01	OLYMPUS CAMERA	1,110.00	1,110.00	1.00		1,110.00	155.40	1,265.40

**Other Items**

Status	Description	Excl Total	Tax	Incl Total
1		1,110.00	155.40	1,265.40
	Direct	0.00	0.00	0.00
	Returns	0.00	0.00	0.00
	Trade-ins	0.00	0.00	0.00
	Specials	0.00	0.00	0.00
	Net	1,110.00	155.40	1,265.40

**CUSTOMER:**  
GRABORSKI, THERESA

Account: 07306  
CRM: 00492  
Club:  
Expire:

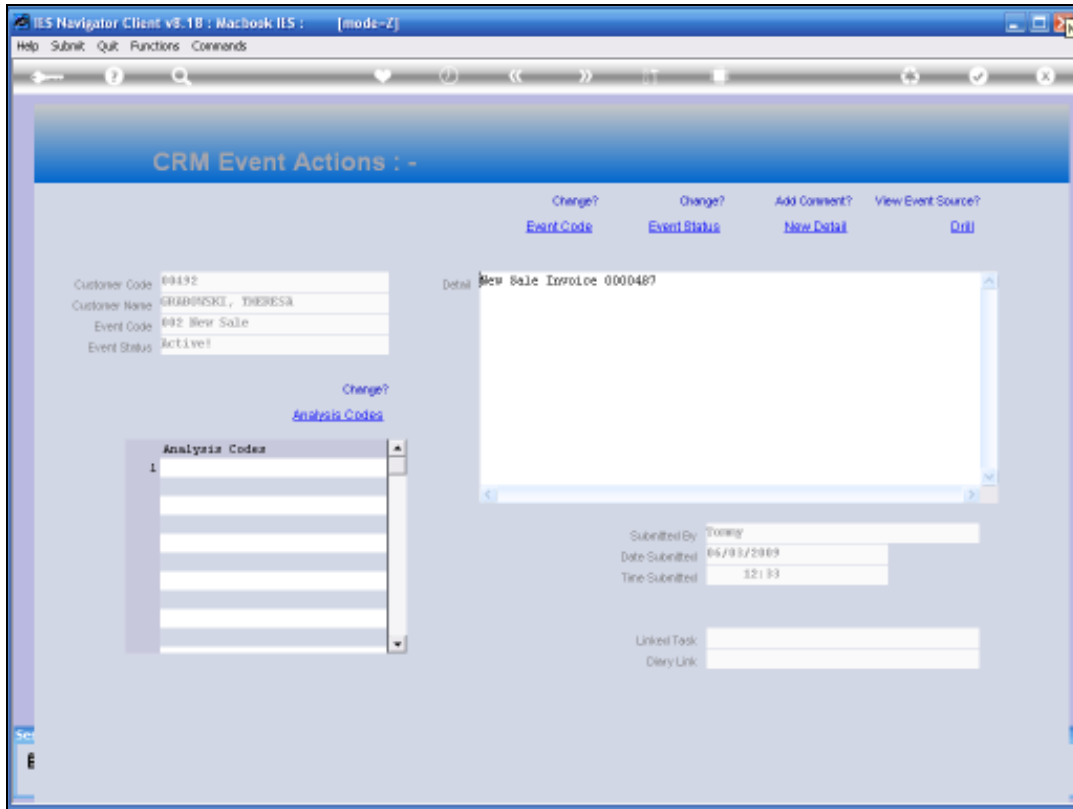
Deal Note(s):

[Deal Views](#)  
[Transaction Drills](#)  
[Customer Barcodes](#)

Slide 13

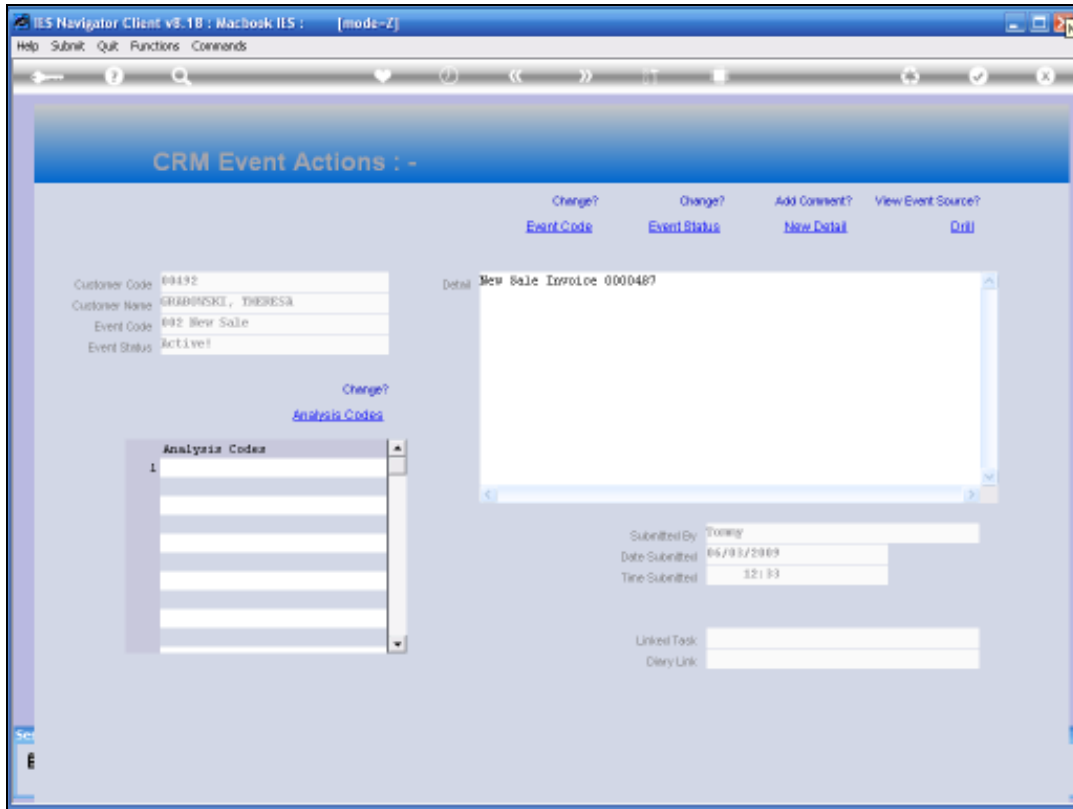
Slide notes: And this reveals the detail of this Sale event.





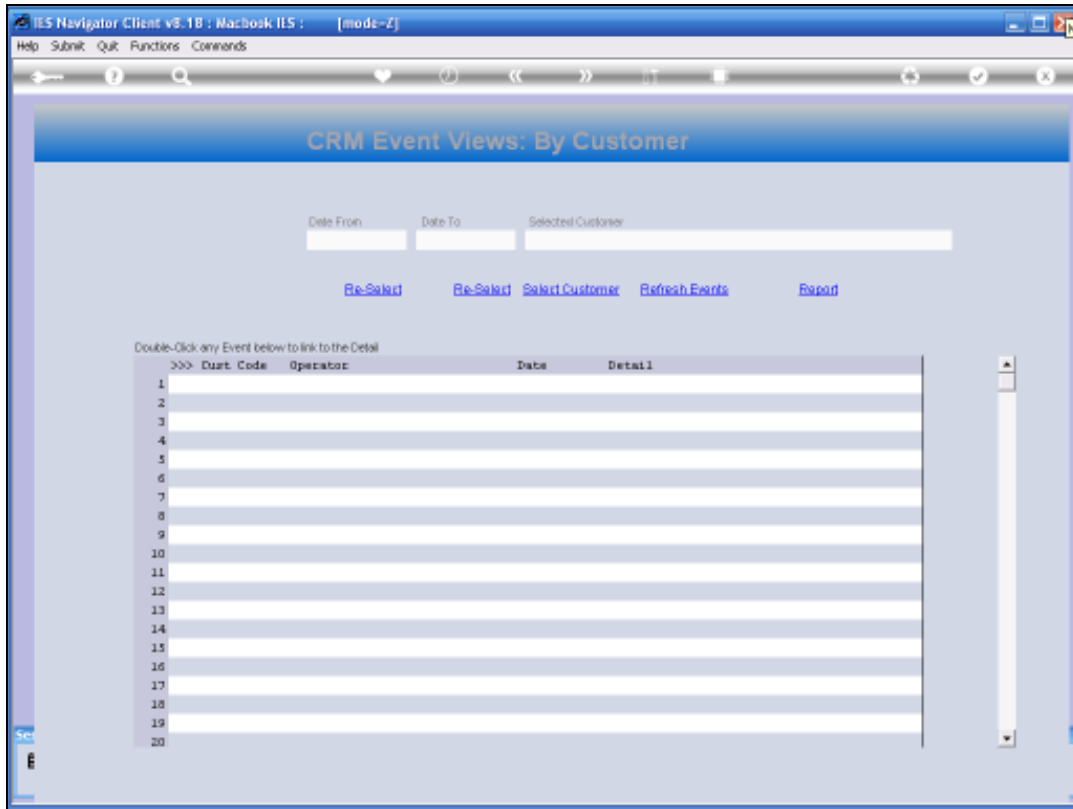
Slide 15

Slide notes:



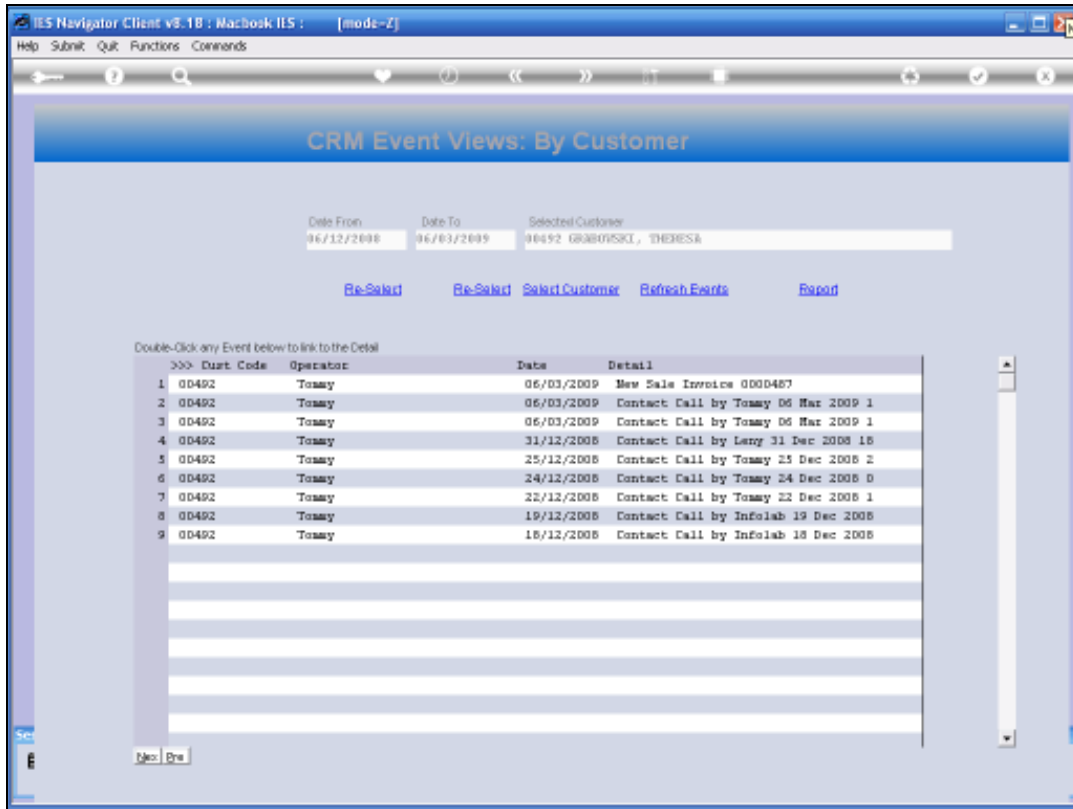
Slide 16

Slide notes:



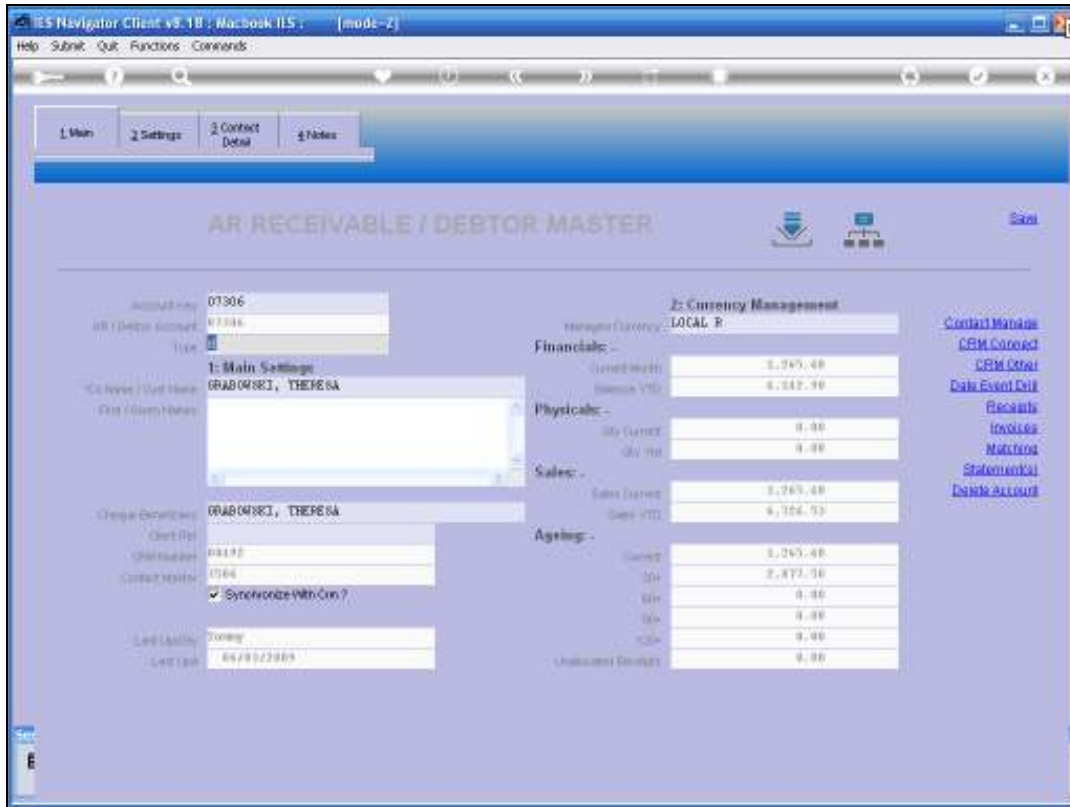
Slide 17

Slide notes:



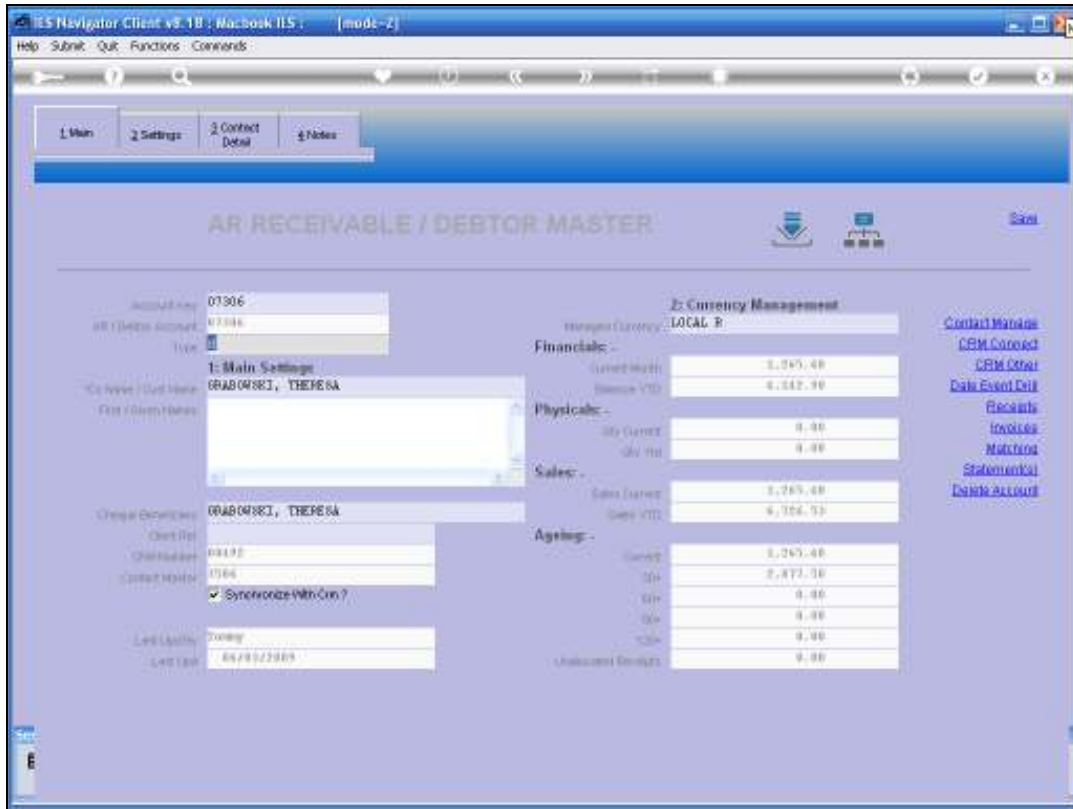
Slide 18

Slide notes:



Slide 19

Slide notes:



Slide 20

Slide notes: So we see that from the AR Debtor master screen, we have full access to related CRM functions.