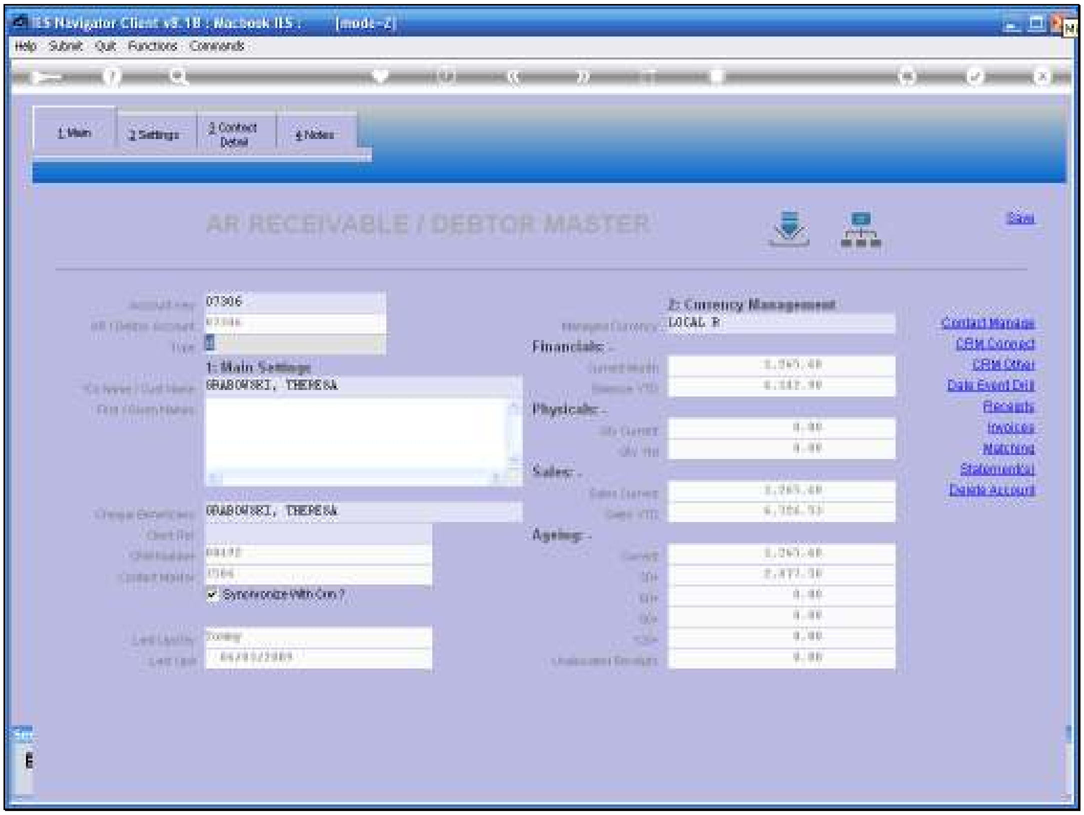
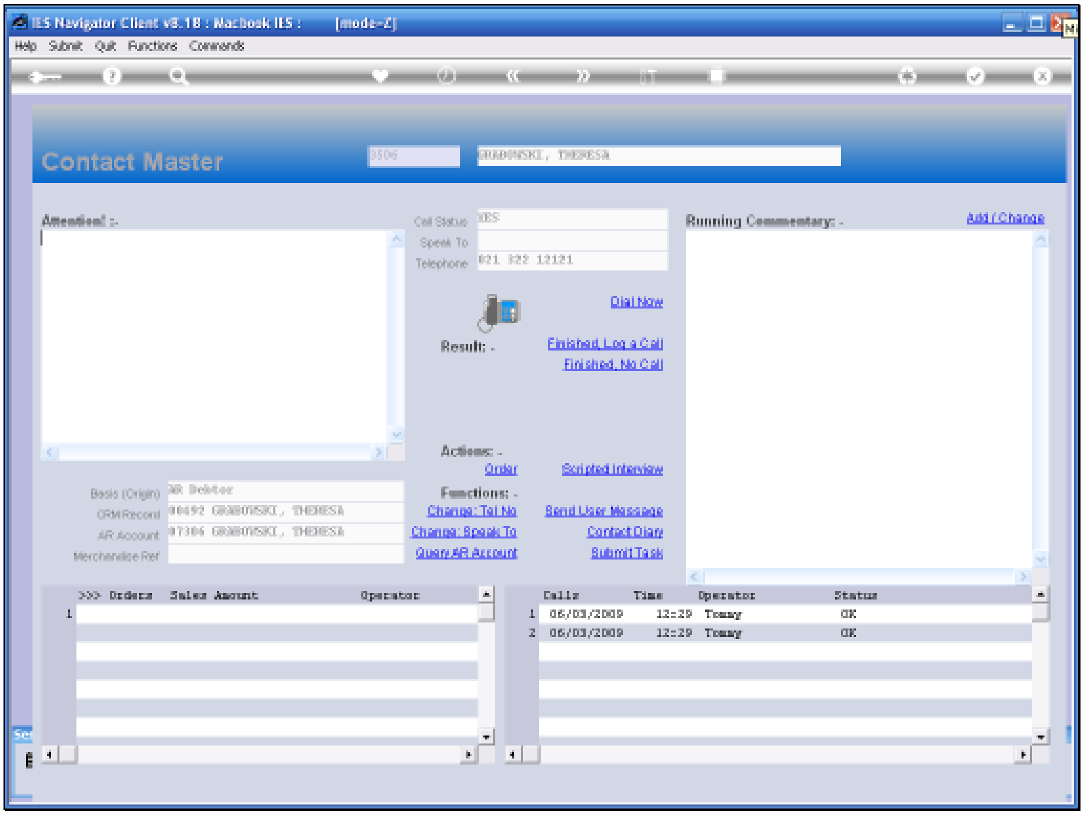


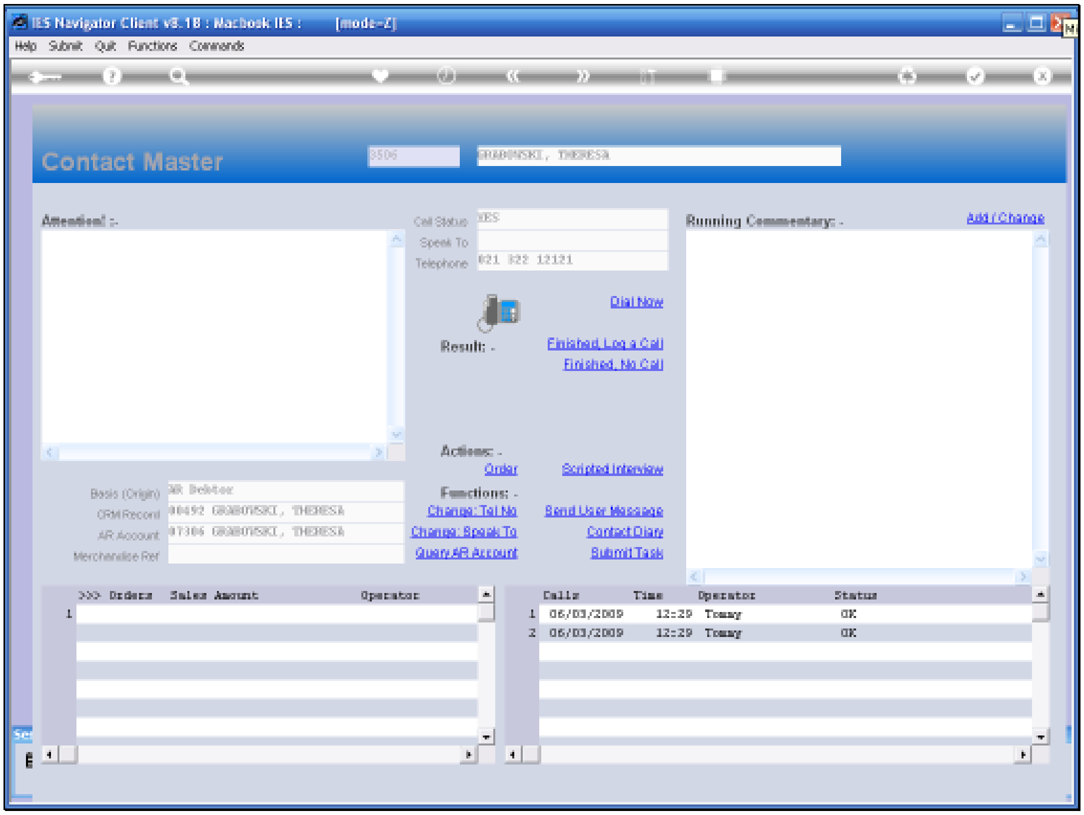
Slide 1

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



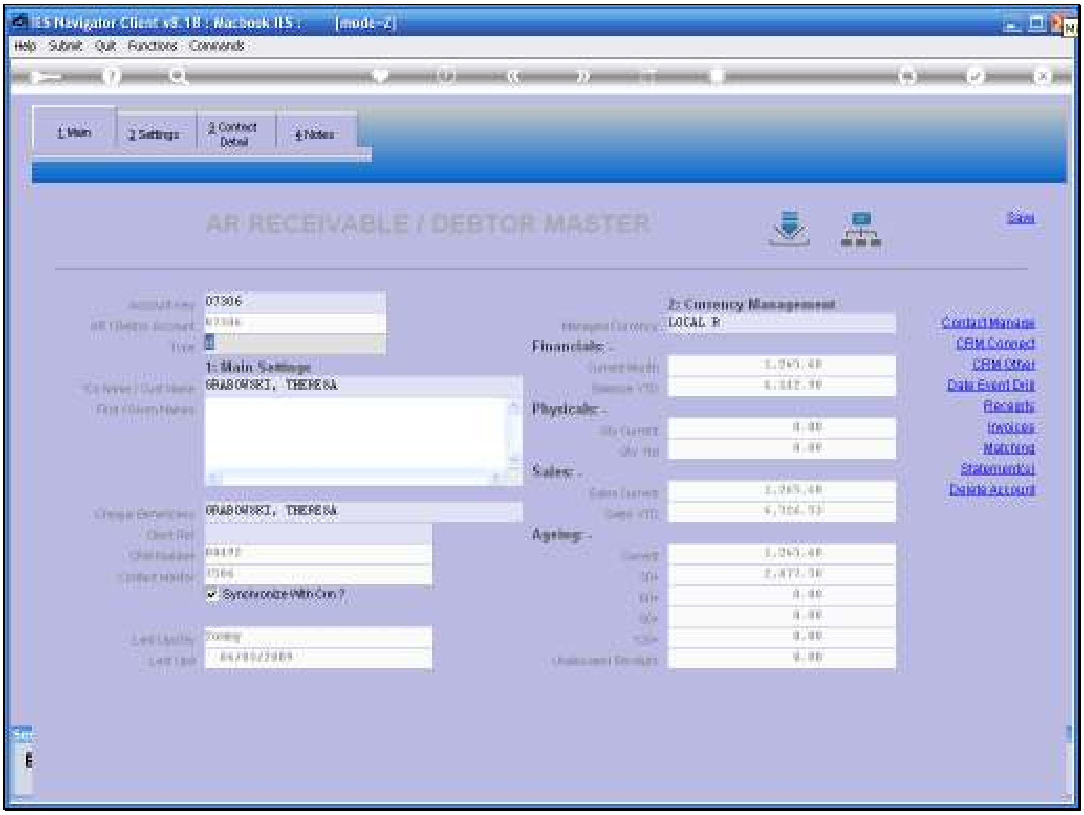
Slide 2

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.

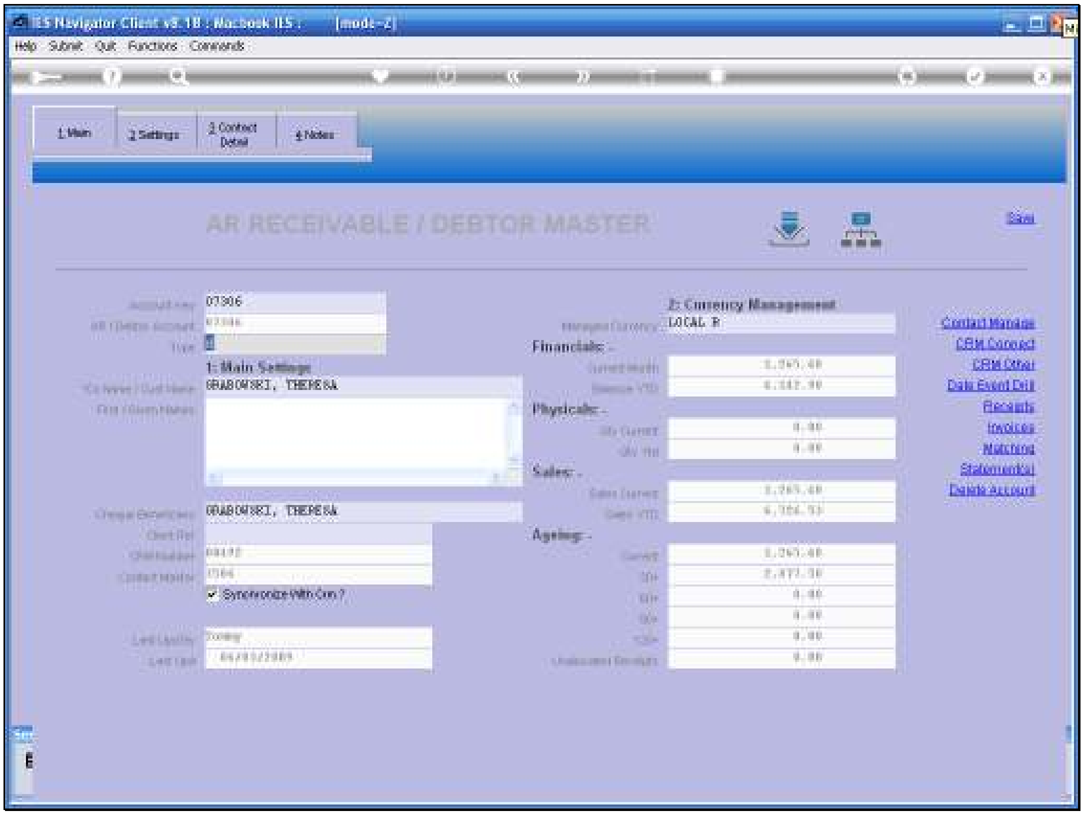


Slide 3

Slide notes:

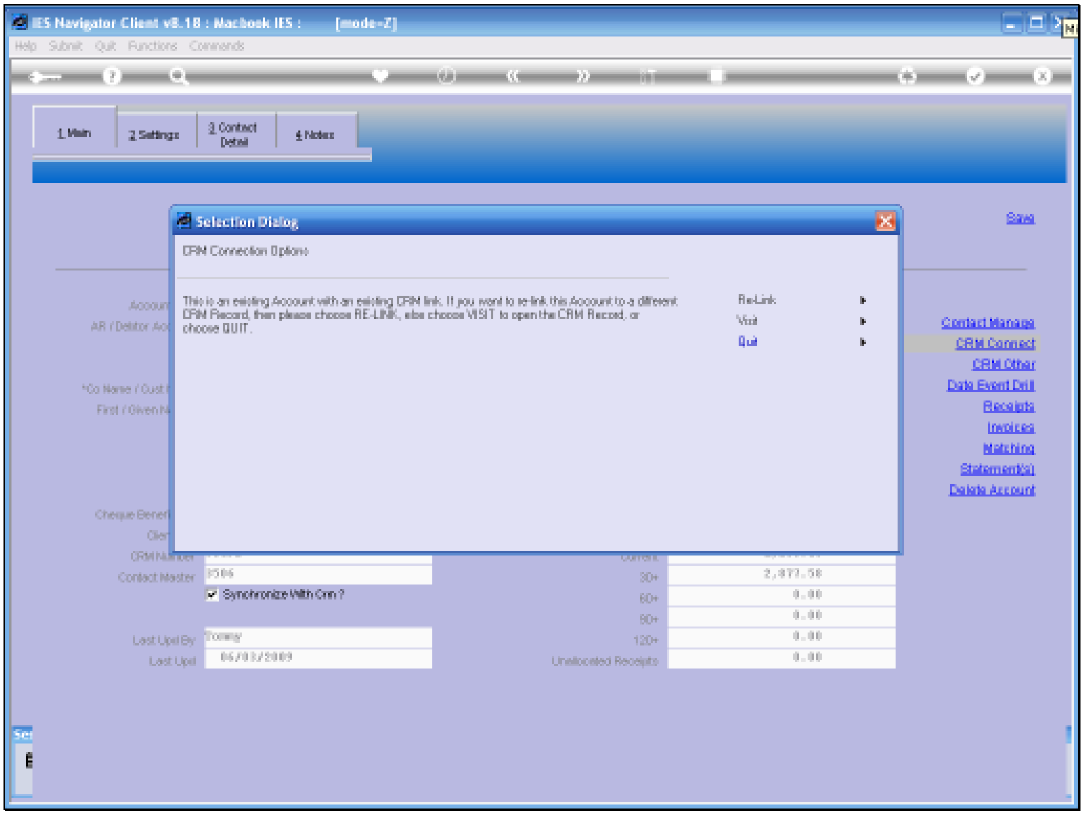


Slide 4
Slide notes:



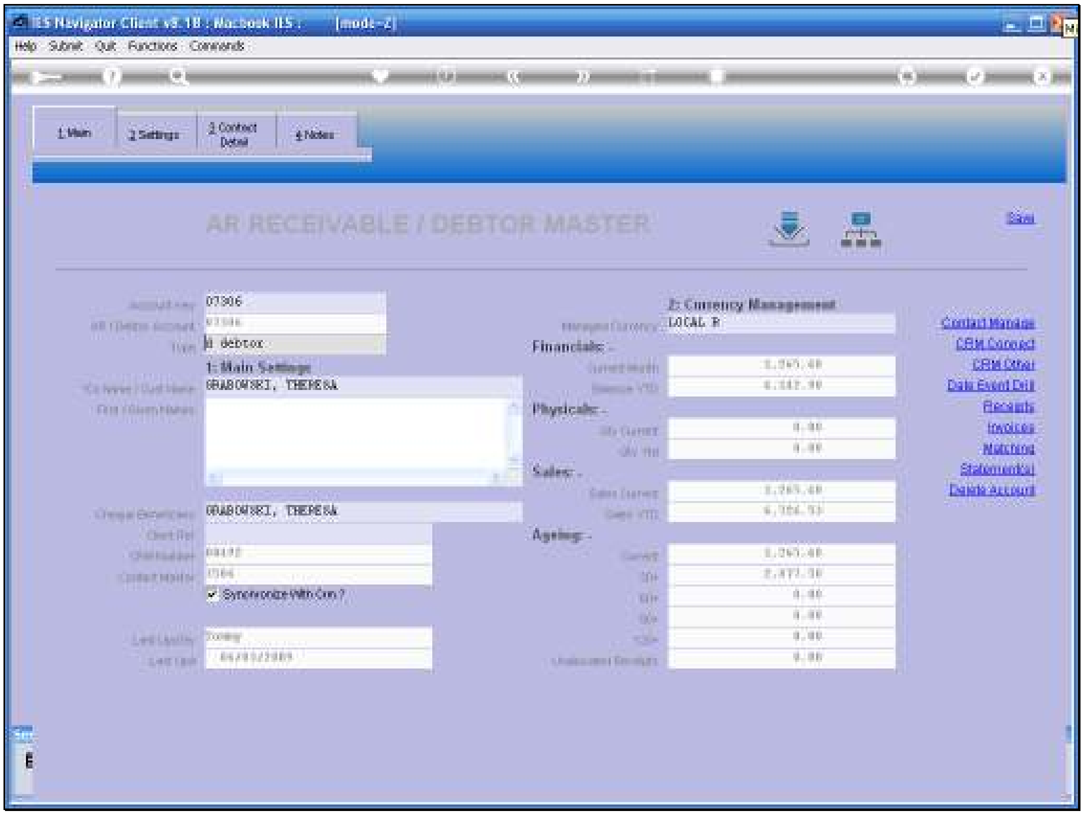
Slide 5

Slide notes:

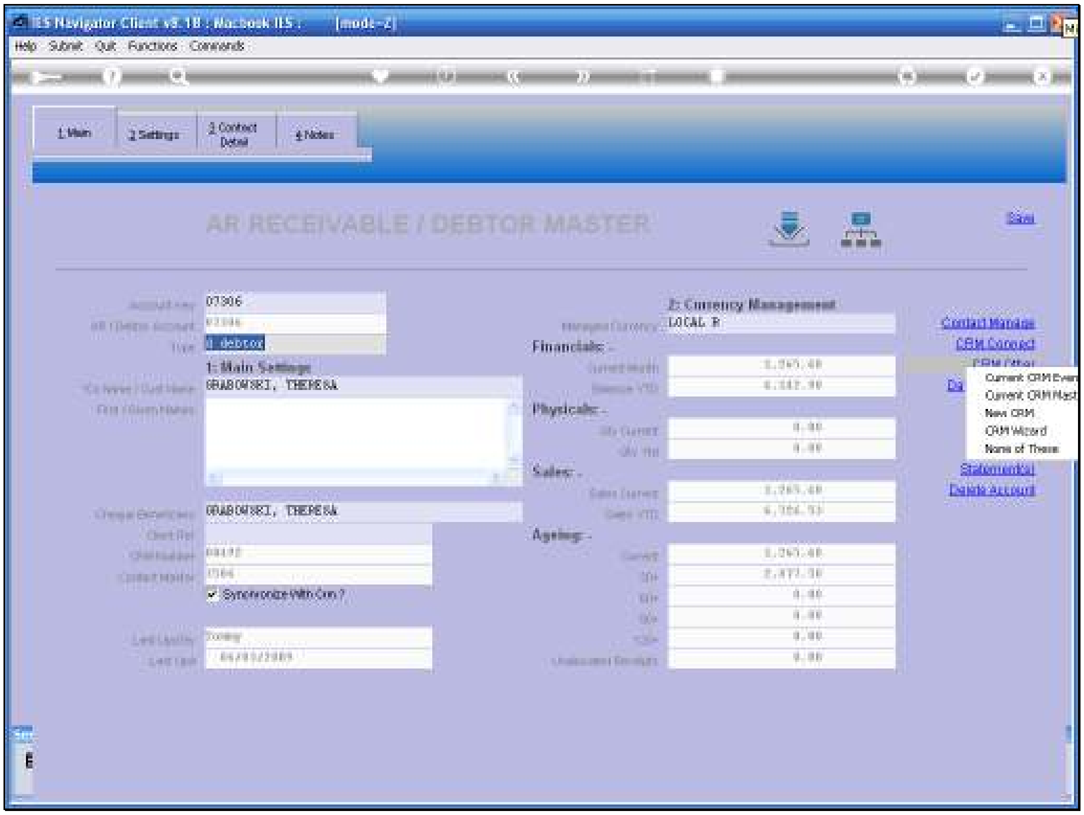


Slide 6

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.

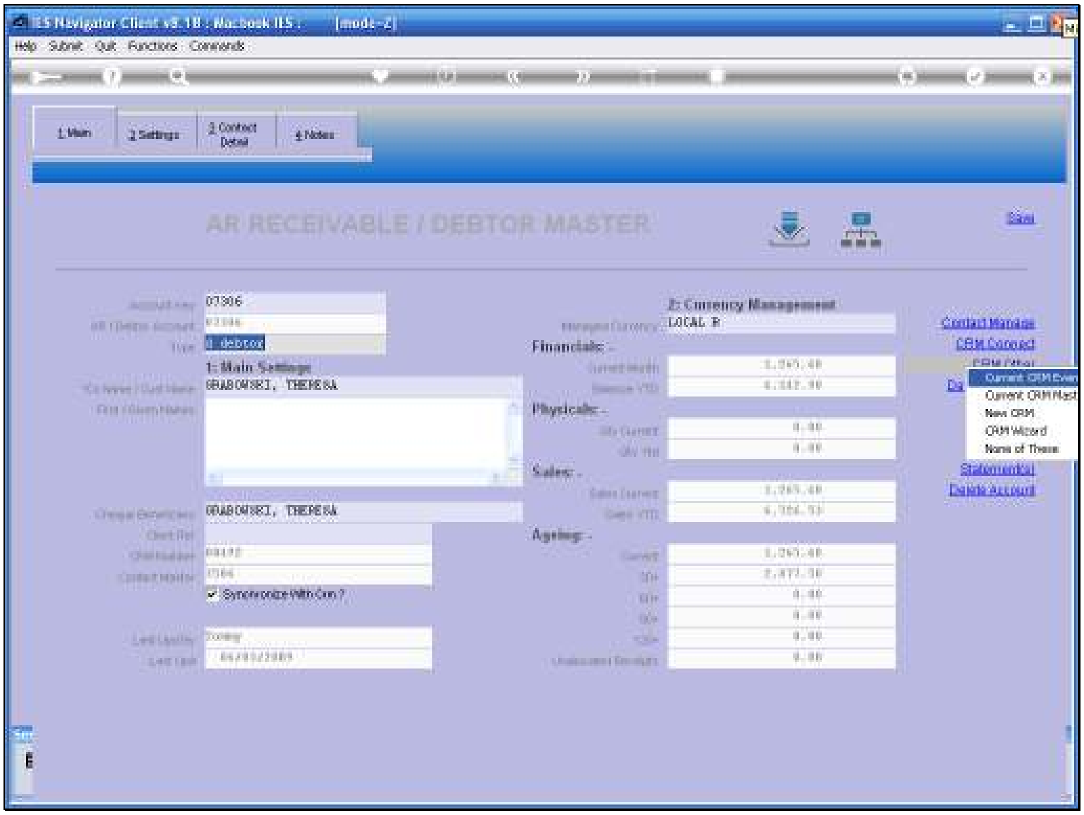


Slide 7
Slide notes:



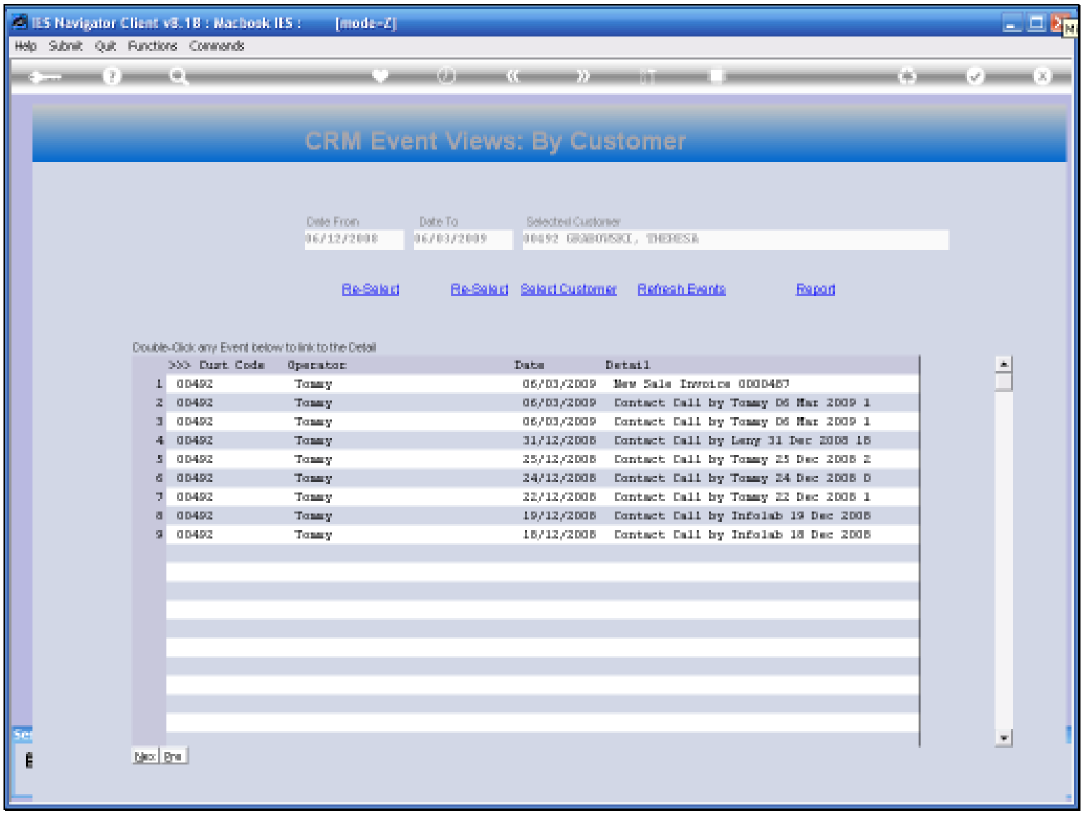
Slide 8

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.



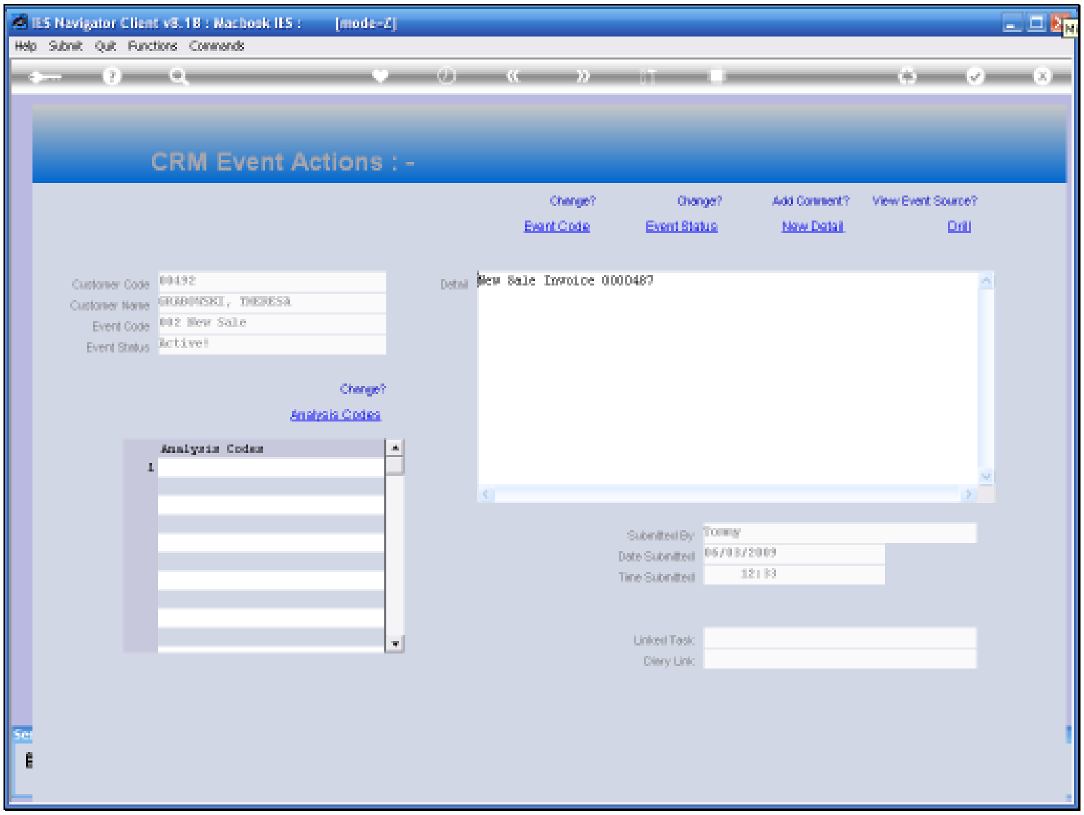
Slide 9

Slide notes:

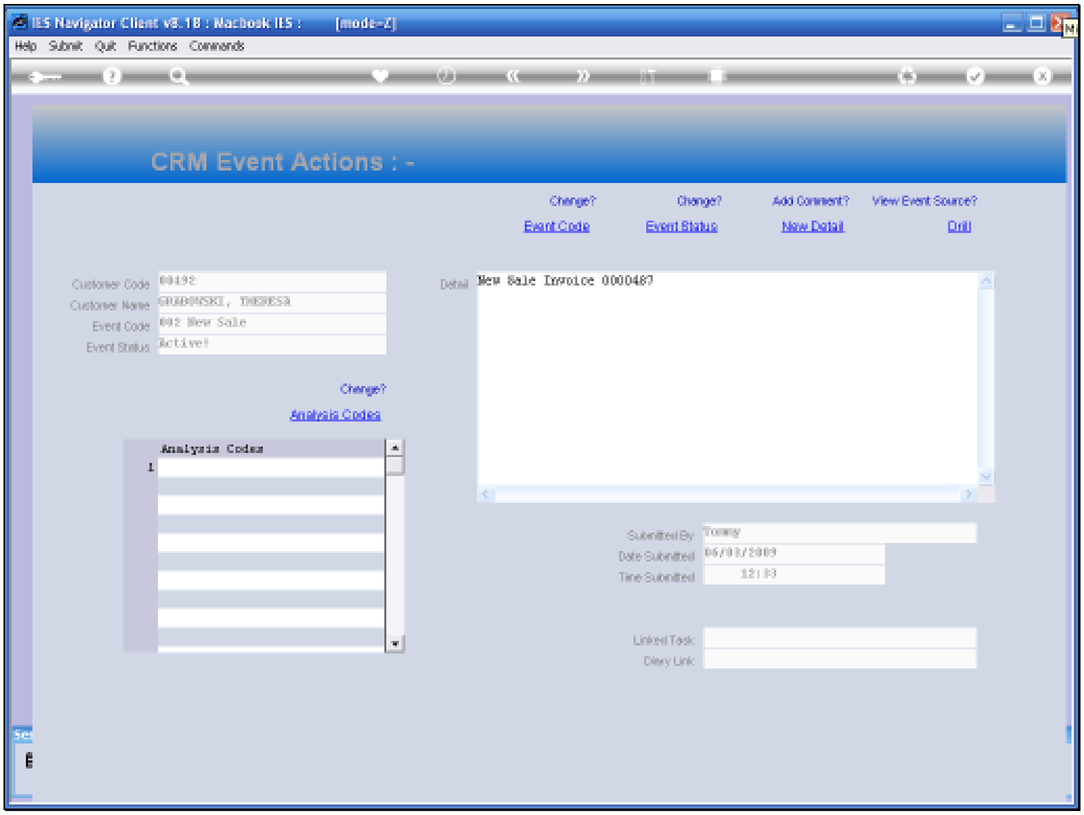


Slide 10

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.

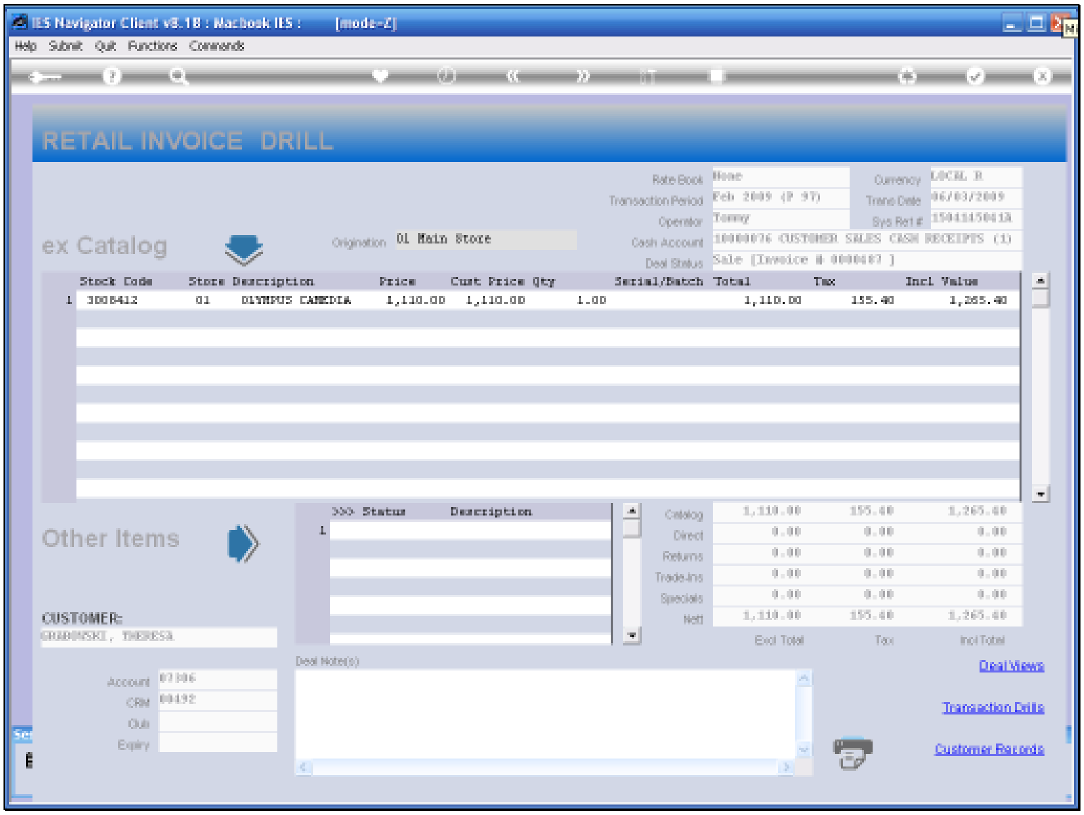


Slide 11
Slide notes:



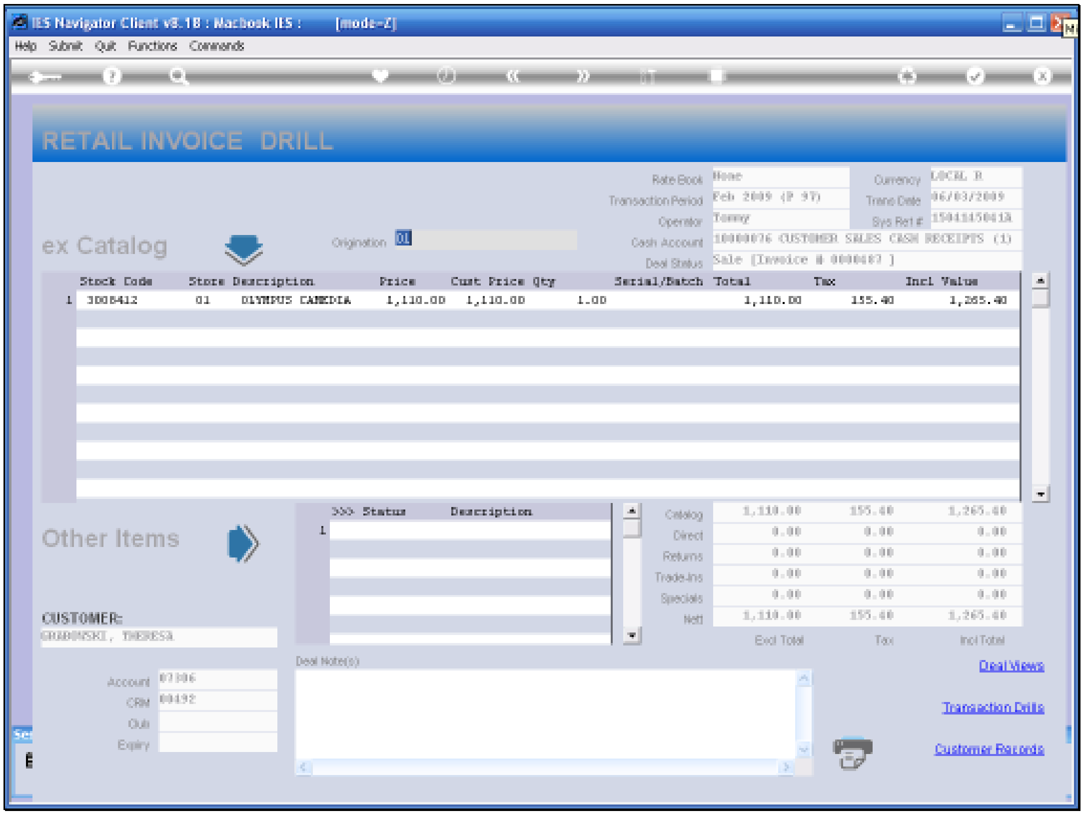
Slide 12

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

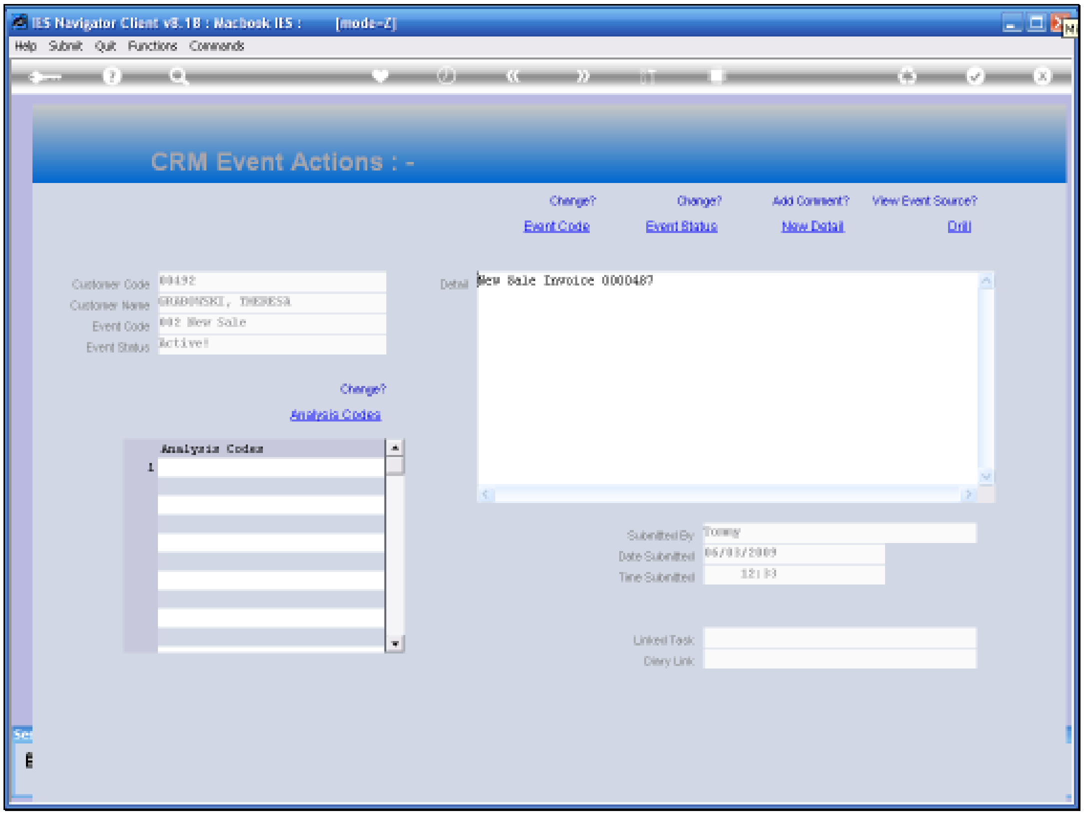


Slide 13

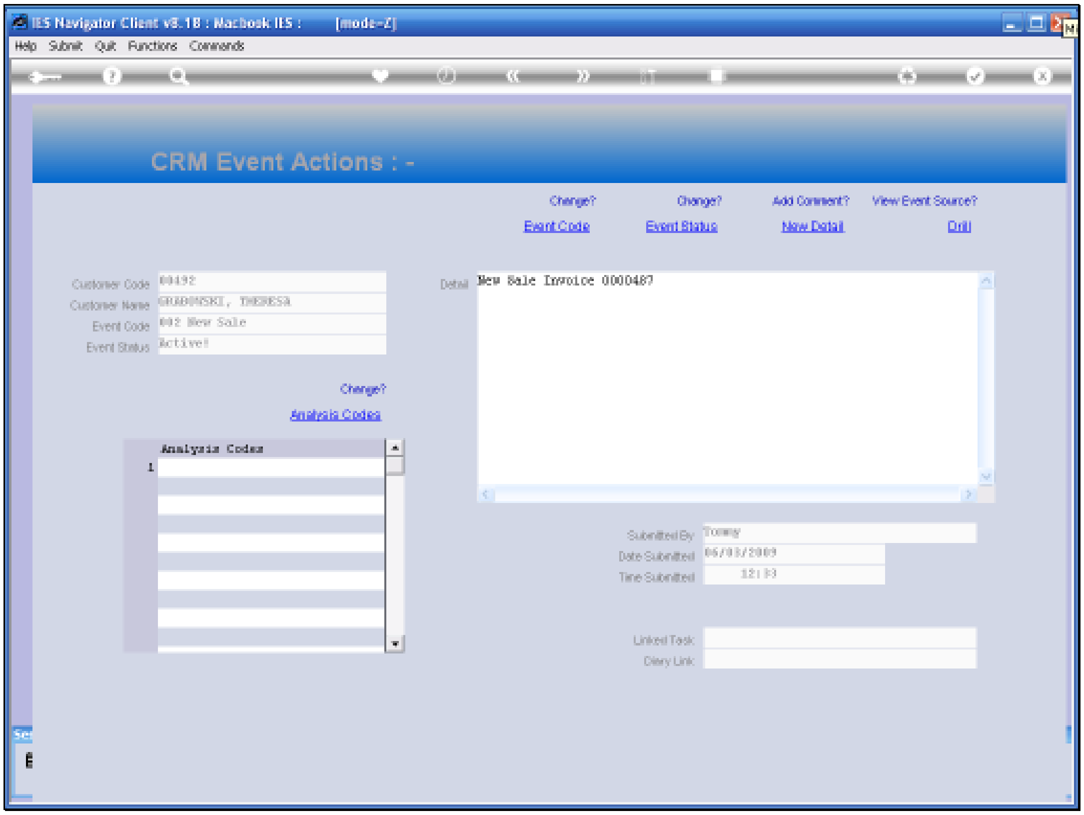
Slide notes: And this reveals the detail of this Sale event.



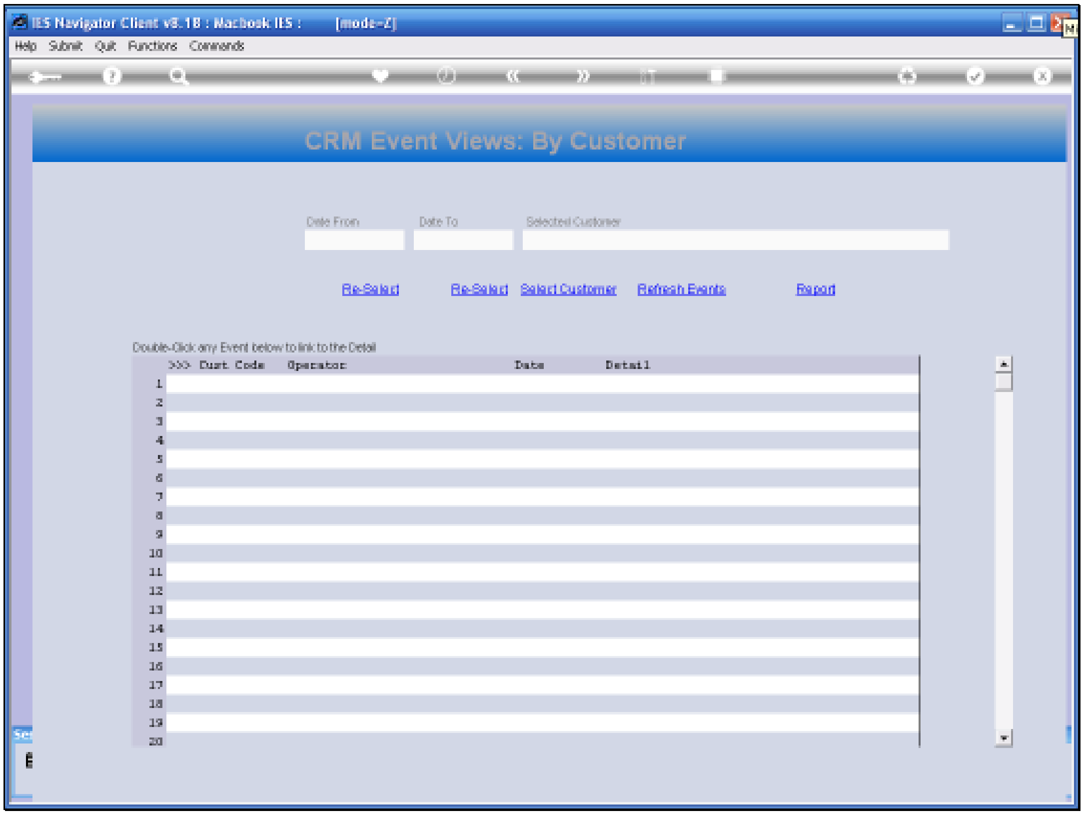
Slide 14
Slide notes:



Slide 15
Slide notes:

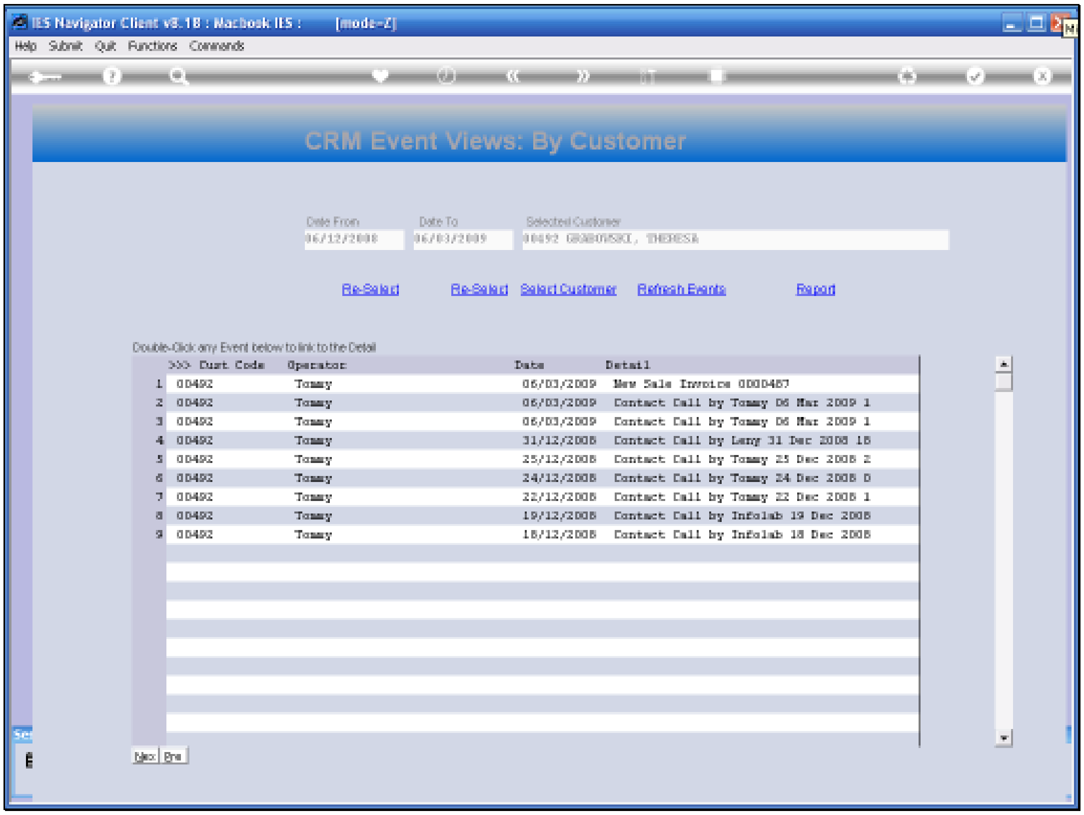


Slide 16
Slide notes:

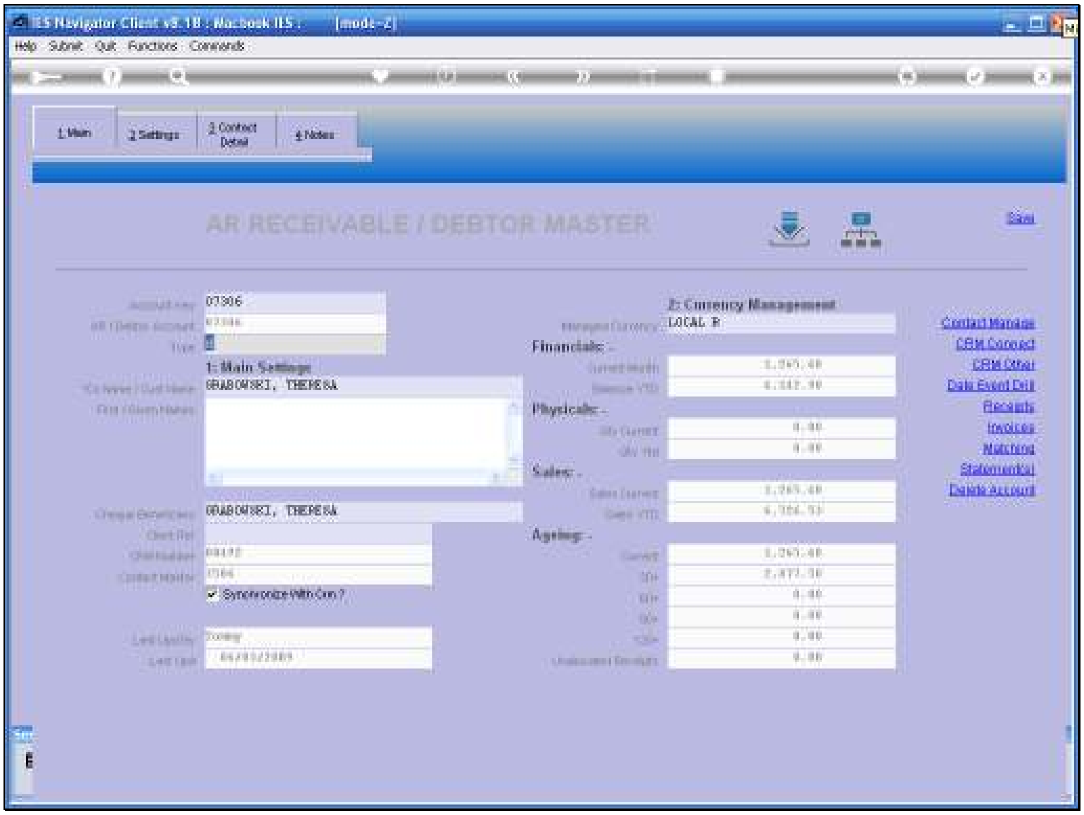


Slide 17

Slide notes:

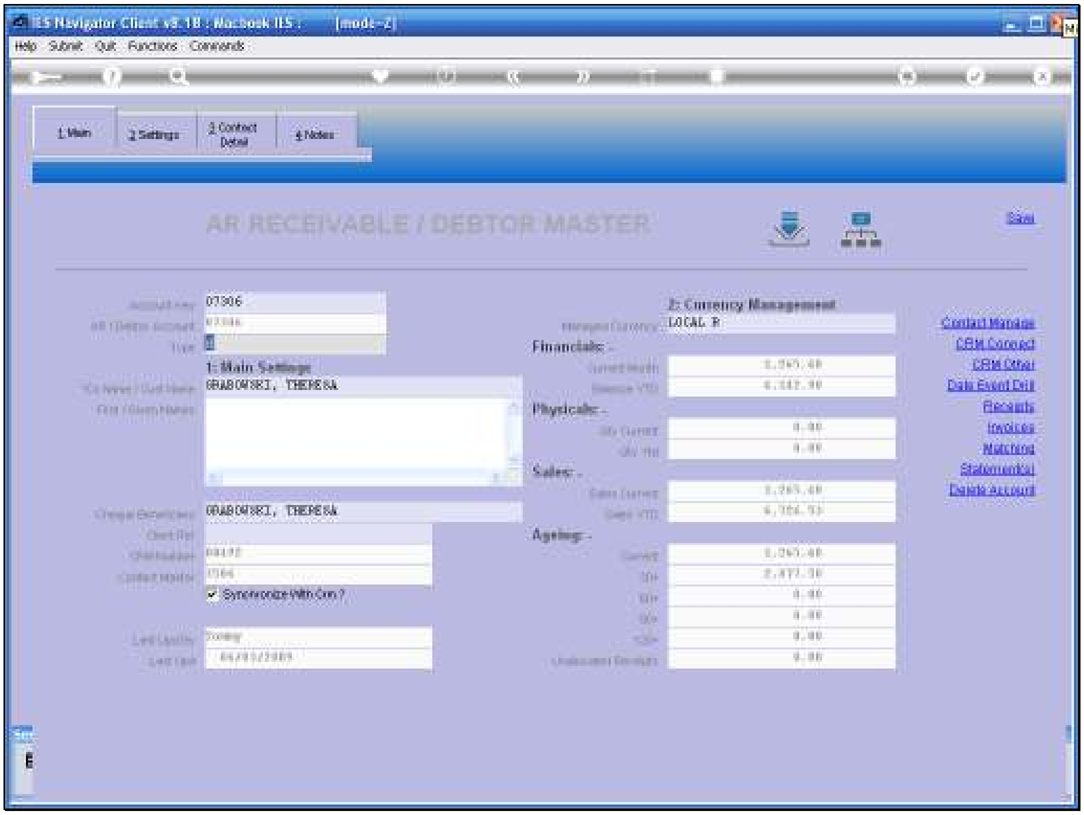


Slide 18
Slide notes:



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.