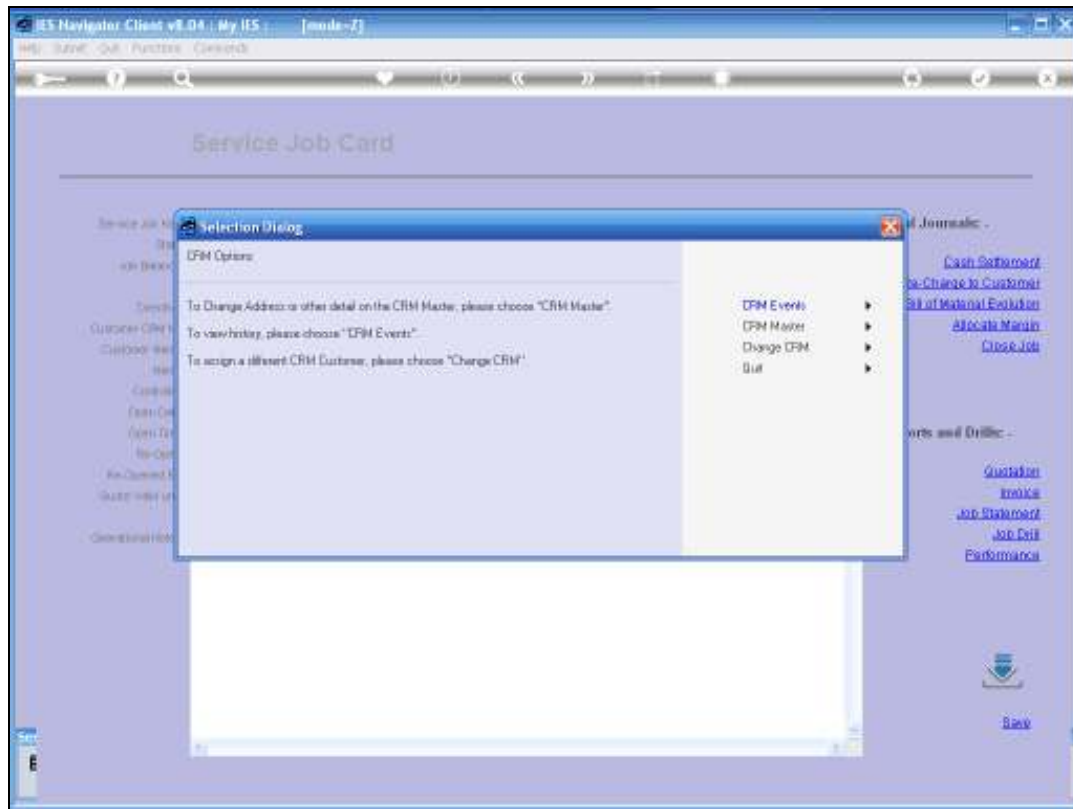


Slide 1
Slide notes:

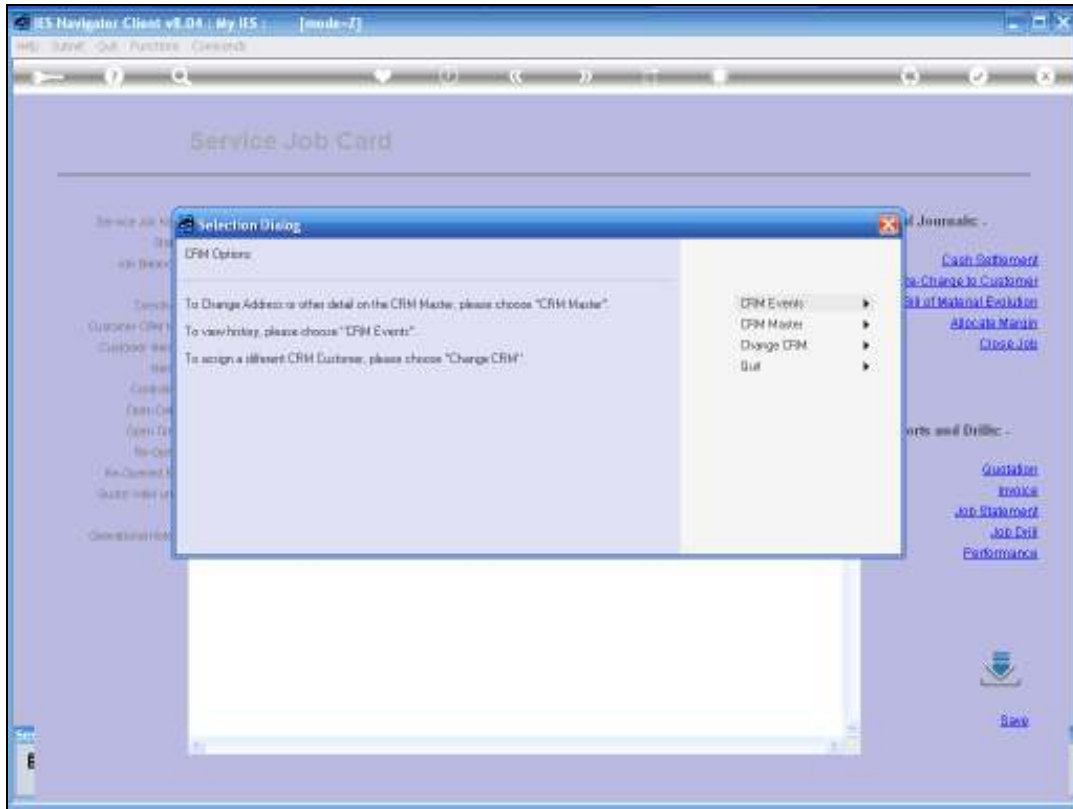
In this session we have a quick look at the CRM Functions that are available on all Service Jobs.



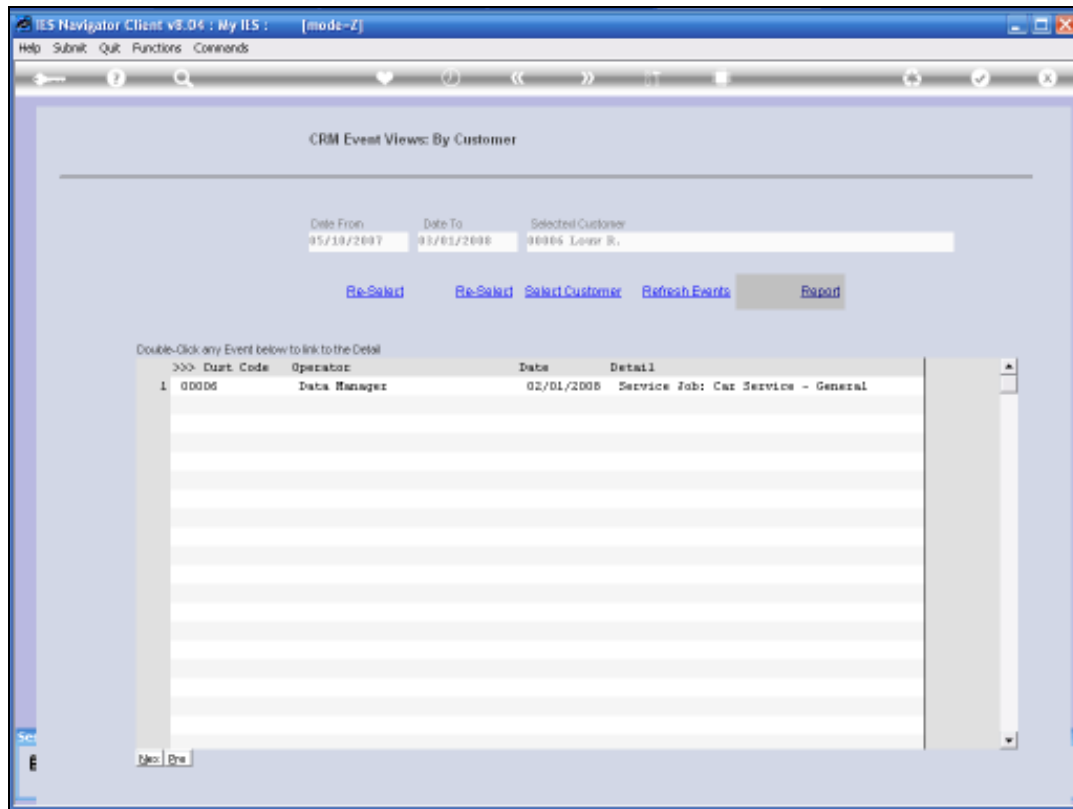
Slide 2

Slide notes:

If there is already a CRM Connection on this Service Job then of course we can change it. Possibly we can go to the CRM Master. We can also Drill into the events which is what we are going to do in this example.



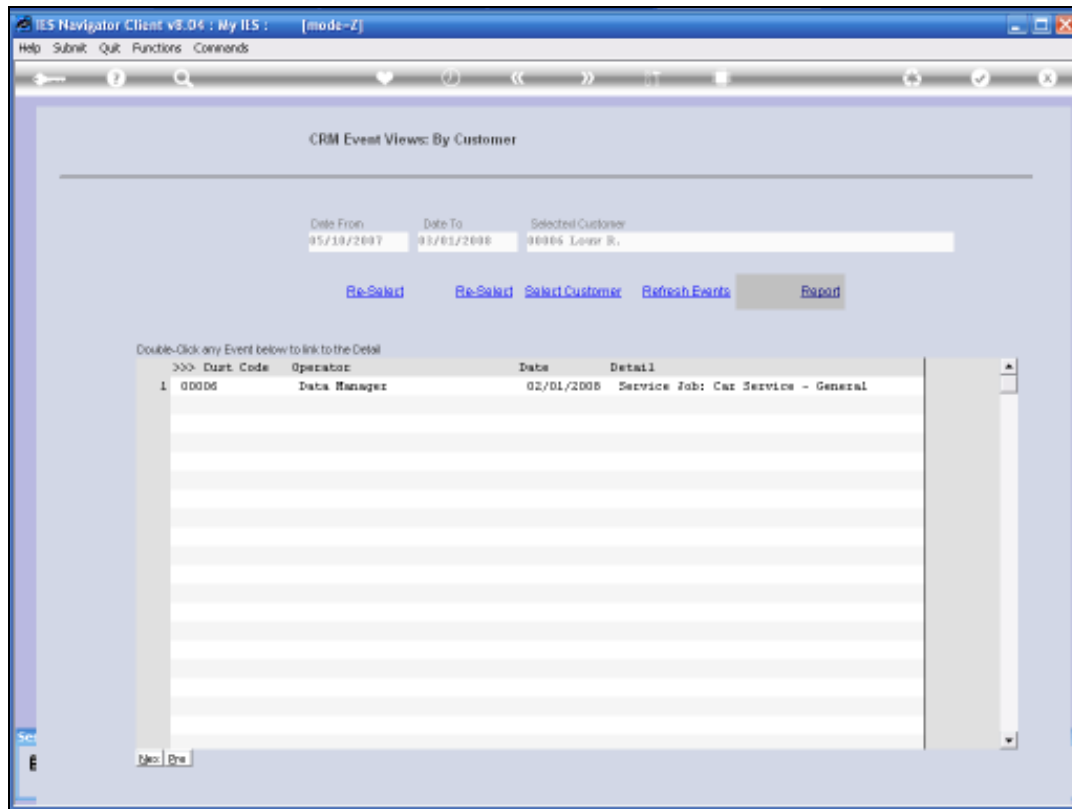
Slide 3
Slide notes:



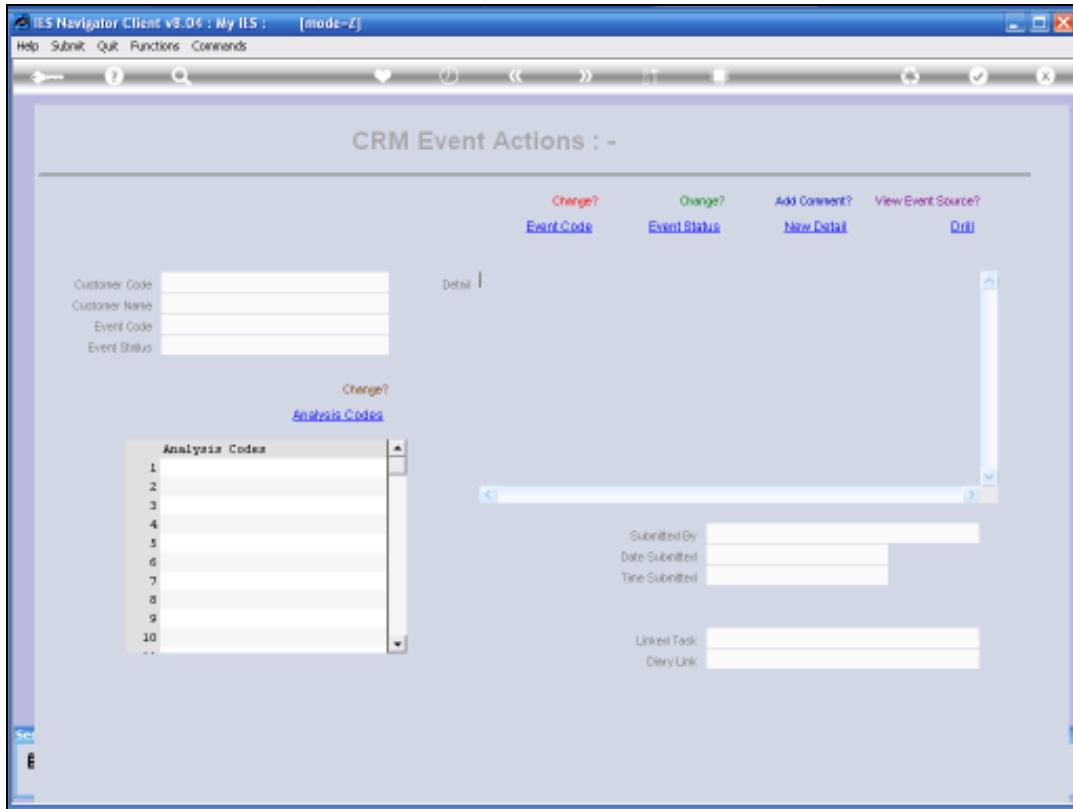
Slide 4

Slide notes:

In this example we can see that this is the 1st Service Job that we are performing for this particular Customer because it is the only Service Job listed. If this Customer has been here before, for various Services, then all of those Service Jobs would be listed here and we can Drill into any of them.

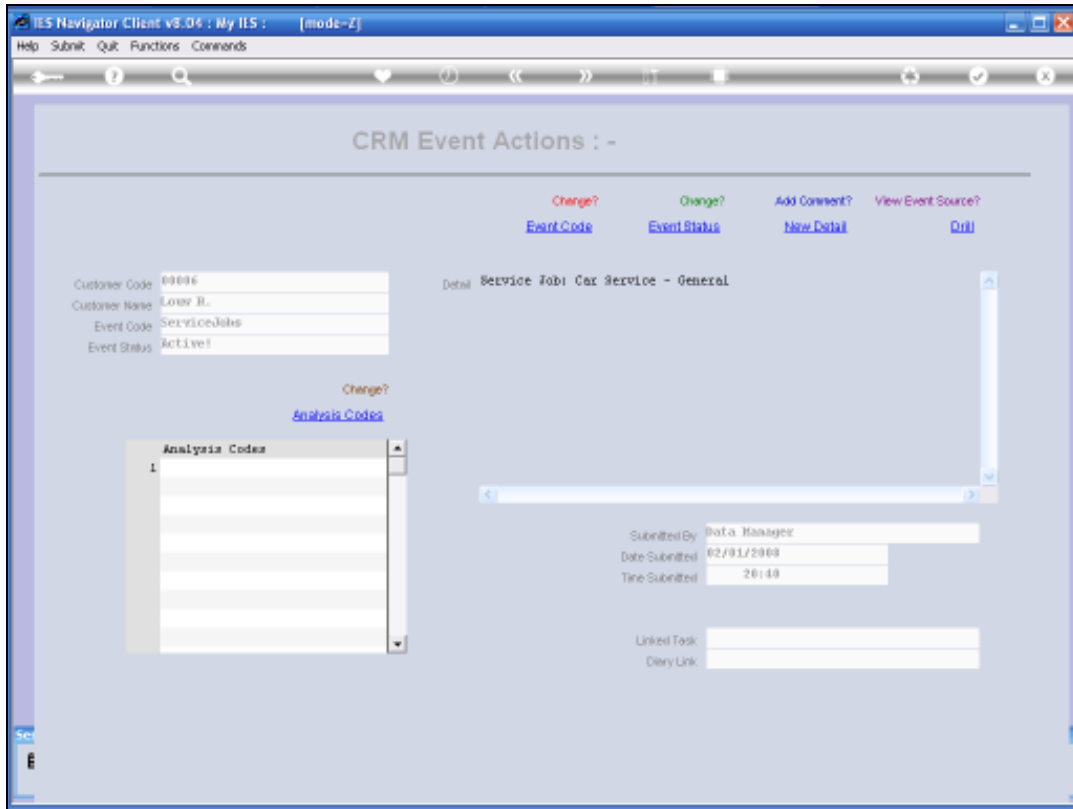


Slide 5
Slide notes:



Slide 6
Slide notes:

From the Event Action Screen, we can Drill deeper and this will open the Service Job that this particular event is linked to and will take us into a Query, on that Service Job.



Slide 7
Slide notes:

The screenshot shows a web browser window titled "IES Navigator Client vs. 04 : My IIS : [mode-Z]". The browser's address bar and navigation buttons are visible. The main content area displays a "Service Job Card" form. The form is organized into several sections:

- Service Job Key:** S000002
- State:** Open
- Job Balance:** 534.73
- Directive:** 0000001 Mr. B. Loney
- Customer CRM No:** 00004 Loney B.
- Customer Name:** Car Service - General
- Controller:** Data Manager
- Quote Valid until:** 18/01/2008
- Open Date:** 02/01/2008
- Open Time:** 20:39
- Date Re-Opened:**
- Re-Opened By:**
- Close Date:**
- Close Time:**
- Operational Notes:** A large empty text area for notes.

To the right of the form, there are two columns of links:

- Query Actions:**
 - [CRM Customer](#)
 - [Customer Dispute](#)
 - [Change Sheet](#)
 - [Cost/Budget Sheet](#)
 - [Purchase Orders](#)
 - [Contact or Reverse](#)
 - [Re-Open Job](#)
- Reports and Drills:**
 - [Invoice](#)
 - [Job Statement](#)
 - [Job Cost](#)
 - [Performance](#)

At the bottom left of the browser window, there is a small "Sec" icon.

Slide 8
Slide notes:

The screenshot displays the IES Navigator Client interface for a Service Job Card. The window title is "IES Navigator Client vs. 04 : My IIS : [mode-Z]". The menu bar includes "Help", "Submit", "Quit", "Functions", and "Comments". The main content area is titled "Service Job Card" and contains a form with the following fields:

Service Job Key	S000002
State	Open
Job Balance	534.73
Directive	0000001 Mr. B. Loney
Customer CRM No	00004 Loney B.
Customer Name	Car Service - General
Controller	Data Manager
Quote Valid until	18/01/2008
Open Date	02/01/2008
Open Time	20:39
Date Re-Opened	
Re-Opened By	
Close Date	
Close Time	
Operational Notes	

Query Actions: -

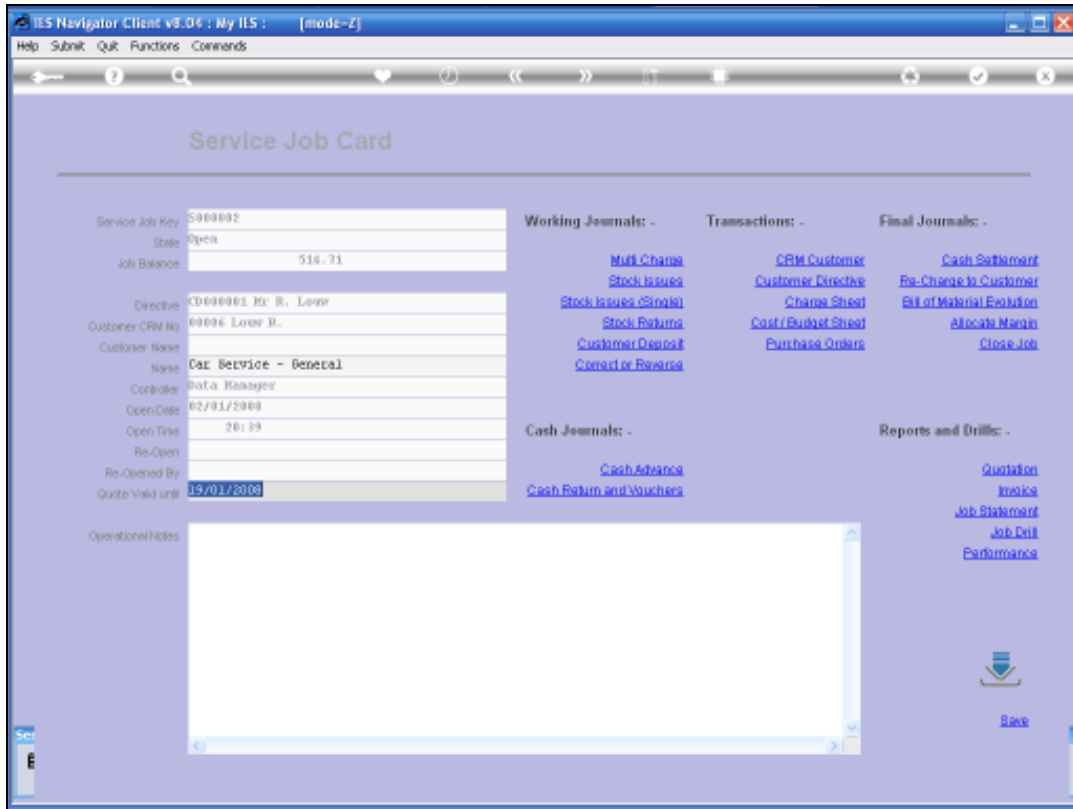
- [CRM Customer](#)
- [Customer Dispatch](#)
- [Change Sheet](#)
- [Cost/Budget Sheet](#)
- [Purchase Orders](#)
- [Contact or Reverse](#)
- [Re-Open Job](#)

Reports and Drills: -

- [Invoice](#)
- [Job Statement](#)
- [Job Cost](#)
- [Performance](#)

Operational Notes: [Empty text area]

Slide 9
Slide notes:



Slide 10
Slide notes:

So this is simply one example of how we can use CRM Functions on this Service Job.