



Slide 1

Slide notes:

In this session we are going to look at Customer Directives.

A Customer Directive is basically the instruction from the Customer as to what we have to do.



Slide 2

Slide notes:

A Customer Directive is not necessarily an essential part of a Service Job, but in many cases it will be.

To make a New Customer Directive, we will just choose the "New" Function.

Customer (Service) Directive

|                     |             |              |  |
|---------------------|-------------|--------------|--|
| Directive Number    | 0900001     | Chassis      |  |
| Retriever CRM No.   |             | Engine #     |  |
| Opened By           | Dale Swager | VIN #        |  |
| Open Date           | 02/03/2008  | Make         |  |
| Open Time           | 16:51       | Fleet #      |  |
| State               | Open        | Mileage      |  |
| Customer Name       |             |              |  |
| Customer Tax Number |             |              |  |
| Billing Address     |             | Instructions |  |
| Contact Detail      |             |              |  |
| AR Debtor Acct      |             |              |  |
| Budget              |             |              |  |
| Payment Type        | Pre-Paid    |              |  |
| Lic #               |             |              |  |
| Model               |             |              |  |

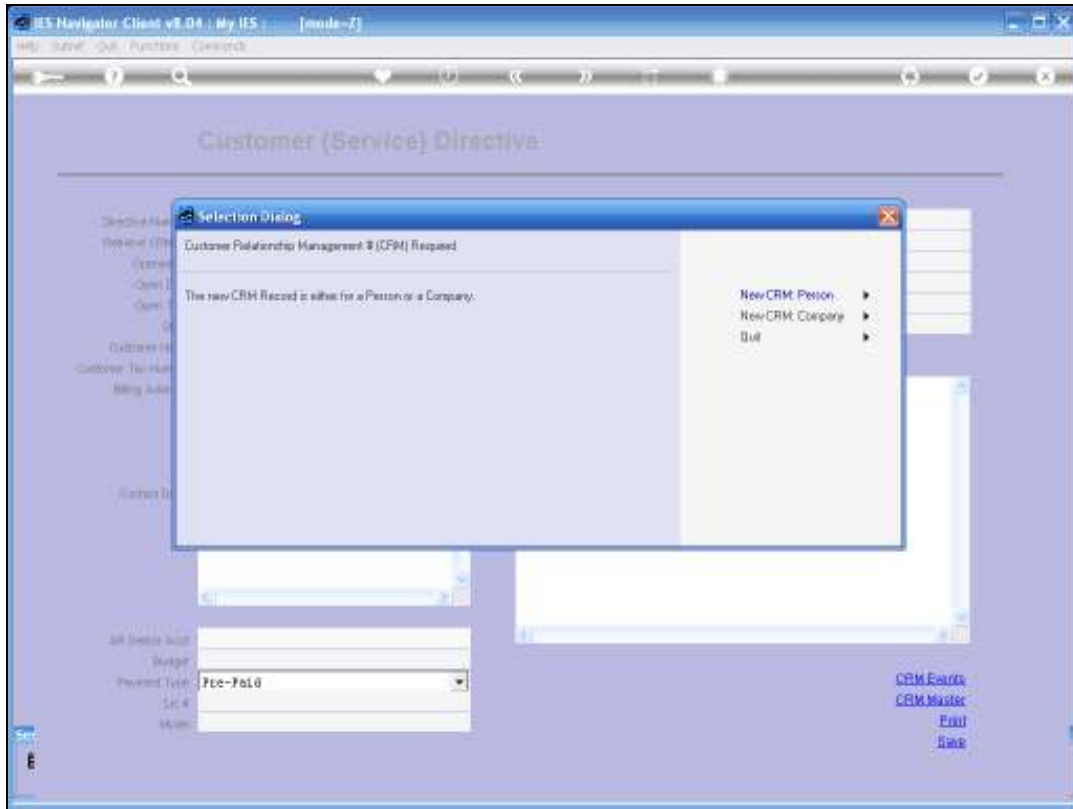
[New CRM](#)

[CRM Entry](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 3

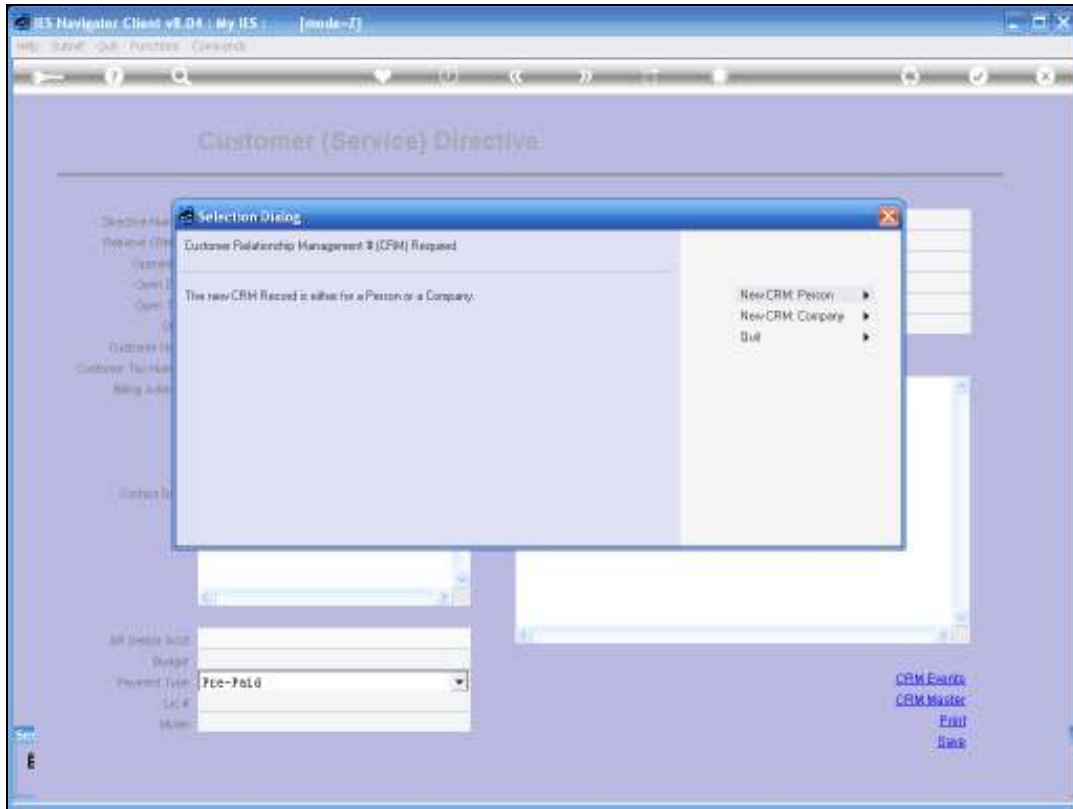
Slide notes:

The System will automatically number the New Directive for us and if this is an existing Customer with an existing CRM, then of course we will just retrieve the current CRM Number to be included with this Service Directive. But if it is a New Customer for whom we do not yet have a CRM Record, then we can use the "New CRM Function" to open a New CRM Record for this Customer.



Slide 4

Slide notes:



Slide 5  
Slide notes:

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

### Customer (Service) Directive

|                     |              |              |  |
|---------------------|--------------|--------------|--|
| Directive Number    | C900001      | Chassis      |  |
| Retrive CRM No      |              | Engine #     |  |
| Opened By           | Dale Blawger | VIN #        |  |
| Open Date           | 02/03/2008   | Make         |  |
| Open Time           | 16:51        | Fleet #      |  |
| State               | Open         | Mileage      |  |
| Customer Name       |              |              |  |
| Customer Tax Number |              |              |  |
| Billing Address     |              | Instructions |  |
| Contact Detail      |              |              |  |
| AR Debtor Acct      |              |              |  |
| Budget              |              |              |  |
| Payment Type        | Pre-Paid     |              |  |
| Lic #               |              |              |  |
| Model               |              |              |  |

[New CRM](#)

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 6  
Slide notes:

The screenshot shows a software window titled "ILS Navigator Client v8.04 : My ILS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form contains several input fields:

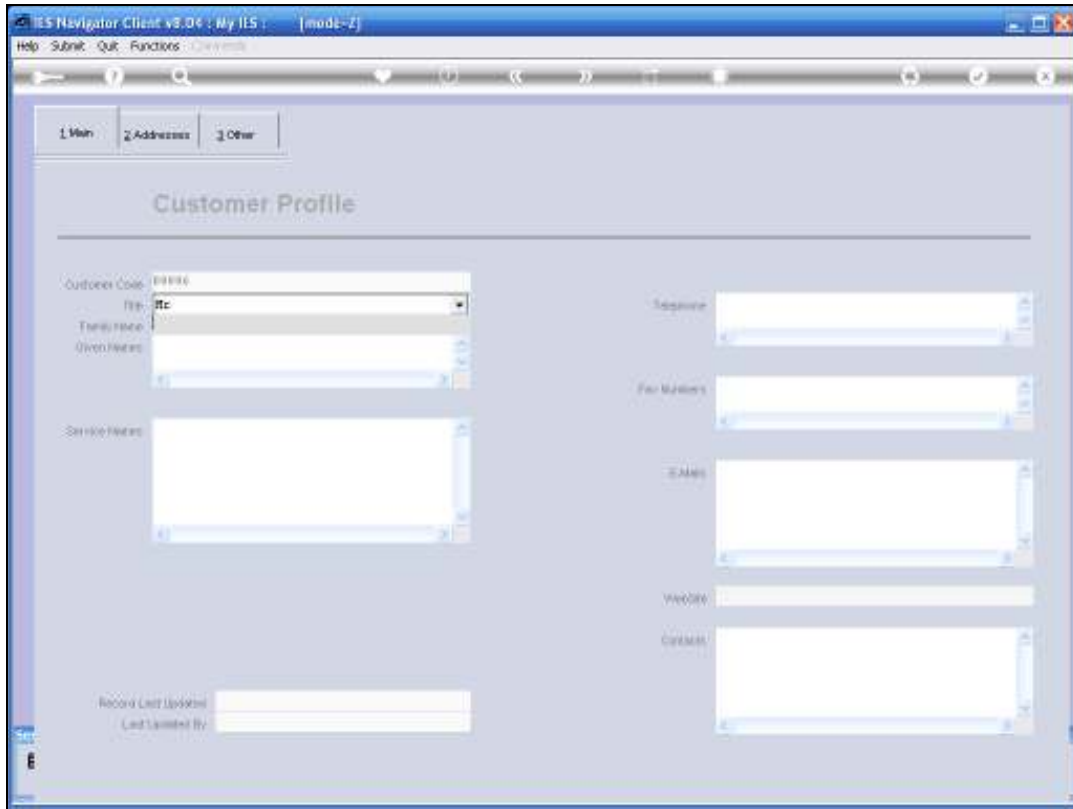
- Customer Code: 11916
- First Name: [dropdown menu]
- Telephone: [text input]
- Fax Number: [text input]
- E-MAIL: [text input]
- Website: [text input]
- CREWMEM: [text input]
- Record Last Updated: [text input]
- Last Updated By: [text input]

Slide 7  
Slide notes:

The screenshot shows a software window titled "IIS Navigator Client v3.04 : My IIS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form contains several input fields: "Customer Code" (text box with "00000"), "Name" (text box with "Mr"), "Telephone" (text box with "0123456789"), "Given Name" (text box with "John"), "Service Name" (text box with "John"), "Telephone" (text box with "0123456789"), "Fax Number" (text box with "0123456789"), "E-MAIL" (text box with "John"), "WebSite" (text box with "John"), "CREATED" (text box with "John"), "Record Last Updated" (text box with "John"), and "Last Updated By" (text box with "John").

Slide 8  
Slide notes:





Slide 9  
Slide notes:

The screenshot shows a software window titled "IIS Navigator Client v3.04 : My IIS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form is divided into two columns. The left column contains: "Customer Code" (text box with "00000"), "Type" (dropdown menu with "01" selected), "Family Name" (text box with "LOMB"), "Given Name" (text box with "J"), "Service Name" (text box), "Record Last Updated" (text box), and "Last Updated By" (text box). The right column contains: "Telephone" (text box), "Fax Number" (text box), "E-MAIL" (text box), "Website" (text box), and "Comments" (text box). The window also features a status bar at the bottom left with a small icon.

Slide 10  
Slide notes:

The screenshot displays the ILS Navigator Client v3.04 interface. The window title is "ILS Navigator Client v3.04 : My ILS : [mode-Z]". The menu bar includes "Help", "Submit", "Quit", "Functions", and "Keywords". The main content area is titled "Customer Profile" and contains several input fields:

- Customer Code: 00000
- Title: Mr
- Family Name: LOUIE
- Given Names: [Empty]
- Service Number: [Empty]
- Telephone: [Empty]
- Fac Number: [Empty]
- EMAIL: [Empty]
- Website: [Empty]
- CREMAIL: [Empty]
- Record Last Updated: [Empty]
- Last Updated By: [Empty]

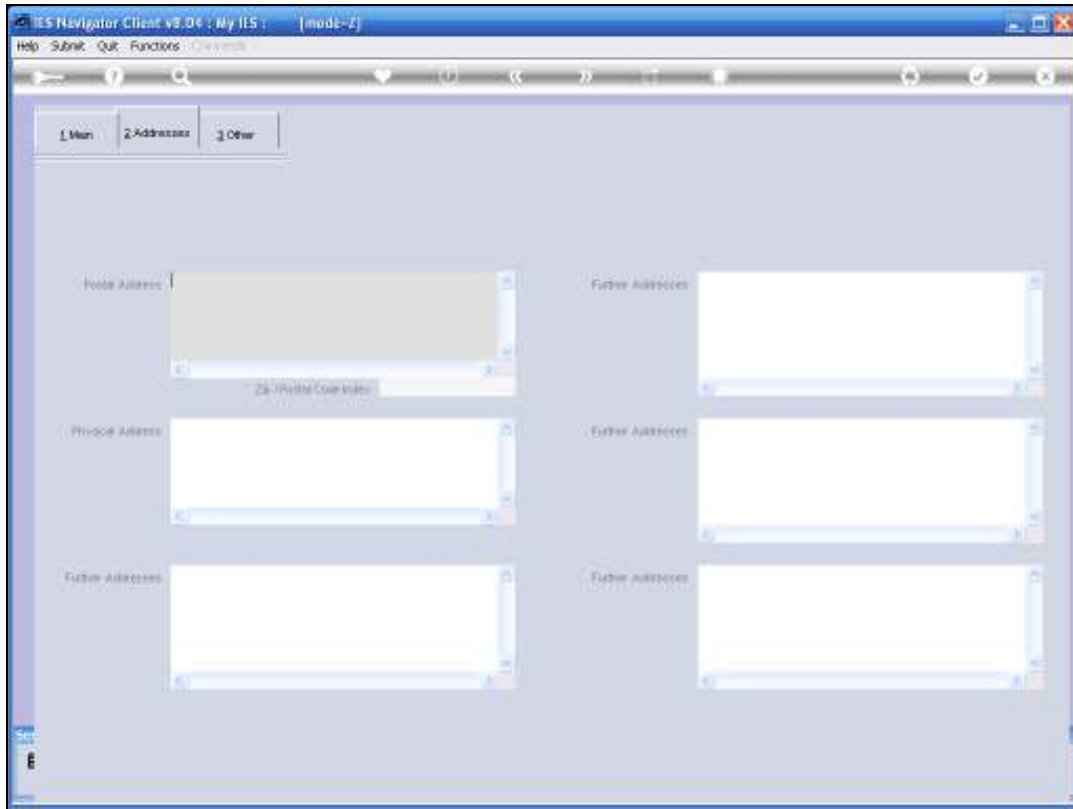
Slide 11

Slide notes:

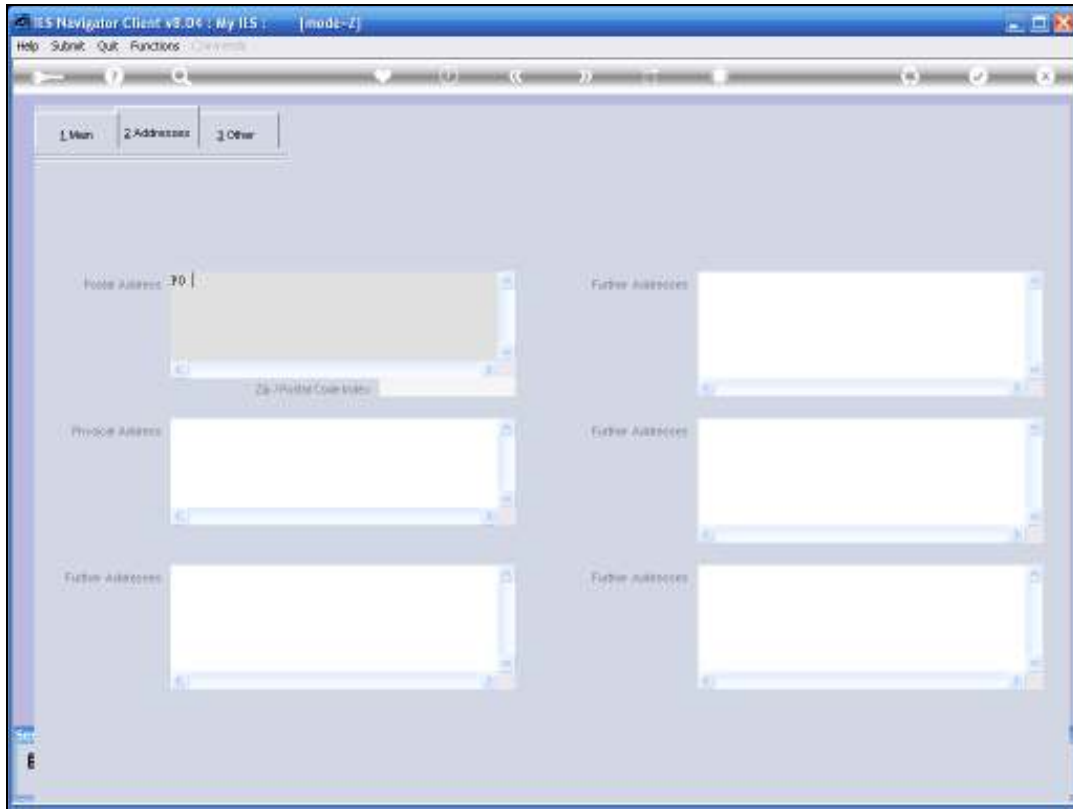
The system will also number the New CRM Record for us and the essential elements, minimum elements, that we will normally define, with a New Customer Profile, is to have the Title in the case of an individual, the Family Name, Given Names, Telephone, and primary address.

The screenshot shows a software window titled "IIS Navigator Client v3.04 : My IIS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form is divided into two columns. The left column contains fields for "Customer Code" (value: 00000), "Type" (dropdown menu showing "01"), "Transfer Date" (value: 2008), "Given Name" (value: FRODO), "Service Name" (empty), "Record Last Updated" (empty), and "Last Updated By" (empty). The right column contains fields for "Telephone" (empty), "Fax Number" (empty), "E-MAIL" (empty), "WebSite" (empty), and "CREATED" (empty). Each field has a small icon to its right, likely for data entry or validation.

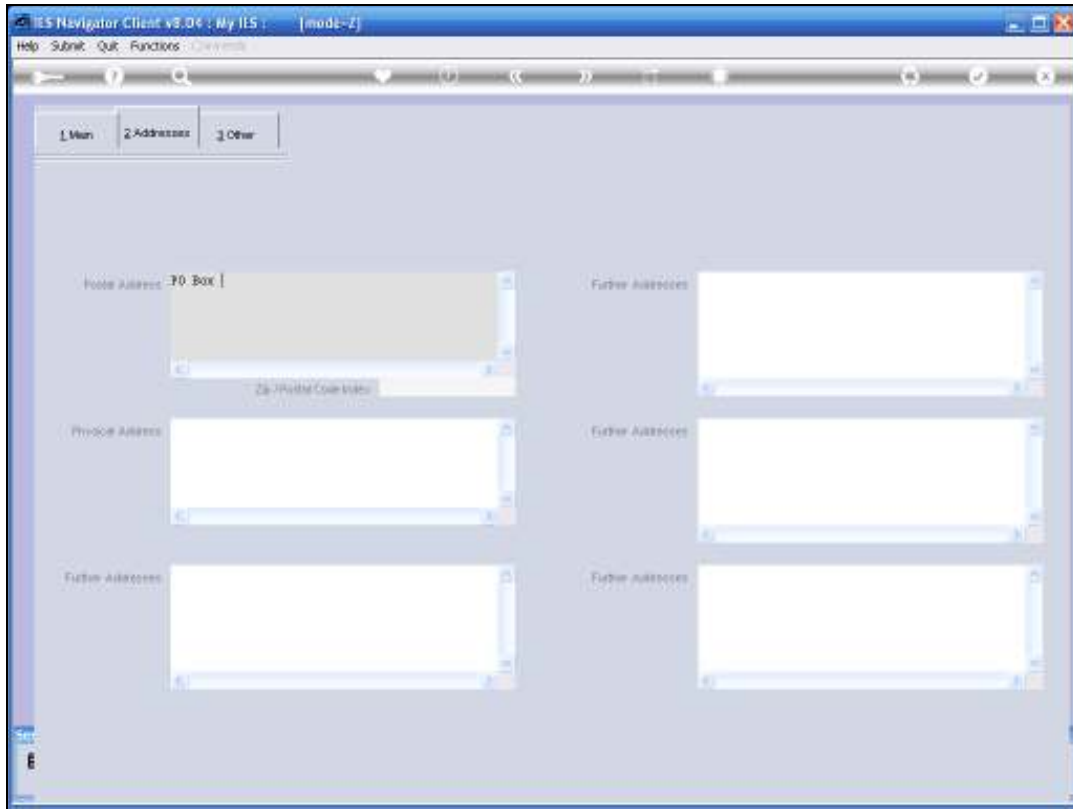
Slide 12  
Slide notes:



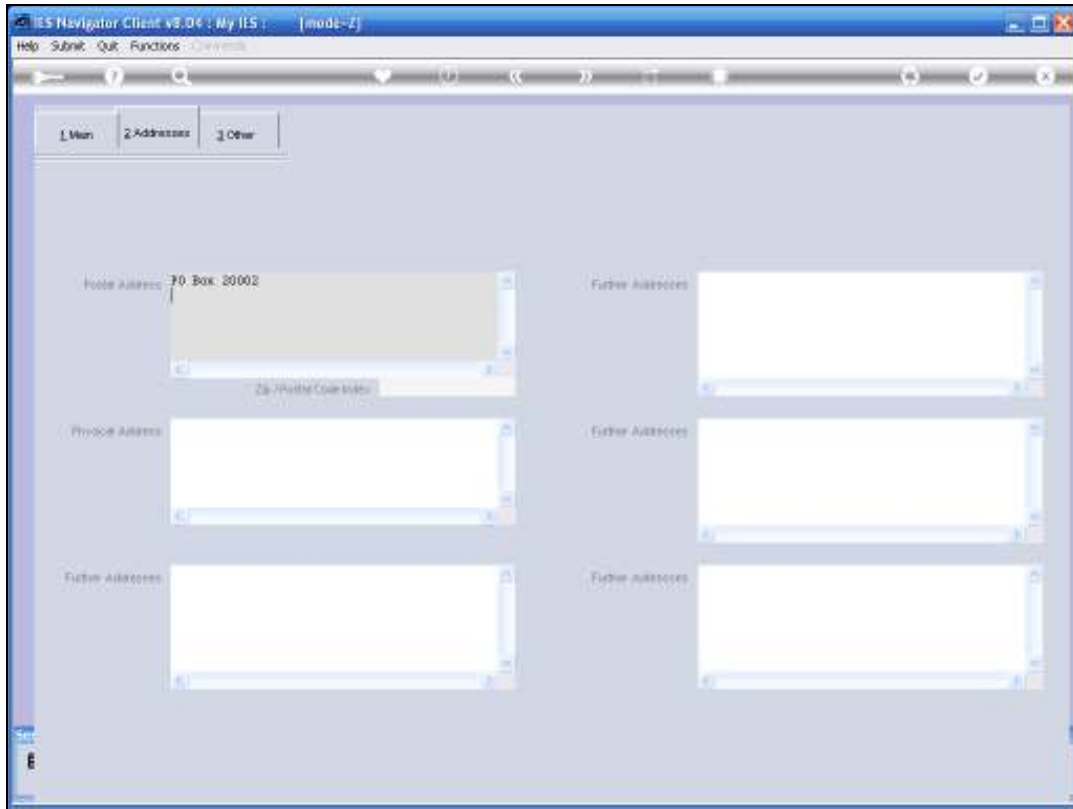
Slide 13  
Slide notes:



Slide 14  
Slide notes:

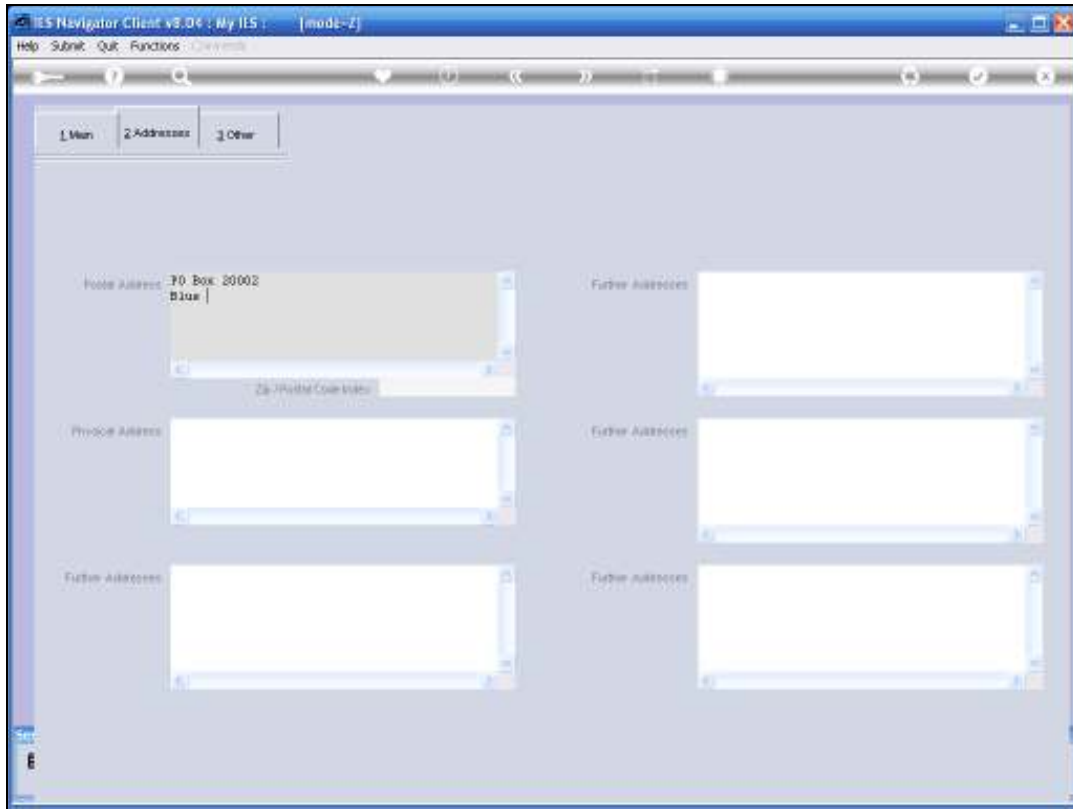


Slide 15  
Slide notes:

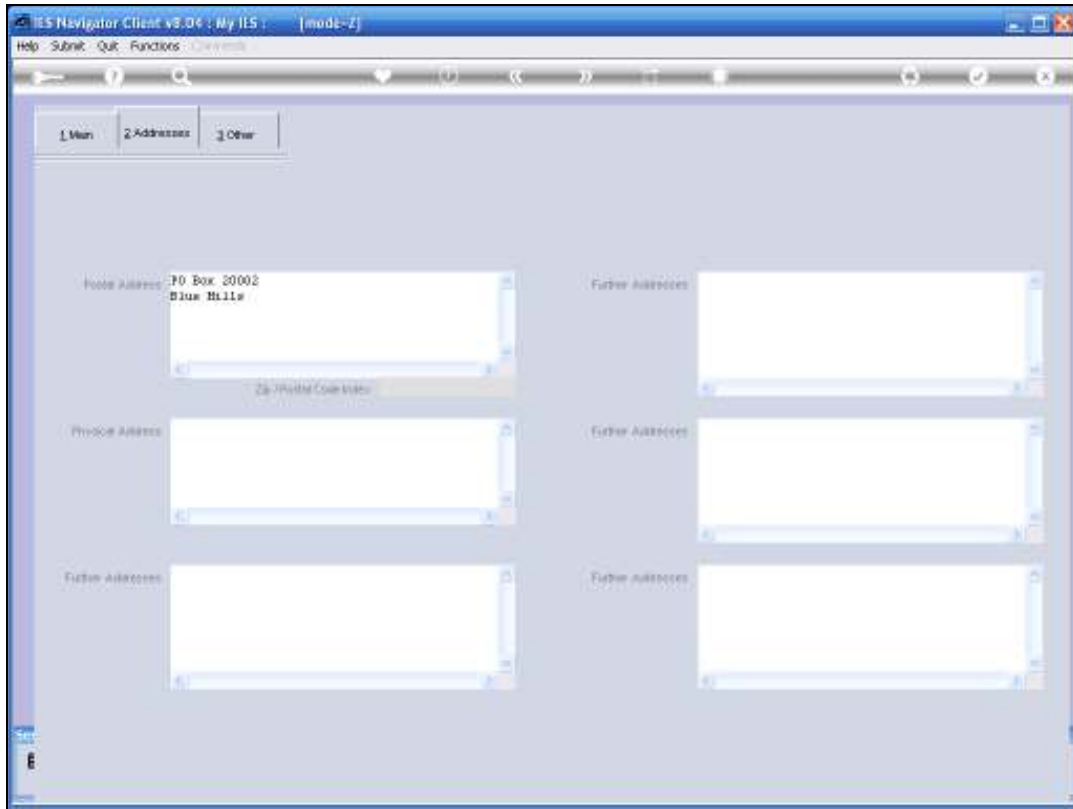


Slide 16  
Slide notes:





Slide 17  
Slide notes:



Slide 18  
Slide notes:

The screenshot shows a software window titled "IIS Navigator Client v3.04 : My IIS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form is divided into two columns. The left column contains fields for "Customer Code" (value: 00000), "Pty" (value: 00), "Trade Name" (value: LOWE), "Given Name" (value: FRODO), "Service Name" (empty), "Record Last Updated" (empty), and "Last Updated By" (empty). The right column contains fields for "Telephone" (value: 555-3535), "Fax Number" (empty), "E-MAIL" (empty), "WebSite" (empty), and "CREATED" (empty). Each field has a small "X" icon to its right. The window also features a status bar at the bottom left with a small icon.

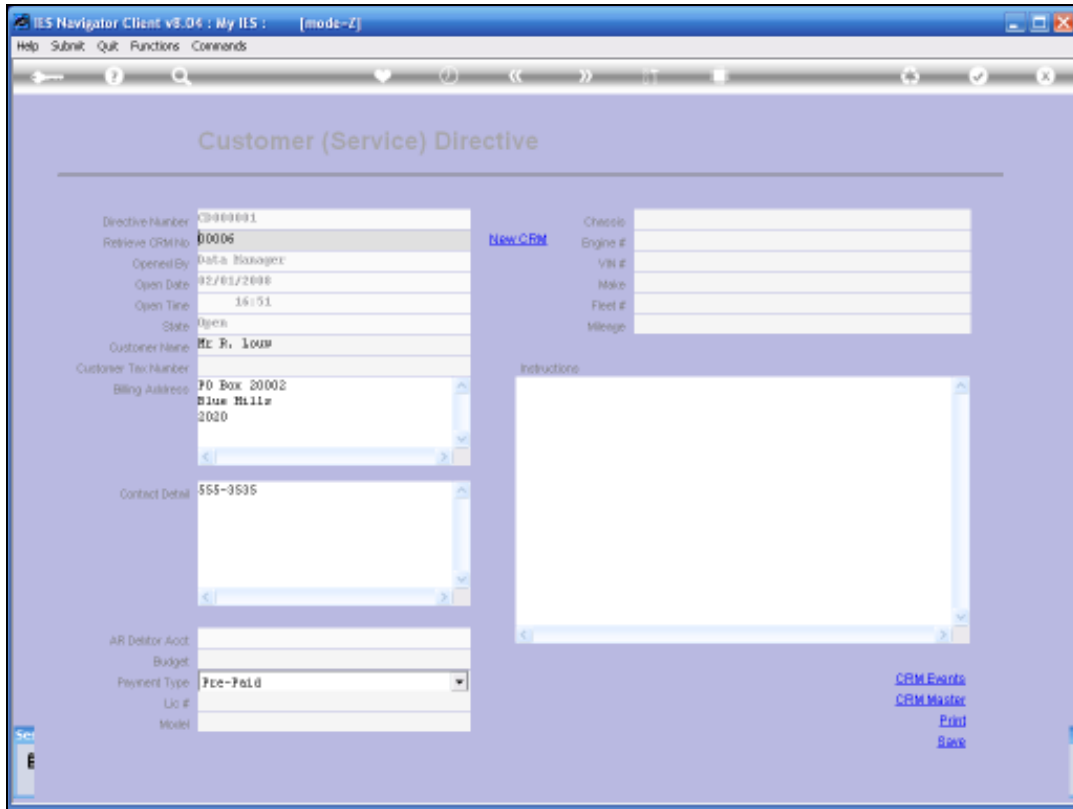
Slide 19  
Slide notes:

The screenshot shows a software window titled "IIS Navigator Client v3.04 : My IIS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form is organized into two columns. The left column contains fields for "Customer Code" (value: 00000), "Pfx" (value: 00), "Trans Name" (value: LOW), "Given Name" (value: FRODO), "Service Name" (empty), "Record Last Updated" (empty), and "Last Updated By" (empty). The right column contains fields for "Telephone" (value: 555-3535), "Fax Number" (empty), "E-MAIL" (empty), "WebSite" (empty), and "CREATED" (empty). Each field is a text input box with a small "X" icon on the right side.

Slide 20  
Slide notes:

The screenshot shows a software window titled "IIS Navigator Client v3.04 : My IIS : [mode-Z]". The window has a menu bar with "Help", "Submit", "Quit", "Functions", and "Keywords". Below the menu bar is a toolbar with navigation icons. The main content area has three tabs: "1 Main", "2 Address", and "3 Other". The "Main" tab is active, displaying a "Customer Profile" form. The form is divided into two columns. The left column contains: "Customer Code" (text box with "19194"), "Pfx" (dropdown menu with "LOW" selected), "Family Name" (text box with "LOW"), "Given Name" (text box with "FRANK"), "Service Name" (text box), "Record Last Updated" (text box), and "Last Updated By" (text box). The right column contains: "Telephone" (text box with "555-3535"), "Fax Number" (text box), "E-MAIL" (text box), "WebSite" (text box), and "CREATED" (text box). The window has a standard Windows-style title bar and window controls.

Slide 21  
Slide notes:



Slide 22  
Slide notes:

So, when we "Save" the New CRM Record, it is automatically attached to the current Directive that we are busy creating.

Customer (Service) Directive

Directive Number: C900001

Retrive CRM No: 00006 [New CRM](#)

Opened By: Date Manager

Open Date: 02/03/2008

Open Time: 16:51

State: Open

Customer Name: Mc R. Low

Customer Tax Number:

Billing Address: PO Box 20002  
Blue Hill  
3020

Contact Detail: 555-3535

AR Debtor Acct:

Budget:

Payment Type: Pre-Paid

License #:

Model:

Chassis:

Engine #:

VIN #:

Make:

Fleet #:

Mileage:

Instructions:

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 23  
Slide notes:

There are now additional Fields that are optional that we can include as information on this Directive. But the minimum that we need to do is to specify some kind of instruction from the Customer.



Slide 24  
Slide notes:



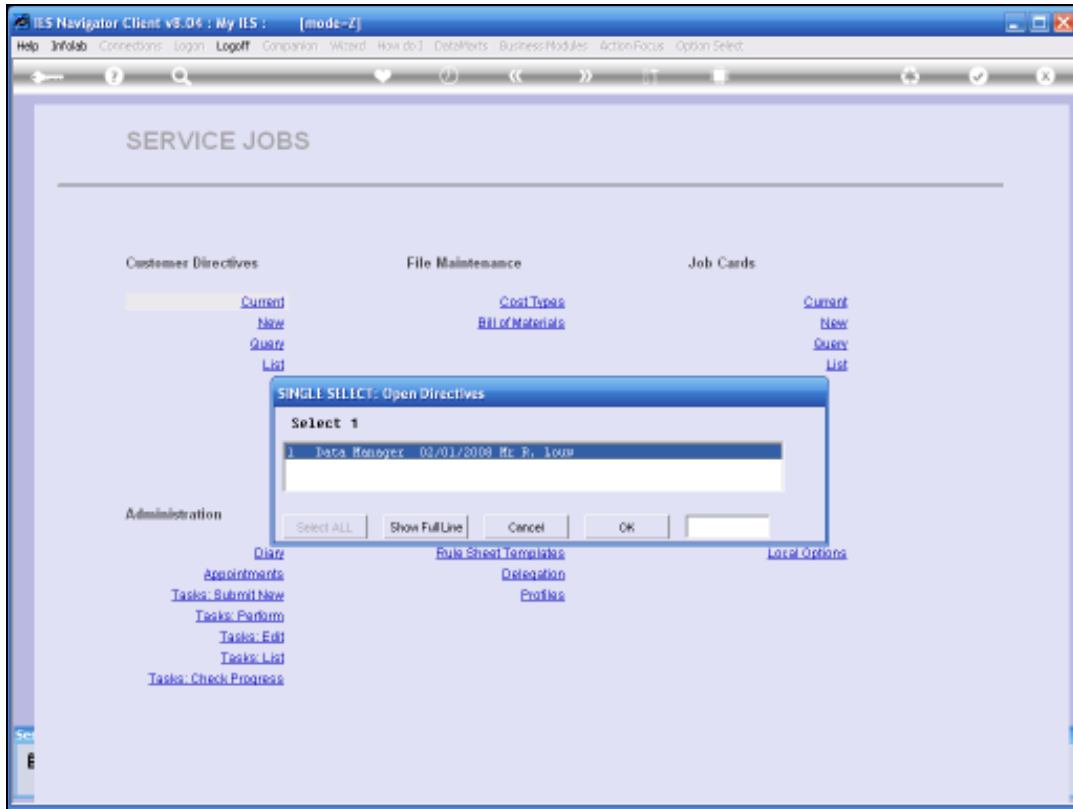


Slide 25  
Slide notes:

This new Service Directive will now be Current, Open, Not yet Attached, to a Job. Therefore, when we choose the Current Option, it will be on the list, in this case it will be the only one on this list.



Slide 26  
Slide notes:



Slide 27  
Slide notes:

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

### Customer (Service) Directive

|                     |                                    |              |                     |
|---------------------|------------------------------------|--------------|---------------------|
| Directive Number    | 3988881                            | Chassis      |                     |
| Retrive CRM No      | 00006                              | Engine #     |                     |
| Opened By           | Date: Manager                      | VIN #        |                     |
| Open Date           | 02/03/2008                         | Make         |                     |
| Open Time           | 16:51                              | Fleet #      |                     |
| State               | Open                               | Mileage      |                     |
| Customer Name       | Mc R. Low                          |              |                     |
| Customer Tax Number |                                    |              |                     |
| Billing Address     | PO Box 20002<br>Blue Hills<br>3020 | Instructions | Service on HTV2000P |
| Contact Detail      | 555-3535                           |              |                     |
| AR Debtor Acct      |                                    |              |                     |
| Budget              |                                    |              |                     |
| Payment Type        | Pre-Paid                           |              |                     |
| Lot #               |                                    |              |                     |
| Model               |                                    |              |                     |

[New CRM](#)

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 28  
Slide notes:

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

### Customer (Service) Directive

|                     |                                    |          |  |
|---------------------|------------------------------------|----------|--|
| Directive Number    | 3988881                            | Chassis  |  |
| Retrive CRM No      | 00006                              | Engine # |  |
| Opened By           | Date: Manager                      | VIN #    |  |
| Open Date           | 02/03/2008                         | Make     |  |
| Open Time           | 16:51                              | Fleet #  |  |
| State               | Open                               | Mileage  |  |
| Customer Name       | Mc R. Low                          |          |  |
| Customer Tax Number |                                    |          |  |
| Billing Address     | PO Box 20002<br>Blue Hills<br>3020 |          |  |
| Contact Detail      | 555-3535                           |          |  |
| AR Debtor Acct      |                                    |          |  |
| Budget              |                                    |          |  |
| Payment Type        | Pre-Paid                           |          |  |
| Lot #               |                                    |          |  |
| Model               |                                    |          |  |

[New CRM](#)

Instructions:  
Service on HTV2000P

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 29  
Slide notes:



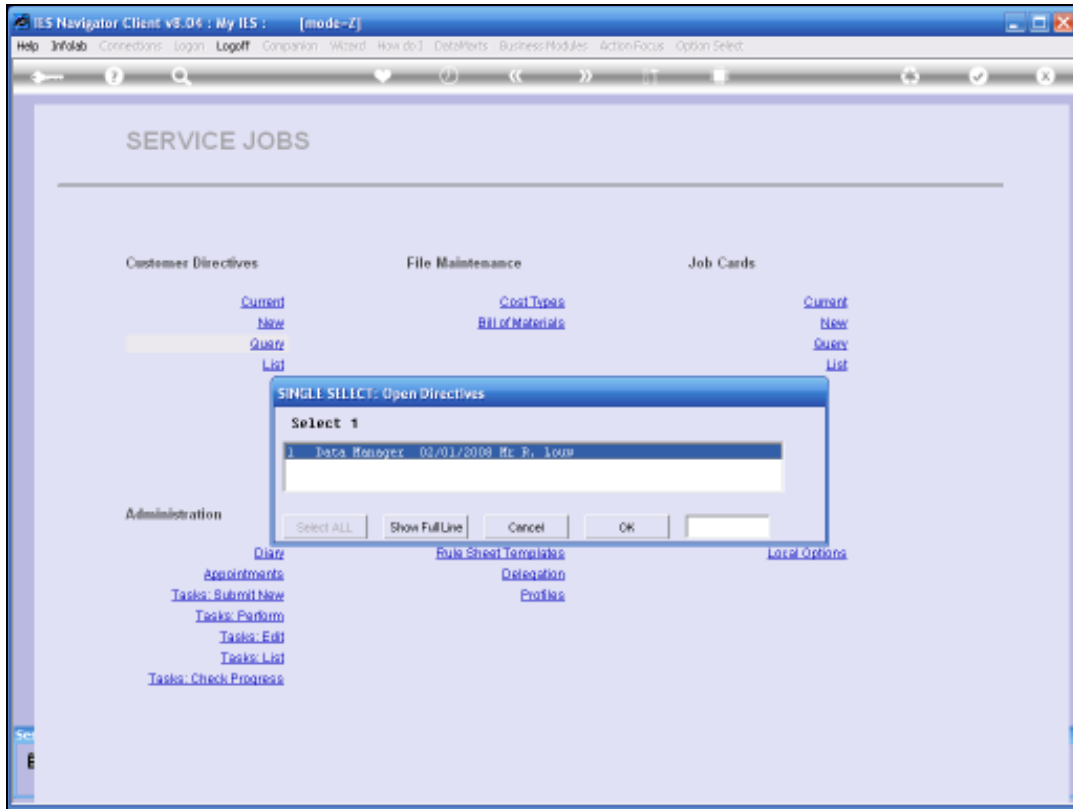
Slide 30  
Slide notes:



Slide 31

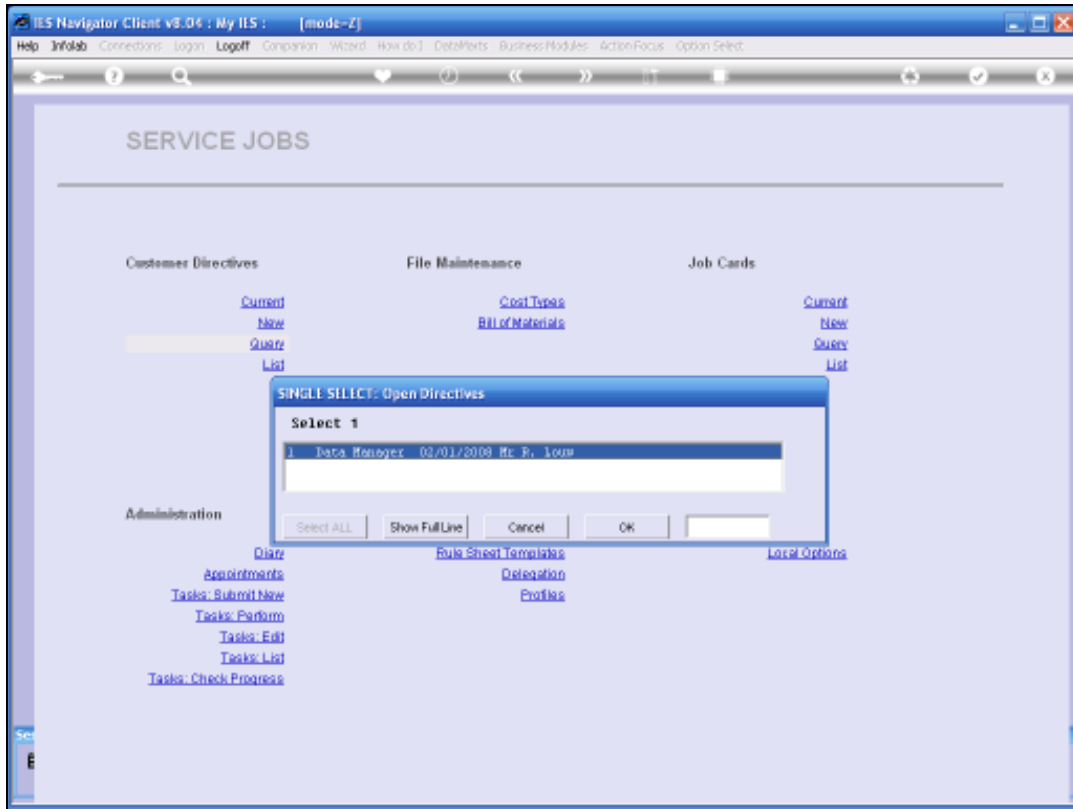
Slide notes:

We also have a "Query" Option available on the Customer Directives.



Slide 32  
Slide notes:

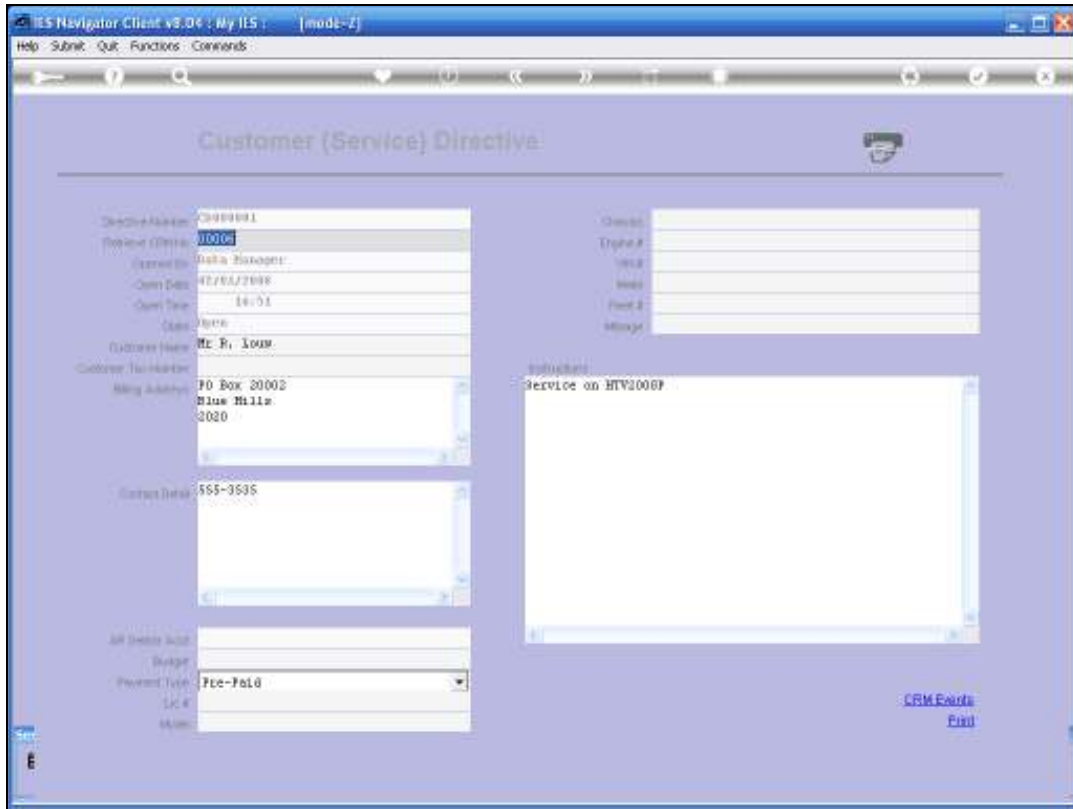




Slide 33  
Slide notes:



Slide 34  
Slide notes:



Slide 35  
Slide notes:

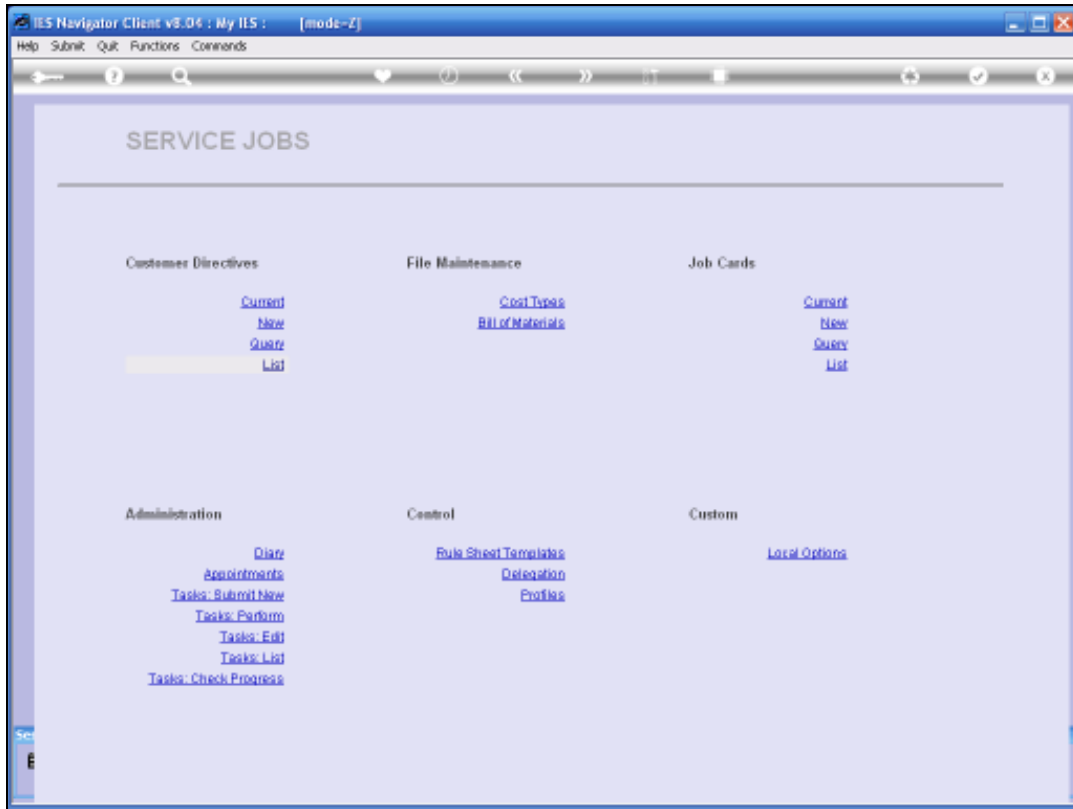


Slide 36  
Slide notes:

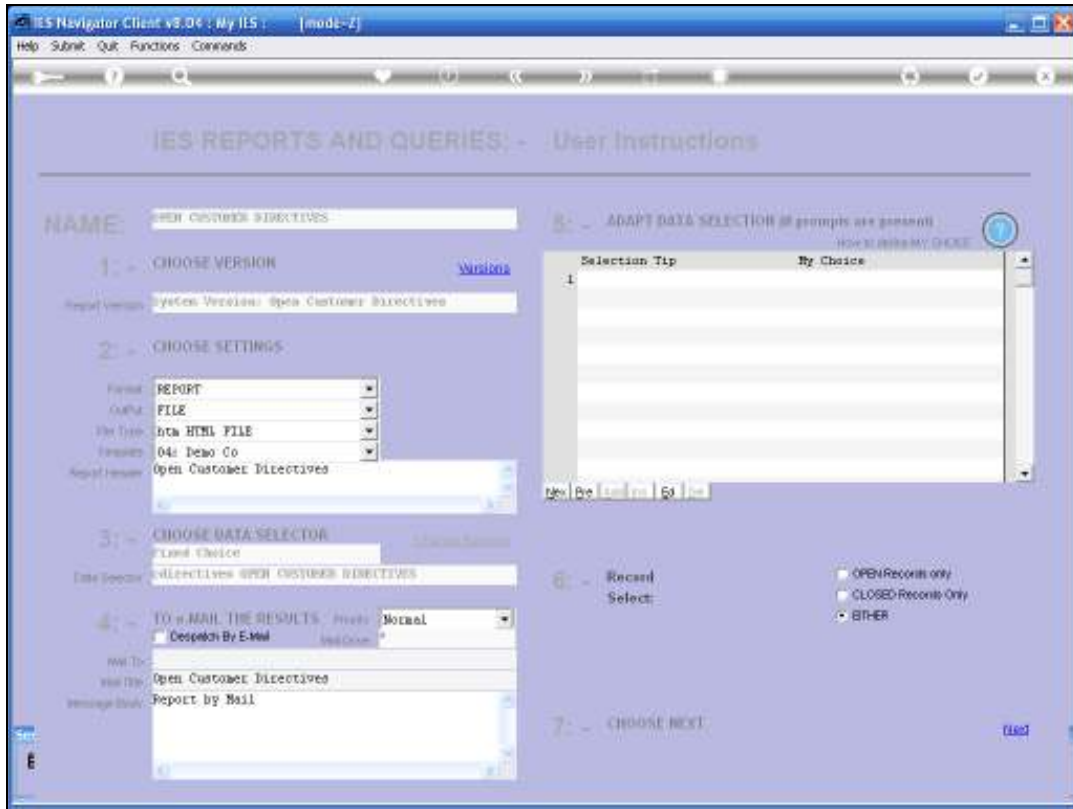


Slide 37  
Slide notes:

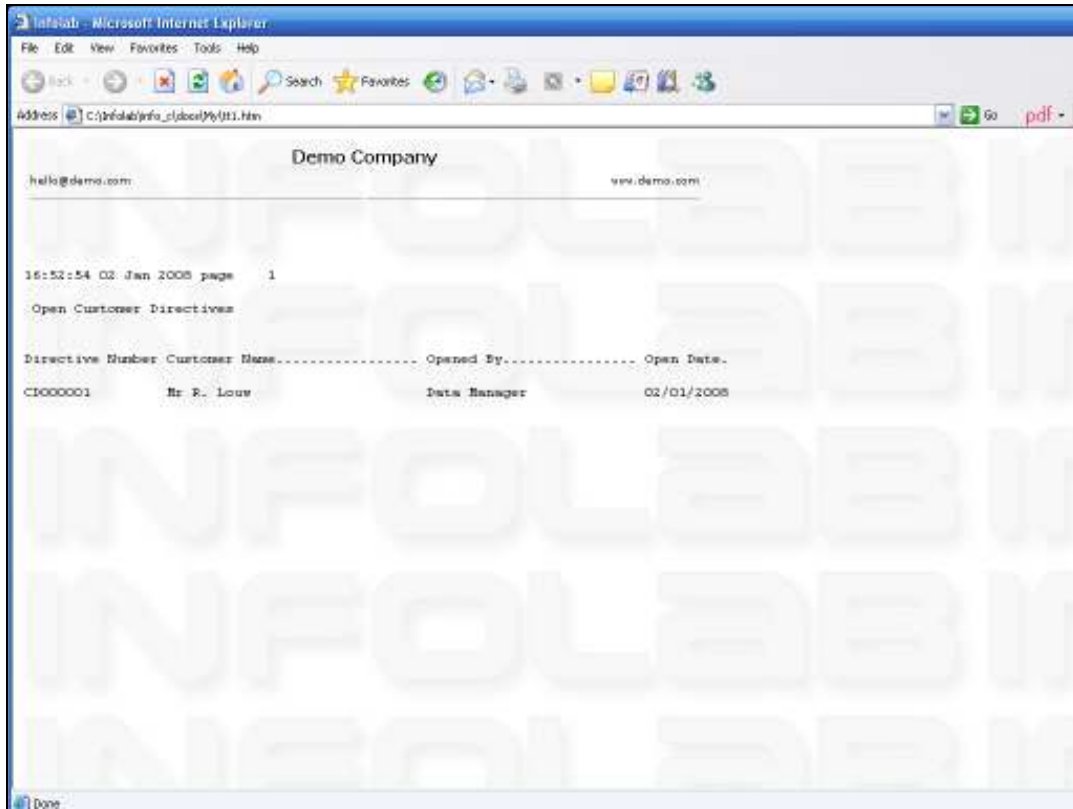
We also have a "List" option so that we can produce a Report on the Current or Open Customer Directives.



Slide 38  
Slide notes:



Slide 39  
Slide notes:



Slide 40  
Slide notes:





Slide 41

Slide notes:

Now we are going to do a New Directive again so that we can see how we retrieve an existing CRM Record. It is important when we already have a customer in File, not to keep creating additional or new CRM Records for that Customer because we want everything to be tied together to the correct CRM Record.

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

### Customer (Service) Directive

|                     |             |              |  |
|---------------------|-------------|--------------|--|
| Directive Number    | 0900003     | Chassis      |  |
| Retrive CRM No      |             | Engine #     |  |
| Opened By           | Dale Sawyer | VIN #        |  |
| Open Date           | 02/03/2008  | Make         |  |
| Open Time           | 17:06       | Fleet #      |  |
| State               | Open        | Mileage      |  |
| Customer Name       |             |              |  |
| Customer Tax Number |             |              |  |
| Billing Address     |             | Instructions |  |
| Contact Detail      |             |              |  |
| AR Debtor Acct      |             |              |  |
| Budget              |             |              |  |
| Payment Type        | Pre-Paid    |              |  |
| Lic #               |             |              |  |
| Model               |             |              |  |

[New CRM](#)

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 42  
Slide notes:

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

### Customer (Service) Directive

|                     |                 |              |  |
|---------------------|-----------------|--------------|--|
| Directive Number    | 0900003         | Chassis      |  |
| Retrive CRM No      |                 | Engine #     |  |
| Opened By           | Patricia Sawyer | VIN #        |  |
| Open Date           | 02/03/2008      | Make         |  |
| Open Time           | 17:06           | Fleet #      |  |
| State               | Open            | Mileage      |  |
| Customer Name       |                 |              |  |
| Customer Tax Number |                 |              |  |
| Billing Address     |                 | Instructions |  |
| Contact Detail      |                 |              |  |
| AR Debtor Acct      |                 |              |  |
| Budget              |                 |              |  |
| Payment Type        | Pre-Paid        |              |  |
| Lic #               |                 |              |  |
| Model               |                 |              |  |

[New CRM](#)

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 43  
Slide notes:

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

### Customer (Service) Directive

|                     |               |          |  |
|---------------------|---------------|----------|--|
| Directive Number    | C900003       | Chassis  |  |
| Retrieve CRM No     | LOUP          | Engine # |  |
| Opened By           | Date: Manager | VIN #    |  |
| Open Date           | 02/03/2008    | Make     |  |
| Open Time           | 17:06         | Fleet #  |  |
| State               | Open          | Mileage  |  |
| Customer Name       |               |          |  |
| Customer Tax Number |               |          |  |
| Billing Address     |               |          |  |
| Contact Detail      |               |          |  |
| AR Debtor Acct      |               |          |  |
| Budget              |               |          |  |
| Payment Type        | Pre-Paid      |          |  |
| Lot #               |               |          |  |
| Model               |               |          |  |

[New CRM](#)

Instructions

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 44  
Slide notes:

The screenshot shows a web browser window titled "IES Navigator Client v8.04 : My IIS : [mode-Z]". The browser address bar is empty. The main content area displays a form titled "Customer (Service) Directive".

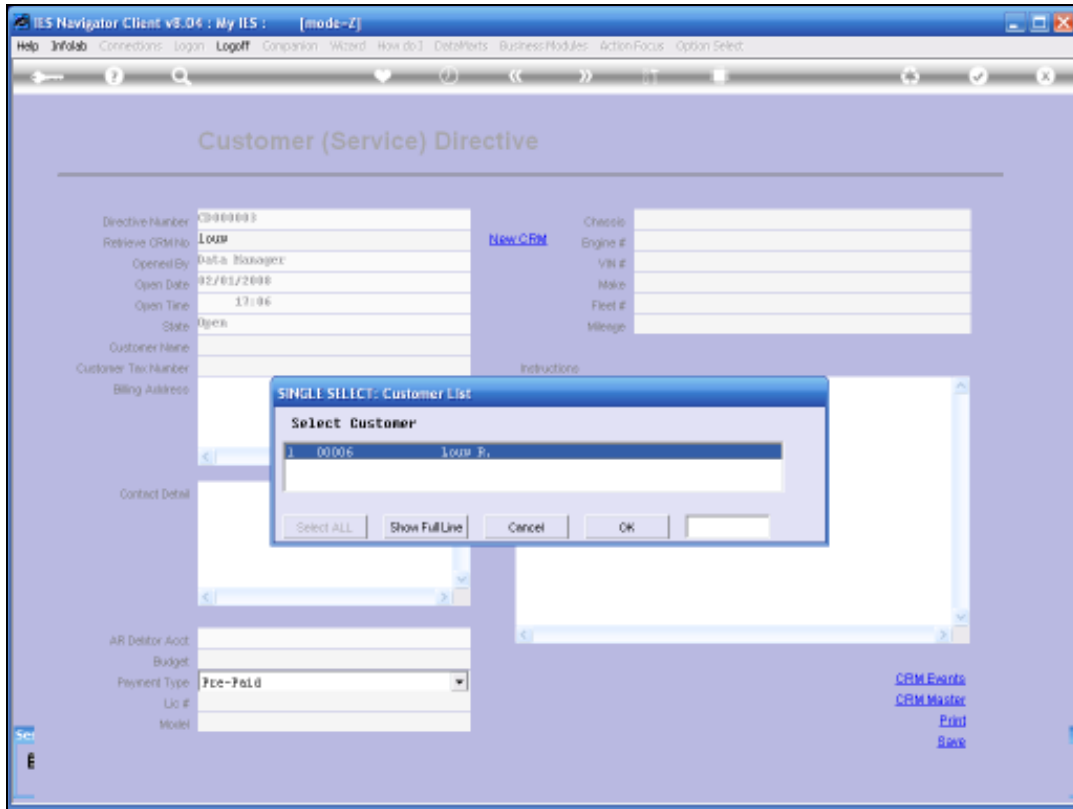
The form is divided into several sections:

- Directive Information:**
  - Directive Number: 03000003
  - Retrieve CRM No: **Lookup** (with a "New CRM" link)
  - Opened By: Data Manager
  - Open Date: 02/03/2008
  - Open Time: 17:06
  - State: Open
- Customer Information:**
  - Customer Name: [Empty]
  - Customer Tax Number: [Empty]
  - Billing Address: [Empty]
- Contact Detail:** [Empty]
- Vehicle Information:**
  - AR Debtor Acct: [Empty]
  - Budget: [Empty]
  - Payment Type: **Pre-Paid** (dropdown menu)
  - Lic #: [Empty]
  - Model: [Empty]
- Vehicle Details:**
  - Chassis: [Empty]
  - Engine #: [Empty]
  - VIN #: [Empty]
  - Make: [Empty]
  - Fleet #: [Empty]
  - Mileage: [Empty]
- Instructions:** [Empty text area]

At the bottom right of the form, there are three links: [CRM Events](#), [CRM Master](#), and [Print](#).

Slide 45  
Slide notes:

We can choose the "Lookup" Function, but we can also just type part of the Name of this Customer and then the System will find the Profile for us.



Slide 46  
Slide notes:

Customer (Service) Directive

|                     |              |                 |                                   |                         |          |          |
|---------------------|--------------|-----------------|-----------------------------------|-------------------------|----------|----------|
| Directive Number    | C900003      | Retrieve CRM No | 00006                             | <a href="#">New CRM</a> | Cheese   |          |
| Opened By           | Date Manager | Open Date       | 17:06                             | State                   | Open     | Engine # |
| Customer Name       | Mr. P. Loun  | Billing Address | PO Box 20002<br>Blue Hill<br>3020 | Contact Detail          | 555-3535 | VIN #    |
| Customer Tax Number |              | AR Debtor Acct  |                                   | Payment Type            | Pre-Paid | Make     |
|                     |              | Budget          |                                   | Lic #                   |          | Fleet #  |
|                     |              | Model           |                                   |                         |          | Mileage  |

Instructions

[CRM Events](#)  
[CRM Master](#)  
[Print](#)  
[Back](#)

Slide 47  
 Slide notes:

When we select an Existing, Current CRM Record, then the Directive is populated automatically from the Data available on the CRM Record.