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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.

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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.





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.

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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.

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





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.

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## 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.

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Slide 27 Slide notes:



Slide 28 Slide notes:

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

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Slide 37 Slide notes:

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

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Slide 39 Slide notes:

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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.



Slide 42 Slide notes:



Slide 43 Slide notes:



Slide 44 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.

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Slide 46 Slide notes:



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.