

C104: CRM - Not Just for New Business Sales

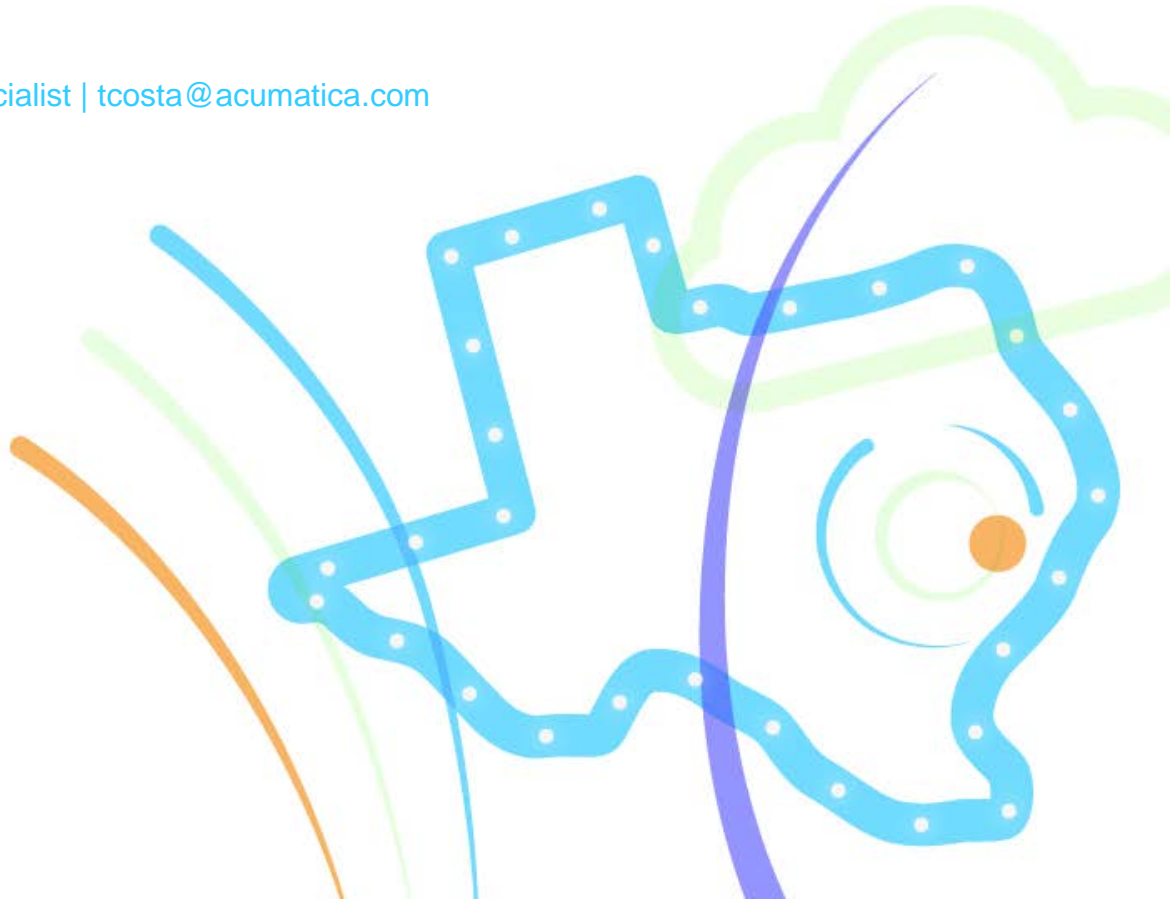
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Agenda

- Brief Introduction to CRM & Field Service
- Creating Service Orders from the Customer Portal
 - Existing Customers
- Creating Service Orders from an Incoming eMail
 - New Customers
- Q & A

Intro to CRM



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Intro to CRM

Opportunities
can create a Service Order

Cases can be

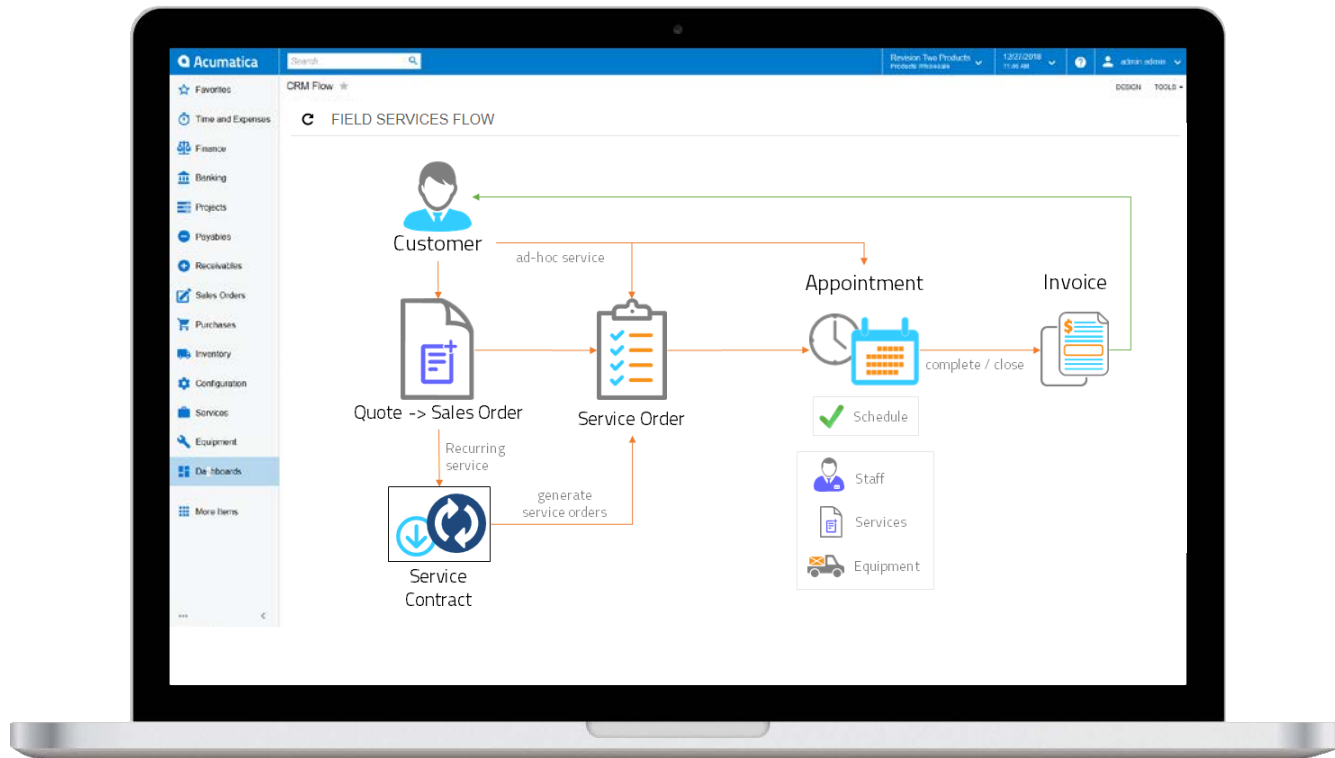
- Assigned
- Have Activities
- Invoiced
- Without creating a Service Order



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Intro to Field Service



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Field Service: Opportunities & Customer Portal

Creating Service Orders

Scenario 1

- Existing Customers can initiate a Service Call from the Customer Portal that a Service Order is then created from.
- 2018 R2 Feature Highlights
 - Push Notifications

Scenario 2

- New Customers send an email requesting a Service Call. *(New Customers can also be created from an existing Contact Us Page from your company website. The Code is available on our Partner Portal. This would require a Web Developer.)*
- An Opportunity is created from the email.
- Sale Rep's can create a Service Order from an Opportunity
- 2018 R2 Feature Highlights
 - Side Panel Navigation
 - Push Notifications

Recap

Created Service Orders from the Customer Portal

- Existing Customers

Created Service Orders from an Incoming eMail

- New Customers

Q & A



Thank You

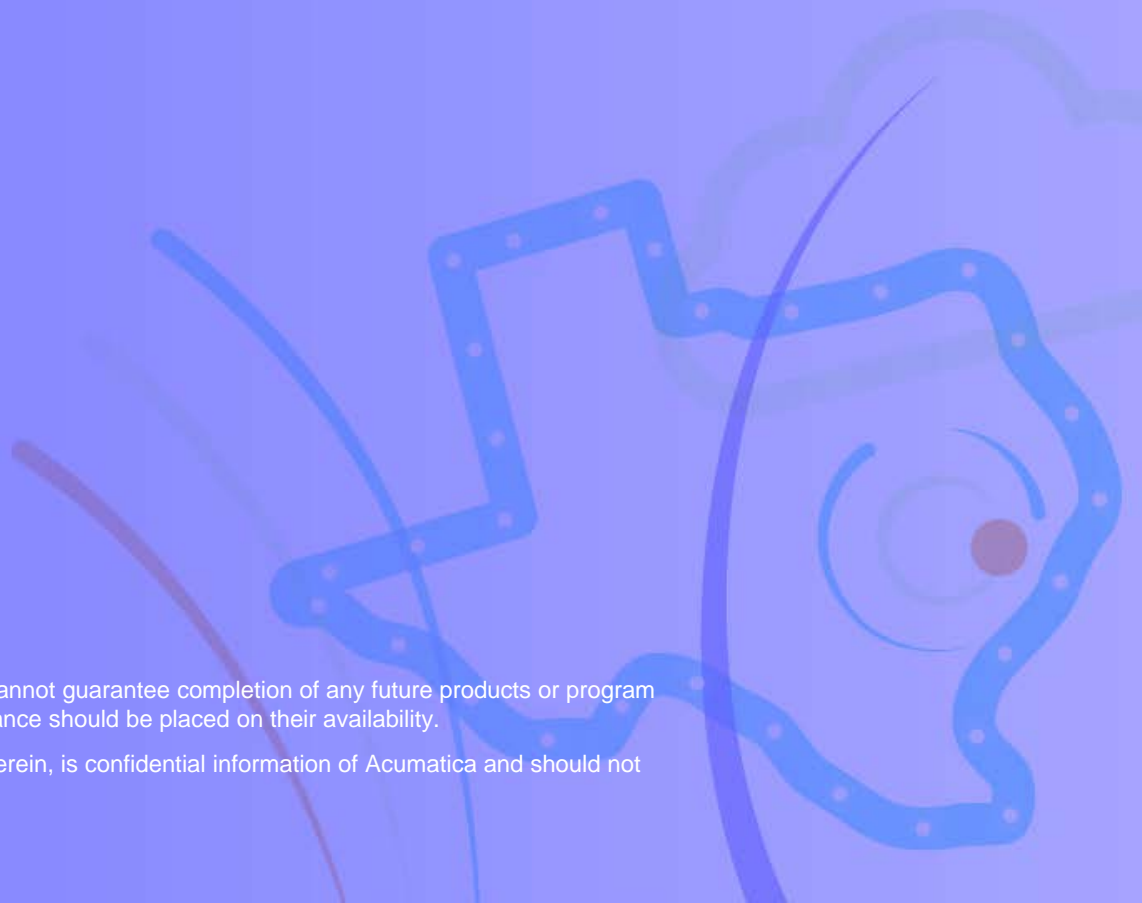
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