

Customer Order

Process Order: [Place Order](#)

Deal Functions: [Show for Later](#) [Functions](#)

Originator: Contact
 Exp. Delivery: 12/03/2009
 Deliv. Info:

Customer: SHAWMPOLE, THERESA

From Catalog:

| Stock Code | Store | Description | Price | Cust. Price | Qty | Serial/Batch | Total | Tax | Incl. Value |
|--------------------|-------|------------------|----------|-------------|------|--------------|----------|--------|-----------------|
| 1 3007174 | 01 | MINI COOLPIX 880 | 1,199.96 | 1,199.96 | 1.00 | | 1,199.96 | 167.99 | 1,367.95 |
| 2 0201756 | 01 | CANON EF 75-300M | 288.00 | 288.00 | 2.00 | | 576.00 | 80.64 | 656.64 |
| 3 3008412 | 01 | OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 1,110.00 | 155.40 | 1,265.40 |
| GRAND TOTAL | | | | | | | | | 3,797.99 |

Recently Ordered, Not Recently Ordered (to promote) and Special Offers

| Stock Code | Description | Price | Qty | Information |
|------------|----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.00 | 1.00 | Order: 09/03/09 |
| 2 3007174 | MINI COOLPIX 8800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA MASTER PRO | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.0 IS | 664.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201710 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205200 | CANON RS-60E/60E3 REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 1

Slide notes: We will now look at the CRM options available on the Customer Order screen.

The screenshot shows the ILS Navigator Client interface for a 'Customer Order'. At the top, there are navigation buttons and a menu. The main area is titled 'Customer Order' and includes fields for 'Process Order' (Place Order), 'Deal Functions' (Save for Later, Functions), and 'Originator' (Contact: 12/03/2009). Below this, there's a section for 'From Catalog' with a table of items:

| Stock Code | Store Description | Price | Cost Price | Qty | Sp | Tax | Incl. Value |
|------------|---------------------|----------|------------|------|----|------|-------------|
| 1 3007174 | 01 NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 9.06 | 1,207.95 |
| 2 0201756 | 01 CANON EF 75-300M | 288.00 | 288.00 | 2.00 | | 6.00 | 656.64 |
| 3 3008412 | 01 OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 0.00 | 1,265.40 |

A context menu is open over the items, listing various actions such as 'Lost Sale Reporting', 'Deal View', 'Notes to the Deal', 'CRM Connections', 'Tax Toggle', 'Comastore', 'Send User Message', 'Diary', 'New Task', 'Retail Catalog', and 'None of These'. At the bottom right, the 'PRICE TOTAL' is 3,257.99. Below the main table, there's a section for 'Recently Ordered, Not Recently Ordered (to promote) and Special Offers' with a 'Go-Start' button and another table of items:

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 664.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60ES REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 2
Slide notes:

The screenshot shows the IIS Navigator Client interface for a 'Customer Order'. The window title is 'IIS Navigator Client v8.1B : My IIS - Mac - [made-1]'. The main area is titled 'Customer Order' and shows a 'Process Order' button and 'Deal Functions' like 'Place Order' and 'Save for Later Functions'. A customer name 'CUCOCCI, THERESA' is entered. Below this is a table of items from a catalog:

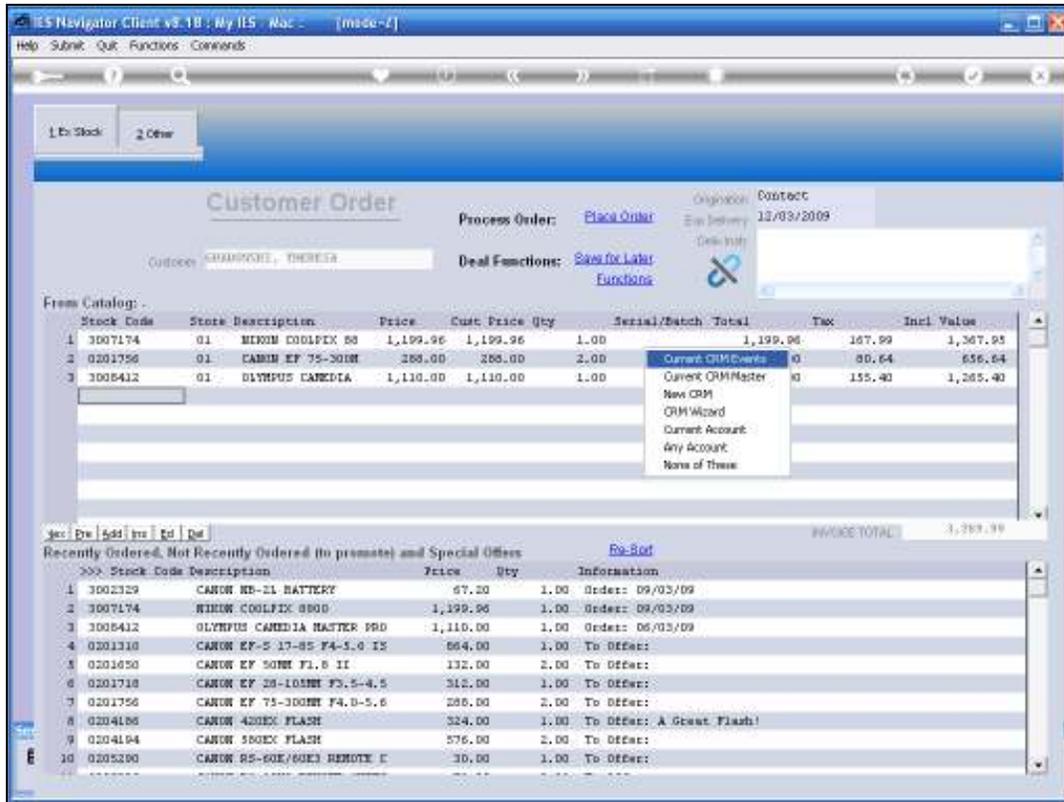
| Stock Code | Store Description | Price | Cost Price | Qty | Se | Tax | Incl. Value |
|------------|---------------------|----------|------------|------|----|------|-------------|
| 1 3007174 | 01 NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 9.06 | 1,207.99 |
| 2 0201756 | 01 CANON EF 75-300M | 288.00 | 288.00 | 2.00 | | 8.00 | 656.64 |
| 3 3008412 | 01 OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 0.00 | 1,265.40 |

A context menu is open over the items, listing actions such as 'Lost Sale Reporting', 'Deal View', 'Notes to the Deal', 'CRN Corrections', 'Tax Toggle', 'Commission', 'Send User Message', 'Diary', 'New Task', 'Retail Catalog', and 'None of These'. At the bottom right, the 'GRAND TOTAL' is 3,257.99. Below the main table is a section for 'Recently Ordered, Not Recently Ordered (to promote) and Special Offers' with a 'Go-Start' button. This section contains a list of items with their stock codes, descriptions, prices, quantities, and order dates or notes.

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 664.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204106 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60K3 REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 3

Slide notes:



Slide 4

Slide notes: We 1st look at the Current CRM Events option.

IES Navigator Client v8.1B : My IIS - Mac - [made-1]

Help Submit Quit Functions Comments

1 To Stock 2 Other

Customer Order

Process Order: [Place Order](#) Origination Contact: 12/03/2009

Deal Functions: [Save for Later](#) [Delete Item](#)

Customer: CHAMPONE, THERESA

From Catalog:

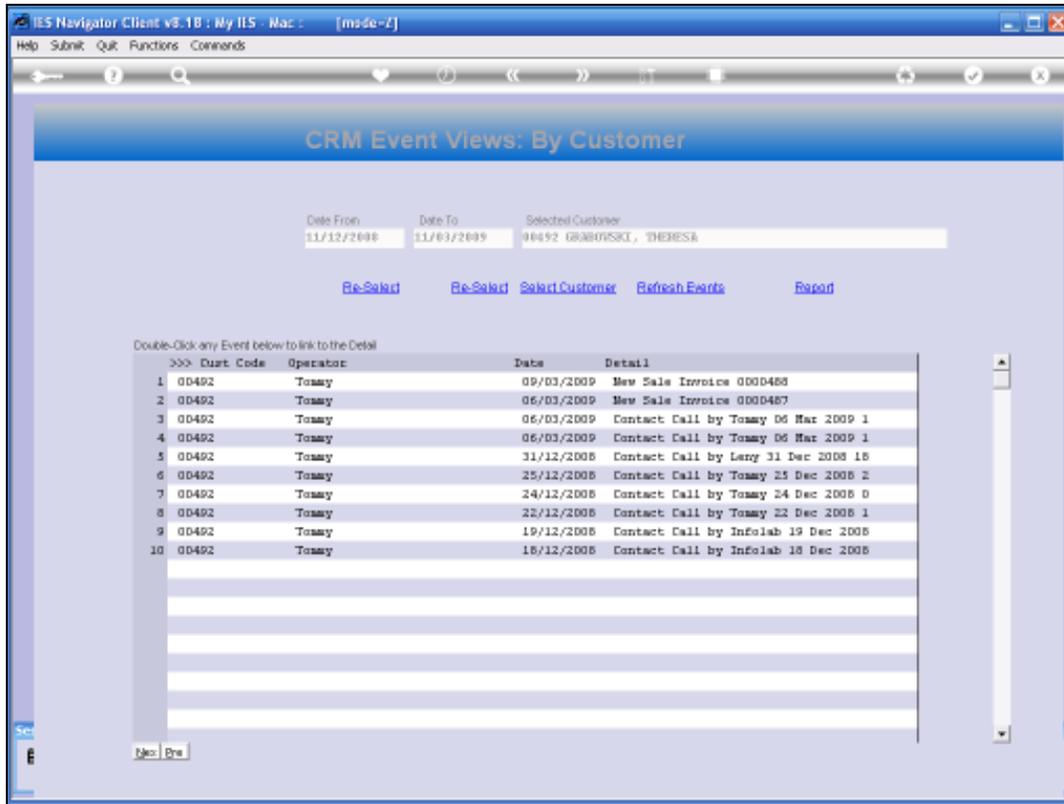
| Stock Code | Store Description | Price | Cost Price | Qty | Serial/Batch | Total | Tax | Incl Value |
|------------|---------------------|----------|------------|------|--------------|----------|--------|------------|
| 1 3007174 | 01 NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 1,199.96 | 167.99 | 1,367.95 |
| 2 0201756 | 01 CANON EF 75-300M | 288.00 | 288.00 | 2.00 | | 576.00 | 80.64 | 656.64 |
| 3 3008412 | 01 OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 1,110.00 | 155.40 | 1,265.40 |

GRAND TOTAL: 3,293.99

Recently Ordered, Not Recently Ordered (to promote) and Special Offers

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 664.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60K3 REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 5
Slide notes:



Slide 6

Slide notes: And in this case, we can drill into the most recent events on this CRM Account.

IES Navigator Client v8.1B : My IIS - Mac - [made-1]

Help Submit Quit Functions Comments

1 To Stock 2 Other

Customer Order

Process Order: [Place Order](#) Origination Contact: 12/03/2009

Deal Functions: [Save for Later](#) [Delete Item](#)

Customer: CHAMPONE, THERESA

From Catalog:

| Stock Code | Store Description | Price | Cost Price | Qty | Serial/Batch | Total | Tax | Incl Value |
|------------|---------------------|----------|------------|------|--------------|----------|--------|------------|
| 1 3007174 | 01 NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 1,199.96 | 167.99 | 1,367.95 |
| 2 0201756 | 01 CANON EF 75-300M | 288.00 | 288.00 | 2.00 | | 576.00 | 80.64 | 656.64 |
| 3 3008412 | 01 OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 1,110.00 | 155.40 | 1,265.40 |

GRAND TOTAL: 3,293.99

Recently Ordered, Not Recently Ordered (to promote) and Special Offers

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 664.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60K3 REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 7
Slide notes:

IES Navigator Client v8.1B : My IIS - Mac - [made-1]

Help Submit Quit Functions Comments

1 To Stock 2 Other

Customer Order

Process Order: [Place Order](#) Origination Contact: 12/03/2009

Deal Functions: [Save for Later](#) [Delete Item](#)

Customer: CHAMPONE, THERESA

From Catalog:

| Stock Code | Store Description | Price | Cost Price | Qty | Serial/Batch | Total | Tax | Incl Value |
|------------|---------------------|----------|------------|------|--------------|----------|--------|------------|
| 1 3007174 | 01 NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 1,199.96 | 167.99 | 1,367.95 |
| 2 0201756 | 01 CANON EF 75-300M | 288.00 | 288.00 | 2.00 | | 576.00 | 80.64 | 656.64 |
| 3 3008412 | 01 OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 1,110.00 | 155.40 | 1,265.40 |

GRAND TOTAL: 3,293.99

Recently Ordered, Not Recently Ordered (to promote) and Special Offers

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 664.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204106 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60K3 REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 8
Slide notes:

The screenshot shows the IIS Navigator Client interface. At the top, there's a menu bar with 'Help', 'Submit', 'Quit', 'Functions', and 'Comments'. Below that is a toolbar with navigation icons. The main window title is 'IIS Navigator Client v8.1B : My IIS - Mac - [made-1]'. The interface is divided into several sections:

- Customer Order**: A header section with 'Process Order: Place Order' and 'Deal Functions: Save for Later Function'. It also shows 'Originator Contact' as '12/03/2009'.
- Customer**: A field containing 'CHAMPONE, THERESA'.
- From Catalog**: A table listing items from a catalog.
- Context Menu**: A menu is open over the catalog table, listing options like 'Lost Sale Reporting', 'Deal View', 'Notes to the Deal', 'CRM Connections', 'Tax Toggle', 'Commissions', 'Send User Message', 'Diary', 'New Tool', 'Retail Catalog', and 'None of These'.
- Summary**: A table with columns 'Price', 'Cust. Price', and 'Qty'. It shows a 'PRICE TOTAL' of '3,357.99'.
- Recently Ordered, Not Recently Ordered (to promote) and Special Offers**: A table listing recently ordered items with columns for 'Stock Code', 'Description', 'Price', 'Qty', and 'Information'.

| Stock Code | Store Description | Price | Cust. Price | Qty | Sex |
|------------|---------------------|----------|-------------|------|-----|
| 1 3007174 | 01 NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | |
| 2 0201756 | 01 CANON EF 75-300M | 288.00 | 288.00 | 2.00 | |
| 3 3008412 | 01 OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | |

| Price | Cust. Price | Qty |
|----------|-------------|-----|
| 3,357.99 | | |

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 864.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60ES REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 9
Slide notes:

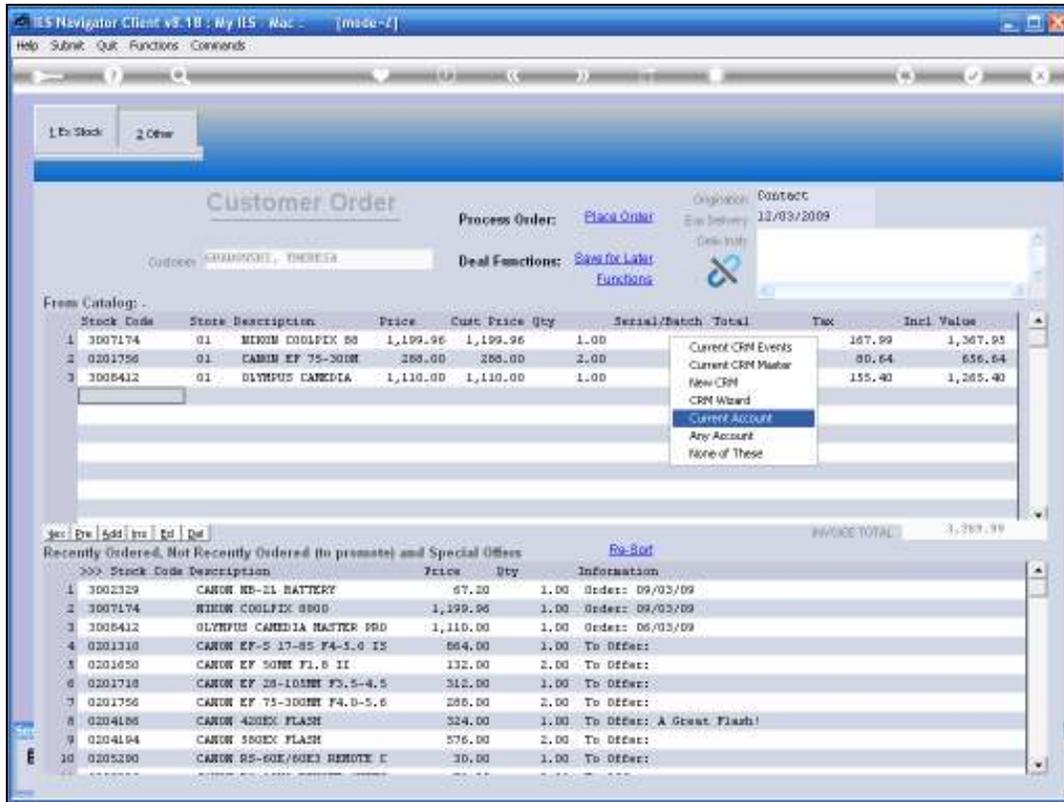
The screenshot shows the IIS Navigator Client interface. At the top, there's a menu bar with 'Help', 'Submit', 'Quit', 'Functions', and 'Comments'. Below that is a navigation bar with '1 To Stock' and '2 Other' tabs. The main area is titled 'Customer Order' and includes fields for 'Customer: CHAMPONE, THERESA', 'Process Order: Place Order', and 'Deal Functions: Save for Later Function'. A 'Context' menu is open over the table, listing options like 'Lost Sale Reporting', 'Deal View', 'Notes to the Deal', 'GPI/Conversions', 'Tax Toggle', 'Commissions', 'Send User Message', 'Diary', 'New Tool', 'Retail Catalog', and 'None of These'. The table below has columns for Stock Code, Store, Description, Price, Cust. Price, Qty, and Sex. Below the table is a 'GRAND TOTAL: 3,357.99' and a section for 'Recently Ordered, Not Recently Ordered (to promote) and Special Offers' with a 'Go Back' link.

| Stock Code | Store | Description | Price | Cust. Price | Qty | Sex | Tax | Incl. Value | |
|------------|-------|------------------|----------|-------------|------|-----|-----|-------------|----------|
| 1 3007174 | 01 | NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 36 | 167.99 | 1,367.95 |
| 2 0201756 | 01 | CANON EF 75-30MM | 288.00 | 288.00 | 2.00 | | 30 | 86.64 | 656.64 |
| 3 3008412 | 01 | OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 30 | 155.40 | 1,265.40 |

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 864.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60ES REMOTE C | 30.00 | 1.00 | To Offer: |

Slide 10

Slide notes:



Slide 11

Slide notes: And next we look at the example of drilling into the Customer Debtor Account, if there is a linked Debtor Account and if we have access to it.

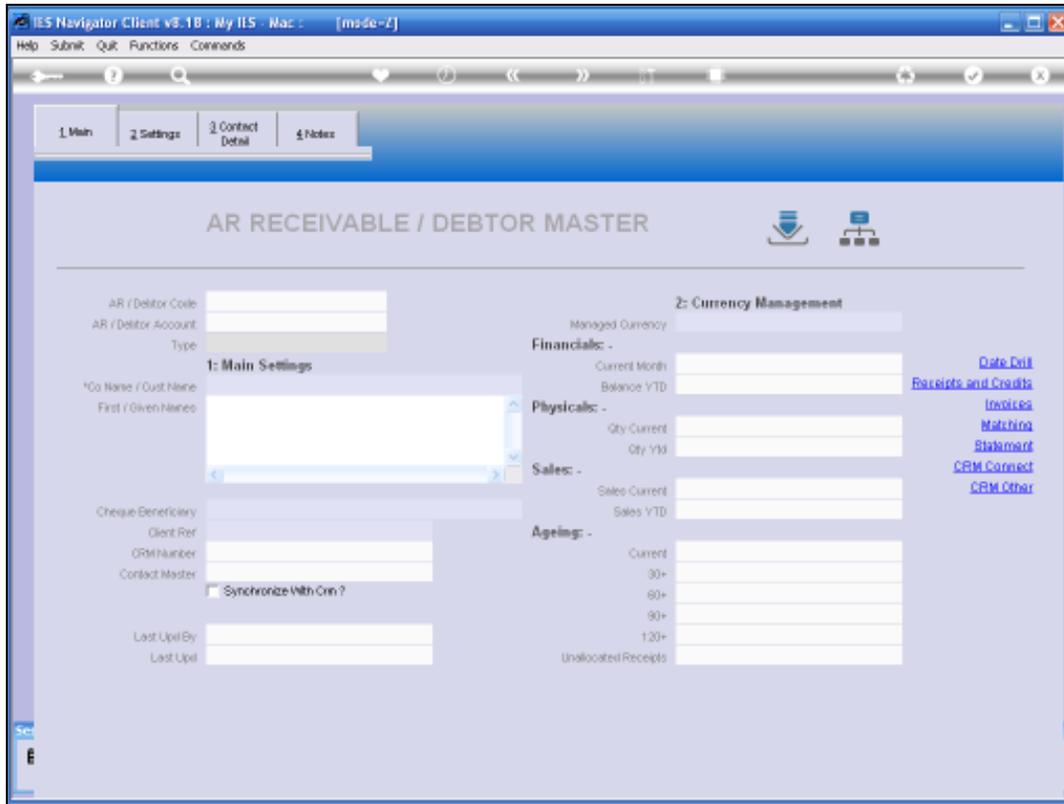
The screenshot shows the IIS Navigator Client interface. At the top, there's a menu bar with 'Help', 'Submit', 'Quit', 'Functions', and 'Comments'. Below the menu is a toolbar with navigation icons. The main window has a header with 'Customer Order' and 'Process Order: Place Order'. A customer name 'CUCOCCI, THERESA' is entered in the 'Customer' field. 'Deal Functions: Save for Later Functions' is visible. The 'From Catalog' section contains a table with columns: Stock Code, Store, Description, Price, Cust. Price, Qty, Serial/Batch, Total, Tax, and Incl. Value. Below this is a 'Recently Ordered, Not Recently Ordered (to promote) and Special Offers' section with a table including columns for Stock Code, Description, Price, Qty, and Information.

| Stock Code | Store | Description | Price | Cust. Price | Qty | Serial/Batch | Total | Tax | Incl. Value |
|------------|-------|------------------|----------|-------------|------|--------------|----------|--------|-------------|
| 1 3007174 | 01 | NIKON COOLPIX S8 | 1,199.96 | 1,199.96 | 1.00 | | 1,199.96 | 167.99 | 1,367.95 |
| 2 0201756 | 01 | CANON EF 75-30MM | 288.00 | 288.00 | 2.00 | | 576.00 | 80.64 | 656.64 |
| 3 3008412 | 01 | OLYMPUS CAMEDIA | 1,110.00 | 1,110.00 | 1.00 | | 1,110.00 | 155.40 | 1,265.40 |

| Stock Code | Description | Price | Qty | Information |
|------------|-----------------------------|----------|------|--------------------------|
| 1 3002329 | CANON NB-2L BATTERY | 67.20 | 1.00 | Order: 09/03/09 |
| 2 3007174 | NIKON COOLPIX S800 | 1,199.96 | 1.00 | Order: 09/03/09 |
| 3 3008412 | OLYMPUS CAMEDIA BATTERY P80 | 1,110.00 | 1.00 | Order: 06/03/09 |
| 4 0201310 | CANON EF-S 17-85 F4-5.6 IS | 864.00 | 1.00 | To Offer: |
| 5 0201650 | CANON EF 50MM F1.8 II | 132.00 | 2.00 | To Offer: |
| 6 0201718 | CANON EF 28-105MM F3.5-4.5 | 312.00 | 1.00 | To Offer: |
| 7 0201756 | CANON EF 75-300MM F4.0-5.6 | 288.00 | 2.00 | To Offer: |
| 8 0204186 | CANON 420EX FLASH | 324.00 | 1.00 | To Offer: A Great Flash! |
| 9 0204194 | CANON 580EX FLASH | 576.00 | 2.00 | To Offer: |
| 10 0205290 | CANON RS-60K/60K3 REMOTE C | 30.00 | 1.00 | To Offer: |

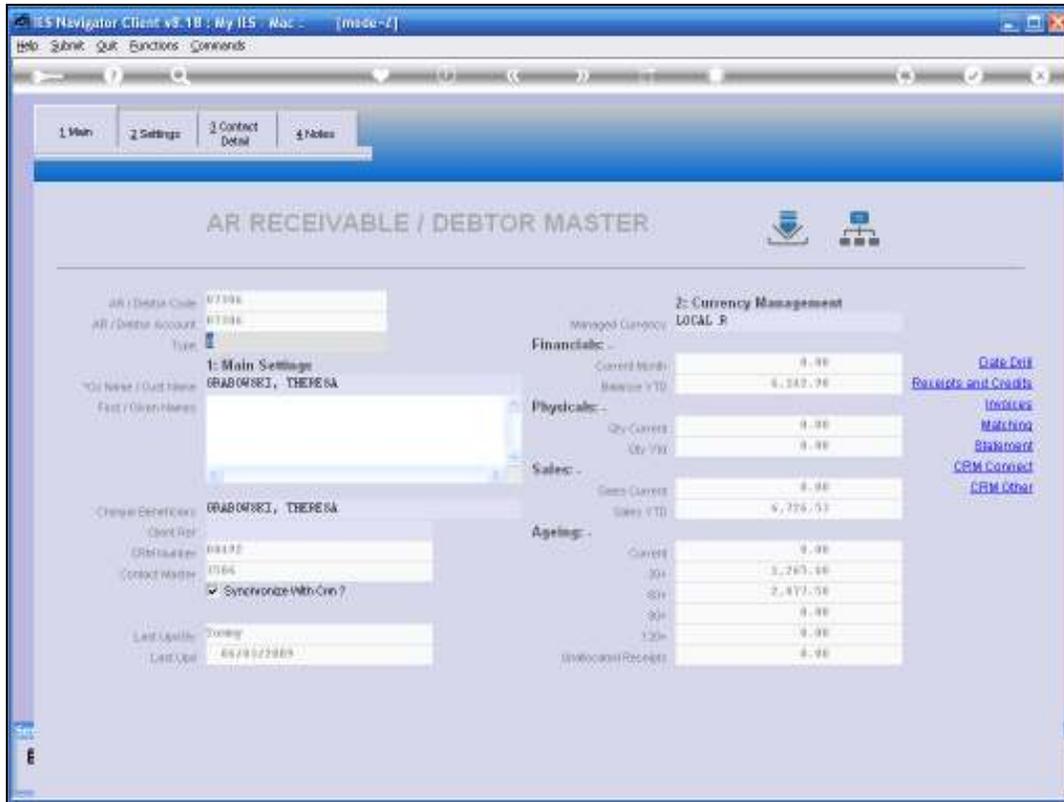
Slide 12

Slide notes:



Slide 13

Slide notes:



Slide 14

Slide notes: In this case, we can drill into the Customer Account and find the latest detail on the Account.