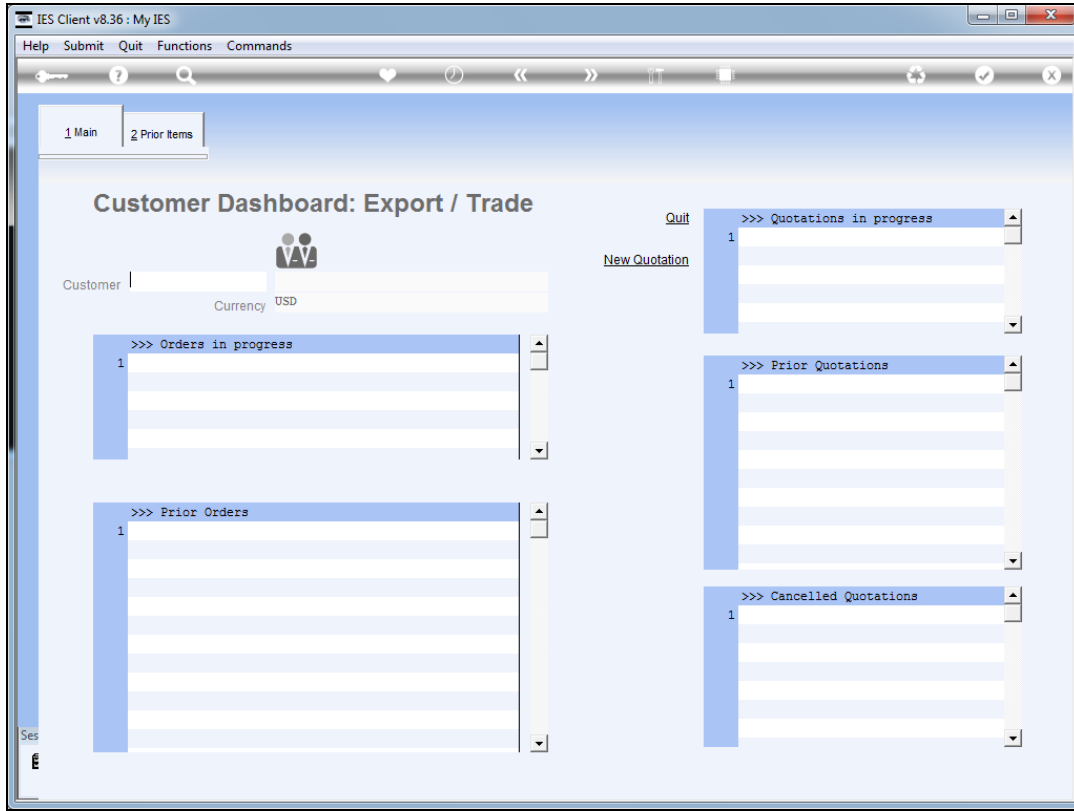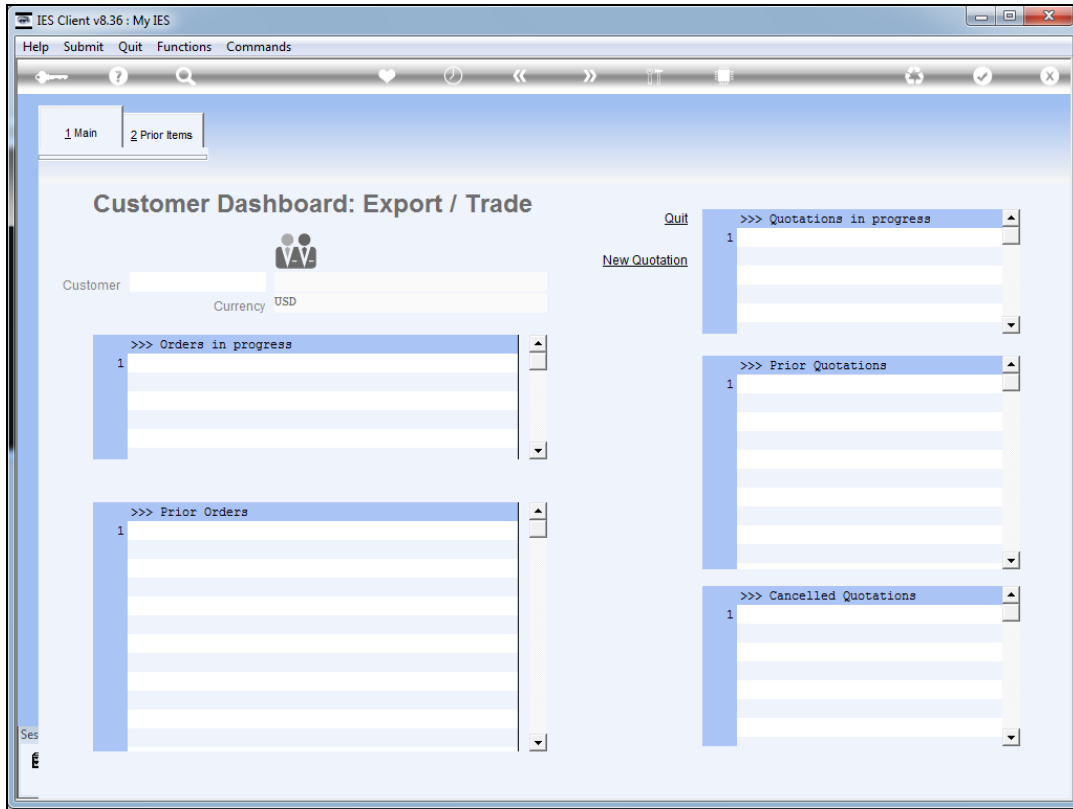Slide 1

Slide notes: The Customer Dashboard is the primary entry point to do a new Quotation for a Customer, and where all history for this Customer comes together.
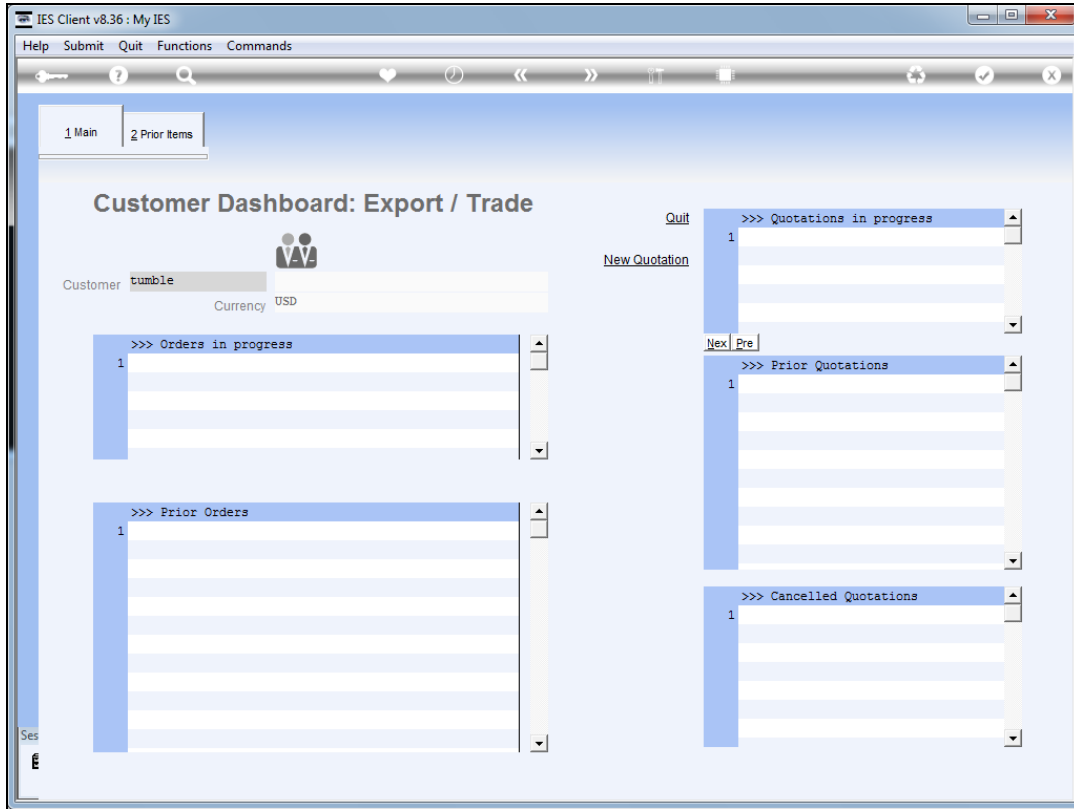
Slide 2

Slide notes: At the Customer prompt, we can type "new" to create a new Customer account, or we can select an existing Customer by the lookup, by entering the Account code, or by using intuitive lookup.
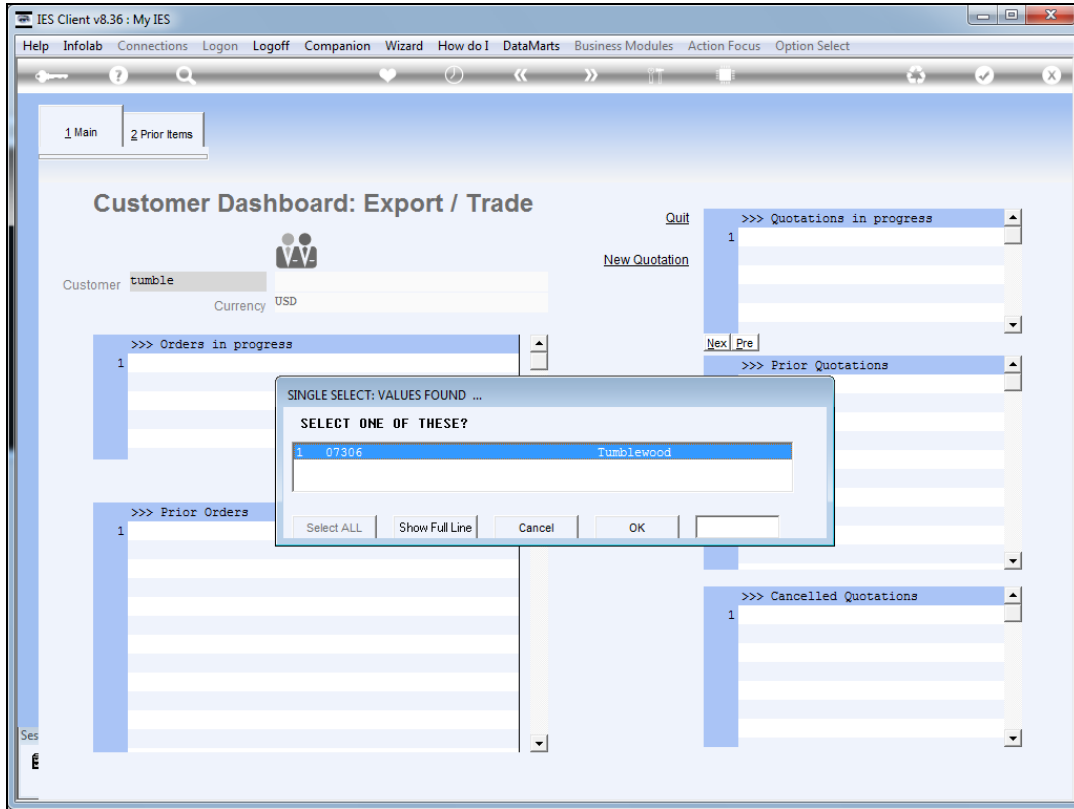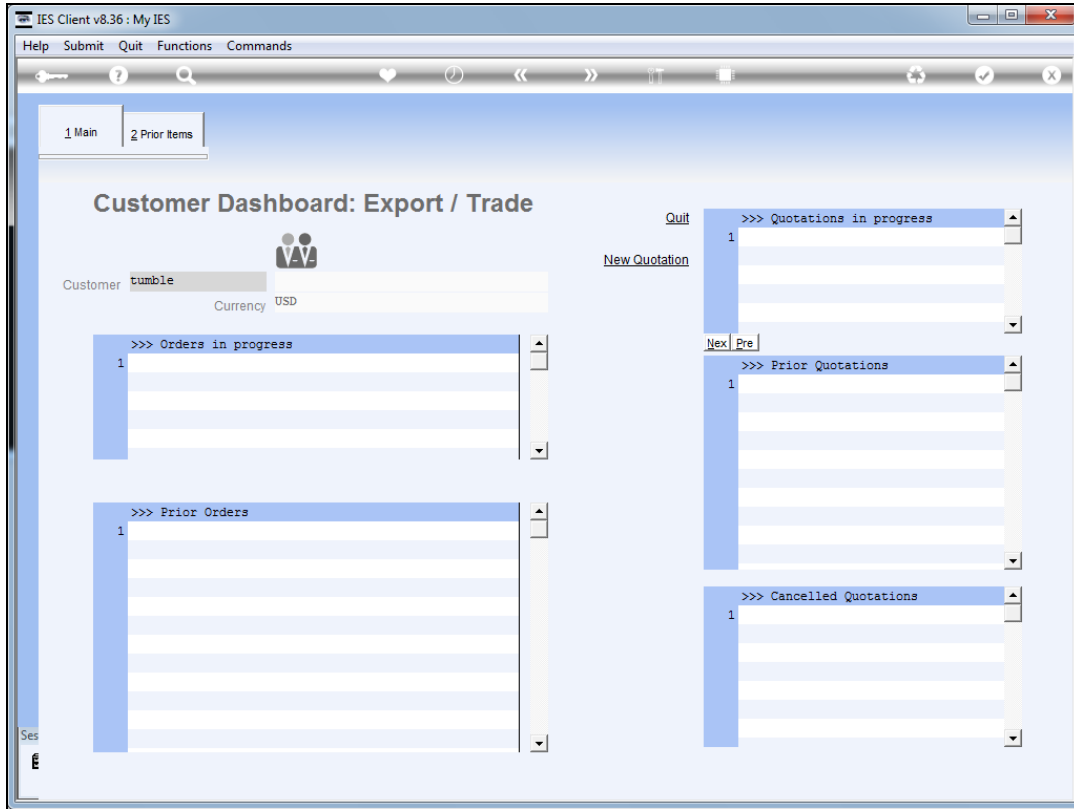
Slide 3

Slide notes: For example, we can type part of the Customer name to find the Account.

Slide 4
Slide notes:

Slide 5
Slide notes:

Slide 6

Slide notes:

Slide 7

Slide notes: Here we will find the records of all Items ever ordered by this Customer, and we can drill into any Item to see the history.

Slide 8

Slide notes:

Slide 9

Slide notes:

Slide 10
Slide notes:

Slide 11
Slide notes:

Slide 12

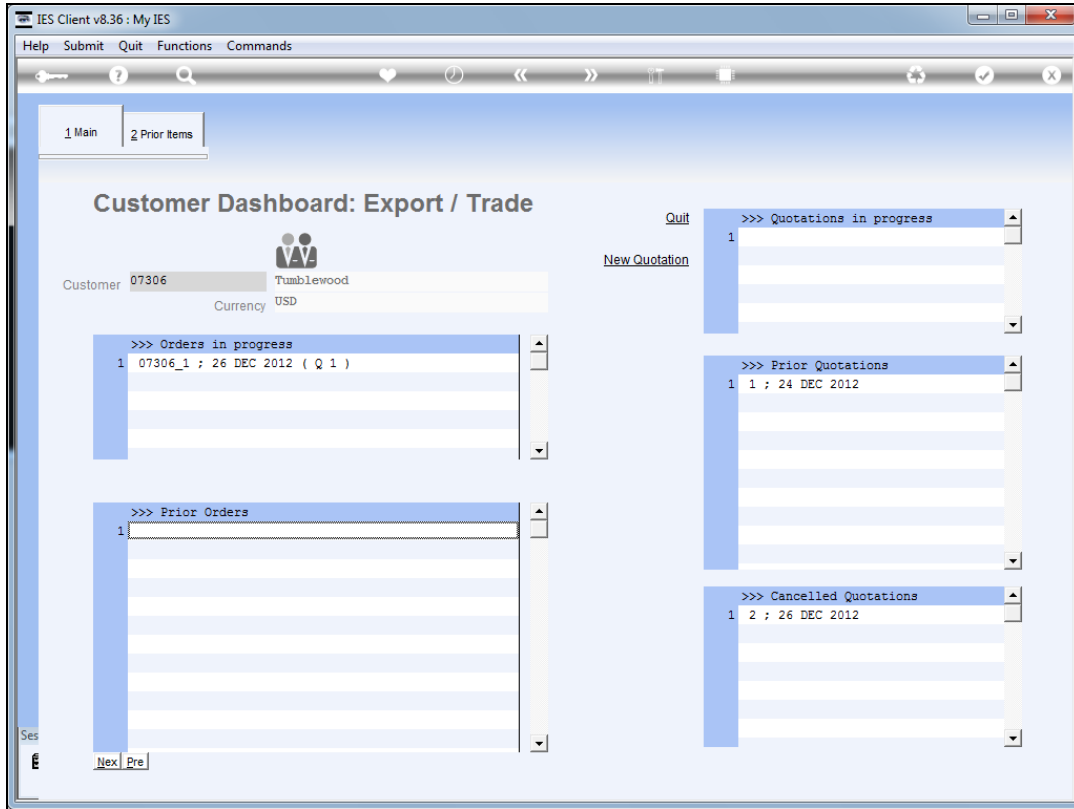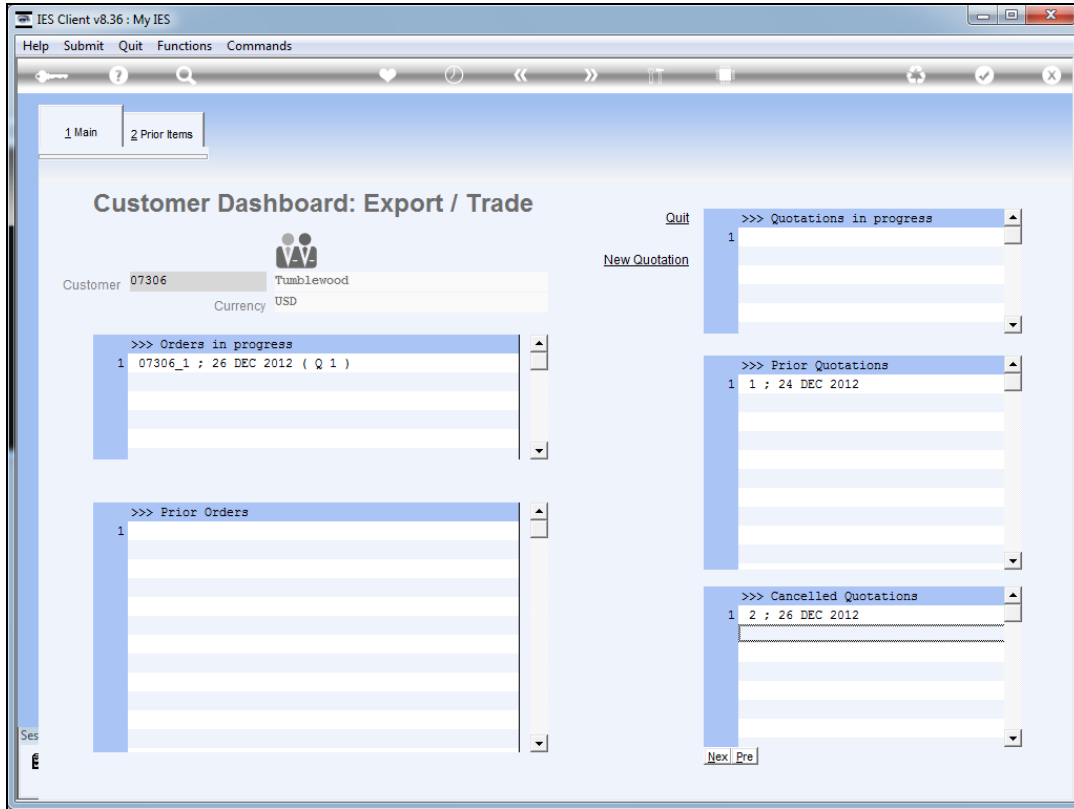Slide notes: We can access information on Orders in progress as well as prior Orders.
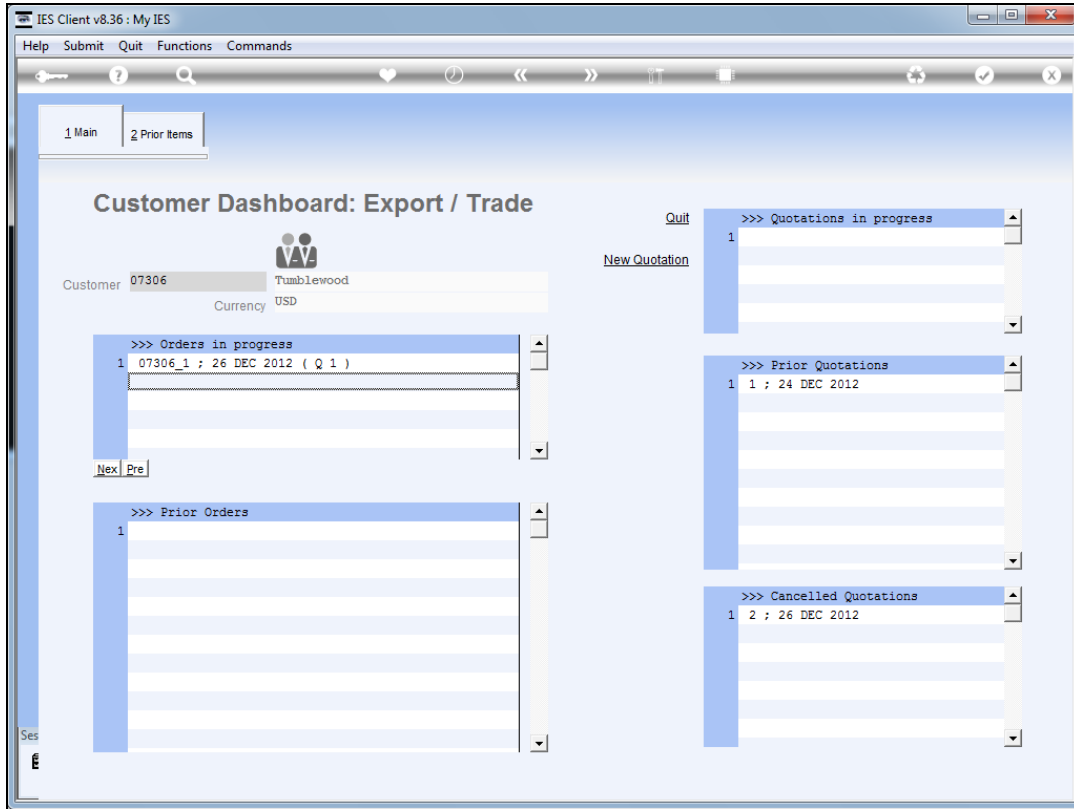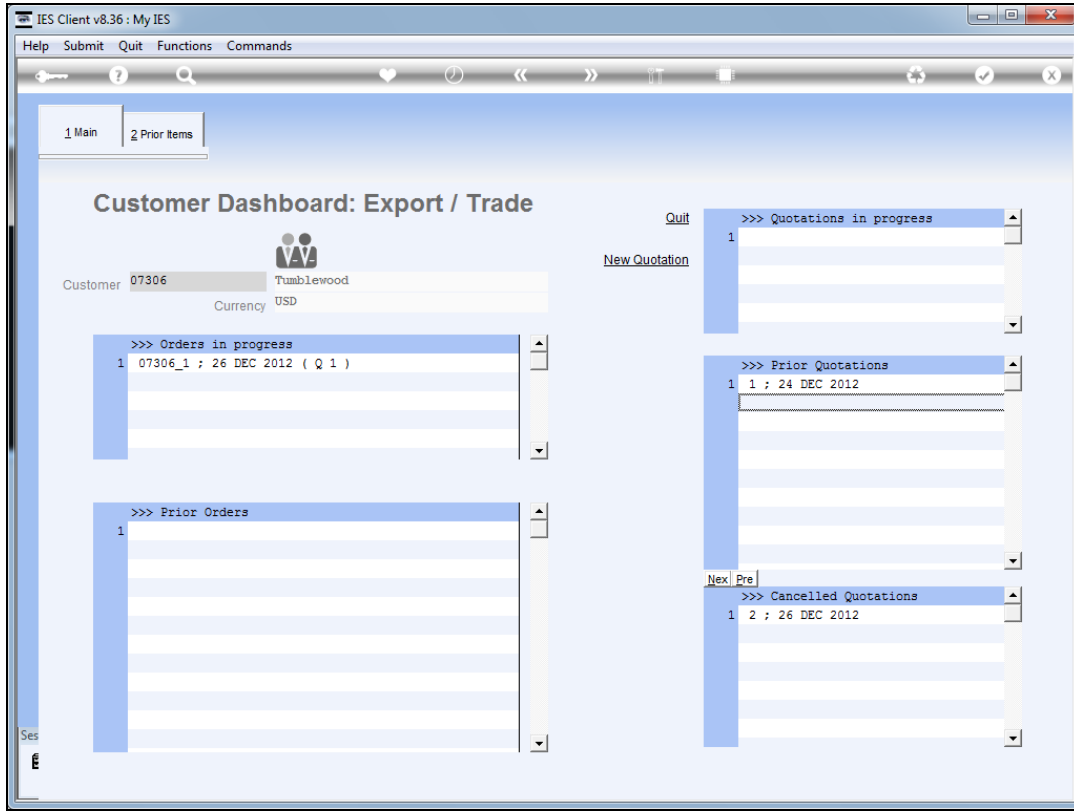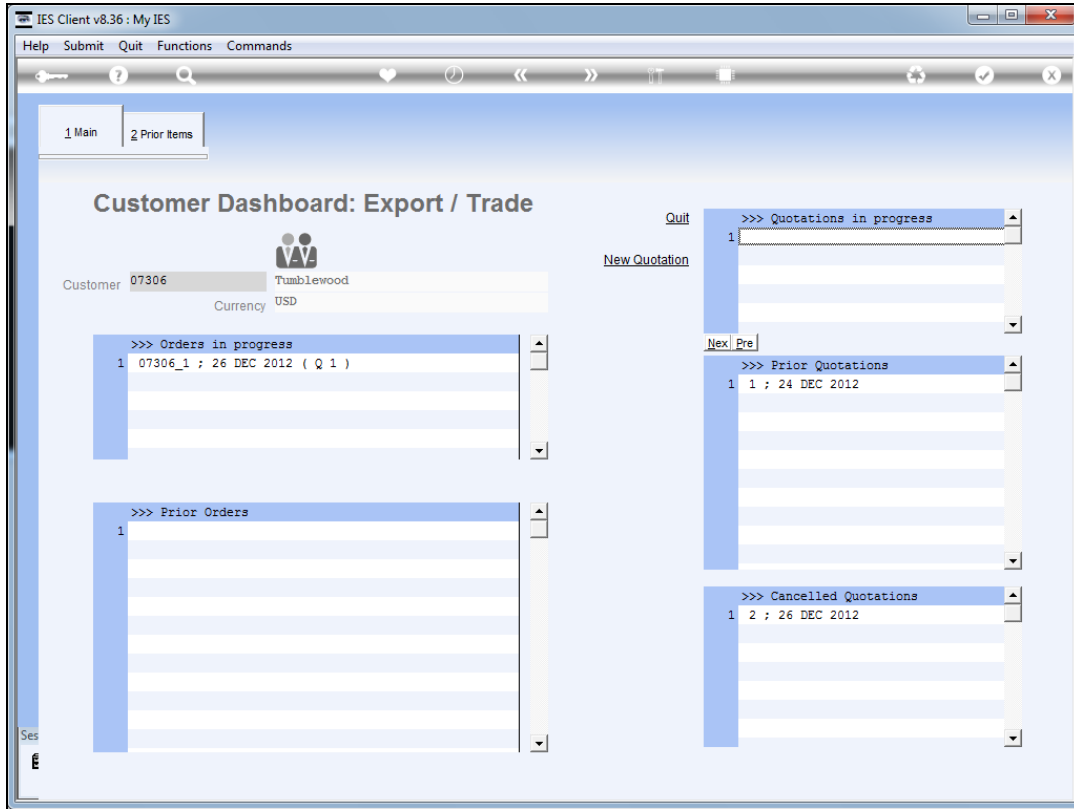
Slide 13
Slide notes:

Slide 14

Slide notes: We can also drill into cancelled Quotations and Prior Quotations, and we can work with current Quotations for this Customer.
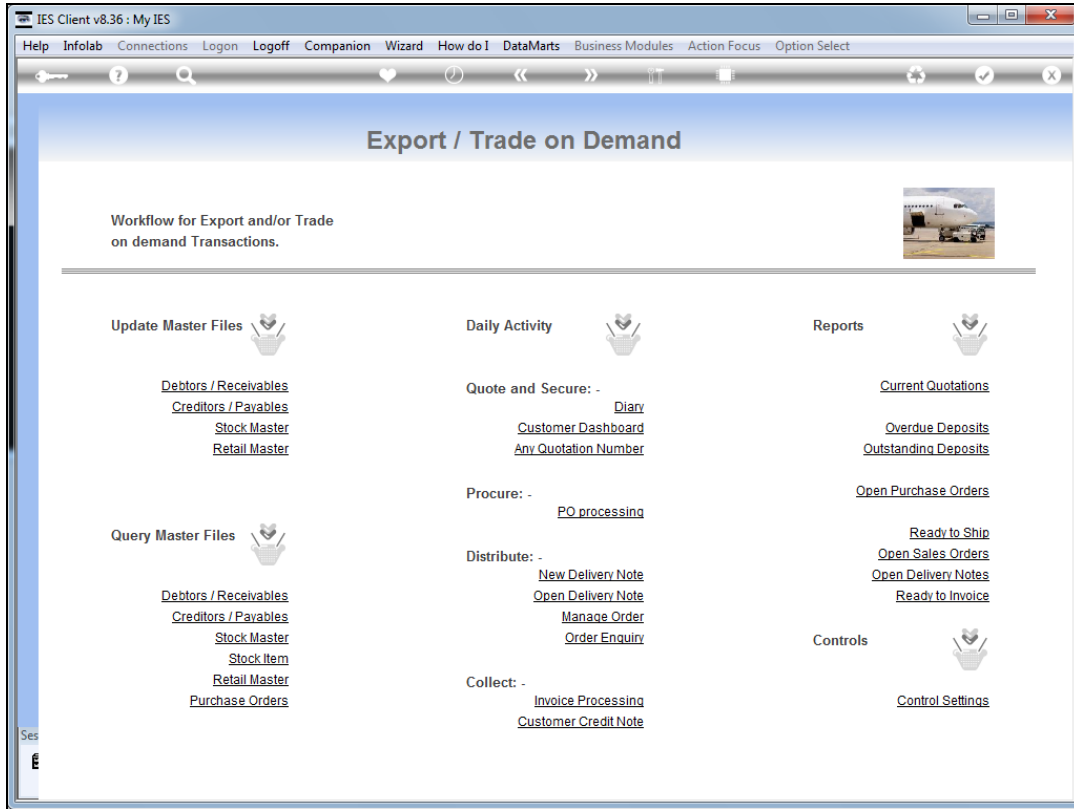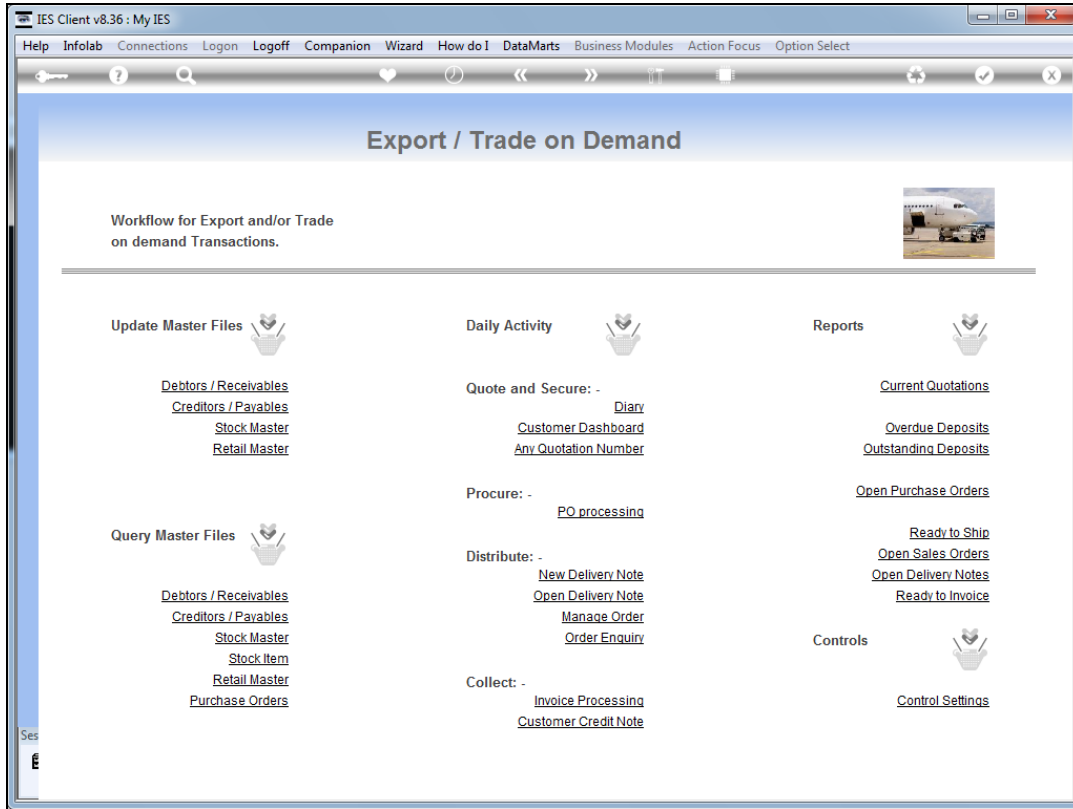
Slide 15
Slide notes:

Slide 16
Slide notes:

Slide 17
Slide notes:

Slide 18
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Slide 19

Slide notes: