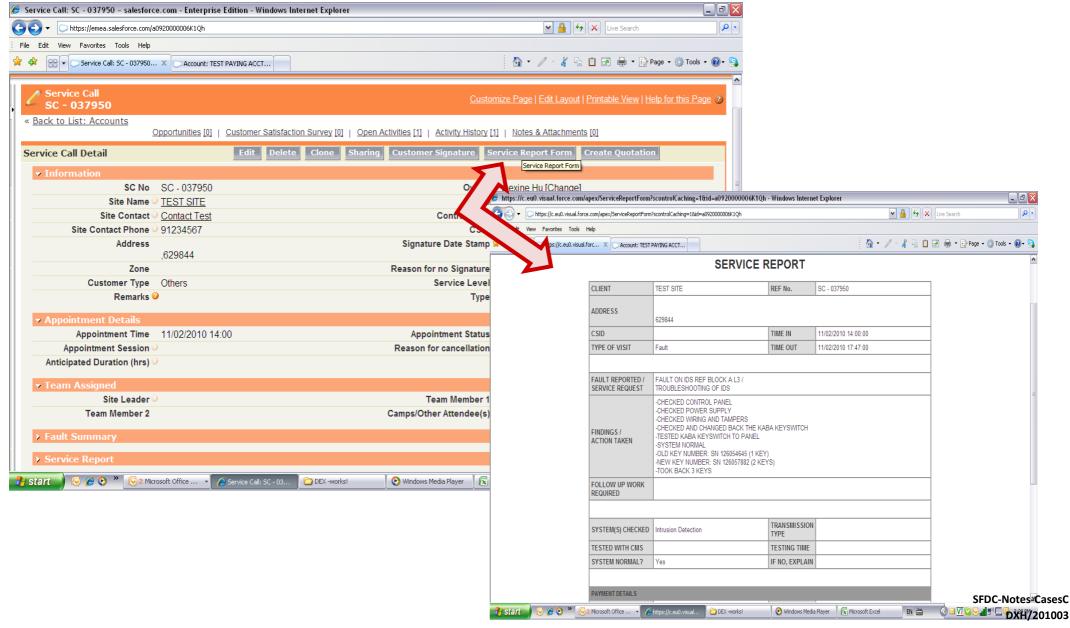
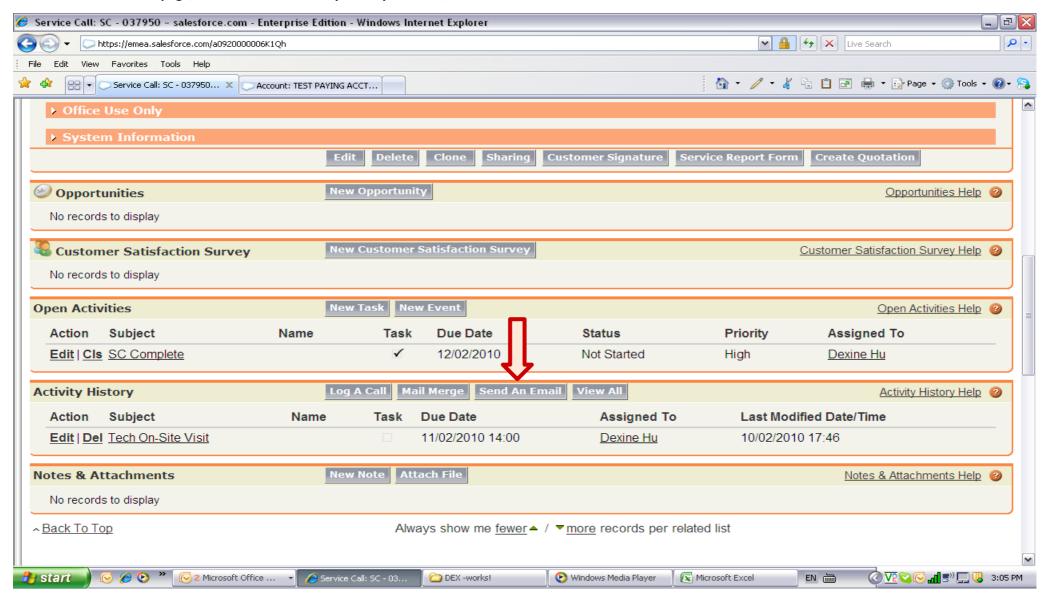
Sending Servce Report to Client

Once a Service Call is completed, a PDF copy of it is to be sent to Client via email/fax.

1. On the "Service Call" page, click on "Service Report Form" to view printable format. Save this report in PDF format.

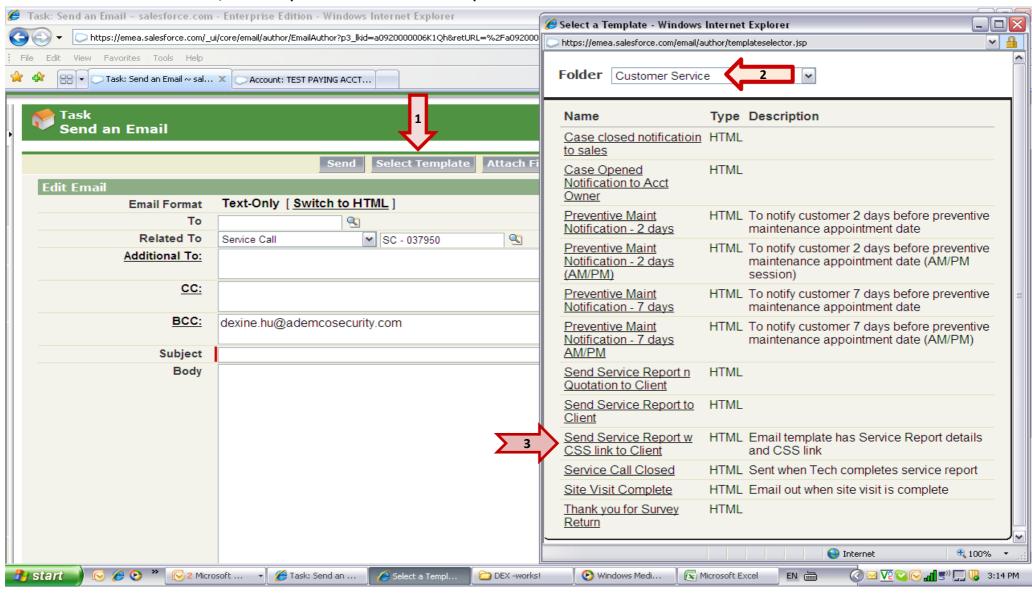


2. On the "Service Call" page, scroll down to "Activity History" section, and click "Send An Email".

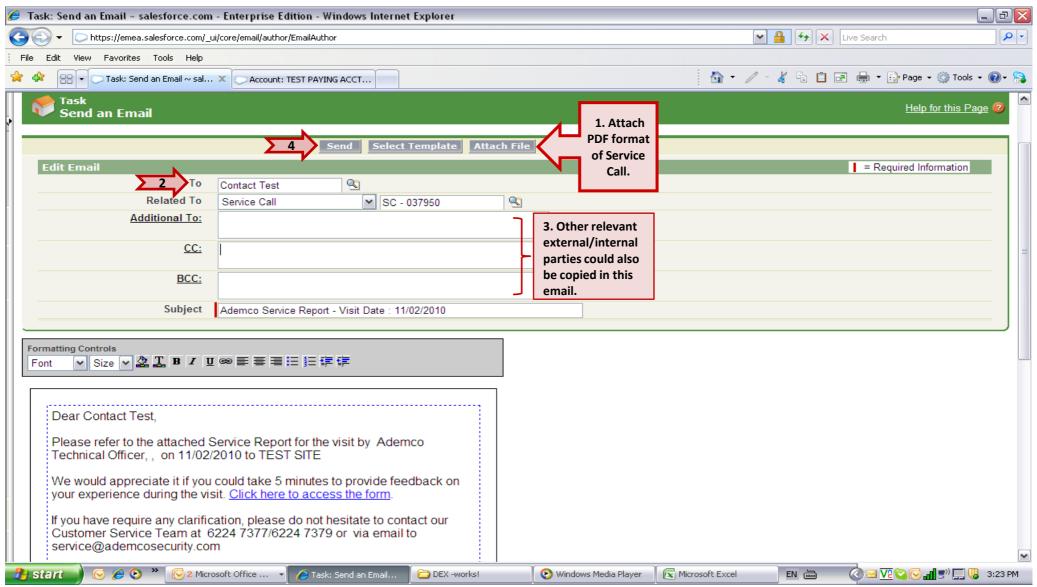


3. Click "Select Template".

Under "Customer Service" folder, select template named "Send Service Report w CSS link to Client".



4. Attach Service Call/Report in PDF format. Select Contact Persons to send this email to.



If Client has no email account:

- a) Under "Notes & Attachments", click on "New Note".
- b) Title: "SC sent by Fax"
- c) Body: "To ["Names of Contact Persons] at [Fax number]