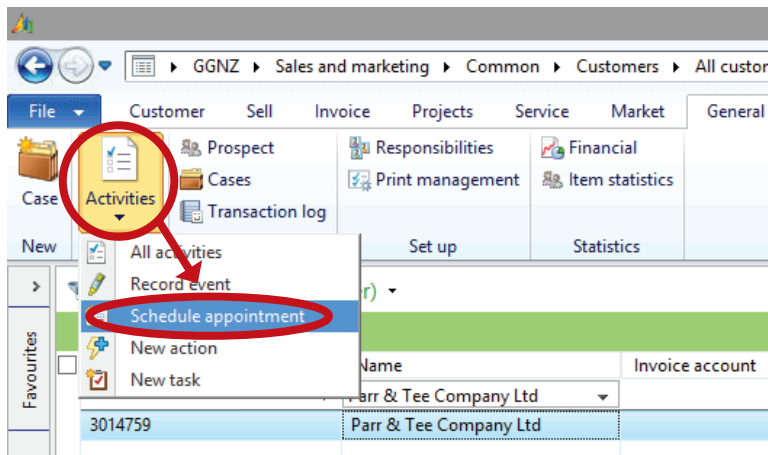


QUICK TIPS: PARS

1. Create an activity from a Customer select 'Schedule appointment'



- a) Purpose = Customer#; Customer name
- b) Phase = CREATED
- c) Type = PAR
- d) Due date = as required
- e) Responsibility = select CSAM, TSM, ISR etc as required
- f) Responsible = Rep name

The screenshot shows the 'Activities' form for activity A-00075427. The following fields are highlighted with red circles and labeled with letters:

- a**: Purpose (1234567 : Parr & Tee Company Ltd)
- b**: Phase (CREATED)
- c**: Type (PAR)
- d**: Date/Time (Start date/time: 30/09/2020 12:00:00 am, End date/time: 30/09/2020 01:00:00 am)
- e**: Responsibility (CSAM)
- f**: Responsible (Jessica Macfarlane)

2. Filter to find PARs

The screenshot shows the 'All activities (Unsaved filter)' table. The 'Type' column is highlighted with a red circle, showing 'PAR' for the selected activity.

Due date	Purpose	Priority	Category	Responsibility	Type	Responsible	Notes
30/09/2020 01:00:00 am	1234567 : Parr & Tee Company Ltd	Normal	Appointment	CSAM	PAR	Jessica Macfarlane	Who: Achieved: Future:

3. Complete PARs

The screenshot shows the 'Activities' form for activity A-00075427. The following fields are highlighted with red circles and labeled with letters:

- a**: Phase (COMPLETED)
- b**: Notes (Who: Met with Mike and Tim, Achieved: Reviewed existing fleet and recorded updates required, Future: Discussed future rebuild plans based on OLGA data. Waiting to hear on)

- a) Phase = COMPLETED
- b) Note = Who, Achieved, Future

Who: Met with Mike and Tim
Achieved: Reviewed existing fleet and recorded updates required
 Discussed future rebuild plans based on OLGA data
Future: Waiting to hear on tender for new bypass project

EXAMPLE