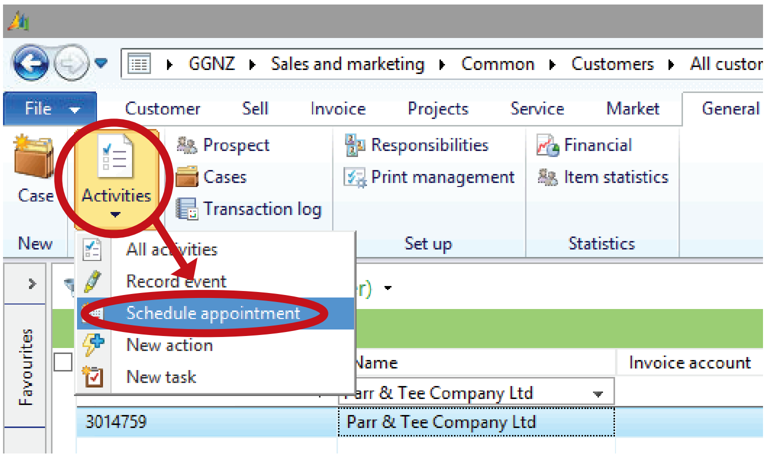
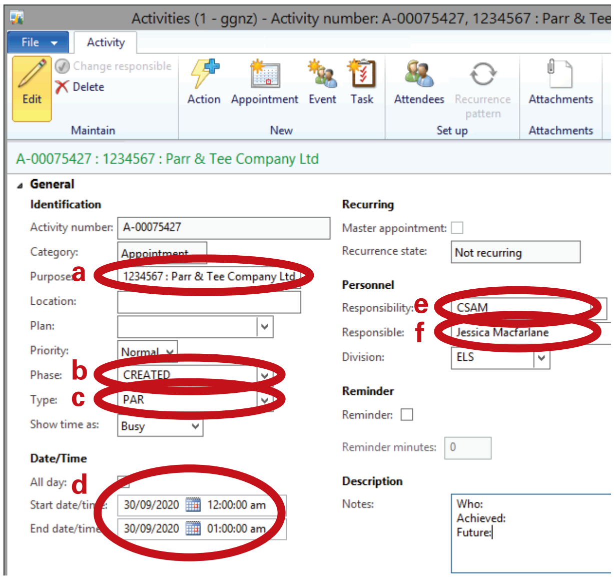
Terra Cat – Training Series

QUICK TIPS: PARS

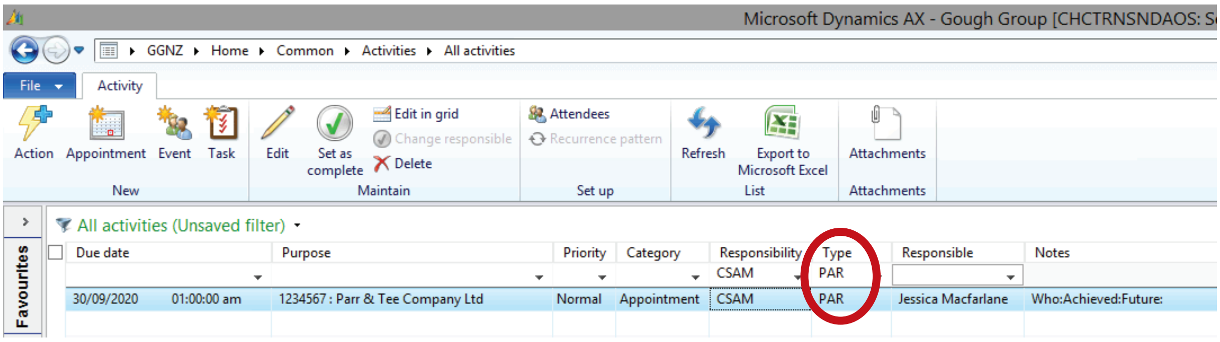
1. Create an activity from a Customer select ‘Schedule appointment’



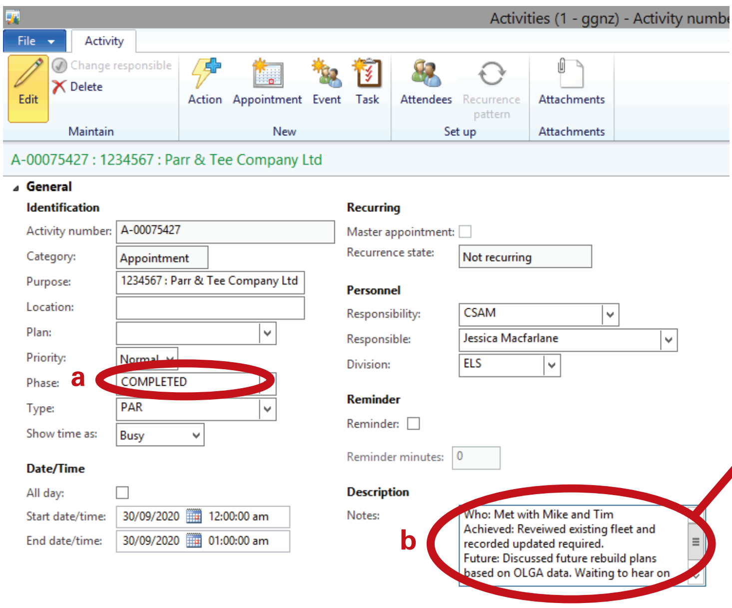
a) Purpose = Customer#; Customer name
b) Phase = CREATED
c) Type = PAR
d) Due date = as required
e) Responsibility = select CSAM, TSM, ISR etc as required
f) Responsible = Rep name



2. Filter to find PARs



3. Complete PARs



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

EXAMPLE

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

TERRA CAT