Professional Service Copy Check daily **Process Flow for** customer, SO#, Oracle (OBI) \$\$ into excel gathering information for new orders spreadsheet Copy order information, Look up SO in BOM, ship call center date and tracking info into spreadsheet Search SF for copy account opportunity **Check Sales** (SO), Pull Acct team Engineer team and information SharePoint site —No info found into spread customer for config files contact info sheet and customer notes No info found Create customer Start emailing specific project sale folks, best plan guess Set up internal call w/account team Set up customer kick off call Schedule engagement Update spreadsheet, SharePoint calendar, TAC outlook calendar and customer project plan with schedule Track progress on spreadsheet, update account team

Information Needed

- Customer name
- Customer contact
- Sales channel
- Sales Order (SO#)
- Account Team
- Order amount \$\$
- Booked date
- Model Type
- Description of Service

Othe

- Dashboard
- Metric
- Tracking credits by booked date, expires after 1 year
- Tracking credits used and un-used

