

Testing PDF file B002

Active Digital Playbook has been setup in the Back Office (Master Data Management > Digital Playbook)

Only Playbook which are currently running will be downloaded to the SFA

This means that the current date must be equal to or greater than Start Date, and equal to or lower than End Date

Only Playbook with Status = Active will be downloaded to the SFA

If in the Back Office Playbook setup screen, Assign To = Route, then such Playbook will be displayed under the 'My Playbook' main menu

If in the Back Office Playbook setup screen, Assign To = Customer, then such Playbook will be displayed at Customer Level. User can access these playbook through the Customer Details, Sales Order, Action, or Steps of Call